

CON PLAN QUICK GUIDE



Creating a Year 2-5 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](#).

CREATING A YEAR 2-5 ANNUAL ACTION PLAN

For State and Entitlement Grantees

These instructions are for state and entitlement grantees. Consortia grantees and regional grantees should use the consortia and regional grantee quick guides.

Action Plans for Years 2-5 are set up under the Action Plan submenu in IDIS. To add a new Action Plan, grantees can either copy the previous Annual Action Plan or create a new Action Plan.

1. Copying a previous Action Plan entered into IDIS: Copying a plan copies all data from the source Action Plan into a new version. The copy of the Action Plan will include any attachments and all additional content, such as images, maps, and text boxes that were inserted throughout the template.

If the Action Plan that is copied is associated with a Consolidated Plan in the system, the copy will be associated with the same plan. Grantees must review the content and adjust to reflect goals, projects, outreach and other elements that are unique to the new year's Action Plan.

The system will automatically copy previous year projects without updating the project year. Grantees should remove previous year projects and create new projects for the new Action Plan.

The copy functions for Annual Action Plans have been modified in IDIS Release 11.19 (December 2019). Through the new amendment functionality, grantees will have one and only one "official" plan for each program year. Grantees should now only use the copy functions to create new plans for new program years.

2. Adding a new Annual Action Plan: Adding a new plan produces a blank template associated with the identified Consolidated Plan. Grantees will need to complete all narrative fields and tables.

I. CREATING AN AAP BY COPYING A PREVIOUS AAP

1. Click “Copy” under the “Annual Action Plans” submenu.



2. Click the “Select Source AAP” button.

Copy Annual Action Plan

Copy | Cancel

Source Plan:

Source AAP Program Year:*

Source AAP Plan Version:*

New AAP Program Year:*

New AAP Plan Version:*

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- The system will display a search screen. Click the “Search” button to locate the source plan to be copied, and then click the “Select” link in the “Action” column. Only one Annual Action Plan for each program year will be available. A plan will be displayed for selection only if it has a status of “Review Completed” and is associated with the “official” Consolidated Plan.

Select Source Annual Action Plan

Cancel

Grantee Name	State	Year	Version	Title	Status	Action
BUFFALO	NY	2017	V3	AAP Final Revised	Review Completed	Select
BUFFALO	NY	2016	V1	Annual Action Plan Amendment-3.2017	Review Completed	Select
BUFFALO	NY	2015	V4	Buffalo AAP 2015 Amendment-V2	Review Completed	Select
BUFFALO	NY	2014	V1 Amendment	AAP V1 Amendment	Review Completed	Select
BUFFALO	NY	2013	2013_02	First AAP for Con Plan titled City of Buffalo Consolidated Plan	Review Completed	Select

- Enter the new AAP program year and plan version. Click the “Copy” button.

Source Plan:

Source AAP Program Year: *

Source AAP Plan Version: *

New AAP Program Year: *

New AAP Plan Version: *

Housing Trust Fund Subgrantee:

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5. The new plan has been created and will appear on the Search Annual Action Plans screen. The default title of the plan appears as “AAP Copy.” Grantees should update the title on the AD-26 Administration screen.

Grantee Name	State	Year	Version	Title	Status	Action
BUFFALO	NY	2020	1	AAP Copy	Open - In Progress	Edit View

II. CREATING A NEW PLAN BY ADDING A NEW ANNUAL ACTION PLAN

1. Click “Add” under the “Annual Action Plan” submenu.



2. Enter the AAP program year. This is the federal fiscal year in which the program year begins.
3. Enter a title. The title will be displayed on the cover and at the top of each page of the printed report.
4. Enter a version. This field is listed in the search results and is the plan’s unique identifier in IDIS.
5. DO NOT indicate that the plan is an amendment. Keep the default N/A.

AD-26 Administration of the Annual Action Plan

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AAP Program Year:*

AAP Title:*

AAP Plan Version:*

If Amendment: ▼

Programs included:*
 CDBG
 HOME
 ESG
 HOPWA

Housing Trust Fund Subgrantee: ▼

Is this Annual Action Plan associated with a Consolidated Plan?* ▼

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6. Ensure the programs included are correct. Edit the default selections as necessary.

Programs included:*

- CDBG
- HOME
- ESG
- HOPWA

7. Indicate that the Action Plan is associated with a Consolidated Plan by selecting “Yes” from the dropdown menu.

Is this Annual Action Plan associated with a Consolidated Plan?*

Yes ▾

8. Click the “Associate with ConPlan” button.

Associate with ConPlan

9. On the Select Consolidated Plan screen, search for the associated Consolidated Plan. Click the radio button next to the appropriate Consolidated Plan and click the “Select” button at the top of the screen. The system will display a list of all Consolidated Plans, regardless of status. However, it is a best practice to make sure the selected Consolidated Plan has been approved by HUD.

Select Consolidated Plan

Search

Select | Cancel

Search Criteria

Year: All Years ▾ Status: Select ▾

Search | Reset

Results Page 1 of 1

Select	Grantee Name	State	Year	Version	Title	Status
<input type="radio"/>	BUFFALO	NY	2013	2013_02	2013-2017_Amendment 1	Open - Amendment
<input type="radio"/>	BUFFALO	NY	2013	2013	City of Buffalo 2013-2017 Consolidated Plan	Review Completed
<input checked="" type="radio"/>	BUFFALO	NY	2020	1.0	City of Buffalo 2020-2024 Consolidated Plan	Review Completed

10. The associated Consolidated Plan information will appear on the AD-26 screen. Click the “Save” button at the bottom of the screen to create the new Action Plan.