

CON PLAN QUICK GUIDE



Amending a Consolidated Plan & Annual Action Plan For State and Entitlement 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 State and Entitlement 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 state and entitlement grantees. Consortia and regional grantees should use the consortia and regional quick guides.

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, 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.”

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.

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

By default, when IDIS Release 11.19 initially deployed, if a grantee 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.

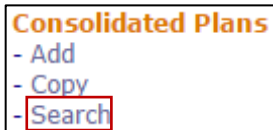
- If the most current plan for a program year has a status of “Submitted for Review,” it will have an Amend action link after the HUD Field Office has marked the plan with a status of “Review Completed.”
- If the most current plan for a program year has a status of “Reviewed and Waiting Modification”, it will have an Edit link in the Action column. 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.

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

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

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



2. Locate the plan to be amended.

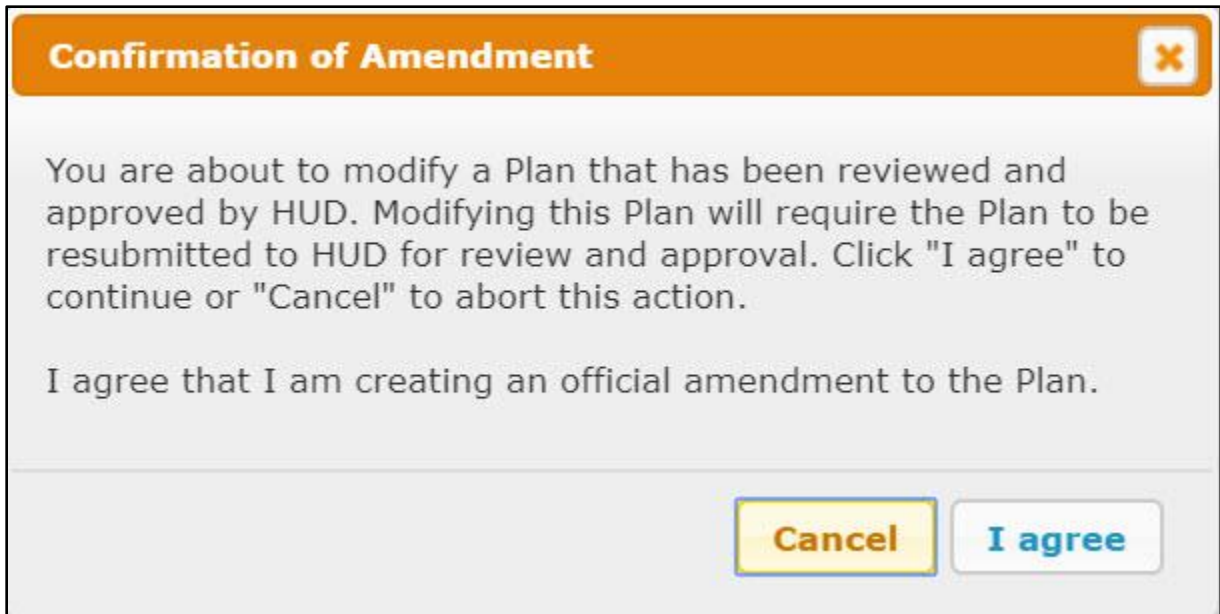
Results Page 1 of 1						
Grantee Name	State	Year	Version	Title	Status	Action
SEATTLE	WA	2018	1	2018 TEST and DEMO	Open - In Progress	View
SEATTLE	WA	2018	2	2018-2022 Seattle CP	Review Completed	Amend View
SEATTLE	WA	2014	2014-1	City of Seattle Consolidated Plan for Housing and Community Development	Review Completed	Amend View
SEATTLE	WA	2013	test 1	TEST PLAN	Open - In Progress	Edit View

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

Status	Action
Open - in Progress	View
Review Completed	Amend View

A red arrow points from the center of the table towards the "Amend | View" link in the "Review Completed" row.

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



- By selecting the "I Agree" button, the system will reopen the plan for edit and change the status to "Open – Amendment."

Grantee Name	State	Year	Version	Title	Status	Action
SEATTLE	WA	2018	1	2018 TEST and DEMO	Open - In Progress	View
SEATTLE	WA	2018	2	2018-2022 Seattle CP	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:* 2018

Ending Year:* 2022

Title:* 2018-2022 Seattle CP

Plan Version:* 2

If Amendment: N/A ▼

Programs included:*

- Select
- N/A
- Minor
- Substantial
- HOPWA

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. This explanation is now required, regardless of amendment type.

Strategic Plan Beginning Year:* 2018

Ending Year:* 2022

Title:* 2018-2022 Seattle CP

Plan Version:* 2

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

|

II. AMENDING YEAR 2-5 ACTION PLAN

1. Click "Search" under the "Annual Action Plans" submenu.



2. Locate the Annual Action Plan to be amended.

Annual Action Plans

Search

Search Criteria

Year: All Years | Status: Select

|

Results Page 1 of 1

Grantee Name	State	Year	Version	Title	Status	Action
ALABAMA	AL	2016	2	Do Not Use #1	Open - in Progress	View
ALABAMA	AL	2019	1	Alabama PY2019 One-Year Annual Action Plan for CDBG, HOME, ESG, HOPWA, and HTF Programs	Review Completed	Amend View
ALABAMA	AL	2016	#2	Alabama PY2016 One-Year Annual Action Plan for CDBG, HOME, ESG, HOPWA, and HTF Programs	Review Completed	Amend View
ALABAMA	AL	2017	1	Alabama PY2017 One-Year Annual Action Plan for CDBG, HOME, ESG, HOPWA, and HTF Programs	Review Completed	Amend View
ALABAMA	AL	2016	1	State of Alabama PY2016 One-Year Annual Action Plan for CDBG, HOME, ESG, and HOPWA Programs	Review Completed	View
ALABAMA	AL	2018	1	Alabama PY2018 One-Year Annual Action Plan for CDBG, HOME, ESG, HOPWA, and HTF Programs	Review Completed	Amend View

- Click "Amend" in the "Action" column.

Status	Action
Open - in Progress	View
Review Completed	Amend View



- 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

- 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
ALABAMA	AL	2019	1	Alabama PY2019 One-Year Annual Action Plan for CDBG, HOME, ESG, HOPWA, and HTF Programs	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:* Alabama PY2019 AAP Amendment

AAP Plan Version:* 1

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: 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 the data needed, reviewing the collection of information, and completing and reviewing the collection of information. This agency may not conduct or sponsor, and a person who is providing information to this collection of information does not have to respond to this collection of information if it does not display this OMB Control number.

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

(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 archived copy will be displayed with the date and time that it was created.

[Click to Download Version Created on \[2020-01-23 16:47\]](#)

(Note: click on a link to edit)