

CON PLAN QUICK GUIDE



Amending a Consolidated Plan and Annual Action Plan For Consortia Grantees

February 2020





WHAT ARE CON PLAN QUICK GUIDES?

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

This guide includes three sections: 1) amending an approved Consolidated Plan or Year 1 Action Plan, 2) amending a Year 2-5 Action Plan, and 3) downloading archived plan versions.

These instructions are for consortia grantees. State, entitlement, and regional grantees should use the quick guides for state/entitlement and regional plans.

Overview of the New Amendment Process (December 2019)

IDIS Online Release 11.19, launched December 2019, introduced new functionality for processing Consolidated Plan and Annual Action Plan amendments in the eCon Planning Suite.

The previous method for creating, preparing, and submitting a plan amendment required the lead entity to use the “Copy” function, thus resulting in multiple copies of a plan for the same program year.

The new amendment process now enables grantees to amend (modify) a single plan for a specific program year and resubmit to HUD for review. A new “Amend” action link is available for the lead entity’s Consolidated Plan or Annual Action Plan that has been most recently marked “Review Completed.” Only one plan for each program year may be amended and only one plan for each program year can have an “Amend” action link.

When searching Consolidated Plans or Annual Action Plans for a specific year, there are some situations where the lead entity may not see an “Amend” action link. An “Amend” action link will not be available if:

- The consortia does not currently have any plans for that year with a status of “Review Completed.”
- The consortia has a more recent copy of a plan for that year with a status of “Submitted for Review” or “Reviewed and Waiting Modification.”

The new Amend-Submit-Review cycle may be repeated as frequently as needed using the same plan rather than creating and using multiple copies of the original submitted plan.

Plans “Submitted for Review” or “Reviewed and Awaiting Modification” December 23, 2019

By default, when IDIS Release 11.19 initially deployed, if a consortia had a copy of a plan for a program year that had a status of “Submitted for Review” or “Reviewed and Awaiting Modification,” the system tagged the most recent plan as the “official” plan for that program year.

- If the most current plan for a program year has a status of “Submitted for Review,” it will have an “Amend” action link after the HUD Field Office has marked the plan with a status of “Review Completed.”
- If the most current plan for a program year has a status of “Reviewed and Waiting Modification,” it will have an “Edit” action link. When this plan is submitted to HUD for review and subsequently updated by the HUD Field Office with a status of “Review Completed,” then this plan will 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 amended.

Consortia Roles and Responsibilities with Amendments

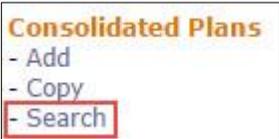
In order to edit an approved Consolidated Plan or Action Plan, the lead entity must click the “Amend” action link next to the desired plan, even if only a participating member needs an amendment. The “Amend” action link is not available for participating members.

When the lead entity reopens the plan, the status of the plan will change to “Open – Amendment” and will be editable for all participating members. The lead entity should notify all participating grantees that the amendment is available and can be accessed by all grantees. Likewise, participating members should notify the lead entity when they have completed their updates to the plan. Only the lead entity can resubmit the amendment to HUD for review and approval. As soon as the lead entity changes the status of the amendment to “Submitted for Review,” the system will automatically submit the amendment for all participating grantees as well.

I. AMENDING AN APPROVED CONSOLIDATED PLAN OR YEAR 1 ACTION PLAN

To amend a Consolidated Plan or Year 1 Action Plan, the lead entity must first locate the existing plan they would like to update.

- 1. Click “Search” under the “Consolidated Plans” submenu.**



AMENDING A CONSOLIDATED PLAN & ANNUAL ACTION PLAN FOR CONSORTIA GRANTEES

2. Locate the plan to be amended.

Grantee Name	State	Year	Version	Title	Status	Action
CHINO HILLS	CA	2020	1	San Bernardino County Consortia ConPlan	Open - In Progress	View
CHINO HILLS	CA	2015	Consortia Revision	San Bernardino County Consortia ConPlan	Review Completed	View
RANCHO CUCAMONGA	CA	2015	Consortia Revision	San Bernardino County Consortia ConPlan	Review Completed	View
RANCHO CUCAMONGA	CA	2020	1	San Bernardino County Consortia ConPlan	Open - In Progress	View
SAN BERNARDINO COUNTY	CA	2015	1	San Bernardino County ConPlan	Review Completed	View
SAN BERNARDINO COUNTY	CA	2015	Consortia Revision	San Bernardino County Consortia ConPlan	Review Completed	Amend View
SAN BERNARDINO COUNTY	CA	2020	1	San Bernardino County Consortia ConPlan	Open - in Progress	Edit View
SAN BERNARDINO COUNTY	CA	2015	4	Con Plan Substantial Amendment # 2	Review Completed	View
SAN BERNARDINO COUNTY	CA	2015	2	Plan Amendment to San Bernardino County Con Plan	Open - in Progress	View
SAN BERNARDINO COUNTY	CA	2015	3	Con Plan Substantial Amendment	Review Completed	View

3. Click “Amend” in the “Action” column.

Status	Action
Open - in Progress	View
Review Completed	Amend View



4. Click “I Agree” in the “Confirmation of Amendment” window.

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.

Cancel
I agree

5. By selecting the “I Agree” button, the system will reopen the plan for edit and change the status to “Open – Amendment” on the Consolidated Plan search screen. The “Open – Amendment” plan will automatically become editable for all participating grantees.

SAN BERNARDINO COUNTY	CA	2015	Consortia Revision	San Bernardino County Consortia ConPlan	Review Completed	Amend View
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- 6. On the AD-25 Administration screen, modify the Con Plan ending year or title as needed. All consortia members have the ability to change their own title, but when the lead entity changes the plan’s title, it will automatically change the title of the participating grantees’ plans.
- 7. Select the amendment type in the “If Amendment” dropdown menu.

AD-25 Administration of the Consolidated Plan

Save and Return | Cancel

Strategic Plan Beginning Year:* 2015

Ending Year:* 2019

Title:* San Bernardino County Consortia Con

Plan Version:* Consortia Revision

If Amendment: Substantial ▼

Purpose of the amendment:*

- Select
- N/A
- Minor
- Substantial

- 8. For minor or substantial amendments, the screen will include a “Purpose of the Amendment” textbox following the “If Amendment” dropdown menu to provide a summary of the updates. This explanation is now required, regardless of amendment type.
- 9. Click the “Save and Return” button to return to the Consolidated Plan menu screen.

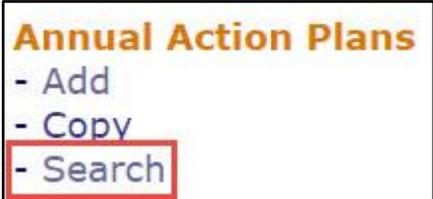
10. Once all updates in the Consolidated Plan have been made, return to the AD-25 Administration screen. All minor and substantial amendments must be submitted to HUD for review and marked as “Review Completed” so the updated information is included in the CAPER for that program year. Depending on the amendment, the Field Office may not conduct a full review of the plan, but it must functionally mark the amended plan as “Review Complete” in IDIS.

Status:	Open - Amendment
Status changed on:	Open in Progress
	Open - in Progress/FO Review
	Submitted for Review
	Reviewed and Waiting for Modifications
	Review Completed
	Open - Amendment

Save and Return |

II. AMENDING A YEAR 2-5 ACTION PLAN

1. Click “Search” under the “Annual Action Plans” submenu.



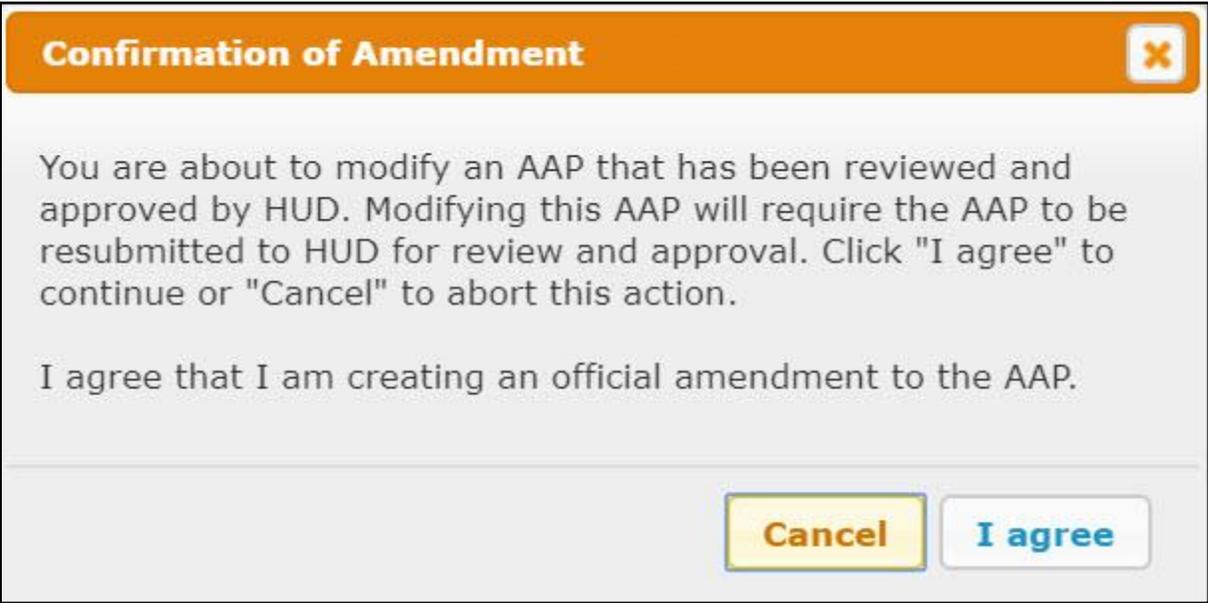
2. Locate the Annual Action Plan to be amended.

3. Click “Amend” in the “Action” column.

Status	Action
Open - in Progress	View
Review Completed	Amend View

A red arrow points from the "Amend" link in the "Review Completed" row to the "Action" column header.

4. Click "I Agree" in the "Confirmation of Amendment" window.



- 5. By selection the "I Agree" button, the plan is now open for edit and the status is changed to "Open – Amendment."
- 6. On the AD-26 Administration screen, modify the title as needed. All consortia members have the ability to change their own title, but when the lead entity changes the plan's title, it will automatically change the title of the participating grantees' plans.

- 7. Select whether the amendment is minor or substantial. Provide a summary of the updates in the “Purpose of the Amendment” text box. This explanation is now required for all amendment types.

AD-26 Administration of the Annual Action Plan

Save and Return | Cancel

AAP Program Year:* 2018

AAP Title:* 2018-19 AP Consortia Revision

AAP Plan Version:* Consortia Revision

If Amendment: Minor ▼

Purpose of the amendment:* Minor

Substantial

- 8. Click the “Save and Return” button to return to the Annual Action Plan menu screen.
- 9. Once all updates have been made, return to the AD-26 Administration screen. All minor and substantial amendments must be submitted to HUD for review and marked as “Review Completed” so the updated information is included in the CAPER for that program year. Depending on the amendment, the Field Office may not conduct a full review of the plan, but it must functionally mark the amended plan as “Review Completed” in IDIS.

Status: Submitted for Review

Status changed on:

Save and Return | C

- Open - in Progress
- Open - in Progress/FO Review
- Submitted for Review
- Reviewed and Waiting for Modifications
- Review Completed
- Open - Amendment

During the AAP amendment process, if it is subsequently determined that the amendment is not needed, the system provides a “Delete this Amendment” option to discard the changes and restore the previous “Review Completed” version of the plan.

***NOTE:** This option is **ONLY** available for the lead entity Annual Action Plans that are in “Open – Amendment” or “Reviewed and Waiting Modifications” status. Once the amendment is marked as “Review Completed,” it can no longer be deleted.

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

(Note: click on a link to edit)

After selecting the “Delete this Amendment” button, a pop-up warning box will request confirmation to delete this amendment.

cpd1.hud.gov says

You are about to delete an Amendment. You WILL LOSE ALL INFORMATION entered in this Plan Amendment. Click OK to continue or Cancel to abort this action.

OK | Cancel

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

III. DOWNLOADING ARCHIVED PLAN VERSIONS

These instructions can be used to retrieve a copy of the previous plan version for both Consolidated Plan and Annual Action Plan amendments.

1. Each time the “Amend” action link is selected, the system will create a backup or archived copy of the plan. Grantee and Field Office users can use this new option to select and download an archived copy of the current amended plan.

Consolidated Plans

Menu

Public reporting burden for this collection of information is estimated (average 15 minutes per response), including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and reviewing and editing the information. This agency may not conduct or sponsor, and a person who is providing information to this collection of information does not incur a legal liability for providing false or misleading information. Send comments regarding this burden estimate or any aspect of this collection of information, including suggestions for reducing this burden, to Washington, DC 20543-0182, and to the Office of Management and Budget, Paperwork Project Director (0142-0046).

OMB Control No: 2506-0117 (exp. 06/30/2018)

[Cancel](#) [Download as Word document](#) [Download Previous Versions](#)

(Note: click on a link to edit)

Consolidated Plan

Setup

- AD-25 Administration
- AD-50 Verify Grantee/PJ Information in IDIS
- AD-55 Verify Grantee/PJ - Program Contacts

Executive Summary

- ES-05 Executive Summary

- 2. The system will display a list of available archived copies for selection and download as a Microsoft Word document. Each available archive copy will be displayed with the date 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]		
<p>(Note: click on a link to edit)</p>		