NEW YORK STATE | Office of Temporary and Disability Assistance

Biennial Employment Plan System (BEPS): District System User

User Manual

August 2021
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 for the Temporary Assistance and Supplemental Nutrition Assistance Program Employment Plan 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 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 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.

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

*Figure 1: Sample BEPS **Home** screen- plan year, status, and status date are listed in a table.*

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.

NEW YORK STATE	Biennial Employment Plans									BEPS 1.1.0.1

Home Plan History Documents

| 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

Plan Summary

Generate Plan as: [PDF] [Word]

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.

*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.
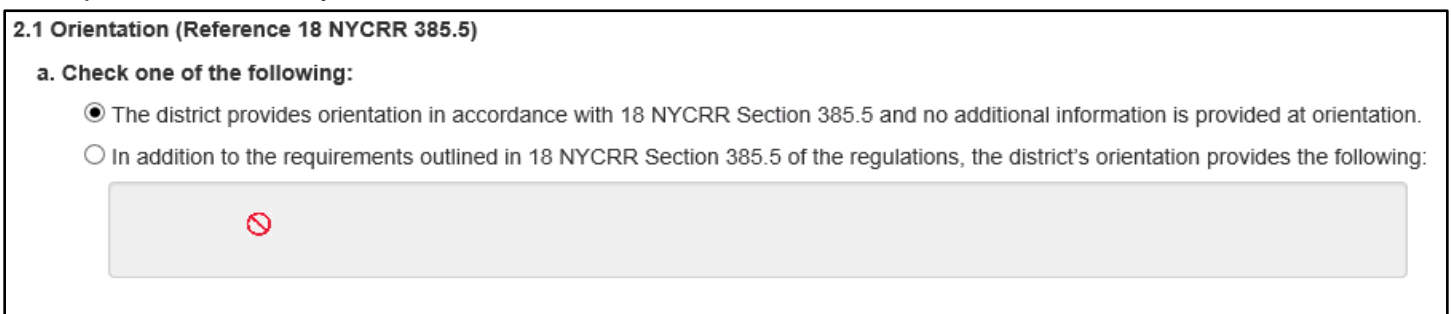

*Figure 5: Sample **Save Successful** Screen*

- 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:

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**.

*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, including 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.

*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.

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 to 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
☐ Assessment/Employment Plan	☐ Applicants
☐ Supervised Job Search	☐ FA & SNA with children
☐ Job Readiness Training	☐ SNA without Children
☐ Job Club	☐ SNAP
☐ Job Placement Service	☐ TANF 200%
☐ Grant Diversion	
☐ Job Development (employer outreach)	
☐ 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.
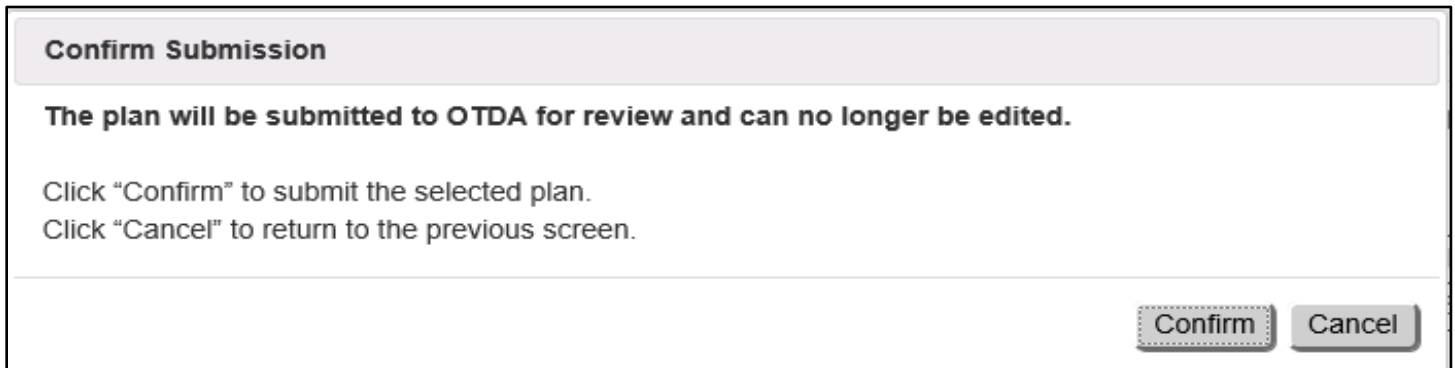
Erie Commissioner	9/14/2020
Commissioner	Date

Submit

*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.

Last Modified: 09/29/2020 12:59:37 PM by Norma

2. Orientation, Assessment and Employment Plan

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:
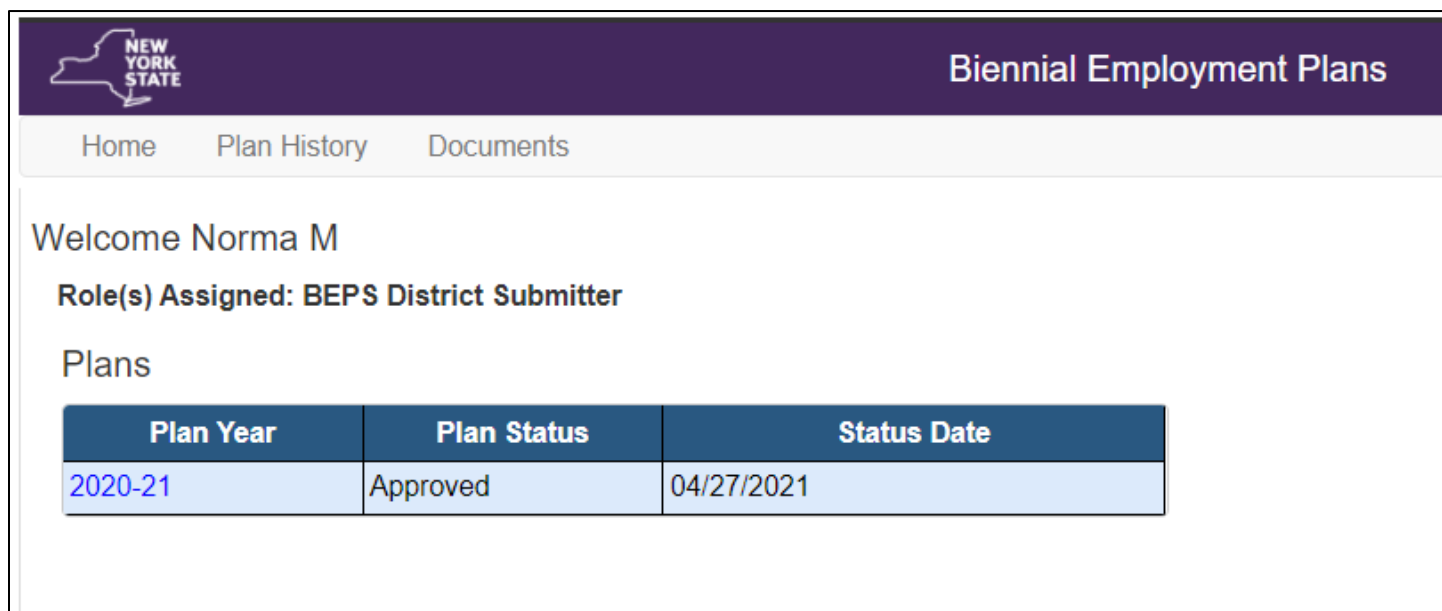
Figure 20: Sample Navigating Through Submitted Plan

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.
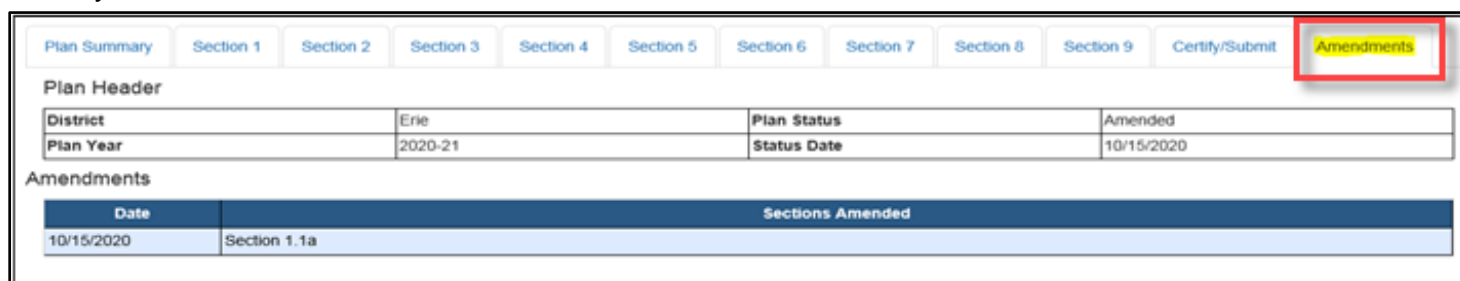

*Figure 21: Sample **Home** Screen – **Plan Status Approved***

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.
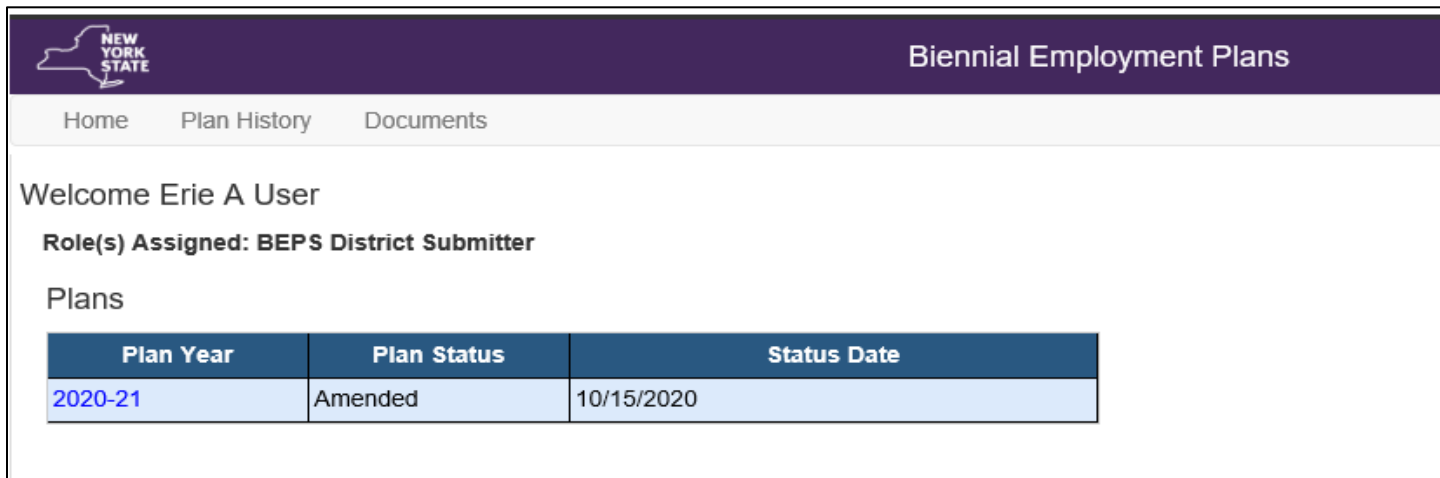

*Figure 22: Sample **Amendments** Tab*

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.

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