



Con Plan Quick Guide
Creating a CAPER

For All Grantees

April 2016





The Con Plan Quick Guides are intended to 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 CAPER

Within 90 days after the program year, a jurisdiction is required to provide an annual report to HUD that summarizes its performance for the program year.

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.

All grantees (regardless of participation in a Consortium or Regional Strategy) must create and submit a CAPER through IDIS.

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.
- Accomplishment Data for Activities: Before generating the CAPER, update the accomplishment data for all open activities.

I. ADDING A NEW CAPER

1. Click “Add” in the CAPER submenu.





CR-00 - Administration

Save | Cancel

Program Year:*

Title:

Version:*

Save | Cancel

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

Program Year:*

3. Enter a Title. The title will appear on the cover and in the page heading of the printed report.
4. Enter a Version. The version is the CAPER's unique identifier This field cannot be edited once the CAPER is created.
5. Click the "Save" button.

Program Year:*

Title:

Version:*

Save | Cancel

6. Once saved, the CAPER's status is "Open-in Progress" and the grantee will be taken to the CAPER template in IDIS.



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)