| Rob Sronce: | We begin our webinar for today. So good afternoon everyone, good morning if you are out West like me. Today we are having a webinar about the new way to amend the consolidated plan and annual action plans in the eCon Planning Suite in IDIS. My name is Rob Sronce. I work with the Cloudburst Group. I am joined today by my colleague Ben Sturm, also known as Mr. eCon Plan. He is a familiar voice and has had a hand in Ask a Question in many of the products this year regarding the eCon Plan. Hello, Ben. |
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| Ben Sturm: | Hi, Rob, and thank you for the wonderful introduction. |
| Rob Sronce: | You are quite welcome. We are also joined today by a special guest, Gloria Coates, from HUD office of Block Grant Assistance. Hello, Gloria. |
| Gloria Coates: | Hello, everyone, good afternoon. |
| Rob Sronce: | Before we get started, I'd like to make a few housekeeping notes regarding today's session. This webinar is scheduled for one hour. However, this session could run a little bit longer, so we thank you for your patience. However, if you need to step away at any time, or if you need to leave early, please know that our session will be recorded today. The slides, the transcript, and recording will be posted on the HUD Exchange usually within a few weeks for the session. |
| | So as I mentioned, we do have time set aside to take your questions today at the end, towards the end, at the very end of the session. All questions will be handled through the WebEx Q&A pod. By default, this pod is hidden in the WebEx application. So if you could all please take a moment to orient yourself to the WebEx control panel, which is on the right-hand side of your screen or it should be there. Take a moment now to locate and click on the Q&A pod. You will see participants, chat, and Q&A. You can go ahead and click on that Q&A one to activate it so you can submit your questions through there. Again, that should be located in the top right in your control panel. Please enter your questions as you have them during the presentation. We will start grabbing them and queue them up and answer as many as we can at the end of our session today, but please feel free to enter them as you have them. If we are not able to get to your question today, we want to remind you that you can submit it through the HUD Exchange Ask a Question for the eCon Planning Suite and we will answer your questions that way as well. |
| | Please note that all participants are muted by default. If you need help with WebEx or other technical issues, you need us to repeat something, please also use the Q&A pod. We will be keeping an eye on that. |
| | Lastly, if you would like to change your audio settings from phone to computer, please be sure to click on the Quick Start menu at the top left of |

the WebEx screen and then go to the audio conference section and switch the selection there from phone to computer audio.

Next slide. Also, we would like to extend a special thanks to HUD CPD for making this webinar possible.

So we have a full agenda today. We are going to move quickly. We will review the recent release, review some amendment basics, the new process for a Con Plan, amending the Con Plan and new action plan amendments, downloading, and the copy function, and last take your questions. We encourage you to minimize distraction and give us your undivided attention.

So Ben, what are we going to learn about today?

Ben Sturm:      All right, Rob, well, some of the objectives of today's sessions are we are going to talk about why and when to amend your consolidated plan or annual action plan in the eCon Planning Suite. Then we're going to discuss some of the new changes that have recently gone into processing the Con Plan and the Annual Action Plan in the IDIS system. These are new changes that came through the 11.19 release this past December. We are also going to discuss new changes to the copy function, as well as special considerations for Consortia grantees.

Rob Sronce:      All right, okay, thanks. So, if a grantee wants to find resources about these changes after today, what is a good place for them to look?

Ben Sturm:      Good question, so we have just recently updated some new Quick Guides that will include the new instructions for processing amendments for both the Consolidated Plan and the Annual Action Plan. We've also updated some of the Quick Guides that speak to how to create a Con Plan and year two to five Annual Action Plan because as we will get into further along in this presentation, the copy function has changed significantly and that will impact the way grantees can create new Con Plans. So those updated Quick Guides are now available on HUD Exchange and some additional resources that will be updated and posted on HUD Exchange will include updates to the Con Plan in IDIS Desk Guide, as well as updates to the Troubleshooting Guide. These are existing resources that are already available on HUD Exchange, but updates reflecting the new 11.19 changes will be coming shortly.

Rob Sronce:      Great, great, so keep an eye on the HUD Exchange, a real trove of valuable materials. Updates are happening quite frequently. Some of that just went up today, right Ben?

Ben Sturm:      Correct, yes, the Amending the Con Plan and Annual Action Plan, Creating the Con Plan, and Creating the Year 2 Annual Action Plan Quick Guides just got posted today on HUD Exchange.

| Rob Sronce: | Great, thanks. So release 11.19 went up on the 23$^{rd}$ of December, so very recently. So can you tell us a little bit about what changed in IDIS and how that will impact how plans are amended? |
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| Ben Sturm: | Yeah, so as you mentioned, the IDIS 11.19 release was launched December 23, this past year. Through this release, it included several major updates to the eCon Planning Suite, specifically regarding the amendment process. Some of the major updates includes the release introduced a new process for amending Con Plans where plans that had been marked review completed can now be reopened rather than copying a previous plan to create amendments. There is now a new amend action link that is next to the officially tagged plan. We will get into what plans would have that Amend action link and what plans wouldn't a little bit later. But that's one of the major updates through the release.

The release also modified the copy functionality to limit the amount of plans created for the same program year. So now the copy link can only be used to create new Con Plans rather than copy a plan from one program year and making another plan for that same program year.

It is something that we won't be talking too much today, but this will be reflected in the updates to the Con Plan Desk Guide that we will be doing this spring is the release also introduced two new strains in the Con Plan template. This is in the market analysis section and one strain is for broadband needs of housing data and the other is for hazard mitigation. These are two requirements that started, that took effect I believe January 1, 2018, and now they finally have their own screen in the Con Plan template. |
| Rob Sronce: | Oh great, so there was more than just the amendment and features that went in 11.19. So there are a couple of screens there. I also see you didn't catch that the Desk Guide is going to be updated to reflect not only these changes, but other changes that have happened since it was last published. So that will be up fairly soon as well. When do you think that is going to be up through the Desk Guide? |
| Ben Sturm: | The Desk Guide, we are going to, we are going to try to get the updates up this spring. We do plan to schedule another webinar sometime in late spring, possibly May. The date hasn't been set yet, but we hope to have up the Desk Guide updates completed by the time we have our next best practices webinar. |
| Rob Sronce: | All right, stay tuned. Let's talk about amendments. When would a grantee want to amend their plan? |
| Ben Sturm: | So granteesmay decide to make amendments any time throughout the program year if there's been updates to funding sources, goals, projects, or any other corrections that they would like to make |

in their plan. I would like to say grantees should always consult their Citizen Participation Plan before processing an amendment. The Citizen Participation Plan should also indicate whether an update would require a substantial amendment. All amendments minor or substantial should be submitted to HUD and be marked review completed.

Rob Sronce:      Okay, so lots of moving parts there. You want to talk a little bit about the sort of how they flow from one to another, all the moving parts there of action plan connects to Con Plan connects to CAPER.

Ben Sturm:      Yeah, absolutely. First, I would like to go off the past slide. It's also really important to note that the amendments should be created and approved by HUD before grantees create their CAPER. As you know, the CAPERs are due 90 days after the end of the program year, but it's very important that grantees are making any changes to their plans and they create an amendment, that they should hold off from creating that CAPER until they complete their amendment and HUD has marked that amendment as review completed.

As you can see on this flow chart, on this screen, it illustrates the flow and alignment that the Action Plan has with the CAPER. So you have the year one Action Plan which when you create the CAPER, the CAPER is generated then from that year one Action Plan. The same with the year two Action Plan and the year two CAPER.

What this flow chart shows, for an example, if you amend your year two Action Plan, you would want to make sure that that amendment occurs before you create your year two CAPER. The reason for that is if you create your CAPER before that amendment is approved, then the information in the amendment is not going to flow into the CAPER.

Rob Sronce:      Right, so that CAPER is like the snapshot that point in time, it was whatever was in the Action Plan at that time, the CAPER is created, it's what's using the CAPER. Remember that for making change to the Action Plan. It won't be in the CAPER until after it's been reviewed and approved, correct.

Ben Sturm:      Correct.

Rob Sronce:      Okay, so let's go to the next section. We will actually start talking about how these amendments are made. So I see that for the starting point for amending the Con Plan has changed with this release. What's that look like?

Ben Sturm:      Yes, so in the Con Plan search screen, there is now an amend action link next to the most recently approved Con Plan version. The amend action link will allow grantees to modify and resubmit plans that have been previously submitted and reviewed by HUD. Supporting that only one plan per each program year may be amended and only one plan for each program year can

have an amend action link. In future program years, grantees will only have one plan for each program year that may be submitted, reviewed by HUD, and then amended.

Rob Sronce:   Okay, great. Go ahead.

Ben Sturm: There may, another thing to add is there may be some situations where grantees may not see an amend action link and that may occur if the grantee does not currently have any plans for that year with the status of review completed or the grantee has a more recent copy of a plan for that year with the status of submitted for review or reviewed and awaiting modifications.

Rob Sronce: Great, okay, so they've got, no more, no more copies. We are going to have this very clear amend link in there. How about we take a look at what it looks like in IDIS.

Ben Sturm: All right, yeah, so let's jump in. Let me just take a me a minute to share my screen and figure out how to do that. Okay, so I am in the UAT training environment and we are going to go ahead and test out creating an amendment for a Con Plan. So as always, it would be in your Plans/Projects/Activities tab. The next thing that you want to do in the Consolidated Plans submenu you want to go ahead and click the search link. I always like to just click the search all button and that will show all the Con Plans that have been created. So far as we can see, for San Antonio's 2015-2019 consolidated plan, their status is review completed. We have the amend action link next to their plan. So to reopen this review to make an amendment, we would just go ahead and click amend. Yeah, any time you select the amend action link, the system is going to display an alert or warning message asking you to confirm that you would like to create this Con Plan amendment. The reason for this is because once the Con Plan amendment has been created, it cannot be deleted after creation. So when you select agree, the system is automatically going to create a back up copy of the plan. That back up or archived copy of the plan will not be visible to grantees or HUD, but it would be able to be downloaded as a Word document, which we will discuss a little bit later. Also by clicking the agree button, the system will automatically update the plan status to open amendment. The system will enable grantees to edit, modify, and resubmit the amended plan to HUD for review.

So as we see, I am going to click the agree button and it's probably going to take a little bit. But once the amendment, the plan is reopened, we are going to go see how the status has changed. So real quick, a minute ago the status said review completed. It now says open amendment and we can go ahead now and edit the plan.

Rob Sronce: So, Ben, grantees if they want to experiment this, can they access this training site?

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| Ben Sturm: | Yes, so if you have IDIS access, you also have access to the UAT training environment. You can log into UAT training environment on HUD exchange on the IDIS page. There should be a link for the UAT training. If you have trouble logging in, you can just contact the HITS national help desk and they will be able to reset your password for UAT. |
| | One thing I'd like to point out, when you create your amendment, most, after the creation stage, even though a lot has changed without an amendment is created, one thing that really hasn't changed is how to process your amendments after it's been created. So once the plan has been opened for amendment, whatever your reasoning for doing the amendment is, you can just jump to that specific screen to update. So if you are updating your year one Action Plan in the Con Plan, and you're adding in a new project, you can jump to the project screen and add in that new project. Just be aware you may need to also update your resources screens or your goals screens. So however you did amendments before once they were created, that doesn't change. Even in the AD-25 administration screen, you will want to select what type of amendment. |
| | As we mentioned before, always consult your Citizen Participation Plan in case you are confused as to whether your change will trigger a substantial amendment or not. If you are just making, if your change does not trigger a substantial amendment, then you can click minor amendment. Whether you click minor or substantial, a purpose of the amendment text box will appear. In order to save your screen and return back to your plan, you will need to type in some text into the purpose of the amendment text box. This is also the section where you will want to provide your explanation of what your new updates are and what the reasoning for the amendment is. You can also change the title of your plan, so if you want to change it to Amendment One or whatever you would like your new amendment title to say, you can change that here on the AD-25 screen. |
| | What you cannot change is, you cannot change the plan version. So this will always be the original version number that was assigned to the plan when it was first created. |
| | Okay, now after you've changed, you went in and you've done all your updates and you're ready to submit this to HUD, you will do so the same way as you did before, by going down to the status drop down menu and clicking submit for review. |
| Rob Sronce: | Great, thank you. And this new process for the Annual Plan as well. Does it differ much from the Con Plan process? |
| Ben Sturm: | The process is for the most part for any annual action plan amendments, for the most part, the process for creating is the same. So much like the Con Plan |

for Annual Action Plan amendments, the amend action link will be only be available for one version of each program year. To open it up, you would just click the amend link and just like Con Plan amendments, you will have that confirmation of amendment. We will jump in IDIS and there is one big difference between Action Plan amendments and Con Plan amendments. So once I get back in, we will show you what that big difference is.

Okay, so much like Con Plans amendments, to get there, I'm going to go ahead for Annual Action Plan. I am going to go to my Annual Action Plan submenu. I'm going to click the search button. And as we see with the Annual Action Plans, you will have the most recently approved plan for that program year. So if there are multiple Plans, if we look back at say, for example, let's look at the 2014 Annual Action Plans. We'll see that version one only has the view link, but version two has the amend link. That's because version two was created and marked as review completed more recently than version one was. So for the 2014 program year, you can only amend one of those plans.

But we are not going to look at the 2014 plan today. We are going to look at the 2019 Annual Action Plan and we're going to go ahead and click the amend link. Just like we did for the Con Plans, we will get that confirmation of amendment box. We'll click agree. All right, so much like the Con Plan, everything on the AD-26 administration screen is the same. You can change your title. You can select whether it's minor or substantial and provide your text and explanation for amendment. Just like Con plans, you would change the status when you're ready to submit the plan for review.

Now, one big difference between the Annual Action Plan amendments and the Con Plan amendments is if a grantee begins to amend an Annual Acton Plan and subsequently determines that the amendment is not needed, then the system will provide a delete this amendment option to discard their changes and restore the previous review completed version of the plan.

So you see this button right here, Rob?

Rob Sronce:      Uh-hm.

Ben Sturm:      Say I created this Annual Action Plan amendment and at some point, during the process, I realize this amendment is not needed. I can go ahead and delete this amended version. So by clicking the delete button, the system is going to display a confirmation dialogue box to the user before deleting the current amendment and restoring the previous version. So by clicking okay, what the system is going to do is it's going to restore the 2019 Action Plan.

Rob Sronce:      Oh okay.

| Ben Sturm: | Oops, jumped around here. It's going to restore it and it's going to change the status back to review completed. So it went from open amendment to review completed. Now, this option is only available for Annual Action Plan amendments. This is not something that is available for Con Plan amendments. |
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| Rob Sronce: | Okay and once that is approved, it cannot be deleted, is that correct? Once it's gone through the process, you submitted, and approved it, okay. |
| Ben Sturm: | Correct, yes, very good. That's very important to clarify that the Action Plan can only be deleted when it is in the open amendment status. The amendment had been submitted to HUD or marked as review completed, then that amendment could not be deleted. |
| Rob Sronce: | Okay. |
| Ben Sturm: | So even if it gets submitted to HUD, if it's in submitted for review, you are not going to be able to delete the amendment. |
| Rob Sronce: | Right, thank you. That actually was a question that we had. Then we're seeing questions about the connections between the CAPER and amendments and what advice would you give the timing of these Action Plan and Con Plans and the CAPER? When does it impact the CAPER? Once it's saved, approved? |
| Ben Sturm: | Yes, marked as review completed. So you would not want to create the CAPER until any Action Plan amendments have been marked as review completed by HUD. |
| Rob Sronce: | Great, thank you. |
| Ben Sturm: | The reason for that is when you create a CAPER, it pulls from the most recently approved Action Plan for that desired program year. So if you're making changes to your Action Plan, say you're adding in a project or you're updating a goal in your Action Plan, if you want those changes to be reflected in your CAPER, then you would want to hold off to creating your CAPER until those changes have been made and you've submitted that plan to HUD, and that plan had been marked as review completed. I don't want to get too far into CAPERs because we will have another webinar later on this summer specifically for CAPERs. But another thing that you want to hold off on before training on CAPERs is you want to make sure your IDIS activity accomplishments are reported in IDIS before you create the CAPER as well. |
| Rob Sronce: | Great point. Yeah, let's go on to talk about that, I saw that download previous version button there. Let's talk about what can you do with that. |

| Ben Sturm: | All right, so each time the grantee selects the amend action link in the system, it's going to create a new archived copy of the plan. So grantees and HUD users can use this new option to select and download an archived copy of the current amended plan. The system will display a list of available archived copies for the user to select and download to Microsoft Word document. Each available archived copy will be displayed with the data and time that that it was created. So I am not going to jump into IDIS for this one, but as you can see on the screenshot on the slide, if you click the download as Word document, that is the typical button that you would use to download the current version that you have open. |
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| | But if you want to download a previous version, say you amended your Con Plan and maybe you amended it a couple of times, if you click the download previous version, there are going to be several links underneath that is going to display each time the plan was marked as review completed. If you wanted to look at an older version, you would be able to look at the older version by opening it up as a Microsoft Word download. Because you are not going to be able to access the previous version in the IDIS system. So what you can do is you can download a Word document of that previous version. |
| Rob Sronce: | Okay, so we're not going to see all of the different versions there in the search results anymore? |
| Ben Sturm: | No, and that is the big benefit of this 11.19 release, it will be really ideal for future program years. There will still be previous plans that had been created for the same program year listed, but moving forward the system allows grantees to retain just one plan for each program year. So in the previous way of creating amendments was you have to copy a previous plan and then the system would then essentially create a whole new plan for that amendment. Now, you can just reopen the original plan and make your changes to it. So you are having one plan for one program year. So you're not going to have a convoluted screen of multiple plans for the same program year. |
| Rob Sronce: | Great, that's going to be nice. Well, it is nice. It's live in the system right now. So we are not doing that whole copy process to create our amendment, but there is a copy function still alive and well. When we use that, how is that used and when might a grantee want to use that? |
| Ben Sturm: | Yeah, so the copy functions for the Con Plans and Annual Action Plans have been modified pretty significantly through the 11.19 release. That was really done to support the new amendment functionality. With the new amendment functionality, grantees will have one and only one official plan for each program year. Grantees should now only use the copy functions to create new plans for new program years. |

So as we previously stated before, before the 11.19 release, the copy function was used to do three things. It was used to create a Con Plan or Annual Action Plan amendment, used to create a copy of a current Con Plan or Annual Action Plan for the same program year, as well as create a new Con Plan or Annual Action Plan for a new program year. Now, through the 11.19 release, there is only one function that the copy link is now used for. That is to create a New Con Plan or Action Plan for the new program year. So it is no longer to be used to create amendments and no longer to be used to create plans for the same program year.

Rob Sronce:            Very good.

Ben Sturm:            So and the copy, so we'll jump into IDIS in a little bit to show this, but there are some differences between using the copy function for a Con Plan and using it for an Action Plan. So when a user selects the copy function for a Consolidated Plan, the user is going to be prompted to select a source Con Plan rather than manually enter a plan year or version. Before, you may recall that you were able to mainly enter in the start year and version number of the plan that you want to copy. Now, you can select the, there is a button that will generate a list of plans that you will be able to copy. So I think maybe now is a good time to jump back into IDIS to kind of show what that looks like.

All right, so I am just going to jump to a new grantee for this. All right, for the Con Plan, what we will do is just as we did before, if we wanted to create a new plan by copying a previous Con Plan, we would go ahead, and we would click the copy link. And as I mentioned a minute ago, Rob, the big change with his new feature is now there is a select source Con Plan button. So when we select that button, we can generate a list of available plans that we can copy.

Rob Sronce:            Approved plans, review completed plans I see.

Ben Sturm:            Yes, that's very important to note. Only one Con Plan for each strategic plan timeframe will be available for selection and only if the plan has a status of review completed and only if it is the most current plan for a particular start year. So as we see we have the 2015 Con Plan that we can go ahead and copy because this is the plan that had been marked as review completed. What is not showing is that there is, it will not show if there is any other draft Con Plans in the system. So that this list will only show plans that have been marked as review completed and that are also the most recently approved plan for that program year.

Rob Sronce:            Very good.

Ben Sturm:            So let me go ahead and to copy this plan, I am going to go ahead and click the select button. We will see that source plan had automatically been populated and we cannot edit it. So we cannot edit the start year. We cannot

edit the source plan version. What we can do is we can add a new plan number. So we'll use 2020 and we'll put in the new plan year. And we'll click copy. Now, if a plan already has another like a plan in draft or open in progress for the same start year such as 2020, then the system is going to generate an error message, not allowing you to create another plan for that same program year. So you would need to enter a unique plan version or value for the new plan. So we're just going to go ahead and change the program years. This is just for text only.

Okay, if you see it, the top of the list, you see the new plan for 2021. The version is test. Now, by default, whenever you create a Con Plan by copying the previous version, it is now going to have copy in brackets at the front of the plan title. You can go in and you can edit that title by opening up the plan and then going to AD-25 administration screen. You can change the title of your new plan. Right.

Rob Sronce:          And this works much the same for Annual Action Plans?

Ben Sturm:           For the most part, yes. The process of it is typically the same. There are a few differences though and I will jump in and will show the new functionality for copying an Annual Action Plan. So just like the Con Plan, we will go ahead, and we'll click the copy link in the Annual Action Plan submenu. Then on the annual, on the copy Annual Action Plan screen, you will see that we do have the select source AAP button. We can go ahead and choose the plan for each program year that we would like to copy. So say if we wanted to create the 2020 plan, we would go ahead, and we would click select. Then we would enter in the new program year and the new plan version.

Now the system is not going to, since there is already a 2020 Action Plan for Alabama in the training environment, we will not want to create this new plan, but just like the Con Plan, what we would have done is we would have entered in the year that we want. So it would be 2020. We would put in the version. Then we would click the copy button. Then the new action plan copy will populate on the Annual Action Plan screen.

Rob Sronce:          Okay and remember that year one Action Plan is in the Con Plan, which we wouldn't see in this list correct.

Ben Sturm:           Correct. And year one action plan would be in the Con Plan. That is why in our previous example, we created a draft 2021 to 2025 Con Plan. We do not see a 2021 Action Plan in this list. That is because that 2021 Action Plan is embedded in the Con Plan template. So if you wanted to amend or if you wanted to amend your 2020, 2021 action plan, always know that you have go in and amend your Con Plan in order to update that plan.

Rob Sronce:          Great and we will have a webinar. We will have a webinar about amendments and best practices copying in amendments. Okay.

Now, let's talk about consortia. Always the exception. What do Consortia grantees need to know that's different for them?

Ben Sturm:     So as with the previous amendment process, only the lead entity of a home consortium can amend the Con Plan and Action Plan. The amend action link will only be available for their plans. So any participating members of a home consortium, you are not going to see the amend action link for either your Con Plans or your Action Plan. You also will not be able to copy your plans as well. If you need, if a participating member needs to have their Con Plan or Action Plan amended, then they will need to reach out to their lead entity and the lead entity would do it for them. As always, when the lead entity creates a new plan, or amends a plan, then that action is taking place for all members of that consortium.

Rob Sronce:     Great, thanks so much, Ben. All right, we are now at that portion, the question and answer portion of our webinar. So thanks for your patience. Remember, just reminding you that all questions, please submit those to the Q&A pod. If you can't see it, it's up there in the top right-hand corner. You need to click on it to activate it. It may be hidden. So we'll go ahead and open it up. Remember, we will answer as many as we can. Please remember that Ask a Question on the HUD exchange is available. So Laura, what's our first question?

Laura:     Okay, so we've had a lot about a couple of topics, but the first one was amending a plan multiple times. So if you need to amend a plan two, three times in a year, can you do that and how do you do it?

Rob Sronce:     Okay.

Ben Sturm:     Yes, you can amend a plan multiple times throughout the program year. You would do it just like clicking the amend link. So when you click the amend link, it reopens your plan and you can make your updates and then once you finish your updates, it's very important you want to submit that to HUD to be marked as review completed. Then once the actual plan or Con Plan is marked as review completed again, let's say you need to another amendment, you can still go ahead and click that amend link again even if it's within the same program year as your last change. You can do that for as however many times as you need.

Laura:     Great, so another question we had often was what about deleting a Con Plan. Can you either delete an amendment or any of those open plans that you have sitting in your queue?

Rob Sronce:     So we start one and we realize, oops, we didn't want to do that.

Ben Sturm:        Unfortunately just like before, plans that have already been created and yes, cannot be deleted whether it's a draft plan that was created by mistake or even if it's a Con Plan amendment and you use the new amendment functionality. As we stated before, only Annual Action Plan amendments when the status is open amendment can be deleted, but Consolidated Plans, once if you open it up as an amendment and you click that I agree button on the confirmation box, then you are no longer able to delete that Con Plan amendment. The same is true for any Con Plans that have been completed or created in the past and now may only be view only, even if they are obsolete. Grantees do not have the functionality to delete those plans. If you have an open in progress plan that you can still edit and you know you have no intent to submit that to HUD, then you can change the title to obsolete or do not use. But through the 11.19 release, many plans that were draft or open in progress now are probably only view only and grantees would not be able to update the titles for those plans either. So unfortunately, they will need to just sit in the queue.

Rob Sronce:        But those abandoned plans are okay. They are not going to impact the CAPER unless they were submitted and approved, correct?

Ben Sturm:        Correct. If they were submitted and approved, then they would have been marked as the official plan. Any plans that were marked as view only are not the official plan and would not have an impact on the CAPER. So they would really just sit in the queue and really just collect dust.

Rob Sronce:        Thanks. Next question, Laura.

Laura:        Okay, this one is a little bit of a policy question, but if you are making an amendment to the Action Plan, do you also have to go in and make a Con Plan amendment and how do you do that with the new amend buttons?

Ben Sturm:        With the new amend buttons, you should only need to, if you need to amend your year one Action Plan, then you would amend your Con Plan. But if you need to amend your year two to five Action Plans, then you should not need to make an amendment to your Con Plan unless you're adding a new goal. If you need to add a new goal to your Action Plan that was not initially added to your Strategic Plan on the SP-45 screen, then you may need to amend the Con Plan first to add that goal in order for that goal to be selected in your Action Plan. But if you are just updated the Action Plan, you, say for year two to five, and it doesn't require any changes to the strategic plan section of the Con Plan, then you would only need to make the amendment to the Action Plan by clicking the amend link for that Action Plan. And you should not need to make changes to your Con Plan.

Rob Sronce:        Great, thanks. We have a question again about the process of the CAPER. Somebody is, I want to reemphasize this, somebody amends a plan, start creating one, can they still create a CAPER. I think the answer is yes,

however as we said before, it's important to do things in order that you are not creating your CAPER, and we will talk about this in best practices. You are not creating a CAPER until you have that approved plan in place. So they are not things that you want to have going on at the same time. However, the system will not stop you. The CAPER will be generated based on the last approved Con Plan or the last approved Action Plan. Okay, Laura.

Laura:              Do you have time for more questions here?

Rob Sronce:        Oh absolutely, yes, yeah.

Laura:              Great, so along that same line when you were talking about the CAPER, and you need to submit an amendment after your CAPER has already been completed, or submit an Annual Action Plan amendment after your CAPER has been completed, and you realize that long after the fact, can you still go back and amend your Annual Action Plan?

Ben Sturm:         So let me understand that. We are saying the question is if a past CAPER has already been approved or created?

Laura:              Approved.

Ben Sturm:         Approved, okay. And there may need to be a reason to go back and update the Action Plan or Con Plan or the Action Plan that that CAPER was created for?

Laura:              Correct, if I am understanding this, the questions correctly, yes.

Ben Sturm:         Okay, I believe in the system you would still be able to do the amendment because as we showed in the demo, for the Action Plans, when you go to your Action Plan search menu, all program years, the most recently approved Action Plan for each program year will have the amend link. And as long as that amend link is available, you can still amend your Action Plans. Now, the reasoning is if you would need to amend your Action Plan after a CAPER had already been submitted and approved, that might be another question entirely, because most cases you would be amending your Action Plans before you would need to create your CAPER, but again, in the system if you do need to create, go back and amend an old Action Plan, the functionality allows you to do that. It's just you would want to look into the reasoning of why you are doing it.

Laura:              You may have to talk to the field office about going back. Here is maybe a quick question. When you are amending one of the plans, does the plan name automatically change or do you have to do that manually?

Ben Sturm:         So you would need to change the plan name manually. For the amendments, the title of the plan will not change. But you would certainly want to edit the

title. You can do that just by going to the, if it's a Con Plan amendment, you would go to the AD-25 administration screen and you could manually update your title. If it's an Annual Action Plan amendment, you could go to AD-26 administration screen and then update your title.

Laura:            Great and somebody asked can you, if you are looking to make a copy of your Action Plan in years two through five, can you pass copy just the Action Plan that was in your original year one Consolidated Plans?

Rob Sronce:        Laura, can you run that one by me one more time?

Laura:            Sure. If you are copying or want to copy your Action Plan to plan for years two through five, can you copy your year one Action Plan, the one that's embedded in the Consolidated Plan?

Ben Sturm:        I believe so, yes. So if you are looking to create your year two Action Plan and you would want to copy the year one Action Plan, then by going to the copy link in the Annual Action Plan, you should be able to when you click that source AAP button, what that's going to do is that's going to generate the list of the plans, the Action Plans available for you to copy. And as long as the Con Plan had been marked as review completed, then that year one Action Plan should be available in that drop-down box.

Let me, this might be a good time to see, to jump into IDIS and just kind of give a quick example what this may look like. So let me just set this up real quick before I share my screen again. Okay, so I'm going to go ahead and share my screen.

Rob Sronce:        I just want to remind people if we don't get to your questions, please do go to HUD Exchange, and enter it. There was a question also about finding the new Quick Guides. If you go to the Con Plans, guides, tools, and training page on the HUD Exchange, you go to the Quick Guides page, it will show that it's been updated as of today. You should be able to Google Consolidated Plan Quick Guides and land right on that page.

Ben Sturm:        Yeah and I have that right on the screen, Rob. So if you go to the Consolidated Plan webpage on HUD Exchange, and you go under Featured Resources, there is a link for Consolidated Plan Quick Guides. Not all of them have been updated. There are still a few more that we need to update. I will admit that some of the Consortia Quick Guides don't need to be updated. But creating a Con Plan for state entitlement grantees, creating a year two to five Annual Action Plan for state entitlement grantees, creating a year two to five or amending the Consolidated Plan and Annual Action Plan for state entitlement grantees, as well as amending a Consolidated Plan for Consortia grantees have been updated and they are available. You will see that they have the February 2020 date posted on the cover page. So if you are not sure if you are looking at the updated version or not, if it says February 2020, then

that is the new version and will have the new amendment functionality in it. Again, that is on the Con Plan webpage on HUD Exchange.

But jumping back into IDIS, to answer that one question, can you copy the year one Action Plan to create a new Action Plan and the answer is yes. So for this grantee, they have a 2018-2022 Con Plan. You can see the title of that right here. This is the source Annual Action Plan list. So this is their only reviewed Action Plan that's been review completed so far. So if they would like to create their new Action Play by copying this, they would just select yes. They would put in their new version. We will just say 2020. And go ahead and click copy. And you would see that it is added to the list for 2020 AAP copy.

Rob Sronce:    Right, all right, next question, please.

Laura:    All right, getting back to Consortia, should members of Consortia be able to see any amend buttons and what happens if they don't have any?

Ben Sturm:    Only the lead entity for the Consortia will have the amend link. If the Consortia member is a participating member, then they will not have the amend link available for either the Con Plan or the Action Plans. If they need to create an amendment, then they are going to need to contact their lead entity and they will create the amendment for the entire Consortium.

Laura:    Great, another question we have had is if you have a Con Plan that's still been sitting as submitted for review, can you make a copy of that one?

Ben Sturm:    You will not be able to copy a plan that's submitted for review until it's been marked as review completed, so no. The answer to that is HUD will need to first mark that Con Plan or that Action Plan as review completed before the grantee can copy it. Grantees now can only copy plans that have that review completed status.

Laura:    Okay and for the new requirements in the Con Plan template, are they in there right now? So for example, could the 2016 – '20 Con Plan be copied to get ready for a 2021- '25 Con Plan with the new screens?

Ben Sturm:    The new screens are in there and they were also integrated to past Consolidated Plan templates. So if you had an older Con Plan template, a 2015-2019 and you may not, unless you've looked at it recently, you may not have noticed this, but if you go to that screen, if you go to open up your old template, you will see that the MA-60 and the MA-65 screens have been added in there. They will be blank, but the screens are there. So those screens were incorporated into all Con Plans no matter what status they were in the system. So if it was open in progress, if it was submitted for review, if it was review completed, those screens have been added. So I don't

think you need to create a new plan just to get those screens generated if you have already created your plan. They should be in there.

Laura: Great, somebody asked about the fact that the last time they used the copy function for an Action Plan, it didn't allow them to change the year for the new program year. Is that going to be something that is editable now?

Ben Sturm: Well when you use the copy function, whether it's the Con Plan or Action Plan, the new year and the new version number is something that you can manually put in. What you cannot edit is the source program year of the plan that you are copying. But you are able to when you create a copy, you are able to enter in the year that the plan tyou are creating that plan for. So if I was copying a 2019 Action Plan to create a 2020 plan and I use the copy link, I would select my source plan, which should be the 2019 Action Plan and then the new AAP plan year and the new AAP plan version, those cells would be blank. So I would need to manually enter in 2020 and the new version number for that plan. If a 2020 Action Plan already exists in the system, I am not going to be able to create that plan because you can only now have one Action Plan for each program year.

Rob Sronce: All right, thank you, Ben. Thank you, Ben. Thank you, Laura. We have lots more questions and I encourage you to submit those to Ask a Question. Some of them are a little more complicated so if you submit that question through Ask a Question, we will be able to get in touch with you and clarify your question and actually dialogue with you over the phone. So please do so. Go ahead and submit those questions. Operators are standing by so please take advantage of that. Also want to remind you that this webinar has been recorded. So if you want to refer back to it later, that will be posted, the slides, the recording transcript will be also up on the HUD Exchange. At this time, I would like to again thank Ben Sturm and Laura Dieter for managing the question queue, T.J. Winfield. They are our host and registrar. And the entire team at Cloudburst and also the IDIS development team at DMI at HUD. Special thanks today to our guest Gloria Coates for joining us and of course, all of the staff at OBGA at HUD headquarters. So good afternoon everyone and please keep up the good work out there. Thank you.

Ben Sturm: Thank you, Rob.

[End of audio]