

CON PLAN QUICK GUIDE



# Amending a Consolidated Plan & Annual Action Plan For Consortia Grantees

*March 2018*





# WHAT ARE CON PLAN QUICK GUIDES?

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The Con Plan Quick Guides provide a brief summary of the steps required to set up and complete certain elements of the Consolidated Plan, Annual Action Plan and CAPER. For complete guidance and screen by screen instruction, review the [Con Plan in IDIS Desk Guide](#).

# AMENDING A CONSOLIDATED & ANNUAL ACTION PLAN

## *For Consortia Grantees*

These instructions are for Consortia grantees. State, Entitlement and Regional grantees should use the State/Entitlement and Regional plan specific quick guide.

In order to edit an approved Consolidated Plan or Action Plan, the Lead Entity must make a copy of the plan to make it editable, this is true even if only a participating member is making an amendment.

When the Lead Entity copies the plan, any participating grantees’ Action Plans are copied as well. Participating members cannot directly copy their plans. Once the Lead Entity creates the copy of the plan, the Lead Entity should notify all participating grantees that the copy has been made and can be accessed by all grantees.

Grantees should generally enter amendments into IDIS at the end of the program year and try to limit the number of amendments entered in the system. Amendments completed in the middle of the program year can be documented in the grantee’s paper version of the plan prior to being entered in IDIS.

When a grantee copies the plan to amend it, depending on the type of copy (substantial, minor, or n/a), different data will be copied into the version of the plan as indicated in the table below.

Plan Element	Copy is Substantial Amendment	Copy is Minor Amendment	Copy is NOT an amendment
Attachments	Copied	Copied	Copied
Additional Content	Copied	Copied	Copied
Alternate Data Sources	Copied	List of data sources is copied, but data in tables is replaced with current data sources.	List of data sources is copied, but data in tables is replaced with current data sources.
Pre-populated data in tables	Copied	Data is replaced with current data sources.	Data is replaced with current data sources.

This guide includes two sets of instructions. Instructions on how to amend an approved Consolidated Plan/Year 1 Action Plan and Amending a Year 2-5 Action Plan.

### I. AMENDING THE APPROVED CONSOLIDATED PLAN/YEAR 1 ACTION PLAN

\*To amend a Consolidated Plan/Year 1 Action Plan, the Lead Entity must first create a copy of the existing plan.

- 1. Click "Search" under the Consolidated Plan submenu.



- 2. Make note of the Year and Version of the plan is to be amended.
- 3. Click "Copy" under the Consolidated Plan submenu.



- 4. Enter the Source Year and Version from the Plan that is to be copied (identified in Step 2).

A screenshot of a form titled "Copy" with a "Cancel" button. The form contains several input fields and a dropdown menu. The fields are: "Source Consolidated Plan's Start Year: \*" with a text box; "Source Consolidated Plan's Version: \*" with a text box; "New Consolidated Plan's Start Year: \*" with a text box; "New Consolidated Plan's End Year: \*" with a text box; "New Consolidated Plan's Version: \*" with a text box; and "If Amendment: \*" with a dropdown menu showing "N/A".

5. Enter the Start Year, End Year and Version for the amended plan. For amendments, the Start Year must be the same as the Source Plan. Select whether the amendment is Minor or Substantial from the dropdown menu.
6. Once completed, click “Copy.” The amended plan will be accessible from the Consolidated Plan search screen. The default title of the copied plan will be “ConPlan Copy.”

Grantee Name	State	Year	Version	Title	Status	Action
SAN MATEO COUNTY	CA	2015	2.0	ConPlan Copy	Open - In Progress	Edit   View
SAN MATEO COUNTY	CA	2015	1.0	Consortium Con Plan	Open - In Progress	Edit   View
SOUTH SAN FRANCISCO	CA	2015	1.0	Consortium Con Plan	Open - In Progress	View
SOUTH SAN FRANCISCO	CA	2015	2.0	ConPlan Copy	Open - In Progress	View

7. Grantees should change the name of the plan on the AD-25 screen accessed by clicking “Edit” in the Action column for the corresponding Consolidated Plan. The title should make it clear that this is the current version of the plan. When the Lead Entity changes the plan’s title, it will automatically change the title of the participating grantees’ plans.
8. The plan is now editable for all Consortium grantees. If the copy is a Substantial Amendment, the AD-25 screen will include a text box following the “If Amendment” dropdown menu to explain the amendment.

If Amendment:

If Substantial Amendment, explain: \*

9. All amendments, minor and substantial, must be submitted to HUD for review in IDIS to ensure the amended information is included in the CAPER. Depending on the amendment, the Field Office may not conduct a full review of the plan, but must functionally mark the amended plan as “Review Complete” in IDIS.

## II. AMENDING YEAR 2-5 ACTION PLAN

- 1. Click "Search" under the Action Plan submenu and note the Year and Version of the Action Plan to be amended.
- 2. Click "Copy" in the Action Plan submenu.



- 3. Enter information in the field provided. For amendments, the Program Year for the amended plan must be the same as the Source Program Year.

**Copy Annual Action Plan**

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Source AAP Program Year: \*

Source AAP Plan Version: \*

New AAP Program Year: \*

New AAP Plan Version: \*

If Amendment: \*

- 4. Select whether the amendment is Minor or Substantial.

AMENDING A CONSOLIDATED PLAN & ANNUAL ACTION PLAN FOR CONSORTIA GRANTEES

- 5. When complete, click “Copy”. The amended plans for all Consortium grantees will be accessible from the Action Plan search screen. The default title of the copied plan will be “AAP Copy.”

Search | Reset

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Grantee Name	State	Year	Version	Title	Status	Action
SAN MATEO COUNTY	CA	2014	1	Year 2 Action Plan	Review Completed	View
SAN MATEO COUNTY	CA	2014	2	AAP Copy	Open - In Progress	Edit   View
SOUTH SAN FRANCISCO	CA	2014	2	AAP Copy	Open - In Progress	View
SOUTH SAN FRANCISCO	CA	2014	1	Year 2 Action Plan	Review Completed	View

- 6. Grantees should change the name of the plan on the AD-26 screen accessed by clicking “Edit” in the Action column for the corresponding Action Plan. The title should make it clear that this is the current version of the plan. When the Lead Entity changes the plan’s title, it will automatically change the title of the participating grantees’ plans.
- 7. If the copy is a Substantial Amendment, the AD-26 screen will include a text box immediately following the “If Amendment” dropdown menu to explain the amendment.

If Amendment:

If Substantial Amendment, explain: \*

- 8. All amendments, minor and substantial, must be submitted for review in IDIS to ensure the amended information is included in the CAPER. Depending on the amendment, the Field Office may not conduct a full review of the plan, but must functionally mark the amended plan as “Review Complete” in IDIS.