

CON PLAN QUICK GUIDE



# Amending a Consolidated Plan & Annual Action Plan For Regional 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 *Regional Grantees*

To amend a Consolidated Plan or Action Plan in the eCon Planning Suite, grantees must follow the instructions below. These instructions are for Regional grantees. State/Entitlement grantees and Consortia grantees should use the State/Entitlement and Consortia quick guides.

For Regional Plan grantees, the lead grantee must amend the Consolidated Plan. All grantees are responsible for amending their individual Action Plans.

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

To amend a Consolidated Plan/Year 1 Action Plan, lead grantees must first copy the existing plan.

1. Click “Search” under the Consolidated Plan submenu.



2. Make note of the Year and Version of the Plan to be amended.

Results Page 1 of 1

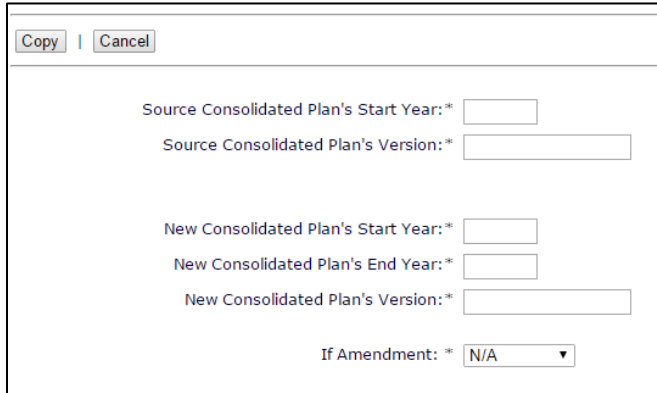
Grantee Name	State	Year	Version	Title	Status	Action
SAN ANTONIO	TX	2015	1	San Antonio Five Year Consolidated Plan 2015-2019	Review Completed	View

3. Click “Copy” under the Consolidated Plan submenu.



## AMENDING A CONSOLIDATED & ANNUAL ACTION PLAN FOR REGIONAL GRANTEES

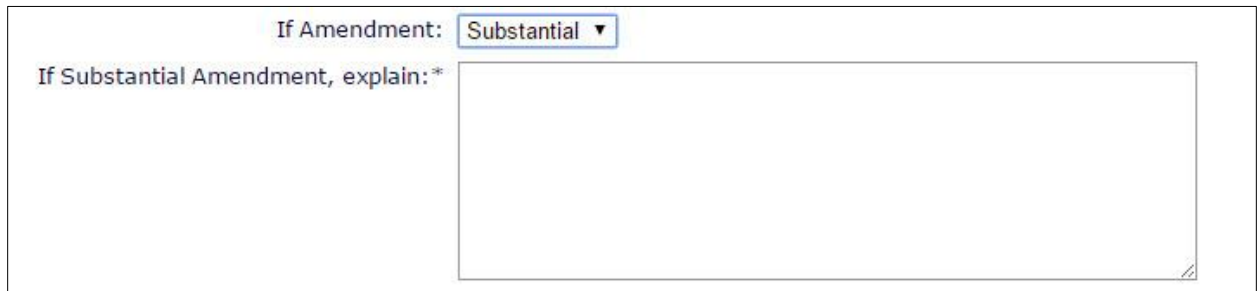
4. Enter the Source Year and Version from the Plan to be copied (identified in Step 2).



A screenshot of a web form titled "Copy" with a "Cancel" button. The form contains the following fields:

- 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: \*
- If Amendment: \*

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's. 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." Grantees can change the title on the AD-25 screen.
7. The plan is now editable for all participating grantees. The grantee that is amending the plan can make the corresponding amendments. If the copy is a Substantial Amendment, the AD-25 screen will include a text box immediately following the "If Amendment" dropdown menu to explain the amendment.



A screenshot of a web form showing the "If Amendment:" dropdown menu set to "Substantial". Below the dropdown is a text box labeled "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.

## II. AMENDING THE ACTION PLAN

1. Click “Copy” in the Action Plan submenu.



2. Enter information in the fields provided. For amendments, the New Program Year must be the same as the existing or 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: \*

3. Select whether the amendment is Minor or Substantial.
4. When complete, click “Copy”. Amended plans will be accessible from the Action Plan search screen. The default title of the copied plan will be “AAP Copy.” Grantees can change the title on the AD-26 screen.

## AMENDING A CONSOLIDATED & ANNUAL ACTION PLAN FOR REGIONAL GRANTEES

5. 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.



The screenshot shows a form with two main components. At the top, there is a label 'If Amendment:' followed by a dropdown menu currently displaying 'Substantial'. Below this, there is a label 'If Substantial Amendment, explain: \*' followed by a large, empty rectangular text box for providing an explanation. The text box has a small cursor icon in the bottom right corner.

6. 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.