

CON PLAN QUICK GUIDE



Amending a Consolidated Plan & Annual Action Plan For State and Entitlement Grantees

March 2018





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 State and Entitlement Grantees

These instructions are for State and Entitlement grantees. Consortia and Regional grantees should use the Consortia and Regional quick guides.

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 APPROVED CONSOLIDATED PLAN/YEAR 1 ACTION PLAN

*To amend a Consolidated Plan/Year 1 Action Plan, 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.

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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.



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

Copy | Cancel

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: * 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.

- 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.”

Search Criteria

Year: Status:

|

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Grantee Name	State	Year	Version	Title	Status	Action
OAKLAND	CA	2015	May 2015	Oakland 5-Year Consolidated Plan	Open - in Progress	Edit View
OAKLAND	CA	2015	2015	Oakland 5-year Consolidated Plan	Review Completed	View
OAKLAND	CA	2015	2015 rev	Oakland 5-Year Consolidated Plan Copy	Open - in Progress	Edit View
OAKLAND	CA	2015	2.0	ConPlan Copy	Open - in Progress	Edit View

- 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.
- 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:*

- 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 YEAR 2-5 ACTION PLAN

- 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 fields provided. For amendments, the Program Year for the amended plan must be the same as the Source Program Year.

A screenshot of a form titled 'Copy Annual Action Plan'. At the top left, there are two buttons: 'Copy' and 'Cancel'. Below the buttons are several input fields:

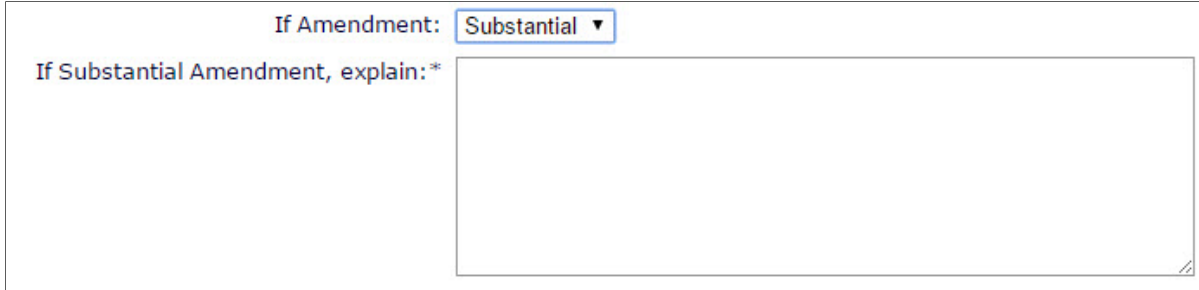
- Source AAP Program Year: * [text input]
- Source AAP Plan Version: * [text input]
- New AAP Program Year: * [text input]
- New AAP Plan Version: * [text input]
- If Amendment: * [dropdown menu with 'N/A' selected]

4. Select whether the amendment is Minor or Substantial.
5. When complete, click “Copy”. The amended plan will be accessible from the Action Plan search screen. The default title of the copied plan will be “AAP Copy.”

A screenshot of a search results page. At the top, there are search criteria: 'Year: All Years' and 'Status: Select'. Below this are 'Search' and 'Reset' buttons. The main content is a table with the following data:

Results Page 1 of 1							
Grantee Name	State	Year	Version	Title	Status	Action	
OAKLAND	CA	2016	DRAFT	OAKLAND 2016/17 ANNUAL ACTION PLAN	Open - in Progress	Edit View	
OAKLAND	CA	2016	Amendment 1	AAP Copy	Open - in Progress	Edit View	

6. Grantees should change the name of the plan on the AD-25 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.
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.



The screenshot shows a form with a dropdown menu labeled "If Amendment:" set to "Substantial". Below it is a text box labeled "If Substantial Amendment, explain:*" which is currently empty.

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.