CON PLAN QUICK GUIDE

Creating a CAPER For All Grantees

March 2018

COMMUNITY
PLANNING
&
DEVELOPMENT

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.

To create a Consolidated Annual Performance and Evaluation Report (CAPER) in the eCon Planning Suite, grantees must follow the instructions below. These instructions are for all State, Entitlement, Consortium, and Regional grantees.

Within 90 days of the end of its program year, a jurisdiction is required to provide an annual report to HUD that summarizes its performance for the program year. All grantees (regardless of participation in a Consortium or Regional Strategy) must create and submit a CAPER through the eCon Planning Suite.

When a CAPER is created in the eCon Planning Suite, the system pulls information from other parts of IDIS. For example, the goals are pulled from the Annual Action Plan and accomplishment data is pulled from the activity accomplishment screens.

Make sure the following sections of IDIS are updated before creating the CAPER:
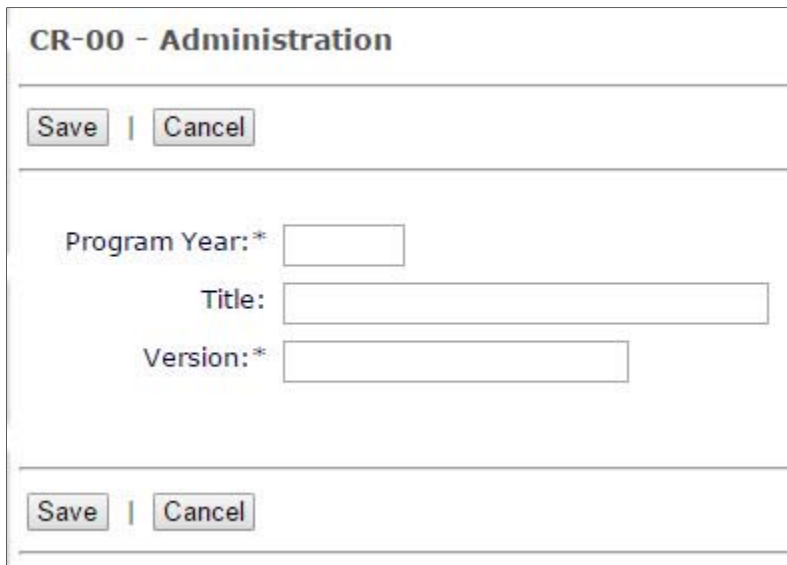
- Amendments to the Annual Action Plan: All amendments to the AAP must be entered into IDIS and approved by HUD, especially if the amendments affected the goals.
- Accomplishment Data for Activities: Before generating the CAPER, update the accomplishment data for each open activity first.

I. ADDING A NEW CAPER

1. **Click on "Add" in the CAPER submenu.**

   Consolidated
   Annual
   Performance
   Evaluation Report
   - Add
   - Search

2. **Complete the CR-00 Administration Screen. Fields marked by an asterisk (*) are required.**

   CR-00 - Administration

   Save | Cancel

   Program Year:*
   Title:
   Version:*

   Save | Cancel

3. Indicate the Program Year of the report. This should match the Federal fiscal year of the allocation received during the program year.

Program Year:* 2015

4. Enter a Title. The title will appear on the cover and in the page heading of the printed report.

5. Enter the Version. The version must be unique to the grantee. This field cannot be edited once the CAPER is created.

6. Click the "Save" button.

Program Year:* 2015

Title: 2015 CAPER Draft

Version:* 1.0

Save | Cancel

7. Once saved, the report's status is set to "Open-in Progress" and the grantee will be taken to the CAPER Menu screen that will list all of the data entry screens.

Setup

CR-00 Administration

Consolidated Annual Performance Evaluation Report

CR-05 - Goals and Outcomes - 91.520(a)
CR-10 Racial and Ethnic composition of (person/households/families) assisted
CR-15 Resources and Investments 91.520(a)
CR-20 Affordable Housing 91.520(b)
CR-25 Homeless and Other Special Needs 91.220(d, e); 91.320(d, e); 91.520(c)
CR-30 Public Housing 91.220(h); 91.320(j)
CR-35 Other actions 91.220(j)-(k); 91.320(i)-(j)
CR-40 Monitoring 91.220(d, e); 91.520(c)

CR-45 CDBG 91.520(c)
CR-50 HOME 91.520(d)