



New Way to Amend Consolidated Plans and Annual Action Plans in eCon Planning Suite

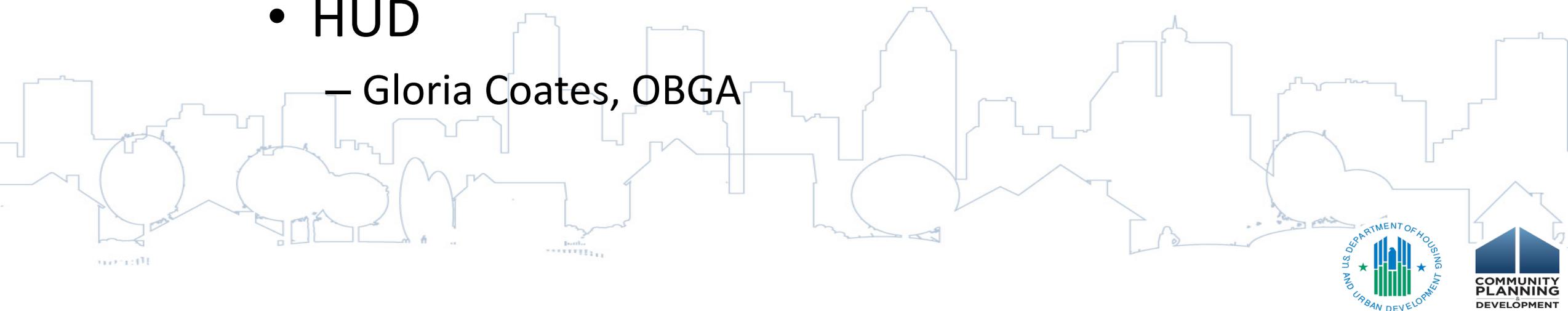
March 10, 2020



Introductions

- Presenters
 - Ben Sturm, The Cloudburst Group
 - Rob Sronce, The Cloudburst Group

- HUD
 - Gloria Coates, OBGA



Housekeeping

Logistics:

- 60-minute webinar
- All lines are muted
- Submit technical issues through “Question” function

Asking questions:

- There will be periodic pauses to discuss questions
- Can also submit questions through “Question” function

Materials:

- To be posted on the HUD Exchange
- Slides, transcript, recording



This webinar is made possible by



Agenda

1. 11.19 IDIS Release Overview
2. Amendment Basics
3. New Set-up for Consolidated Plan Amendments
4. New Set-up for Annual Action Plan Amendments
5. Downloading Previous Plan Versions
6. New Role of the Copy Function
7. Question and Answer



Session Objectives

During this webinar, you will learn:

1. Why and when to amend your Consolidated Plan or Action Plan in the eCon Planning Suite
2. New changes to processing Con Plan and Annual Action Plan amendments in the system
3. New changes to the Copy function
4. Special considerations for Consortia grantees



eCon Planning Suite Materials

Updated HUD Exchange resources to reflect new amendment features:

✓ Quick Guides

- ❖ Amending the Consolidated Plan & Annual Action Plan
- ❖ Creating a Consolidated Plan
- ❖ Creating a Year 2-5 Annual Action Plan

Resources to be updated in Spring 2020:

- ✓ Con Plan in IDIS Desk Guide
- ✓ Troubleshooting Guide



11.19 IDIS RELEASE



IDIS Online Release 11.19

Launched 12/23/2019

- Allow grantees to amend, edit, and resubmit Consolidated Plans and Annual Action Plans (AAP) that have been reviewed by HUD
- Allow grantees to copy Con Plans and AAPs for the next program year; and restrict users from creating multiple copies of plans for the same program year after submission to HUD
- Allow grantees to download previous version(s) of Con Plans and AAPs after amendment
- Allow grantees to delete an amendment from the AAP
- Added new MA-60 screen to allow grantees to maintain Broadband Needs of Housing data/information
- Add new MA-65 screen to allow grantees to maintain Hazard Mitigation data/information



Impact of 11.19 Release

- A new “Amend” action link is available for the most current Con Plan and AAP with a status of “Review Completed”
- Any amendments created before 12/23/2019 and submitted to HUD had been made the “official” plan:
 - If “Submitted for Review” it will have an Amend action link after HUD marks it as “Review Completed”
 - If “Reviewed and Waiting Modifications” it will have an Edit action link
- Amendments created before 12/23/2019 but NOT submitted to HUD are View only and can no longer be edited.



AMENDMENT BASICS

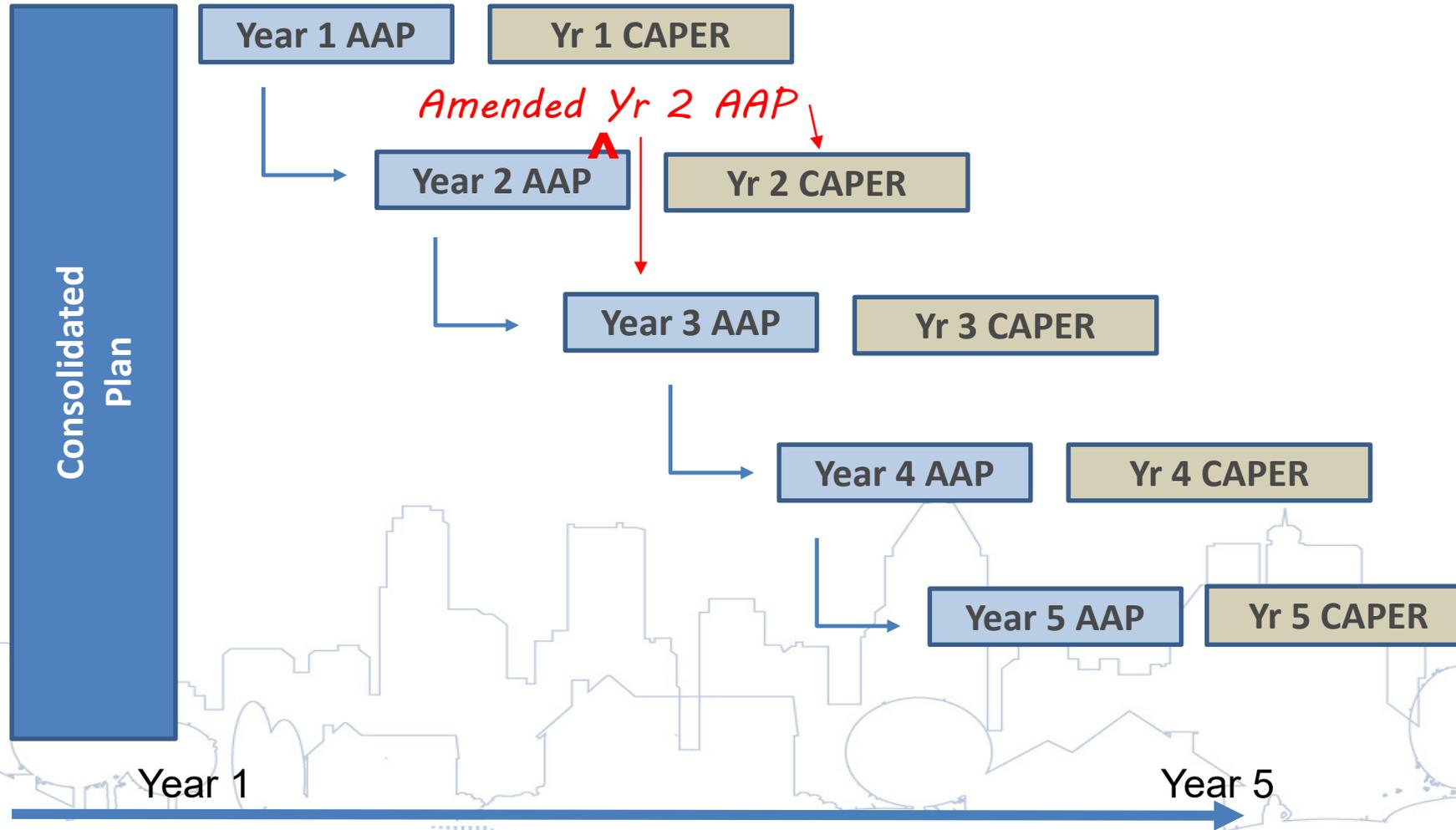


Amendments Basics

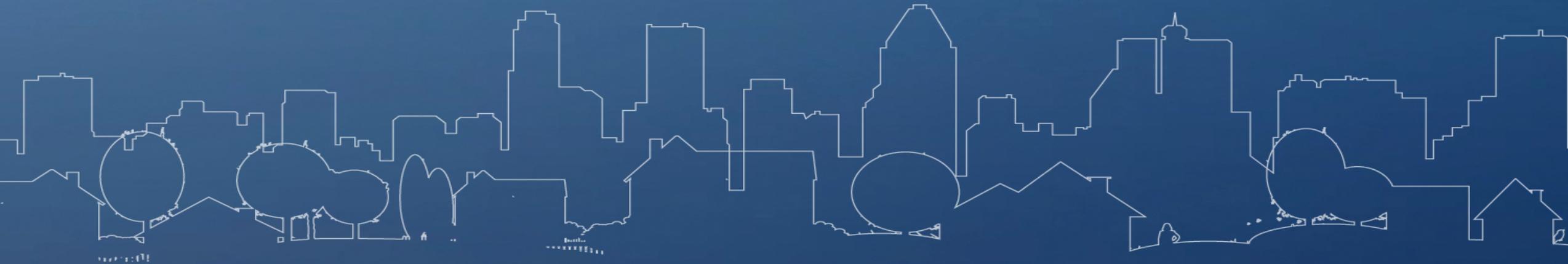
- Consolidated Plan Amendments may be changing funding sources, adding, removing or revising goals and adjusting priority needs and/or target areas
 - CAVEAT: Year 1 AAP is included in the Consolidated Plan template
- AAP Amendments would include adding or revising projects, goals or correcting discrepancies with GOIs
- All amendment types (Minor or Substantial) must be submitted to HUD to be marked “Review Completed”
 - Amendments must be completed and approved by HUD before creating the CAPER



Amendment Flowchart



NEW SET-UP FOR CON PLAN AMENDMENTS



New Set-up for Con Plan Amendments

- Amend action link available for the most recently approved Con Plan version

Results Page 1 of 1

Grantee Name	State	Year	Version	Title	Status	Action
SEATTLE	WA	2018	1	2018 TEST and DEMO	Open - in Progress	View
SEATTLE	WA	2018	2	2018-2022 Seattle CP	Review Completed	Amend View
SEATTLE	WA	2014	2014-1	City of Seattle Consolidated Plan for Housing and Community Development	Review Completed	Amend View
SEATTLE	WA	2013	test 1	TEST PLAN	Open - in Progress	Edit View

Status	Action
Open - in Progress	View
Review Completed	Amend View



New Set-up for Con Plan Amendments

Confirmation of Amendment ✕

You are about to modify a Plan that has been reviewed and approved by HUD. Modifying this Plan will require the Plan to be resubmitted to HUD for review and approval. Click "I agree" to continue or "Cancel" to abort this action.

I agree that I am creating an official amendment to the Plan.

- Confirmation of Amendment – by clicking “I Agree” the system will reopen the Con Plan
 - **WARNING: Con Plan amendments CANNOT be deleted after clicking “I Agree”**
- By clicking “I Agree” the Con Plan is re-opened and the status is changed to “Open-Amendment”

Grantee Name	State	Year	Version	Title	Status	Action
SEATTLE	WA	2018	1	2018 TEST and DEMO	Open - in Progress	View
SEATTLE	WA	2018	2	2018-2022 Seattle CP	Open - Amendment	Edit View



New Set-up for Con Plan Amendments

- The Purpose for Amendment textbox is now required for both Minor and Substantial amendments

Strategic Plan Beginning Year:* 2018

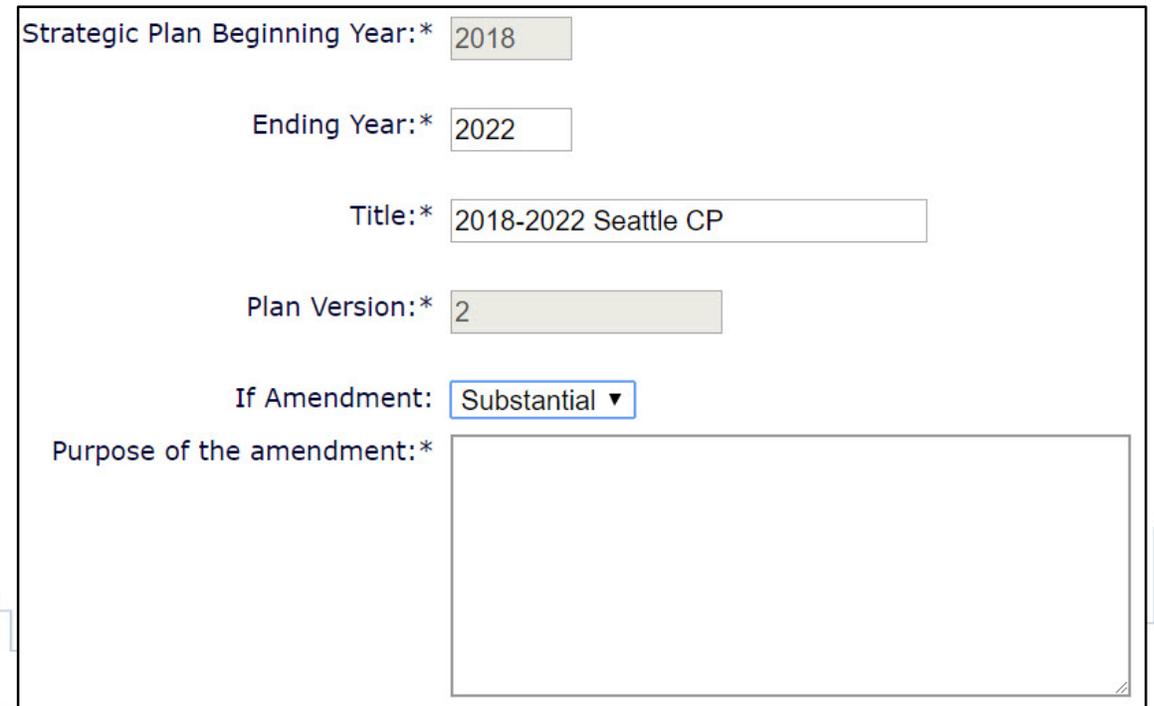
Ending Year:* 2022

Title:* 2018-2022 Seattle CP

Plan Version:* 2

If Amendment: Substantial ▼

Purpose of the amendment:*



NEW SET-UP FOR AAP AMENDMENTS



New Set-up for AAP Amendments

- Amend action link available for most recently-approved AAP for each Program Year

Annual Action Plans

Search

Search Criteria

Year: Status:

|

Results Page 1 of 1

Grantee Name	State	Year	Version	Title	Status	Action
ALABAMA	AL	2016	2	Do Not Use #1	Open - In Progress	View
ALABAMA	AL	2019	1	Alabama PY2019 One-Year Annual Action Plan for CDBG, HOME, ESG, HOPWA, and HTF Programs	Review Completed	Amend View
ALABAMA	AL	2016	#2	Alabama PY2016 One-Year Annual Action Plan for CDBG, HOME, ESG, HOPWA, and HTF Programs	Review Completed	Amend View
ALABAMA	AL	2017	1	Alabama PY2017 One-Year Annual Action Plan for CDBG, HOME, ESG, HOPWA, and HTF Programs	Review Completed	Amend View
ALABAMA	AL	2016	1	State of Alabama PY2016 One-Year Annual Action Plan for CDBG, HOME, ESG, and HOPWA Programs	Review Completed	View
ALABAMA	AL	2018	1	Alabama PY2018 One-Year Annual Action Plan for CDBG, HOME, ESG, HOPWA, and HTF Programs	Review Completed	Amend View

Status	Action
Open - in Progress	View
Review Completed	Amend View



New Set-up for AAP Amendments

- Confirmation of Amendment – by selecting “I Agree” the system will reopen the AAP
- AAP is re-opened with the status “Open-Amendment”
- Grantees must indicate amendment type and provide purpose of amendment

Confirmation of Amendment ✕

You are about to modify an AAP that has been reviewed and approved by HUD. Modifying this AAP will require the AAP to be resubmitted to HUD for review and approval. Click "I agree" to continue or "Cancel" to abort this action.

I agree that I am creating an official amendment to the AAP.

New Set-up for AAP Amendments

- “Delete this Amendment” option can be used to discard the changes and restore the previous AAP to “Review Completed”
 - NOTE: This option ONLY available for AAPs that are “Open-Amendment” or “Reviewed and Waiting Modifications” status. AAPs marked “Review Completed” cannot be deleted.

Cancel Download as Word document **Delete this Amendment** Download Previous Versions

(Note: click on a link to edit)

***NOTE: The “Delete this Amendment” button is not an available option for Consolidated Plan amendments.



DOWNLOADING PREVIOUS PLAN VERSIONS



Downloading Previous Plan Versions

- For both Con Plan and AAP amendments, each time the “Amend” action link is selected, the system will create a backup or archive copy of the plan.
- Grantee and Field Office users can use “Download Previous Version” option to select and download an archived copy of the current amended plan as a Microsoft Word document.
- Each available archived copy will be displayed with the data and time that it was created.

Cancel

Download as Word document

Download a Previous Version

[Click to Download Version Created on \[2020-01-23 16:47\]](#)

(Note: click on a link to edit)

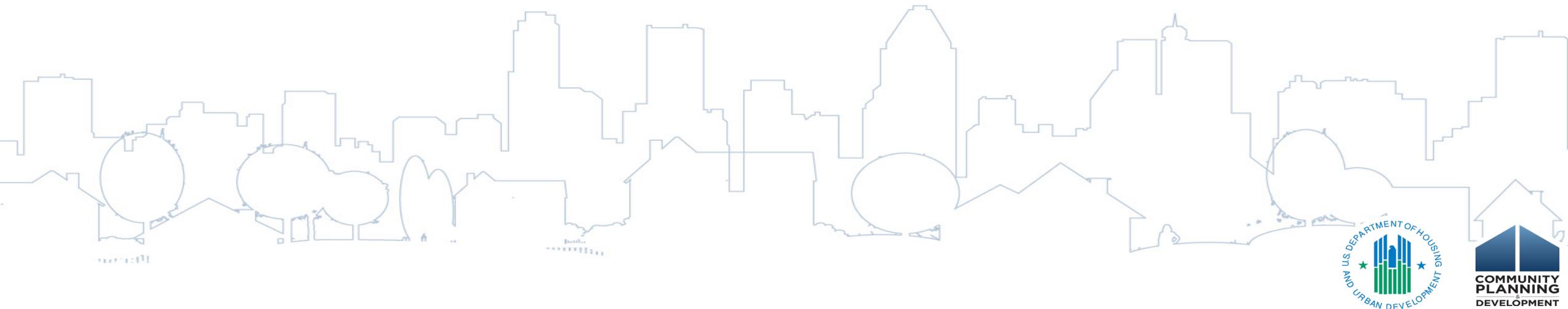


NEW ROLE OF THE COPY FUNCTION



New Role of the Copy Function

- Prior to the 11.19 Release, the Copy function was used to:
 - Create Con Plan and AAP amendments
 - Create a Copy of a current Con Plan or AAP for the same Program Year
 - Create a new Con Plan or AAP for a new Program Year



New Role of the Copy Function

- As part of the 11.19 Release, the Copy function can only be used to:
 - ~~– Create Con Plan and AAP amendments~~
 - ~~– Create a Copy of a current Con Plan or AAP for the same Program Year~~
 - **Create a new Con Plan or AAP for a new Program Year**



New Role of Copy Function

Copying an existing plan to create a new Con Plan:

1. Click Copy link
2. On Copy screen, click “Select Source ConPlan” button
3. On Select Source ConPlan screen, only one Con Plan for each Strategic Plan timeframe will be available:
 - ✓ **MUST have status of “Reviewed Completed”**
 - ✓ **MUST be the most current plan for a particular Start Year**

Copy Consolidated Plan

|

Source Plan:

Source Consolidated Plan's Start Year:*

Source Consolidated Plan's Version:*

New Consolidated Plan's Start Year:*

New Consolidated Plan's End Year:*

New Consolidated Plan's Version:*

New Role of Copy Function

Copying an existing plan to create a new AAP:

1. Click Copy link
2. On Copy screen, click “Select Source AAP” button
3. On Select Source AAP screen, only one AAP for each Program Year will be available:
 - ✓ **MUST have status of “Reviewed Completed”**
 - ✓ **MUST be associated with the “official” Con Plan**

Copy Annual Action Plan

|

Source Plan:

Source AAP Program Year:*

Source AAP Plan Version:*

New AAP Program Year:*

New AAP Plan Version:*

CONSORTIA EXCEPTIONS

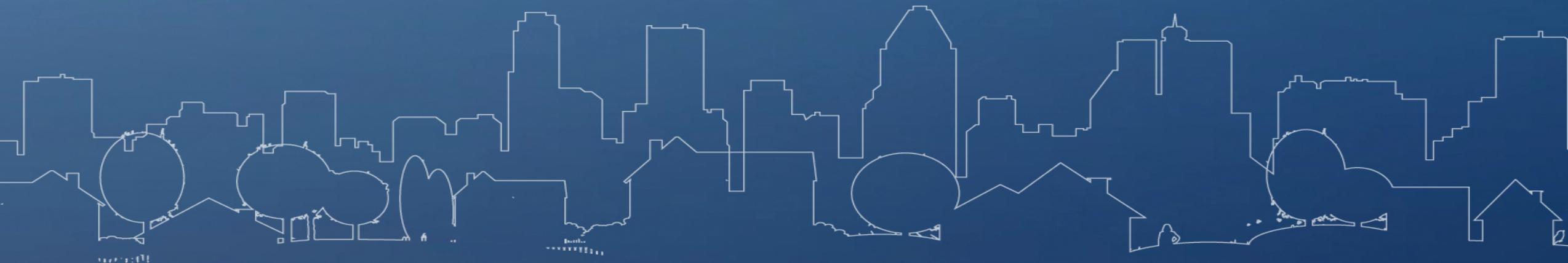


Consortia Exceptions

- Con Plan and AAP amendments can only be created by Consortia Lead
 - Includes creating plans by copying prior year Con Plans and Action Plans
- Participating Consortia Members will not have an Amend action link available for any of their Con Plans or AAPs
 - Participating members will still need to coordinate with the Lead Entity to amend a plan



QUESTIONS???



Question and Answer

- Please submit any questions you have via the Questions pane.
- If you submit questions that are not answered, please submit them to the HUD Exchange Ask-a-Question

