

CON PLAN QUICK GUIDE



Project Set-up in the Annual Action Plan

For all 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.

PROJECT SET-UP IN THE ANNUAL ACTION PLAN

For all Grantees

These instructions are for State, Entitlement, Regional Plan and Consortia grantees.

For each program year, grantees must create new projects and add them to the AP-35 Projects screen in the Annual Action Plan. Projects provide a concise summary of the eligible programs or activities that will take place during the program year to address the priority needs and specific objectives identified in the Strategic Plan. More importantly, projects bridge a grantees activity accomplishments in IDIS with the associated annual goals selected for that program year. The correct alignment between the AAPs Projects and the IDIS Activities is key when preparing the CAPER.

New Projects can be set-up one of two ways:

- Create New Project directly in the AAP through the AP-35 Projects Screen (****this method should be used by all entitlement grantees; State grantees are encouraged to use this method*).
- Create project in the IDIS sub-menu and then add the project to the AP-35 Projects Screen in the AAP (****this method should only be used by State grantees*).

For State grantees, projects should align with state's method of distribution, but activity-level detail is not required during the initial set-up of the Annual Action Plan. However, State grantees will need to add their IDIS Projects to the AP-35 Projects screen of the Annual Action Plan, through an amendment, before the end of the program year for activity accomplishments to associate with the goals listed in the plan.

A common misconception among grantees that create the Annual Action Plan by copying the prior-year's action plan is that the projects copied over are automatically updated to the new program year. This is not the case. When a prior year Action Plan is copied to create the current year Annual Action Plan, it copies the prior year projects into the current plan.

This Quick Guide illustrates the steps grantees should take to:

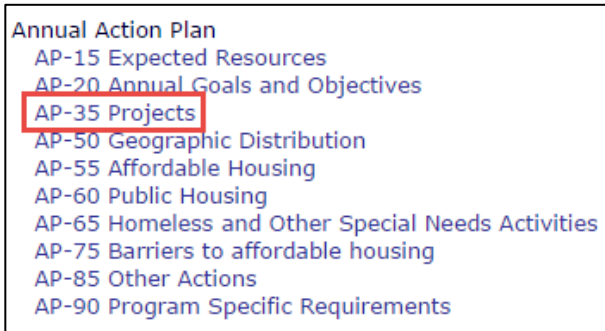
- Create New Project in the Annual Action Plan
- Add Existing Projects to the Annual Action Plan
- Remove Prior-Year Projects from the Annual Action Plan

PROJECT SET-UP IN THE ANNUAL ACTION PLAN FOR ALL GRANTEES

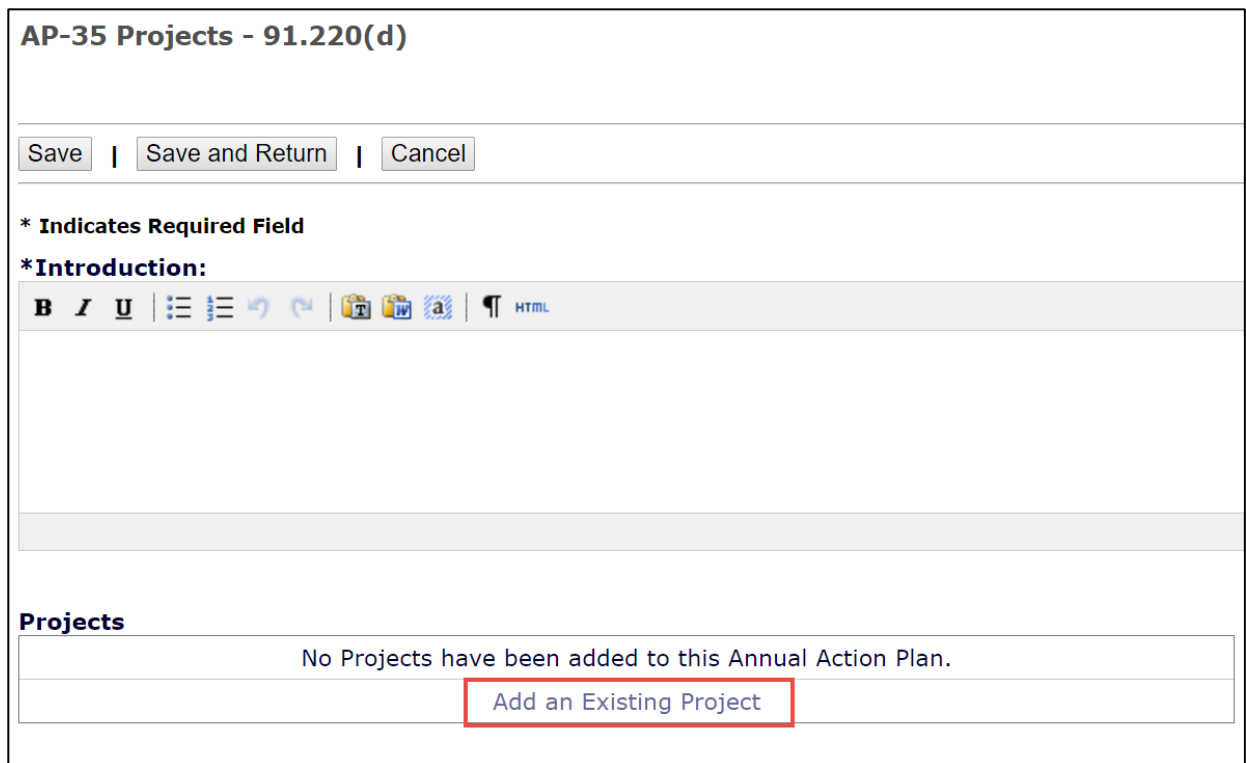
I. CREATING NEW PROJECTS IN THE ACTION PLAN

*When new projects are created in the Action Plan, they are automatically added to the Projects section of IDIS, regardless of whether the plan has been approved by HUD or not.

1. Go to the “AP-35 Projects” in the Annual Action Plan section of your Con Plan or AAP template



2. Click the “Add an Existing Project” link in the Projects table

A screenshot of a web form titled "AP-35 Projects - 91.220(d)". The form has a header section with "Save", "Save and Return", and "Cancel" buttons. Below this is a section labeled "* Indicates Required Field" and "*Introduction:". The "Introduction" section contains a rich text editor with various formatting icons (bold, italic, underline, list, link, unlink, image, video, audio, link, unlink, HTML) and a large text area. Below the text area is a section labeled "Projects". The "Projects" section contains a message: "No Projects have been added to this Annual Action Plan." and a button labeled "Add an Existing Project". The "Add an Existing Project" button is highlighted with a red rectangular box.

PROJECT SET-UP IN THE ANNUAL ACTION PLAN FOR ALL GRANTEES

3. Click “Create a New Project” link on the Search Projects screen

Project
Search Projects

Search Criteria
Program Year:
All ▾
IDIS Project ID:

Program:

Grantee/PJ Project ID:

| | [Return to AP-35 Projects](#) | [Create a New Project](#)

Enter the project’s Title, Grantee/PJ Project ID, and Description

Project
Add Project

|

***Indicates Required Field**
Grantee/PJ Name:
CHESTER COUNTY
Program Year:
2017
IDIS Project ID:

***Project Title:**

Grantee/PJ Project ID:

Description:

PROJECT SET-UP IN THE ANNUAL ACTION PLAN FOR ALL GRANTEES

Enter the anticipated funding amounts for both the Estimated Amount and Expected Resources sections. Please note, the funding amounts in these must be the same.

Estimated Amount (Including Program Income)	
Section 108 Loan amount	\$ 0.00
CDBG	\$ 275000
HOME	\$ 0.00
ESG	\$ 0.00
HOPWA	\$ 0.00
CDBG-R	\$ 0.00
HPRP	\$ 0.00
TCAP	\$ 0.00
HESG	\$ 0.00
HOPWA-C	\$ 0.00
HTF	\$ 0.00
Total	275,000.00

Expected Resources	
CDBG	\$ 275000
HOME	\$
ESG	\$
Other - County Housing Trust Program	\$

Select the Annual Goal supported and any Priority Needs. Only one annual goal should be selected per each project.

Annual Goals Supported	
Eliminate Slum and Blight	<input type="checkbox"/>
Further Fair Housing	<input type="checkbox"/>
Improve Public Facilities	<input checked="" type="checkbox"/>
Improve Public Infrastructure	<input type="checkbox"/>
Improve Quality of Life	<input type="checkbox"/>
Provide Affordable Housing for Homeowners	<input type="checkbox"/>
Provide Affordable Housing for Renters	<input type="checkbox"/>
Serve Homeless Families and Reduce Homelessness	<input type="checkbox"/>
Spur Economic Development	<input type="checkbox"/>

Priority Needs Addressed	
Increasing Affordable Housing	<input type="checkbox"/>
Improving Public Facilities and Infrastructure	<input checked="" type="checkbox"/>
Reducing Homelessness	<input type="checkbox"/>

PROJECT SET-UP IN THE ANNUAL ACTION PLAN FOR ALL GRANTEES

Enter the Goal Outcome Indicators. Make sure you are using the same indicators that were used for the associated annual goal.

Goal Outcome Indicators			
No.	Goal Outcome Indicator	Quantity	Unit of Measures
1	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	<input type="text" value="500"/>	Persons Assisted
2	Public Facility or Infrastructure Activities for Low/Moderate Income Housing Benefit	<input type="text"/>	Households Assisted
3	Public service activities other than Low/Moderate Income Housing Benefit	<input type="text"/>	Persons Assisted
4	Public service activities for Low/Moderate Income Housing Benefit	<input type="text"/>	Households Assisted
5	Facade treatment/business building rehabilitation	<input type="text"/>	Business

4. Click the “Save” button at the bottom of the screen. The newly created project will be added to the AP-35 Projects table and to the Projects section in IDIS.

Logout

Activity

Add
Search
Search HOME/HTF
Review
CDBG Cancellation

Project

Add
Search
Copy

Consolidated Plans

Add
Copy
Search

Annual Action Plans

Add
Copy
Search

Project

Search Projects

Search Criteria

Program Year:

2017

IDIS Project ID:

Program:

Grantee/PJ Project ID:

Search

Reset

Results Page 1 of 1

Program Year	IDIS Project ID	Grantee/PJ Project ID	Project Title
2017	1		Public Facility Improvements

II. ADDING EXISTING IDIS PROJECTS TO THE ACTION PLAN

If projects have already been set-up in IDIS before your jurisdiction has created the Annual Action Plan, then those projects should be added to the AP-35 Projects table instead of creating new projects.

1. On the AP-35 Projects screen, click the “Add an Existing Project” link.

AP-35 Projects - 91.220(d)

* Indicates Required Field

* **Introduction:**

B *I* U
|
 [List Icon] [List Icon]
 |
 [Undo] [Redo]
 |
 [Image] [Video] [Link]
 |
 [HTML]

Projects

No Projects have been added to this Annual Action Plan.

Add an Existing Project

2. On the Search Projects screen, enter the appropriate search criteria or click the “Search” button to display a list of all projects within your jurisdiction.

Project

Search Projects

Search Criteria

Program Year:

All

Program:

Project Title:

IDIS Project ID:

Grantee/PJ Project ID:

Search

Reset

Return to AP-35 Projects

Create a New Project

PROJECT SET-UP IN THE ANNUAL ACTION PLAN FOR ALL GRANTEES

3. Locate the project you would like to select, and click the “Add” link in the Action column.

Results Page 1 of 6						
Program Year	IDIS Project ID	Grantee/PJ Project ID	Project Title	Project Owner	Status	Action
2017	1		2017 Infrastructure	DECATUR, IL	Open	Add
2017	2		2017 Administration	DECATUR, IL	Open	Add
2017	3		2017 CHDO Set-Aside	DECATUR, IL	Open	Add
2017	4		2017 Residential Rehabilitation Program	DECATUR, IL	Open	Add
2017	5		2017 Project Delivery	DECATUR, IL	Open	Add
2017	6		Emergency Program	DECATUR, IL	Open	Add
2017	7		2017 Section 108 Loan Repayment	DECATUR, IL	Open	Add
2017	8		2017 Code Enforcement	DECATUR, IL	Open	Add
2017	9		Public Service-Adult Education for Training and Employment	DECATUR, IL	Open	Add

4. On the Edit Project screen, complete the Expected Resources, Annual Goals Supported, and Goal Outcome Indicators for the project. Click “Save”, and the project will be added to the Projects table on AP-35.

AP-35 Projects - 91.220(d)

- **Project has been saved.**
- **Annual Action Plan Project Data has been saved**

Save | Save and Return | Cancel

*** Indicates Required Field**

***Introduction:**

B *I* U |

Projects

Sort*	Project Title	Action
1	2017 Infrastructure	View Edit Remove

Add a Project | View Summary

III. REMOVING PRIOR-YEAR PROJECTS FROM THE ACTION PLAN

When a prior-year Action Plan is copied to create the upcoming program year Annual Action Plan, the system copies the prior year projects into the new plan. For example, if you copy the 2016 AAP to create the 2017 AAP, all 2016 projects will be copied into the 2017 AAP, and the program year for each project will still be listed as 2016. You will need to remove each project and then either create new projects or add existing 2017 projects if they have already been created in IDIS.

1. On the AP-35 Projects screen, click the “Edit” link in the action column next to a listed project. The top of the next screen will display the program year of the project. If the program year listed is not the same year as the new plan, then the project will need to be removed.

Edit Project

|

***Indicates Required Field**

Grantee/PJ Name:
CHESTER COUNTY

Program Year:
2016

IDIS Project ID:
1

Status:
Open

***Project Title:**
Housing and Community Support Services

2. On AP-35, click the “Remove” link next to the project you would like removed. In some cases, a pop-up box will appear asking “Are you sure?” Click “Yes”.

Projects		
Sort*	Project Title	Action
1	Housing and Community Support Services	View Edit Remove
2	Homeless Shelter	View Edit Remove
3	Home Construction and Community Revitalization	View Edit Remove
4	Planning and Administration	View Edit Remove
5	HESG15 Chester County	View Edit Remove
Add a Project View Summary		

PROJECT SET-UP IN THE ANNUAL ACTION PLAN FOR ALL GRANTEES

3. Error messages may occur for one of two reasons, either there is an apostrophe (') in the project title or the project has Priority Needs selected.

AP-35 Projects - 91.220(d)

• Failed to remove project from Action Plan: Row was updated or deleted by another transaction (or unsaved-value mapping was incorrect): [gov.hud.cpd.idis.business.domain.AapProjGeoArea#900000000250975]; nested exception is org.hibernate.StaleObjectStateException: Row was updated or deleted by another transaction (or unsaved-value mapping was incorrect): [gov.hud.cpd.idis.business.domain.AapProjGeoArea#900000000250975]

If this error appears, open up the project by clicking “Edit” and remove any apostrophes from the project title and unselect all check boxes in the Priority Needs Associated section. Click “Save” and try removing the project again.

4. Once all projects have been removed, click the “Add an Existing Project” link at the bottom of the Projects table in order to create new projects or add existing projects.

Projects

No Projects have been added to this Annual Action Plan.

[Add an Existing Project](#)

5. If projects have not been previously set up in IDIS for the upcoming program year, follow the instruction listed in Section I for Creating New Projects. If the upcoming program year projects have already been created, then follow the instructions in Section II.