

CON PLAN QUICK GUIDE



Amending a Consolidated Plan & Annual Action Plan For Regional Grantees

April 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 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.

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 grantees to use the “Copy” function, thus resulting in multiple copies of a plan for the same program year.

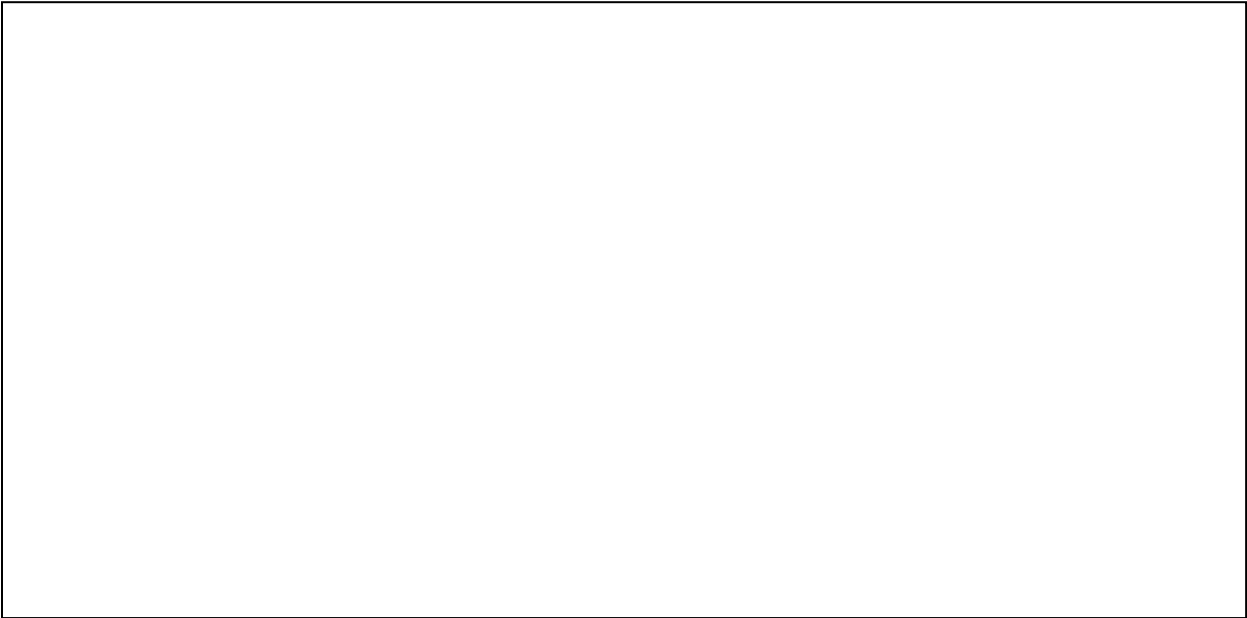
The new amendment process now enables grantees to amend (modify) a single plan for a specific program year and resubmit to HUD for review. A new “Amend” action link is available for the Consolidated Plan or Annual Action Plan most recently marked “Review Completed.” Only one plan for each program year 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 grantee users may not see an “Amend” action link. An “Amend” action link will not be available if:

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

AMENDING A CONSOLIDATED & ANNUAL ACTION PLAN FOR REGIONAL GRANTEES

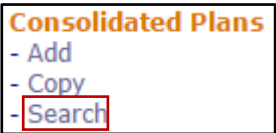
The new Amend-Submit-Review cycle may be repeated as frequently as needed using the same plan rather than creating and using multiple copies of the originally submitted plan.



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

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

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



- 2. Locate the plan to be amended.

Grantee Name	State	Year	Version	Title	Status	Action
MUSKEGON	MI	2016	1	5 year- Regional Consolidated Plan	Review Completed	Amend 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 changes the status to “Open – Amendment.”

Grantee Name	State	Year	Version	Title	Status	Action
MUSKEGON	MI	2016	1	5 year- Regional Consolidated Plan	Open - Amendment	Edit View

6. On the AD-25 Administration screen, modify the Con Plan ending year or title as needed. Select the amendment type for the “If Amendment” dropdown menu.

AD-25 Administration of the Consolidated Plan

Save and Return

 |

Cancel

Strategic Plan Beginning Year:*

2016

Ending Year:*

2020

Title:*

5 year- Regional Consolidated Plan

Plan Version:*

1

If Amendment:

N/A

Select

N/A

Minor

Substantial

Programs included:*

HOPWA

Housing Trust Fund Subgrantee:

No

Consolidated Plan is for*:

Regional

7. For minor or substantial amendments, the screen will include a “Purpose of Amendment” text box following the “If Amendment” dropdown menu to provide a summary of the updates.

Strategic Plan Beginning Year:*

2016

Ending Year:*

2020

Title:*

5 year- Regional Consolidated Plan

Plan Version:*

1

If Amendment:

Substantial ▼

Purpose of the amendment:*

8. Click the “Save and Return” button to return to the Consolidated Plan menu screen.
9. Once all updates in the Consolidated Plan are 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 Completed” 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

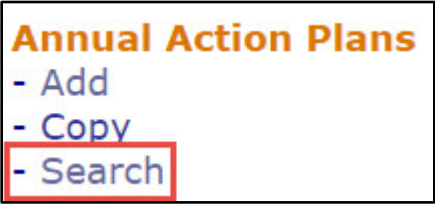
Open - Amendment

Save and Return

|

II. AMENDING THE ACTION PLAN

1. Click “Search” in the “Annual Action Plan” submenu.



2. Locate the Annual Action Plan to be amended.

Annual Action Plans

Search

Search Criteria

Year:
All Years ▼

Status:
Select ▼

Search | Reset

Results Page 1 of 1

Grantee Name	State	Year	Version	Title	Status	Action
MUSKEGON	MI	2016	A	TEST	Open - In Progress	Edit View
MUSKEGON	MI	2014	Year 4	Muskegon 2014 TEST Plan	Open - In Progress	Edit View
MUSKEGON	MI	2017	1	Muskegon 2017 Action Plan	Review Completed	Amend View
MUSKEGON	MI	2019	2	Muskegon Action Plan 2019	Review Completed	Amend View
MUSKEGON	MI	2018	1	Muskegon Action Plan 2018	Review Completed	Amend View
MUSKEGON	MI	2013	New	Muskegon TEST Plan 2013	Open - In Progress	Edit 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 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.

Cancel

I agree

5. By selecting the “I Agree” button, the plan is now open for edit and the status is changed to “Open – Amendment.”

Grantee Name	State	Year	Version	Title	Status	Action
MUSKEGON	MI	2019	2	Muskegon Action Plan 2019	Open - Amendment	Edit View

- 6. On the AD-26 Administration screen, modify the title and select whether the amendment is minor or substantial. Provide a summary of the updates in the “Purpose of Amendment” text box. This explanation is now required for all amendment types.

Annual Action Plans

AD-26 Administration of the Annual Action Plan

Save and Return

 |

Cancel

AAP Program Year:*

2019

AAP Title:*

Muskegon Action Plan 2019

AAP Plan Version:*

2

If Amendment:

Minor

Purpose of the amendment:*

- 7. Click the “Save and Return” button to return to the Annual Action Plan menu screen.
- 8. Once all updates to the Action Plan 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:

Status changed on:

Submitted for Review

Open - in Progress

Open - in Progress/FO Review

Submitted for Review

Reviewed and Waiting for Modifications

Review Completed

Open - Amendment

Save and Return

C

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

III. DOWNLOADING ARCHIVED PLAN VERSIONS

These instructions can be used to retrieve a copy of a 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 1 hour per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing this collection of information. This agency may not conduct or sponsor, and a person who is providing information on this collection of information does not have to respond to this collection of information unless it displays the 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

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2. The system will display a list of available archived copies for selection and download as a Microsoft Word document. Each available archived 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]		
(Note: click on a link to edit)		