

## eCon Planning Suite

### e-Tutorial: Amending a Consolidated Plan

Hello and welcome to the eCon Planning Suite online tutorials. This is one in a series of video tutorials demonstrating the functionality and components of the eCon Planning Suite.

At the end of this tutorial, you will be able to –

- Amend a Consolidated or Action Plan in IDIS

We will first demonstrate how to amend a consolidated plan. Then demonstrate how to amend an annual action plan. Changing conditions, such as lower or higher than expected grant awards, may require you to amend your Consolidated or Annual Action Plan.

To amend a Consolidated Plan, you must first copy the existing plan. To do this, go to Plans/Projects/Activities in the Main Menu. If necessary, open the plan to be amended and note the start year and version name. In the Consolidated Plan sub-menu, click <Copy>. Enter the existing, or source, Consolidated Plan's Start Year and Version.

Next, enter the Start Year, End Year and Version for the new copy of the plan. For amendments, the Start Year must be the same as the Source Plan's. Select whether the amendment is Minor or Substantial from the dropdown menu. Your Citizen Participation Plan sets thresholds for what the grantee considers a substantial amendment, which triggers additional citizen participation. A minor amendment is any change that does not meet the threshold of a Substantial Amendment.

After you copy the plan, there will be a text box in the copied plan to explain what was amended. When complete, click <Copy> The system will display a list of your Consolidated Plans. The new copy will contain everything that was in the original version. To make edits to reflect the amendments, click the Edit link in the Action column. You can edit any of the screens in the template.

On AD-25, you should edit the plan's title in the field provided. Also on AD-25, the dropdown menu indicates if it is a minor or substantial amendment based on your selection when copying the plan. If the amendment type changes after you copied the plan, you can make that change here. If you are doing a substantial amendment, a text box is provided below. Enter a summary of the amendment here. Though this information will not appear on the printed version of the plan, it can be used to make it clear to the HUD Field Office what changes have been made to a previously approved plan. When complete, Update the status to "Submitted for Review" at the bottom of the page.

While Minor Amendments do not require HUD Approval, the plan must still be submitted and the Field Office must change the status to "Review Complete." This ensures that the system will refer to the amended plan for the CAPER. When finished, click <Save and Return> to save any changes.

Let's now demonstrate copying and amending an Action Plan. The process is very similar to amending a Consolidated Plan. To copy an Action Plan, click <Copy> in the Action Plan sub-menu. Enter information in the fields provided. For amendments, the New Program Year must be the same as the existing or Source Program Year. Select whether the amendment is Minor or Substantial. When complete, click <Copy>. The system will display a list of your Annual Action Plans.

The new copy will contain everything that was in the original version. To make edits to reflect the amendments, click the Edit link in the Action column. You can edit any of the screens included in the template. Once you have made you edits, click on <AD-26 > to submit the edits to HUD.

Update the plan's title in the field provided. Like AD-25, AD-26 is a dropdown menu indicating if it is a minor or substantial amendment based on your selection when copying the plan. If the amendment type changes after you copy the plan, you can make that change here. If it is a substantial amendment, enter a summary of the amendment in the text box.

Change the status to "Submitted for Review". While Minor Amendments do not require HUD Approval, the Field Office must change the status to "Review Complete" so the amended Action Plan will be included in the CAPER. When done editing, click <Save and Return>.

This tutorial demonstrated how to amend your Consolidated and Annual Action Plans in IDIS. In summary, you will need to:

- 1) Make a copy of your current "approved" plan.
- 2) Make the edits necessary to the plan, and
- 3) re-submit the amended copy by updating the Status to "Submitted for Review"

Thank you for participating in the online tutorial on amending Consolidated and Annual Action Plans.

For additional tutorials and resources, please go to the OneCPD Resource Library.