



Biennial Employment Plan System (BEPS): District System User

User Manual

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For Training Purposes Only

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Brief Description

This manual will provide district users with instructions on how to use and navigate through the Biennial Employment Plan System (BEPS). These instructions include how to enter information on the various screens, how to submit a biennial Temporary Assistance (TA) and Supplemental Nutrition Assistance Program (SNAP) Employment Plan (Plan), and how to make an amendment to an approved Plan. This manual does not provide comprehensive instructions for completing each section of the Plan. It provides highlights on important sections that are more difficult to complete. Please use the Guide to Completion of the 2022-23 Temporary Assistance and Supplemental Nutrition Assistance Program Employment Plan (Attachment B) for step-by-step instructions for completing a Plan.

The Home Screen

The **Home** (Welcome) screen is the first screen to display upon logging into BEPS. The screen provides tabs at the top of the screen to navigate to additional screens.

- Access BEPS via the internet at <https://beps.otda.ny.gov> or via CentraPort.
- The **NY.gov ID Login** screen displays. Enter your NY.gov ID username and password into the appropriate field and then click the **Sign in** button.

Note: Users who are locked out of their account and need support accessing the system should contact the Human-Services-Information Technology Services (HS-ITS) Enterprise Service Desk: (800) 697-1323.
- The **Home** screen displays, tabs appropriate to the user’s role and are located at the top of the screen in the **Navigation** bar. These tabs allow users to navigate to additional BEPS screens.

Note: The system displays the full name and the roles assigned to the user.
- District roles that are available are:
 - BEPS District Viewer – can view the Plan but can’t make any changes
 - BEPS District User – can view and make changes to the Plan but can’t submit
 - BEPS District Submitter – can view, make changes, and submit the Plan
 - District System Administrator – can add staff to the system.
- The **Home** screen will also list the district’s biennial TA and SNAP Employment Plans by Plan year that are available in BEPS.

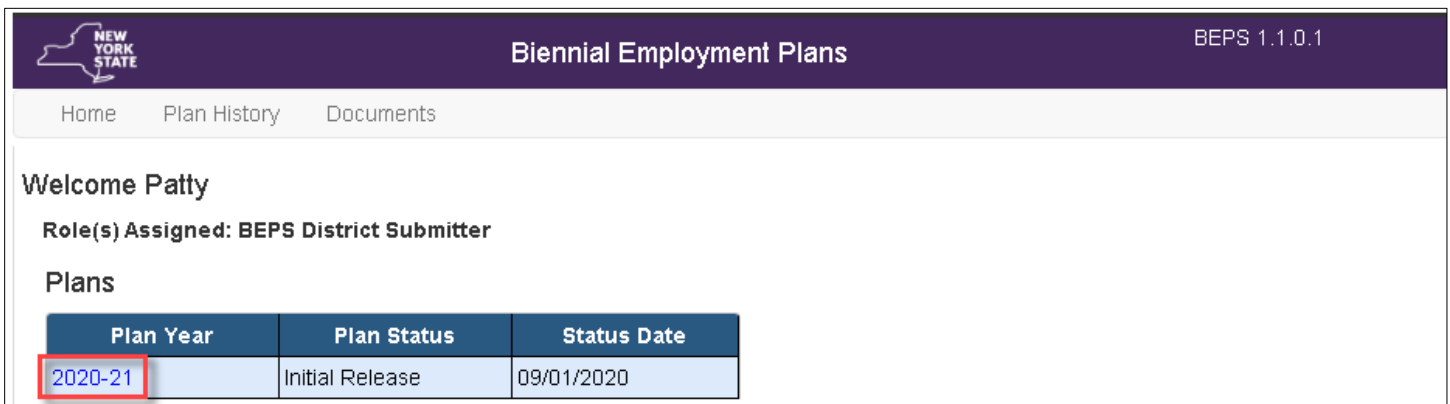


Figure 1: Sample BEPS Home screen

Accessing and Navigating the Biennial Employment Plan in BEPS

To access a Plan, click on the Plan Year hyperlink, as shown in Figure 1, on the previous page.

After clicking on the **Plan** link, the **Plan Summary** screen displays. The sections of the Plan are listed in a table of contents. To navigate, use the section tabs at the top of the screen (highlighted in the next example). Users can also use the hyperlinks in the **Plan Summary** section headers.

The screenshot shows the BEPS interface for Biennial Employment Plans. At the top, there is a navigation bar with 'Home', 'Plan History', and 'Documents'. Below this is a 'Plan Summary' section with a row of tabs for 'Section 1' through 'Section 9' and a 'Certify/Submit' button. The 'Plan Header' section contains a table with the following data:

District	Oswego	Plan Status	Initial Release
Plan Year	2020-21	Status Date	09/01/2020

Below the header is the 'Plan Summary' section, which includes a 'Generate Plan as:' button with 'PDF' and 'Word' options. The main table is as follows:

Section	Plan Components	Last Modified Date	Last Modified By
1	Administration		
1.1	Administrative Structure		
1.2	TA and SNAP Employment & Training (SNAP E&T) Provider Agencies		
1.3	OTDA Jobs Staff Agreement		
1.4	Access to Services at New York State Career Centers		
2	Orientation, Assessment and Employment Plan		
2.1	Orientation (Reference 18 NYCRR 385.5)		
2.2	Temporary Assistance (TA) Employment Assessment		
2.3	Temporary Assistance (TA) Employment Planning (Reference 18 NYCRR 385.6 and ...)		
3	Engagement		
3.1	Federal Engaged in Work Requirement (Reference 18 NYCRR 385.2(f))		
3.2	Strategies/Procedures for Accommodating Individuals with Limited English Proficiency		
3.3	Strategies/Procedures for Increasing Program Attendance		
3.4	Strategies/Procedures for Engaging Sanctioned TA Participants		
3.5	Strategies for reducing the need for TA		
4	Work Activities		
4.1	Allowable Work Activities		
4.2	Job Development		
4.3	Training Approval and Activity Enrollment Policies (Reference 18 NYCRR 385.9)		
4.4	Post-Secondary Education Approval and Enrollment Policies		
5	Work Requirements		
5.1	Meeting TA Work Requirements		

Figure 2: Sample **Plan Summary**

At the top of each section, the **Plan Header** will be displayed. This provides each user with information about the Plan they are working on. Underneath the **Plan Header**, the **Last Modified** date is displayed. This will display the date of the last update to that section and the name of the user who made the update(s).

Plan Summary	Section 1	Section 2	Section 3	Section 4	Section 5	Section 6	Section 7	Section 8	Section 9	Certify/Submit
Plan Header										
District	Oswego			Plan Status	Initial Release					
Plan Year	2020-21			Status Date	09/01/2020					
1. Administration										08/05/2021 13:25:26 PM by Patty
1.1 Administrative Structure										

Figure 3: Sample **Plan Header**

The screens under Sections 1 through 9 allow users to answer the biennial TA and SNAP Employment Plan questions. The responses for the questions can be provided in one of the following formats: checkboxes, radio buttons, text boxes, and tables.

Navigation and Data Entry Tips

- For questions that require a numeric value, only enter numbers. The system will add in the comma or dollar sign once saved.
- Character limit – There is a character limit of 2,500 for most textboxes with an exception for certain fields that require longer responses. Any additional important information that cannot be accommodated due to the character limit can be uploaded as an attachment.
- For most questions, when **Other** is selected as an option, a description is required, and a textbox is provided for the response.

A screenshot of a form interface. At the top left, there is a checked checkbox labeled "Other:". Below this, there is a large, empty rectangular text input field.

Figure 4: Sample **Other** selected

- **SAVE OFTEN!** A pop up will display letting the user know that the information has been saved successfully. Save before navigating away from a section, even if it is not complete. Failure to save before moving on to a new section will cause all data on that page to be lost.

A screenshot of a success message pop-up. The message is contained within a light gray box with a darker gray header that says "Success". The main text of the message reads "Save Successful.". In the bottom right corner of the box, there is a button labeled "OK".

Figure 5: Sample **Save Successful** Screen

- Certain questions will only allow data entry depending on the selection made. If the cursor is hovered over the text a red circle with a line through it will appear and entry is not allowed.

Example: No data entry allowed:

A screenshot of a question titled "2.1 Orientation (Reference 18 NYCRR 385.5)". Underneath the title, it says "a. Check one of the following:". There are two radio button options. The first option is selected (indicated by a filled circle) and reads "The district provides orientation in accordance with 18 NYCRR Section 385.5 and no additional information is provided at orientation." The second option is unselected (indicated by an empty circle) and reads "In addition to the requirements outlined in 18 NYCRR Section 385.5 of the regulations, the district's orientation provides the following:". Below the second option is a text input field that is grayed out, indicating it is disabled. A red circle with a diagonal line through it is overlaid on the text input field.

Figure 6: Sample No Data Entry Allowed

- If data entry is allowed, the box will be white with a blue outline.

Example: Data entry allowed:

2.1 Orientation (Reference 18 NYCRR 385.5)

a. Check one of the following:

The district provides orientation in accordance with 18 NYCRR Section 385.5 and no additional information is provided at orientation.

In addition to the requirements outlined in 18 NYCRR Section 385.5 of the regulations, the district's orientation provides the following:

The district |

Figure 7: Sample Data Entry Allowed

- The **Plan Summary** screen will update each section with the date it was last modified and by who.
- As a user starts to complete the Plan, they will be given the option to generate the Plan as a PDF or Word document.

Plan Summary		Generate Plan as: PDF Word	
Section	Plan Components	Last Modified Date	Last Modified By
1	Administration	10/20/2020 8:22:37 AM	Erie A User
1.1	Administrative Structure		
1.2	TA and SNAP Employment & Training (SNAP E&T) Provider Agencies		
1.3	OTDA Jobs Staff Agreement		
1.4	Access to Services at New York State Career Centers		
2	Orientation, Assessment and Employment Plan	10/14/2020 3:39:11 PM	Erie A User
2.1	Orientation (Reference 18 NYCRR 385.5)		
2.2	Temporary Assistance (TA) Employment Assessment		
2.3	Temporary Assistance (TA) Employment Planning (Reference 18 NYCRR 385.6 and 385.7)		

Figure 8: Sample **Plan Summary** Screen **Last Modified Date** Update/Generate Plan as PDF or Word

If a user clicks on the **Certify/Submit** tab before the Plan is complete, a list of sections that still need to be completed will be displayed in red font.

Plan Summary Section 1 Section 2 Section 3 Section 4 Section 5 Section 6 Section 7 Section 8 Section 9 **Certify/Submit**

Plan Header

District	Oswego	Plan Status	Initial Release
Plan Year	2020-21	Status Date	09/01/2020

10. District Certification

The plan cannot be submitted without completing the following required sections:

- 1. Administration
- 2. Orientation Assessment and Employment Plan
- 3. Engagement
- 4. Work Activities
- 5. Work Requirements
- 6. Quality Assurance/Work Verification
- 7. Supportive Services
- 8. Conciliation, Sanction and Dispute Resolution Procedures
- 9. Disability Determinations, Documentation and Requirements of Exempt Individuals

10.1 Certification

As a condition of the receipt of federal and State funds the Local District Commissioner of **Oswego** Department of Social Services submits this Temporary Assistance (TA) and Supplemental Nutrition Assistance Program (SNAP) Employment Plan (Plan) to the New York State Office of Temporary and Disability Assistance. The Plan outlines the administration of employment services for TA and SNAP applicants and recipients for the period January 01, 2020 through December 31, 2021. Submission of this Plan certifies that the district has read and accepts the terms of this certification and hereby affirms that employment services programs will be administered in accordance with all applicable federal and State policies, laws, regulations and provisions of this Plan.

Figure 9: Sample Incomplete **Certify/Submit** Tab

Section 1.1 – Administrative Structure

Section 1.1 – **Administrative Structure** requires that the district provide an organizational chart. The organizational chart can be uploaded via the **Documents** tab at any time. **Do not navigate to the Documents tab prior to saving your work.**

The screenshot shows the 'Biennial Employment Plans' interface. The 'Documents' tab is selected in the top navigation bar. Below the navigation bar, there are buttons for 'Plan Summary', 'Section 1', 'Section 2', 'Section 3', 'Section 4', 'Section 5', 'Section 6', 'Section 7', 'Section 8', 'Section 9', and 'Certify/Submit'. The 'Section 1' button is highlighted. Below the navigation bar, there is a 'Plan Header' section with a table:

District	Oswego	Plan Status	Initial Release
Plan Year	2020-21	Status Date	09/01/2020

Below the table, there is a '1. Administration' section with a sub-section '1.1 Administrative Structure' highlighted. The text for '1.1 Administrative Structure' reads: 'a. This agency's organizational chart is attached. It identifies the units and staff within the agency that are involved in the operation of the district's employment program. (Attachments must be uploaded to the system through the "Documents" screen prior to submitting the plan. Use the textbox below to provide any additional information. Do not navigate from this page prior to saving.)' Below this text is a large empty text box for additional information.

Figure 10: Sample Section 1.1 – Administrative Structure

Documents Tab

This set of screens allow the users to view or add documents in the system.

Plan managers can upload documents that are applicable to all districts, this includes the most recent LCM and attachments.

District staff can also upload their own documents. When the **Add Document** button is clicked a new screen will appear that allows users to enter information and upload the document they want.

The search yielded 1 results.

Document Type	Description	File Name	Plan Year	Last Modified	Modified By
Training Manuals	trainig	Seating Chart Original.pdf		10/14/2020 10:49:51 AM	Sanus Sharma Dulal

Figure 11: Sample **Add Document** in the **Documents Tab**

The screen below shows the list of documents added to the system. Users can filter the list by selecting the desired document category.

The search yielded 1 results.

Document Type	Description	File Name	Plan Year	Last Modified	Modified By
Training Manuals	trainig	Seating Chart Original.pdf		10/14/2020 10:49:51 AM	Sanus Sharma Dulal

Figure 12: Sample List of Documents Added to the System

Section 1.2 – TA and SNAP Employment & Training (SNAP E&T) Provider Agencies

Section 1.2 requires adding the district’s contracted providers. When the **Add Contractor** button is clicked a new screen will pop up for entry of the provider’s information as well as other data.

Figure 13: Sample Section 1.2 TA and SNAP E&T Provider Agencies

After saving, the contractor’s information will display in the table.

Provider	Total Contract Cost (per year)	Funding Sources	Categories of Clients Served	Programs, Services or Activities Provided
Test	\$10,000	FFFS	FA	Test

Figure 14: Sample Add Contractor Button

Section 1.3 – OTDA Jobs Staff Agreement

Section 1.3(a) - If your district has a Jobs program, select both Services and Target Groups.

Note: this is not a required field. If your district does not have a Jobs program you do not have answer this question.

1.3 OTDA Jobs Staff Agreement	
a. OTDA Jobs Program Services - Target Groups. Check all services and target groups that apply:	
Services	Target Groups
<input type="checkbox"/> Assessment/Employment Plan	<input type="checkbox"/> Applicants
<input type="checkbox"/> Supervised Job Search	<input type="checkbox"/> FA & SNA with children
<input type="checkbox"/> Job Readiness Training	<input type="checkbox"/> SNA without Children
<input type="checkbox"/> Job Club	<input type="checkbox"/> SNAP
<input type="checkbox"/> Job Placement Service	<input type="checkbox"/> TANF 200%
<input type="checkbox"/> Grant Diversion	
<input type="checkbox"/> Job Development (employer outreach)	
<input type="checkbox"/> WOTC pre-certifications	

Figure 15: Sample **Section 1.3 OTDA Jobs Staff Agreement** Section

Plan Submission

Once Sections 1-9 have been completed the “Submit” button will appear. The Commissioner’s name and date will prefill. Only the Commissioner or their designee, who has the District Submitter role, will be able to submit the Plan.

Plan Summary	Section 1	Section 2	Section 3	Section 4	Section 5	Section 6	Section 7	Section 8	Section 9	Certify/Submit
--------------	-----------	-----------	-----------	-----------	-----------	-----------	-----------	-----------	-----------	----------------

Plan Header

District	Erie	Plan Status	Initial Release
Plan Year	2020-21	Status Date	08/13/2020

10. District Certification

10.1 Certification

As a condition of the receipt of federal and State funds the Local District Commissioner of **Erie** Department of Social Services submits this Temporary Assistance (TA) and Supplemental Nutrition Assistance Program (SNAP) Employment Plan (Plan) to the New York State Office of Temporary and Disability Assistance. The Plan outlines the administration of employment services for TA and SNAP applicants and recipients for the period January 01, 2020 through December 31, 2021. Submission of this Plan certifies that the district has read and accepts the terms of this certification and hereby affirms that employment services programs will be administered in accordance with all applicable federal and State policies, laws, regulations and provisions of this Plan.

<p>_____</p> <p>Erie Commissioner</p> <p>Commissioner</p>	<p>_____</p> <p>9/14/2020</p> <p>Date</p>
--	--

Figure 16: Sample Complete **Certify/Submit** tab

Plan Submission Confirmation

After the submit button is clicked, a pop-up box will open, asking to confirm the submission of the Plan.

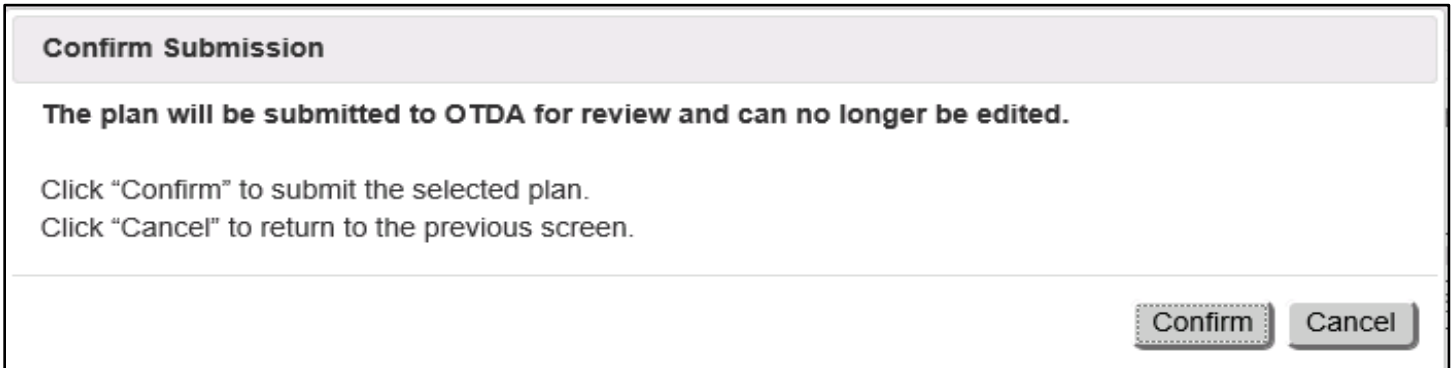


Figure 17: Sample **Confirm Submission** Screen



Figure 18: Sample **Submission Successful** Screen

Submitted Plans

The submitted Plan will display on each district's **Home** screen as submitted under the Plan Status.

Role(s) Assigned: BEPS District Submitter		
Plans		
Plan Year	Plan Status	Status Date
2020-21	Submitted	09/29/2020

Figure 19: Sample **Home** Screen – **Plan Status Submitted**

While in **Submitted** status, no further changes can be made to a Plan. Users who attempt to edit a Plan that has been submitted will not be able to access the Plan, as shown in Figure 20.

2. Orientation, Assessment and Employment Plan Last Modified: 09/29/2020 12:59:37 PM by Norma

2.1 Orientation (Reference 18 NYCRR 385.5)

a. Check one of the following:

- The district provides orientation in accordance with 18 NYCRR Section 385.5 and no additional information is provided at orientation.
- In addition to the requirements outlined in 18 NYCRR Section 385.5 of the regulations, the district's orientation provides the following:

⊘

Figure 20: Sample Navigating Through Submitted Plan

Approved Plans

Once all OTDA reviewers have signed off on the Plan, it will be approved. The approved Plan will display on each district's **Home** screen as approved under the Plan status. Each district will receive written notification of Plan approval. Copies of all approved Plans will be provided to the Office of Administrative Fair Hearings to support hearing decisions and will also be made available for public review on the OTDA website. A copy will also be placed in the document repository.

The screenshot shows the 'Biennial Employment Plans' interface. At the top left is the New York State logo. The title 'Biennial Employment Plans' is on the right. Below the title are navigation links: 'Home', 'Plan History', and 'Documents'. The main content area displays a welcome message for 'Norma M' and identifies her role as 'BEPS District Submitter'. Under the heading 'Plans', there is a table with one row showing a plan for the year '2020-21' with a status of 'Approved' and a status date of '04/27/2021'.

Plan Year	Plan Status	Status Date
2020-21	Approved	04/27/2021

Figure 21: Sample **Home** Screen – **Plan Status Approved**

Amending Plans

Districts may amend their Plan at any time after it has been approved by OTDA. The **Amendments** tab will display only after the Plan is resubmitted for revision. District users have a read only view of this screen. Districts choosing to make amendments to their Plan will need to follow the same steps as they did with the initial submission.

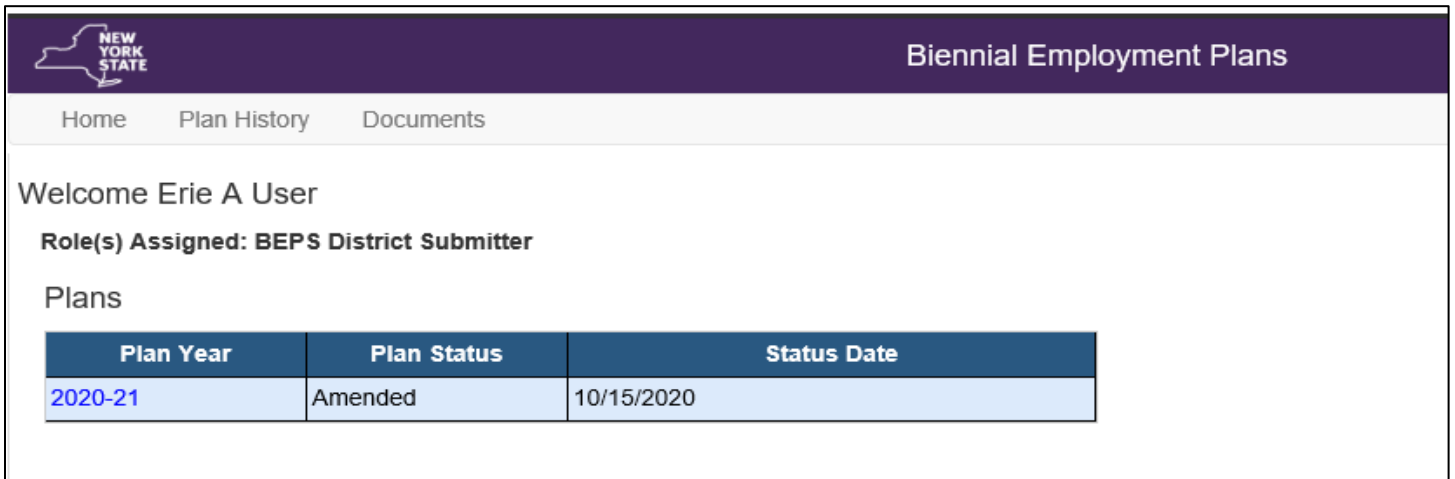
Plan Header			
District	Erie	Plan Status	Amended
Plan Year	2020-21	Status Date	10/15/2020

Amendments	
Date	Sections Amended
10/15/2020	Section 1.1a

Figure 22: Sample **Amendments** Tab

Amendment Status

Once the Plan has been approved after resubmission the Plan Status will now read as amended. Districts will receive written notification of each **Plan** amendment once it has been approved.



The screenshot shows the 'Biennial Employment Plans' interface. At the top left is the New York State logo. The main header is 'Biennial Employment Plans'. Below this is a navigation bar with 'Home', 'Plan History', and 'Documents'. The user is identified as 'Erie A User' with the role 'BEPS District Submitter'. A table titled 'Plans' displays one entry with the following data:

Plan Year	Plan Status	Status Date
2020-21	Amended	10/15/2020

Figure 23: Sample **Home** Screen for **Resubmitted Amended Plan**