The Consolidated Plan, Annual Action Plan and CAPER in IDIS:
Frequently Asked Questions

The following FAQs represent many of the most common issues experienced by grantee users of the IDIS template for preparation of the Consolidated Plan, Annual Action Plan and Consolidated Annual Performance and Evaluation Report (CAPER).

Please note that many of the responses cite references from the Desk Guide for Using IDIS to Prepare the Consolidated Plan, Annual Action Plan, and CAPER/PER ("Desk Guide") which can be accessed at https://www.hudexchange.info/resource/2641/econ-planning-suite-desk-guide-idis-conplan-action-plan-caper-per/ .

If you require additional assistance, please submit a question to the HUD Exchange Ask-A-Question desk at https://www.hudexchange.info/get-assistance/my-question/. In order to expedite a response, please make sure to indicate that your question is related to "Con Plan: eCon Planning Suite," specify the screen you are working on and, if applicable, attach a screenshot of any error message received.

<mark>Gaining Access to IDIS</mark>

How does new staff gain access to IDIS?

For grantee users, the form to request access for new IDIS users is available at https://www.hudexchange.info/resources/documents/IDIS-Online-Access-Request-HUD-Form-27055.pdf. Fill out the entire form as directed in the instructions. In the "Program Areas" section of the form, mark "other" and write the desired Consolidated Plan in the box, then choose the desired roles in the "Modules" section.

The form must be notarized, per the instructions, and submitted to the appropriate HUD Field Office CPD Representative. The CPD Representative will forward the form to HUD Headquarters to be processed.

Can consultants gain access to IDIS to work on a draft plan?

Consultants may gain access to IDIS to help grantees prepare their plans. Grantees must request access for a consultant who is a new IDIS user, following the same steps used for requesting access for staff who are new IDIS users. If the consultant already has an IDIS ID, the grantee will only need to request that the consultant be provided with access to their plan.

I logged into IDIS, but I do not see the Consolidated Plan or Annual Action Plan on the left when I've clicked on Plans/Projects/Activities.

If a user is able to log into IDIS, but does not see the Consolidated Plan/Annual Action Plan or the CAPER module on the screen, the user does not have the correct privileges in IDIS. The user should contact the local IDIS administrator to be given Consolidated Plan/Annual Action Plan or CAPER privileges in the system.

To grant privileges for the Consolidated Plan/Annual Action Plan or CAPER modules in IDIS, the local administrator should follow these steps:
1. Click the<Admin> tab along the top of the IDIS Home screen
2. Search for each user profile using the User ID
3. Click <edit> next to the user's name in the search results to open the Edit User Profile screen
4. On the Edit User Profile screen, click the <Grantee> link under Existing User Roles
5. On the next screen, click the <Edit Access> link in the Action column
6. Select the desired Plan and CAPER privileges on the next screen and click <save>.

The next time the user logs in, they will see the Consolidated Plan/Annual Action Plan and/or CAPER modules along the left side of the screen under the Plans/Projects/Activities tab.

Instructions for granting Con Plan/CAPER privileges in IDIS can be found in Section I of the Desk Guide and were also demonstrated in the Orientation Webinar to the Consolidated Plan Template in IDIS, which aired on May 16, 2012. The steps are illustrated in the slides for this webinar, which can be accessed at https://www.hudexchange.info/consolidated-plan/econ-planning-suite-overview-webinars/

<mark>Submission Requirements and Setting Up the Plan in IDIS</mark>

When is the Consolidated Plan and CAPER required to be completed in IDIS?

As indicated in CPD Notice 12-09, published in April, 2012, grantees are required to use IDIS to submit their Consolidated Plan when their next multi-year strategy is due. Grantees that have an approved multi-year Consolidated Plan are not required to use IDIS to submit their Annual Action Plan until the next multi-year strategy is due.

There is an optional template in IDIS for a Standalone Annual Action Plan. This template allows grantees to use IDIS to submit their Annual Action Plans before they have a multi-year Consolidated Plan in the system. Once grantees have submitted a Plan in the system, all plans, amendments and CAPERs going forward must be submitted in the system.

Can the CAPER be submitted online if I haven't submitted my Consolidated Plan or Annual Action Plan online?

Grantees cannot use IDIS to submit a full CAPER until an Annual Action Plan (or multi-year Consolidated Plan accompanied by an Annual Action Plan) has been submitted in the system. Once a Consolidated Plan or Annual Action Plan is submitted and accepted in IDIS, the first full CAPER to be submitted in the system will be the CAPER for the year addressed by the plan in the system. Grantees that are not required to submit a full CAPER in IDIS must complete the ESG-only CAPER in IDIS, print it out and submit it with the rest of the paper CAPER.

Is there a way to practice in the system? Can I delete the plan?

Grantees can practice using the templates in IDIS by creating a plan, but not submitting it. The HUD Field Office will not be able to view plans until the grantee has changed the status on screen AD-25 to "Submitted for Review," or "Open in Progress – FO Review."

At this time plans cannot be deleted from the system, so it is suggested that grantees use a title or version name that makes it obvious to all users that the open plan is a practice plan.

Are the Consolidated Plan and Annual Action Plan screens available in UAT?

The Consolidated Plan and Annual Action Plan screens are available in the User Acceptance Testing (UAT) version of IDIS. However, because users can create multiple plans in IDIS, UAT is not necessary for creating practice plans. Furthermore, data in UAT is periodically updated with data from live IDIS. At the time of such a data update, any plans created in UAT will be lost.

Can more than one person access a plan at the same time to work on a draft?

Grantees may request access for as many staff as they would like to work in the system. These staff must be given Consolidated Plan/Annual Action Plan and/or CAPER view, edit and/or submit privileges by the grantee local IDIS administrator. Multiple staff may work on the same draft plan in the system; however, staff may not work on the same IDIS screen for the same plan at the same time. Also, if two users try to save the same plan at the same time, one user may receive an error message. Staff should allow several minutes between attempts at saving the plan in order to allow different users to save changes to the same plan.

Further, because of the connection between the goals set up in the Strategic Plan and the menu of goals available in the Annual Action Plan, staff should not work on the Annual Action Plan goals while a coworker is editing goals in the Strategic Plan. To avoid these types of overlap, it is suggested that grantees print out a blank template as a Word document to facilitate work on the plan before entering data and narratives into the system.

Grantees may also open multiple versions of the plan to work on a draft plan, but the information in two different versions cannot be automatically combined in the system. Staff would need to manually enter information from both versions into one of the draft plans in order to complete the plan. Only one plan version should be submitted in the system.

How do I submit an Annual Action Plan in the system if I am not submitting a Consolidated Plan in the system?

Grantees do not have to wait until the submission of their next Consolidated Plan to use the template in IDIS. Grantees with an existing, approved, multi-year Consolidated Plan can prepare and submit an Annual Action Plan without an associated Consolidated Plan entered into IDIS. This is accomplished by creating a new Annual Action Plan in IDIS and choosing "No" in the drop down menu next to the question "Is this Annual Action Plan associated with a Consolidated Plan?" By selecting "no", the user indicates that they do not have an approved Consolidated Plan in IDIS. This selection will provide the template for a standalone Annual Action Plan.

The standalone Annual Action Plan template requires that some basic information from the existing Consolidated Plan be entered into the system, so that Consolidated Plan multi-year goals can be connected to one-year goals in the Annual Action Plan as well as activities and accomplishments recorded throughout the program year automatically populate in the CAPER template.

For additional guidance, please review the Standalone Annual Action Plan Webinar, which can be accessed at https://www.hudexchange.info/consolidated-plan/econ-planning-suite-overview-webinars/.

Can the eCon Planning Suite be used to amend an approved 5-year Consolidated Plan that was not submitted in the system?

No, the eCon Planning Suite can only be used for amendments to plans that have been submitted and approved in IDIS. Grantees should not resubmit approved plans in IDIS. Amendments to approved paper Consolidated Plans should be completed using the same process that has been used in the past. Once a grantee has submitted a Consolidated Plan in the system, all amendments must be completed in IDIS.

How does the Consortium Consolidated Plan and Annual Action Plan work in IDIS?

Consortia plans must be added by the Consortia's lead grantee. Participating grantees are Consortia participants that are also grantees under one or more of the other Consolidated Plan grant programs (CDBG, ESG or HOPWA). When adding the plan, the lead grantee specifies the other participating grantees who receive CDBG, ESG, or HOPWA directly from HUD (grantees who submit an SF-424 for those programs). Once the plan is saved, the system will create a template of the Consortium plan for the lead grantee and separate templates for each participating grantee, based on the specific grants each receives. Consortia participants are not required to submit a stand-alone consolidated plan. All of the required information will be included in the template generated for each of the participating grantees. For example, a Consortium participant that receives their own CDBG grant directly from HUD will have a template that includes the non-housing community development plan. All of the templates will have the same version and title, except that the titles for each of the participating grantees will include the name of that grantee.

Participating grantees are able to view and edit the plan for the Consortium as a whole, but only the lead grantee can submit the plan. The lead grantee has view access to the plans generated

for each participating grantee. When the lead and participant templates are complete, the system automatically compiles the plan for the Consortium as a whole and the separate participating grantee plans under one cover. The compiled plan is submitted by the lead grantee as one document.

For additional guidance, please review the Managing Development of a Consortia Consolidated Plan e-Tutorial, which can be accessed at https://www.hudexchange.info/consolidated-plan/econ-planning-suite-e-tutorials/ .

I'm setting up a Consortium plan and don't see the participating grantee's information.

This is a common issue if the HOME Consortium Plan was set up incorrectly in the AD-25 screen. It is important to determine whether each grantee receives other funds directly from HUD before the Consortium Plan is set-up. The user must set-up a new Consortium plan that indicates the grantees that receive CDBG and/or ESG directly from HUD as participating grantees. Grantees that only receive HOME funds through the consortium do not need to access the system to create their own plan. Jurisdictions that do not receive any grants directly from HUD should provide requested information to the lead grantee, which will then enter the data into the Consortium Plan created in IDIS. The lead grantee is responsible for preparing and submitting all required documents associated with the Consortium Plan for the HOME program.

==Goals==

How does HUD want me to enter my goals in IDIS?

The Consolidated Plan Template provides grantees a great deal of flexibility in establishing goals in that the grantee may determine the number of goals and how the goals are defined. Grantees should set up and describe their projects in whatever way they think is best for their own record keeping, so that they meet the requirements of the individual grant programs. One of the purposes of incorporating the Consolidated Plan, Annual Action Plan and CAPER into an integrated system is to help ensure cohesiveness between the goals established in the Consolidated Plan and further described in the Action Plan and the outcomes tracked in IDIS and reported in the Consolidated Annual Performance and Evaluation Report (CAPER). Thus, the Consolidated Plan should clearly explain the relationships among needs, priorities, resources, goals, and proposed activities. The goals in the Consolidated Plan and the Annual Action Plan should clearly describe the grantee's plans to use the resources available to address the priority needs. The projects in the Annual Action Plan should be designed to address the goals and priority needs outlined in the Consolidated Plan.

Grantees should keep in mind that the CAPER aggregates accomplishments recorded for activities associated with projects and attributes them to the goal that is assigned to that project, so that grantees can assess progress against goals. Grantees should be sure that the goals assigned to projects will match the outcomes and accomplishments expected to be recorded in IDIS throughout the program year.

Also, any projects created in the Annual Action Plan will automatically set up projects in the main part of IDIS when the Action Plan is approved. So, grantees should carefully consider how they are setting up projects currently in IDIS to add activities and draw down funds. Projects created as part of an Annual Action Plan, that are not needed can be deleted from the Plan, but they will remain in IDIS unless they are also deleted under the Projects menu.

Is each Strategic Plan goal required to have an Annual Goal?

No, each Strategic Plan goal does not require an Annual Goal. If the grantee wants to add an Annual Goal, it will be entered on AP-20 by selecting from among the goals set up in the Strategic Plan. Each goal must use one or more of the Goal Outcome Indicators (GOIs) to describe in quantitative terms what the grantee hopes to achieve within the term of the program year. When selecting Goal Outcome Indicators, it is helpful to think about the types of activities that may be undertaken to accomplish the goal, and select GOI's that correspond to the accomplishments for those activities. Appendix B to the Desk Guide shows which CDBG, HOME and HOPWA accomplishments are included in each GOI. To facilitate preparation of the CAPER, it is helpful to use the same Goal Outcome Indicators in Annual Goals as were used in the corresponding Strategic Plan Goal. It is not necessary to provide a GOI for administrative and planning activities.

Can I add a new goal in an Annual Action Plan that is not in the Strategic Plan?

No. The goals in sections SP-45 and AP-20 are closely linked, and a goal must be listed in the Strategic Plan (on SP-45 Goals) in order to be displayed as an option in AP-20 for inclusion in the Action Plan. In order to add a goal in the Strategic Plan on screen SP-45, the Consolidated Plan must be amended. Instructions for amending a plan are available in this document under the Common Problems and Error Messages section.

Projects created in an obsolete or draft Action Plan are appearing in the list of projects in IDIS. How do I delete these?

Once a Project is created in the AP-35 screen, it is automatically linked and added to the list of projects in the Projects/Activities tab of IDIS. Even if the Action Plan is in draft form, the project will be added to this list of projects. To cancel the project, you must search for and cancel the project from the Projects tab.

<mark>Geographic Priorities</mark>

How should we add information concerning Geographic Priorities and selection of target areas in SP-10?

The Geographic Priorities page lists all geographic areas entered in IDIS Online to date. An area will not be included in the Consolidated Plan as a geographic priority area unless the user clicks the box in the "Include" column so that a check mark appears. Only those areas with a check in the Include column will appear on the Priorities and Goals screens. To edit or view the

information for an area, click on the appropriate link in the Action column. At this time, there is no way to delete a local target area from this screen.

To include an area already listed on the screen as part of the Consolidated Plan:
1. Click the box in the Include column so that a check mark appears next to the corresponding target area.
2. Click <save> to save the screen and include the target area in the plan. Click the <edit> link in the Action column to provide additional details about the target area.

To add a new area not listed on the screen:
1. Click on one of the four buttons provided below the table (CDFI, Local Target Area, Strategy Area, or Other).
2. Click the<Add> button at the bottom of the list.
3. The next screen will collect some basic data regarding the area.
4. Click the <Save> button. The system will return to the list of areas. Click the <Return to Geographic Area> button to return to SP-10 Geographic Priorities.
5. Click the box in the Include column so that a check mark appears and then click the <Save> button to save the screen.
6. Click the <Edit> link in the Action column to provide additional details about the target area.

For additional guidance, please refer to the SP-10 section of the Desk Guide, available at: https://www.hudexchange.info/resource/2641/econ-planning-suite-desk-guide-idis-conplan-action-plan-caper-per/.

Are Grantees required to complete the geographic priorities on the AP-35 screen?

Yes, grantees are required to answer the narrative question regarding how investments are distributed geographically within the grantee jurisdiction; however the use of target areas is not required. The regulation at 91.220(f) encourages grantees to identify areas where "geographically targeted revitalization efforts are carried out through multiple activities in a concentrated and coordinate manner," however this is not a requirement.

What are the data sources used to populate screens in the eCon template?

The data used to populate Consolidated Plans in IDIS and displayed in CPD Maps are as follows:
- American Community Survey (ACS)
- Comprehensive Housing Affordability Strategy (CHAS)
- Longitudinal Employer-Household Dynamics

When are the data sources typically updated?

In order to upload these data, HUD must process ACS data into CHAS data on housing needs, this typically takes approximately a year after the ACS update is released by the Census bureau. HUD typically updates the data used to populate Consolidated Plans in late spring/early summer each year.

Grantees can begin drafting their plans using the currently available data. If updated data becomes available before the plan is completed and submitted, and the grantee chooses to update their plan's data, they can create a copy of the plan in IDIS. The copy function will keep all of the text and insertions entered into the plan, but will replace all of the pre-populated data with the updated data.

I know that grantees are not required to use the default data provided in the template, but how can I add an alternate data source?

Default data can be replaced or complemented by specifying a survey or administrative data source. If an alternative source is specified, the user will be asked to identify the source and provide basic information on how the data was collected.

In order to overwrite the default data, the user must use an "Alternate Data Source." Below the data table with the default data, there are two buttons. One is labeled "Default Data," which is the current selection and the basis for the data to be overwritten. To use alternate data, click the <Alternate Data> button. This will take the user to the AD-30 Screen-"Select Alternate/ Local Data Source." If the data is from a Survey, click <Add Survey Data Source>; otherwise, click <Add Administrative Data Source>.

This will take the user to either screen AD-35 (Survey) or AD-40 (Administrative). Use this screen to name and describe the alternate data source. This screen does not require a description of the actual data but rather must indicate how it was obtained. The user should then click <Save and Return> and will be returned to AD-30, which should display the data source just entered. The user should check the "select" box next to the data source described and click the <Select> button. The system will return to the screen with the default data and the user can overwrite the default data with the alternate data.

The user may repeat this process as often as necessary to include all the alternate data sets desired. All the alternate data sources created will be logged on the AD-30 screen and can be used by clicking on the <Alternate Data> button in the appropriate screen which will take the user to AD-30, where the data source needed for that table can be created or selected.

This process is briefly described in the e-tutorial video on this topic, which can be found at https://www.hudexchange.info/training-events/courses/econ-planning-suite-e-tutorial-using-alternate-data/

I have received an error message when I try to save data entered into the template or I have been unable to save data. What should I do?

This issue may be caused by out-of-date information stored in the browser's temporary storage including cookies. When trying to save the screen, this out-of-date information may cause the system to detect a conflict with information previously saved in the database and cause an error message.

Before proceeding to resolve this issue, if the user has been attempting to save narrative text, they should copy and paste this text into a Word document or other word processing file so that information will not be lost in the process of fixing the problem.

To resolve this issue and prevent it from recurring in the future, the user should delete the browser's temporary files and delete cookies, and set these as default Internet Options for the browser. Internet Options can be accessed from the browser 'Tools' menu. The process for deleting temporary files varies by browser. The steps for Internet Explorer are provided below.

1. Logout of IDIS
2. Open the "Internet Options" menu
3. Click <Tools>
4. In the Browsing History section of the General tab click <Delete>
5. Verify that the browser is set to delete Temporary Files and Cookies whenever the brow -ser is closed by ensuring the following are checked: "Temporary Internet and website files" and "Cookies and website data"
6. Click <Delete> at the bottom of the "Delete Browsing History" window
7. Close all browser windows
8. Open a new browser window and login to IDIS

In addition to the issue described above, there are several other conditions under which information may not be saved properly in the IDIS template. They include:

- IDIS session has timed out
- Connectivity to IDIS Web server has been interrupted (e.g., Web server is not responding)
- IDIS has issued a Warning/Error message at the top of the screen that requires attention before the system can save their screen information

Users need to be aware that their session will time-out if they have not completed a "transaction" that communicates with the IDIS Web server within the 20-minute timeframe. Such "transactions" include:

- Navigating to a new screen
- Selecting <Save> <Save and Return> and/or <Cancel> buttons
- Selecting other screen buttons that cause the screen to refresh or open a different screen.

If a user is entering text into one or more text boxes on a single screen, they are NOT communicating with the IDIS Web Server, and the IDIS system may time out their session if they have not performed one of the above actions within the 20-minute session timeout constraint.

Users are advised to occasionally use the <Save and Return> button as an alternate means of verifying that their session remains active and the system has saved their data. If the user selects the <Save and Return> button and the system does not take them back to the ConPlan/AAP menu, then the session may no longer be active or there may be a warning/error message that may have been overlooked. In addition, users should do the following to ensure that their sessions remain active:

- Confirm that they are saving their work at least every 15-20 minutes
- Click the <Save> button periodically and confirm that the system displays a message at the top of the screen indicating that the screen data was saved successfully. (If there is no message, the connection to the server has likely timed out and the data has not been saved)
- Verify that there is not a warning or error message displayed at the top of the screen (such as exceeding 4000 characters in a text box, or that a mandatory field is blank). These issues indicate that the screen data has NOT been saved, and the error must be corrected before the system can save their information.

If the system does not display a message of any kind at the top of the screen, then the system has NOT saved the screen data. The session may have timed out or the Web server may not be responding.

Is there a limit on the number of characters that can be entered? I have received repeated error messages when I enter narrative information.

This issue usually occurs when the response entered into a text box has exceeded the limit of 4,000 characters. Please note that this character limit includes white spaces, formatting marks such as new paragraphs,   and other hidden characters. Consequently, when copying text from an external MS Word document into the on-screen text box, users should be sure to use the <Paste-from-Word> control button above the on-screen text box. The use of this button ensures that the IDIS system reads the formatting features properly rather than inserting character symbols that may cause the text to exceed the character limit. The instructions on using "Paste-from- Word" are discussed in the Desk Guide under the "Narrative Fields" section, which is available at: https://www.hudexchange.info/resource/2641/econ-planning-suite-desk-guide-idis-conplan-action-plan-caper-per/

If the user determines that the narrative required for a particular response exceeds 4,000 characters, the user may add additional content to support the baseline information, such as text boxes and tables (see the section of the Desk Guide on Data Tables). Alternatively, the user may reference an attached report or appendix and import it as a PDF through the "Grantee Unique Appendices" section of screen AD-25. Only one file may be loaded, so grantees may

need to combine several files into a single PDF before uploading. Files are limited to 5 MB and can be in PDF format.

I have received one or more quality check warnings, when I attempt to complete and submit my plan, what should I do?

The quality check warnings are meant to assist users in determining if their plan is complete. While it is important to consult the quality check warnings, changes are not necessarily required. Plans may be submitted in IDIS, even if the quality check warnings are not cleared. Users should cross reference the cited regulations at the top of each screen to ensure they have provided all the required information. If a quality check warning is **incorrectly** stating that the plan is missing information, the user can proceed with finalizing and submitting the plan. Appendix A- Quality Check Errors and Warnings of the Desk Guide lists all the quality check error messages that may be generated and the reasons why they may be received.

I am not able to add organizations on the PR-10 Screen, what is the problem?

This problem occurs when a user attempts to enter an organization that already exists in the IDIS database as a subordinate or carrying-out organization. In order to avoid an error message, the user must enter these particular subrecipients with an alternate name. To make the names unique, the user can add "ESG" at the end of the subrecipients name, or simply add "-1" or "-2", for example.

The user can add a new entry to PR-10 in order to complete the list of organizations. To add additional organizations, the user should complete the following steps:
1. To select an organization for the PR-10 consultation table (question #2), click on <Select Organization> which brings the user to screen AD-60.
2. To search for an organization in AD-60, enter search criteria in the appropriate fields. The user can search by one or multiple criteria. A blank search will populate all organizations listed in the state.
3. After entering the search criteria, click <Search>.
4. If this search populates results, select the appropriate organization by clicking on the radio button to the left of the organization name and clicking <Select> at the top of the screen. This will add the organization to the table displayed in PR-10.
5. If no results are found, click <Add Organization> to add a new organization to the database.
6. After completing the fields in AD-65, click <Save and Return> which will return the user to screen AD-60. Search again for the organization just entered in screen AD-65.
7. Select the organization from the search by clicking on the radio button and clicking <select> at the top of the screen.

How can I amend my plan?

All amendments to the Consolidated Plan or Annual Action Plan must be entered into IDIS. Substantial amendments must be submitted to the Field Office for approval. Minor amendments must be submitted to the Field Office for their records and so that the status of the amended plan can be changed to "Review Completed". Only a grantee user can identify the type of plan amendment being made. The threshold for a Substantial Amendment should be

outlined in the grantee's Citizen Participation Plan. While there is no requirement for HUD to approve minor amendments, the Field Office must change the status of the Plan to "Review Completed" in order for the amendments to be reflected in the system-generated CAPER. Grantees should use the copy feature, as detailed below, to submit an amendment to the Consolidated Plan or Annual Action Plan.

To copy a Consolidated Plan or Annual Action Plan, please follow these steps:

1. Go to Plan/Projects/Activities in the Main Menu. In the Consolidated Plan or Action Plan sub-menu, click <Search>.

2. Click <Search> to bring up all existing Consolidated or Action Plans. Make note of the program year and version name for the plan to be copied (called the "Source Plan").

3. On the left-hand Consolidated or Action Plan sub-menu, click <Copy>.

4. In the copy screen, enter the Source Plan's Program Year and Version. The Source Plan is the plan that will be copied. Please note that the Version is case-sensitive.

5. Enter the Program Year and Version for the new copy of the plan. The combination of the Year and Version for the new plan must be different than any of the grantee's existing plans. Please note that once set on this screen, the version identifier cannot be modified. If the new copy is an amendment (Substantial or Minor) to the existing plan, the Program Year must be the same as the Source Plan Year.

6. Designate that the copy of the plan is an amendment and select either Minor or Substantial Amendment. When an amendment is indicated, the system will provide a dialog box for the grantee to describe the amendment.

7. Click the <Copy> button. The system will create a copy of the plan and display a list of all of the grantee's Action Plans. The title of the copied plan defaults to "AAP Copy." This can be changed on the AD-26 Administration screen.

8. Locate the new copy of the plan and click <Edit>.

9. Click on the link for the AD-26 Administration screen.

10. Update the plan's title.

11. If the copy is a Substantial Amendment, the screen will include a text box labeled "Explanation of Substantial Amendment Changes" immediately following the existing Substantial Amendment checkbox. The information provided in this text box will not appear on the printed version of the plan. The grantee can use this space to communicate to the Field Office a summary of the amendments made to the plan.

12. When finished editing the screen, click <Save and Return> to save any changes.

Once the amendment is complete and has been saved, it must be submitted to the Field Office for their records and/or approval. All plan amendments must be submitted to the field office.

Downloading a Word Version of the Plan

Are citizens able to access the system to view the plan for public comment?

The public will not be able to access IDIS to view Consolidated Plans. Grantees must download the plan as a Word document to post for public comment. This can be accomplished by clicking the <Download as a Word Document> button on the Menu screen. When plans are submitted and accepted in the system, HUD will also post a PDF of the plan on the HUD website.

Can a blank template be printed through IDIS?

Yes, a blank template of the plan can be printed by clicking on the <Download as a Word Document> button on the Consolidated Plan or Annual Action Plan Menu screen. Some of the screens are interactive (e.g. the Strategic Plan screens), so it is suggested that users refer to the screens in IDIS or the Desk Guide if there are questions about any of the tables as they appear on the blank template.

Before downloading the template, the user must open and save the NA-40 and MA-30 Homeless screens to ensure that the associated data tables appear in the downloaded template.

Does the system generate a new Word Document every time it's saved?

The system generates new a Word Document every time a user clicks the <Download as Word Document> button on the Consolidated Plan or Annual Action Plan Menu screen. The system will always produce the most up to date version of the plan, so if the user has saved changes to the plan they will be included when the plan is downloaded to Word.

Mailing Certifications and the SF-424

Can the Certifications and SF-424 be submitted to HUD in IDIS?

No, the Certifications and SF-424 require an original, wet signature, so they must be printed, signed and mailed to the HUD Field Office. The system allows grantees to upload their Certifications and SF-424 so that the documents can be kept in one place, but this does not fulfill the requirement to submit original signed copies of these forms. Note that the Plan cannot be considered complete without signed copies of the Certifications and SF-424.

The SF-424 is available at the following link: https://www.hudexchange.info/resource/306/hud-form-sf424 .

The Non-State Certifications are available at:
http://www.hud.gov/offices/cpd/about/conplan/pdf/conplancertifications.pdf .

The State Certifications are available at:
http://portal.hud.gov/hudportal/documents/huddoc?id=20393_conplanstatecerti.pdf .

May we scan a copy of the signed Certifications and SF-424 and send scanned copies instead of signed originals to HUD?

No, an original signed copy of the Certifications and SF-424 must be received by the HUD Field Office. At this time the requirement to submit these documents is not fulfilled by mailing or emailing scanned copies or uploading scanned images of the signed Certifications and SF-424 into IDIS.