



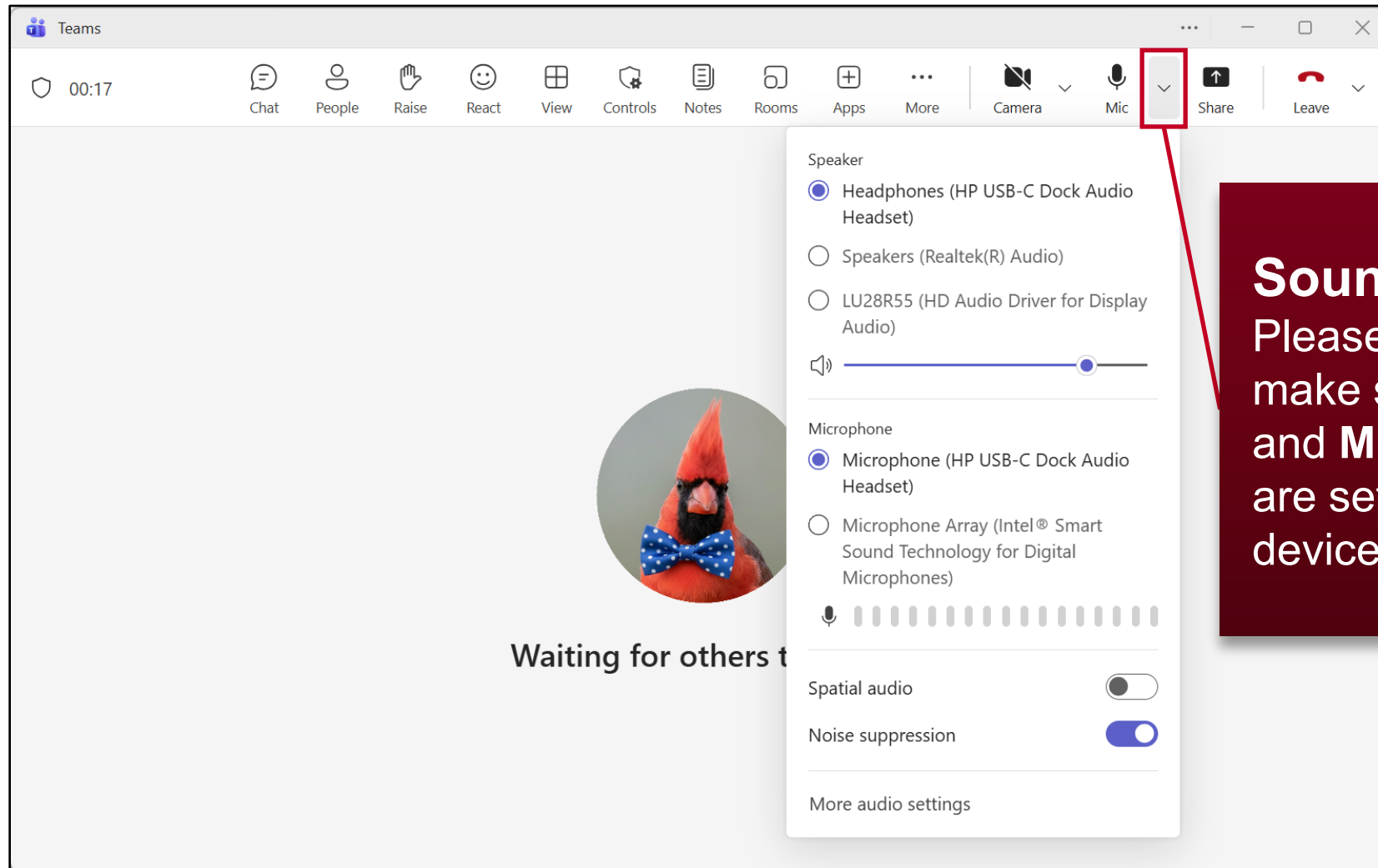
HUMAN CAPITAL MANAGEMENT

The Local Choice (TLC) Data Sheet Forum

March 11, 2026

www.cardinalproject.virginia.gov

Welcome to Today's Session!



The screenshot shows the Microsoft Teams interface with the audio settings menu open. The menu is titled 'Speaker' and 'Microphone'. Under 'Speaker', the selected option is 'Headphones (HP USB-C Dock Audio Headset)'. Under 'Microphone', the selected option is 'Microphone (HP USB-C Dock Audio Headset)'. There is a volume slider for the speaker and a microphone activity indicator. At the bottom of the menu, there are toggle switches for 'Spatial audio' (off) and 'Noise suppression' (on), and a link for 'More audio settings'.

Speaker

- Headphones (HP USB-C Dock Audio Headset)
- Speakers (Realtek(R) Audio)
- LU28R55 (HD Audio Driver for Display Audio)

Microphone

- Microphone (HP USB-C Dock Audio Headset)
- Microphone Array (Intel® Smart Sound Technology for Digital Microphones)

Spatial audio

Noise suppression

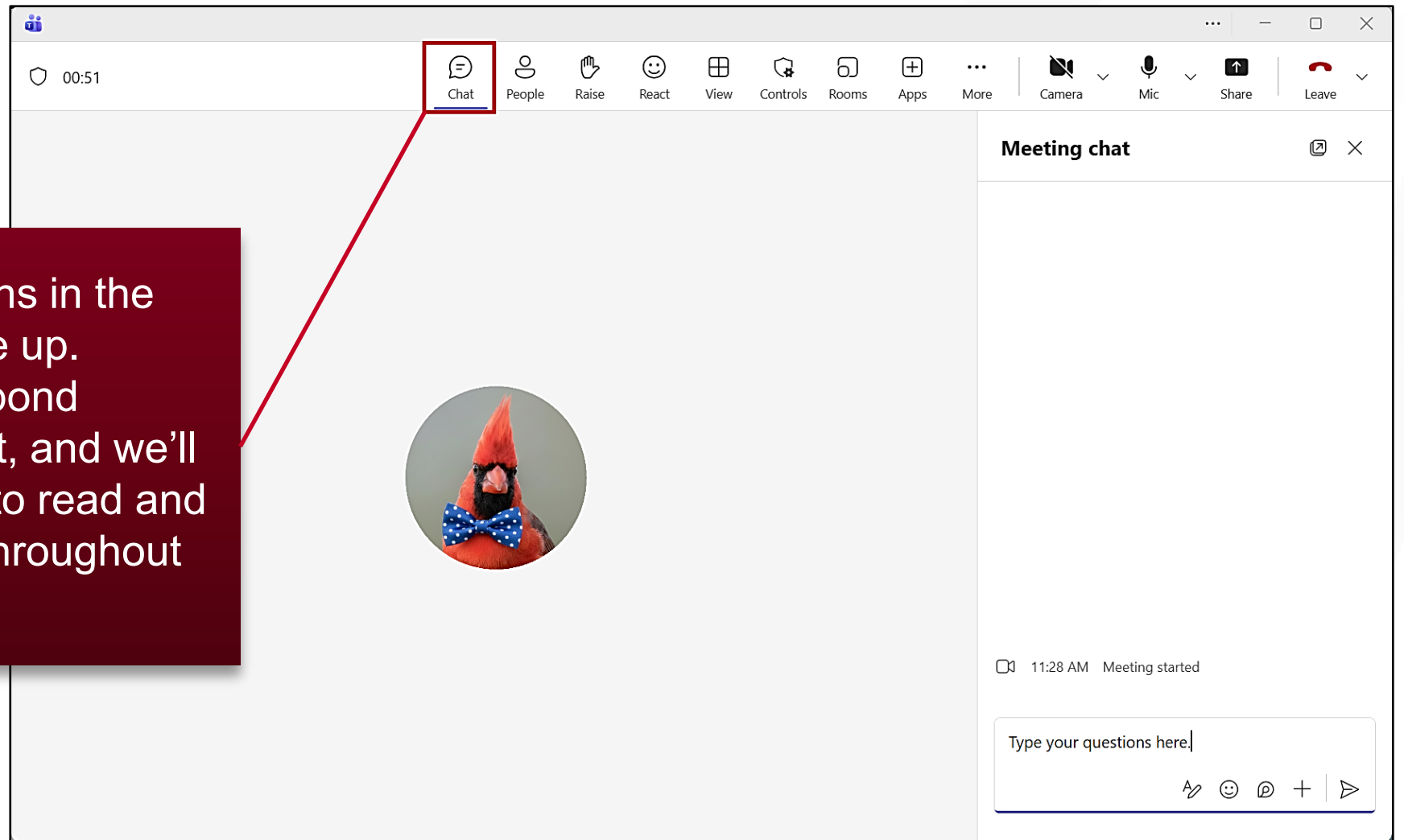
More audio settings

Sound Check!

Please take a moment to make sure your **Speaker** and **Microphone** settings are set to your preferred device.

Have questions?

Post your questions in the chat as they come up. Our team will respond directly in the chat, and we'll also select a few to read and answer out loud throughout the session.



Agenda

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Support

Welcome from TLC OHB Group

Today's forum is dedicated to the comprehensive review of The Local Choice Data Sheet in Cardinal.

Email all questions regarding policy and provisions of the program to **TLCPolicy@dhrm.virginia.gov**

Reminder!

TLC Data Sheet Entry and Certification is due by **Wednesday, April 1**, for all July renewals!

TLC Data Sheet Entry and Certification dates for October renewals will be communicated at a later date.



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Support

Cardinal HCM Login & Access

How to get to Cardinal HCM

- my.cardinal.virginia.gov

Do you have access to the TLC Data Sheet?

- Core users can navigate to TLC Data Sheet using the following navigation path:

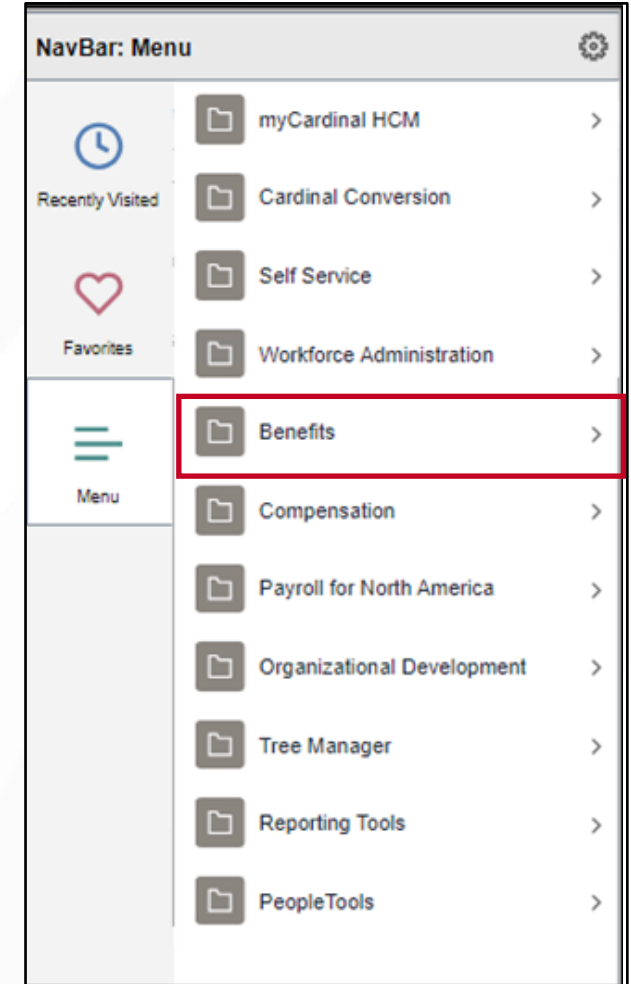
Menu > Benefits > Employer Information > TLC Data Sheet

Can't get to the TLC Data Sheet? You don't have proper access!

- Submit a [Locality Security Access Form](#) directly to TLC

Tired of losing Core User access?

- Login at least once every **90 days**



Cardinal Login: Multi-Factor Authentication (MFA)

The Virginia IT Agency (VITA) is retiring SMS and Phone Call options for Cardinal multi-factor authentication. To ensure uninterrupted access, you must switch to a supported method **before April 1, 2026**.

Method	Best for	Platform	Notes
Okta Verify	Most users	Mobile App (iOs/Android)	Works for desktop, laptop, or tablet logins.
Google Authenticator or Other TOTP* app <i>*Time-based One-Time Password</i>	Users with existing TOTP apps	Mobile App (iOs/Android)	Compatible with Duo, Microsoft Authenticator, etc.
Okta FastPass	Users without smartphones or who prefer not to use one	Desktop	Requires Technical Support

For Okta FastPass, use subject line: '**Cardinal – Okta FastPass**' in your email to the Help Desk. Installation of Okta FastPass may depend on your specific department's computer policies and configurations.

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Navigating to the TLC Data Sheet in Cardinal



Log into Cardinal at my.cardinal.virginia.gov



Click Human Capital Management (HCM) link



Menu > Benefits > Employer Information > TLC Data Sheet

Open your Locality's Data Sheet

Navigation: Menu > Benefits > Employer Information > TLC Data Sheet

Cardinal Homepage

TLC Data Sheet

Enter any information you have and click Search. Leave fields blank for a

Find an Existing Value

▼ Search Criteria

Business Unit LOCAL

TLC Group begins with

Include History

Limit the number of results to (up to 300):

[Basic Search](#)

If you do not know your TLC group number, click the magnifying glass icon to open the **Look Up TLC Group** page.

TLC Data Sheet

Business Unit LOCAL TLC Group 003

Group Details

Effective Date 07/01/2024 Effective Sequence 1

Effective Status Active

Group Description

Group Type Government

Renewal Period July

Waiting Period Days

Total Employees Enrolled 26 Total Participation % 89.66

Total Employees Waived 3

ACA Reporting: Yes - Reporting Agreement on File
 No - Opt Out
 No - Partial year

Premium Averaging Used?

Benefit Program 003 TLC Ben Program

Plan Selection

	Benefit Plan	Short Desc	Description	Plan Type		
1	003F01	003KAExpC	Key Adv Exp Comprehensive Dent	Key Adv	+	-
2	003F02	003KAExpP	Key Adv Exp Preventive Dent	Key Adv	+	-
3	003R01	003KAExpC	Key Adv Exp Comprehensive Dent	Key Adv	+	-
4	003R02	003KAExpP	Key Adv Exp Preventive Dent	Key Adv	+	-
5	003R16	003A65WDV	Advantage 65 + DV	Medicare	+	-

Employer contributions to HRA/HSA? (Required if a HDHP option has been selected) Yes No

Enter your TLC group number. Click **Search**.

The TLC Data Sheet will display.

Review Group Details

Prior to each new plan year, the TLC data sheet is created with the group profile information populated.

- Locality should review and update as appropriate.
- Some fields on this page are not editable by the locality; please contact TLC if changes are required.
- Use the Cardinal Enrollment Report to determine Total Employees Enrolled and Total Employees Waived.
Menu > Benefits > Reports > Cardinal Enrollment

Business Unit LOCAL TLC Group

Group Details

Effective Date 07/01/2024 Effective Sequence 1

Effective Status Active

Group Description

Group Type Government

Renewal Period July

Waiting Period Days

Total Employees Enrolled 26 Total Participation % 89.66

Total Employees Waived 3

ACA Reporting: Yes - Reporting Agreement on File
 No - Opt Out
 No - Partial year

Premium Averaging Used?

Benefit Program 003 TLC 04 Ben Program

	Benefit Plan	Short Desc	Description	Plan Type		
1	003F01	003KAExpC	Key Adv Exp Comprehensive Dent	Key Adv	+	-
2	003F02	003KAExpP	Key Adv Exp Preventive Dent	Key Adv	+	-
3	003R01	003KAExpC	Key Adv Exp Comprehensive Dent	Key Adv	+	-

Employer contributions to HRA/HSA? (Required if a HDHP option has been selected) Yes No

Need to make changes to the Group Details? Contact TLC.

Make Changes to Plan Selection

Each year the new TLC Data Sheet will be populated from the Plan Selections chosen the year before.

When a High Deductible Health Plan (HDHP) is selected, the **Employer contributions to HRA/HSA** question must be answered by selecting the **Yes** or **No** radio button.

- No selection is necessary if no HDHP is selected.

The response to the HRA/HSA question impacts the Minimum Employer Contribution (**MEC**) values on the rate page.

Plan Selection						
	Benefit Plan	Short Desc	Description	Plan Type		
1	003F01	003KAExpC	Key Adv Exp Comprehensive Dent	Key Adv	<input type="checkbox"/>	<input type="checkbox"/>
2	003F02	003KAExpP	Key Adv Exp Preventive Dent	Key Adv	<input type="checkbox"/>	<input type="checkbox"/>
3	003R01	003KAExpC	Key Adv Exp Comprehensive Dent	Key Adv	<input type="checkbox"/>	<input type="checkbox"/>
4	003R02	003KAExpP	Key Adv Exp Preventive Dent	Key Adv	<input type="checkbox"/>	<input type="checkbox"/>
5	003R16	003A65WDV	Advantage 65 + DV	Medicare	<input type="checkbox"/>	<input type="checkbox"/>

Employer contributions to HRA/HSA? (Required if a HDHP option has been selected) Yes No



Do current plans auto populate on the Data Sheet?

- **Yes!** Current plans auto populate on the Data Sheet

Departments: Rates

The Premium Rates page will display only rows for the Benefit Plans selected in the Plan Selection section. Enter the applicable Employer Rate in the **Employer Rate** field.

- The Employer Rate will need to be populated for each Department even if the values are the same for all Departments.
- The Employee Rate automatically adjusts such that Employee Rate + Employer Rate = Total Rate.

The Employer Rate must be more than the MEC Rate.

- Incorrect fields will highlight in red and will not allow you to save.

Primary Flag	Department	Description	Rates	Class
<input checked="" type="checkbox"/>	047		Rates	Class

Department: 04
Effective Date: 04/28/2021 Effective Sequence: 1

Open enrollment dates: *Begin 04/29/2019 *End 05/15/2019

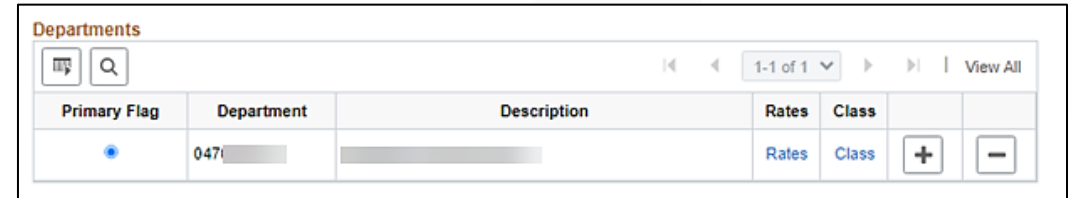
Benefit Plan	Description	Coverage Type	Employee Rate	Employer Rate	MEC Rate	Total Rate
003F01	Key Adv Exp Comprehensive Dent	EE Only	\$22.00	\$750.00	\$617.60	\$772.00
003F01	Key Adv Exp Comprehensive Dent	EE+Spouse	\$828.00	\$600.00	\$750.00	\$1428.00
003F01	Key Adv Exp Comprehensive Dent	EE+Child	\$624.47	\$803.53	\$750.00	\$1428.00
003F01	Key Adv Exp Comprehensive Dent	Family	\$1250.00	\$834.00	\$750.00	\$2084.00
003F02	Key Adv Exp Preventive Dent	EE Only	\$123.25	\$832.75	\$604.80	\$756.00

Departments: Employee Classification

Class will carry over from the prior year.

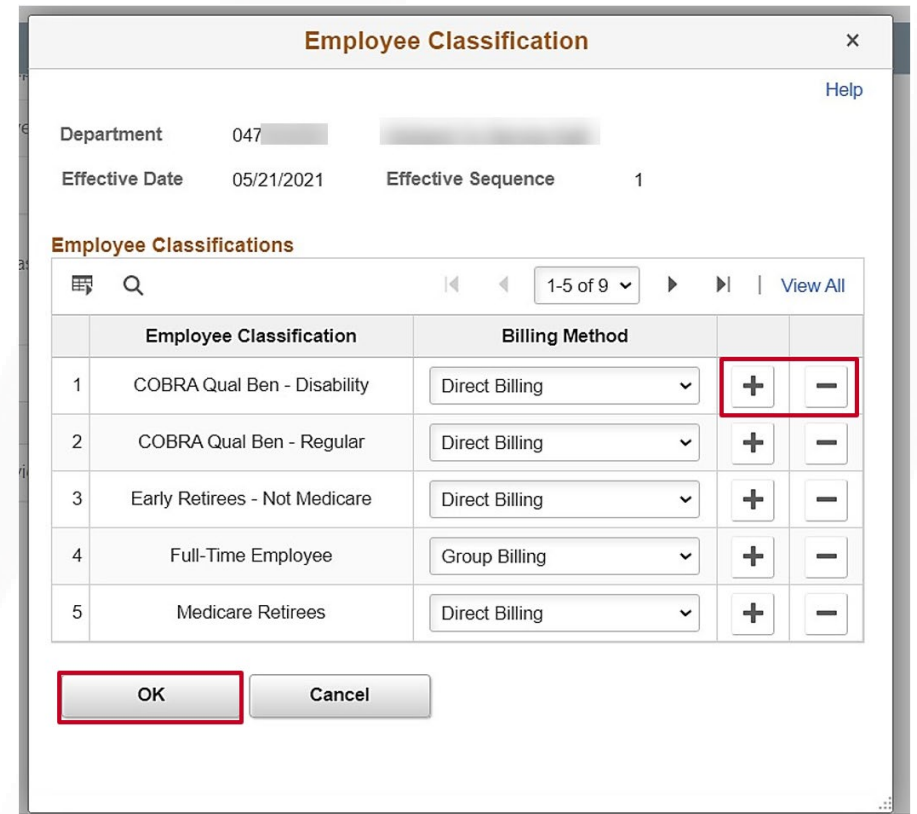
Use the Add a New Row + or Delete Row – buttons to add or remove classes.

- The only mandatory Employee Classification is Full-Time Employee.
- For each Employee Classification a Billing method must be selected.
- The Billing Method options are Direct Billing, Group Billing, or Third-Party Administrator.



The screenshot shows a table titled "Departments" with a search bar and navigation controls. The table has columns for Primary Flag, Department, Description, Rates, and Class. A single row is visible with a blue dot in the Primary Flag column, the value "047" in the Department column, and "Rates" and "Class" in the Rates and Class columns respectively. There are "+" and "-" buttons at the end of the row.

Primary Flag	Department	Description	Rates	Class
•	047		Rates	Class



The screenshot shows a dialog box titled "Employee Classification" with a close button (X) and a Help link. It contains fields for Department (047), Effective Date (05/21/2021), and Effective Sequence (1). Below these fields is a table titled "Employee Classifications" with a search bar and navigation controls. The table has columns for Employee Classification and Billing Method. There are five rows, each with a Billing Method dropdown and "+" and "-" buttons. The "+" and "-" buttons for the first row are highlighted with a red box. At the bottom of the dialog are "OK" and "Cancel" buttons, with the "OK" button also highlighted with a red box.

Employee Classification	Billing Method		
1 COBRA Qual Ben - Disability	Direct Billing	+	-
2 COBRA Qual Ben - Regular	Direct Billing	+	-
3 Early Retirees - Not Medicare	Direct Billing	+	-
4 Full-Time Employee	Group Billing	+	-
5 Medicare Retirees	Direct Billing	+	-

TLC Data Sheet Summary

Summarize **Annual Changes** (Required Field)

- List changes to departments, covered employee types, and plans offered.
- If a plan is being removed, specify the replacement plan into which employees will be enrolled.
- **If no changes, type “No Changes” in the field**

Annual Changes: Summarize the changes to departments, waiting periods, covered employee types and the plans offered. If there are no changes enter 'no changes'.

Group cannot be certified until you click the [Validata Data](#) button to ensure all required data for [Benefit Plan](#), [Rates](#), [Class](#) and [Contacts](#) has been completed.

[Validate Data](#)

TLC Data Sheet: Validate & Certify

Click on **Validate Data** to verify all the information has been added correctly.

- **Note:** A warning message will appear if system finds errors or missing information to let you know which piece of information needs an edit/fix. Take the necessary steps to fix error(s) before continuing.

Click **Yes** to certify the information is correct.

Once saved, the Certifier Name and Certification Date will auto populate with the person logged in and the current date.

Annual Changes: Summarize the changes to departments, covered employee types and the plans offered. If there are no changes enter 'no changes'.

Group cannot be certified until you click the Validata Data button to ensure all required data for Benefit Plan, Rates, and Class has been completed.

Benefit Plan, Rates, and Class validations were successful. You may now attempt to certify this group by clicking YES below. (0,0)

I certify the information is correct Yes No

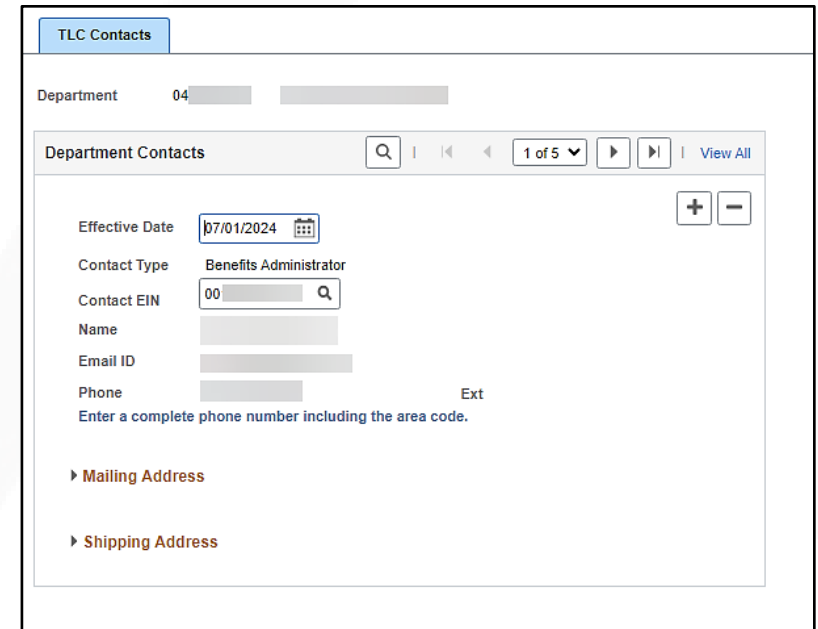
Certifier Name

Certification Date

TLC Contacts Page

Menu > Benefits > Employer Information > TLC Contacts

1. Search for your TLC Department.
2. Select the contact type for update:
Ben Admin, Ben Exec, Bill Admin, or Bill Exec.
Note: Limit 1 contact per contact type.
3. To update the contact, click **Add Row (+)**
4. If the contact is an employee, enter the employee ID in the Contact EIN field. For employees, once the Contact EIN field is populated, Name, Email ID, and Phone will auto populate on the Contacts page. Non-employees will need to be entered manually.



The screenshot displays the 'TLC Contacts' interface. At the top, there is a 'TLC Contacts' tab. Below it, the 'Department' is set to '04'. A 'Department Contacts' table is visible, showing '1 of 5' records. The form fields for a contact are as follows:

- Effective Date: 07/01/2024 (with a calendar icon)
- Contact Type: Benefits Administrator
- Contact EIN: 00 (with a search icon)
- Name: [Redacted]
- Email ID: [Redacted]
- Phone: [Redacted] Ext: [Redacted]

Below the form, there are expandable sections for 'Mailing Address' and 'Shipping Address'. A note at the bottom of the form states: 'Enter a complete phone number including the area code.'

TLC Data Sheet Report

Menu > Benefits > Employer Information > TLC Data Sheet Report

PDF Report of the TLC Data Sheet available to locality Core Users.

This report can be run for:

- All of your TLC groups: This includes both main groups and any subgroups
- A specific TLC group: You can choose to see the report for just one particular group

2024 - 2025 The Local Choice (TLC) Data Sheet Page 1 of 3

Group: Applies to all Group IDs

<input checked="" type="checkbox"/>	Government Group	School Group	Government & School Group	Grandfathered Government & School Group
<input checked="" type="checkbox"/>	July Renewal:	Begins: 7/1/2024	Ends: 6/30/2025	

A group must have a separate group ID, assigned by DHRM, for each Federal Employer Identification (FEIN) included in the group and one of the group IDs must be primary. Separate group IDs with the same FEIN are also permitted.

This group has one Group ID and one FEIN.

This group has more than one Group ID and one FEIN.

This group has more than one Group ID and more than one FEIN.

Primary ID: [REDACTED]

Each Group ID may have different employer cost-sharing. Open Enrollment dates and contacts.

Classifications: Applies to all Group IDs

Enrollee Category	Offer Coverage?	Billing Method
Full-Time Employees	Yes	Group Billing
Part-Time Employees	No	
Elected Official with full-time premium	Yes	Group Billing
Elected Official with part-time premium	No	
Extended Coverage/COBRA Qualified Beneficiaries - Regular	Yes	Direct Billing
Early Retirees - not eligible for Medicare	Yes	Group Billing
Medicare Retirees - eligible for Medicare	Yes	Direct Billing
Split Contract Dependents of Retirees	Yes	Group Billing
Retiree Survivor - not eligible for Medicare	No	
Retiree Survivor - eligible for Medicare	Yes	Group Billing
Extended Coverage/COBRA Qualified Beneficiary - Disability	Yes	Direct Billing
Survivor of Employee extra month coverage	No	

Election Rules: Applies to all Group IDs

Initial Enrollment as an Employee Election Request (Effective the first of the month after the waiting period): Applies to all Group IDs

<input checked="" type="checkbox"/>	Rule 1: No waiting period	0	Number of days allowed to make the enrollment election request	30
<input type="checkbox"/>	Rule 2: Waiting period (1-60 days)		Number of days allowed to make the enrollment election request	

Participation: Applies to all Group IDs

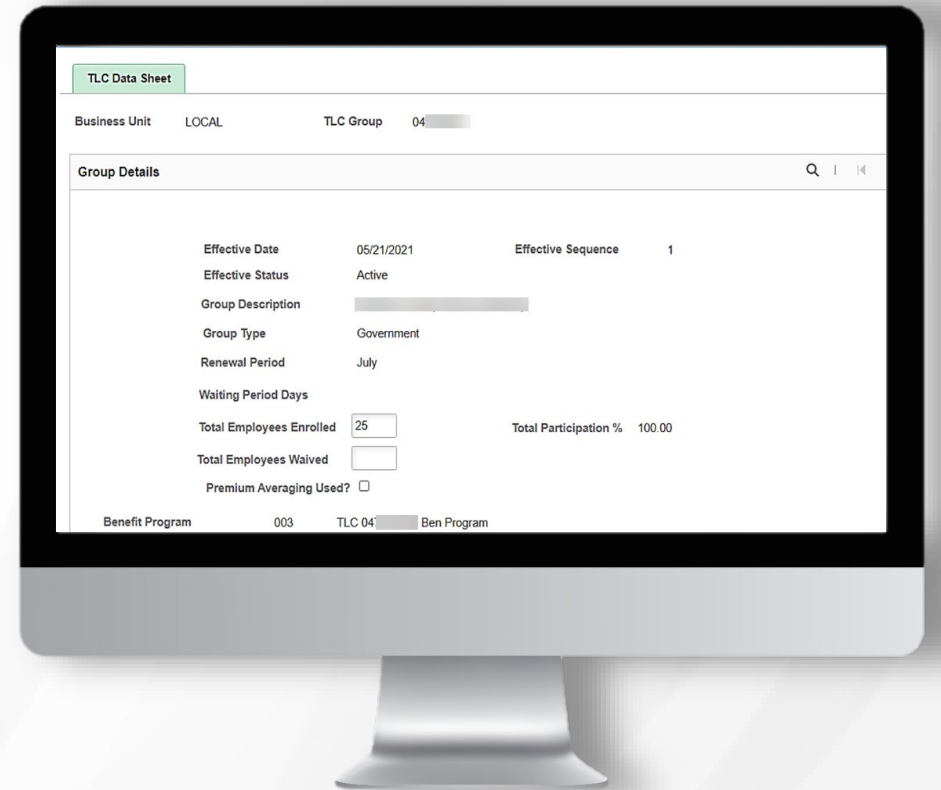
Primary ID:	Enrolled Count	Waived Count	Eligible Count (Enrolled + Waived)
Full-time Employees	26	1	27
Total for this Group ID	26	1	27
Total Participation Percentage			96%

Plans: Applies to all Group IDs

Key Advantage Plan Choices	Key Adv 500 Comprehensive Dent Key Adv 500 Preventive Dent
High Deductible Plan Choice	
Regional HMO Choice	Kaiser HMO
Medicare Plan Choice	Advantage 65 + DV

LIVE DEMONSTRATION

Updating and Certifying the TLC Data Sheet



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TLC Support

Questions about the content of the TLC Data Sheet?	Need to change Group Details on the TLC Data Sheet?
Contact TLC	
Need to make corrections after you certify?	General health care plan and benefits questions?



Email:
• tlc@dhrm.virginia.gov
• tlcpolicy@dhrm.virginia.gov



Phone:
888-642-4414



[The Local Choice E-News List](#)
• Latest updates and messages from TLC

Cardinal Support

Is a page not working?

Technical questions about Cardinal?

Contact Cardinal

Login Issues?

Need support with Cardinal functions?



Submit a ticket to Cardinal



Email
vccc@vita.virginia.gov

- Include “Cardinal” in the subject line

How to Submit a Cardinal Help Desk Ticket

Submit a Help Desk Ticket

Email vccc@vita.virginia.gov and include the following information:

Subject: Cardinal - <brief summary for routing (i.e.: TLC Data Sheet)>

Email Contents:

- Detailed information about your issue (i.e., page, actions, error).
- Locality Name and 9-digit DHRM Group Number (e.g., 047-000-000)
- Name, email address, and best contact phone number.

Additional Tips

- **Screenshots:** Attach as a document, blur or crop all sensitive information.
- **No Encryption:** Do not use Virtru or encrypted email services.
- **No CCs:** Do not copy other mailboxes on the ticket.

Cardinal Resources for Localities

Key locality resources are located at www.cardinalproject.virginia.gov/localityusers

Helpful Job Aids include:

- [TLC Data Sheet](#) – instructions for completing and certifying the TLC Data Sheet
- [TLC Running the TLC Data Sheet Report](#) – instructions for running the TLC Data Sheet Report, which can be stored as a PDF and used for recordkeeping
- [TLC Contacts](#) – instructions for updating key Contacts at your Locality
- [TLC Running the Cardinal Enrollment Report](#) – instructions for running the Cardinal Enrollment Report, which lists all employees and COBRA members enrolled in Healthcare on a specific date.
- [Cardinal System Access Guide](#)
- [Multifactor Authentication for Cardinal Users webpage](#) – MFA setup instructions for Okta Verify and Google Authenticator
- [Cardinal Registration Guide – Active Employees](#) – applicable for all new Locality Core Users and Core Users who have lost access and must re-register

Start soon...

TLC Data Sheet Entry and Certification is due by **Wednesday, April 1**, for all July renewals!

TLC Data Sheet Entry and Certification dates for October renewals will be communicated at a later date.



Thank You

PRESENTATION CONCLUDED

A copy of this presentation and the recording will be sent to all attendees and invitees.

www.cardinalproject.virginia.gov



Cardinal Security Resources

Security forms and associated resources are available on the Cardinal website > Resources > [Security](#).

Locality specific forms, handbook, instructions, and Department ID list are located under the **TLC Locality User Access** section of the page.

Localities **must** use the Locality Security Access Form.

Cardinal access is granted based on specific work that an employee needs to perform in the system and the associated security roles set up by their agency/locality. Specific documentation needs to be submitted to the Cardinal Security team before access can be granted. Please refer to the information below to learn how to gain access to Cardinal. Using Cardinal for the first time? Please reference the [Cardinal Portal page](#).

Statewide User Access
Statewide Security Handbook
Statewide Security Access Form (SE-SW-001)
Instructions for Security Access Form (SE-SW-001)
Primary Permission List
Roles-to-Training Course Mapping
The Cardinal Security Form must be completed by the agency's Cardinal Security Officer (CSO). The form should include required signatures prior to submitting to the Cardinal Security Team, in order for access to be granted in Cardinal.
Statewide Security Forum for the CSO Video: [Security Access and Form Forum](#)

VDOT User Access
VDOT Security Handbook
VDOT Security Access Form (SE-50100-001)
Instructions for Security Access Form (SE-50100-001)
Primary Permission List
Roles-to-Training Course Mapping
The Cardinal Security Form must be completed by the agency's Cardinal Security Officer (CSO). The form should include required signatures prior to submitting to the Cardinal Security Team, in order for access to be granted in Cardinal.

TLC Locality User Access
Locality Security Handbook
Locality Security Access Form (SE-LOCALITY-001)
Instructions for Security Access Form (SE-LOCALITY-001)
TLC Locality Cardinal HCM Department ID List
The Cardinal Locality Security Form must be submitted directly to The Local Choice (TLC).

Audit Access
Audit Security Access Form (SE-AUDIT-001)
Instructions for Audit Security Access Form (SE-AUDIT-001)

Interface File Access
Interface Account Request Form (SE-SW-002)
Instructions for Interface Account Request Form
The Cardinal Interface Account Request Form (SE-SW-002) must be completed by the agency's technical resource in order to establish access/exchange interface files with Cardinal. The form should include the required signatures prior to submitting the form to the Cardinal interface team.

Access in Cardinal HCM

Core User access is required to complete the TLC Data Sheet certification.

Core Users who have not logged in to Cardinal within the last 90 days will not be able to access the TLC Data Sheet.

If a Locality employee needs new, updated, or reinstated Core User access to Cardinal HCM, use the following process:

- Locality submits a Locality Security Access form (SE-LOCALITY-001) to TLC@dhrm.virginia.gov.
- The TLC group at DHRM reviews and approves the request and forwards the request to the Cardinal Security Team for processing.
- Once access has been established or updated, the Cardinal Security team notifies the Core User via email.

Lost Access?

Localities

Submit a [Locality Security Access form](#) to TLC@dhrm.virginia.gov.

The TLC group at DHRM reviews and approves the request and forwards the request to the Cardinal Security Team.

Once access has been established or updated, the Cardinal Security team notifies the Core User via email.

Password Tips and System Timeouts

Password Tips

If a password is entered incorrectly, the user will automatically be locked out after 3 failed attempts.

If the user has forgotten a username or password or locked themselves out, they can complete the **Forgot Username/Forgot Password Request***.

Core Users are required to **login and reset** their passwords every 90 days.

System Timeouts

Cardinal times out or terminates any session that is **inactive** for 15 minutes. If a user is timed out, any work that has not been saved will be lost.

- Two minutes before a timeout occurs, the user will receive a warning message indicating that the session is about to time out.
- It is always recommended to save work as often as possible.
- If multiple Cardinal windows are open, the user is timed out of all windows.