

CON PLAN QUICK GUIDE



Creating a Consolidated Plan

For State and Entitlement 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](#).

CREATING A CONSOLIDATED 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.

When creating a new Consolidated Plan, grantees have two options, copying a previous plan or adding a new, blank template.

1. Copying a previous Consolidated Plan entered into IDIS: Copying a plan retains all information and narrative from the previous Consolidated Plan, but updates the data to the most current data in the eCon Planning Suite. Grantees will need to manually update all narrative to reflect current conditions.

When copying a plan, grantees are unable to change the CPD programs and the Public Housing Agencies included in the Consolidated Plan. **Do not use this option if including a new HUD program in the Consolidated Plan.**

2. Adding a new Consolidated Plan: Adding a new plan produces a completely blank template with the most current data in the eCon Planning Suite. Grantees will need to complete all narrative fields and tables.

When adding a plan, grantees are able to change the CPD programs and the Public Housing Agencies included in the Consolidated Plan. New entitlement grantees should follow the steps for Option 2.

CREATING A CONSOLIDATED PLAN FOR STATE AND ENTITLEMENT GRANTEES

I. CREATING A PLAN BY COPYING A PREVIOUS CONSOLIDATED PLAN

1. Click “Search” under the Consolidated Plan submenu.



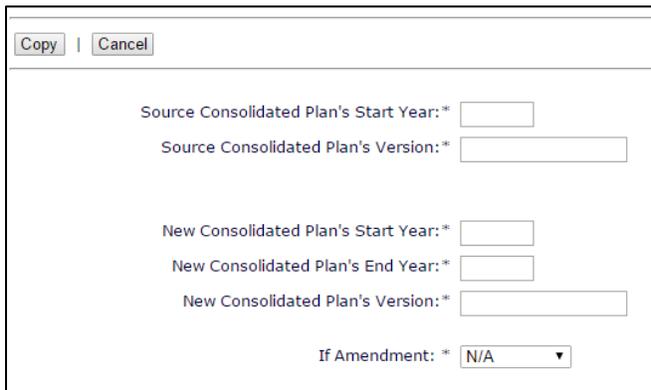
2. Make note of the Year and Version of the Plan to be copied.

Results Page 1 of 1							
Grantee Name	State	Year	Version	Title	Status	Action	
SAN ANTONIO	TX	2015	1	San Antonio Five Year Consolidated Plan 2015-2019	Review Completed	View	

3. Click “Copy” under the Consolidated Plan submenu.



4. Enter the Source Year and Version from the Plan to be copied (identified in Step 2). Enter the Start and End Year and Version for the new Plan. Do not indicate that the plan is an amendment. Once completed, click “Copy.”

A screenshot of a "Copy" dialog box. At the top left are "Copy" and "Cancel" buttons. The dialog contains several input fields: "Source Consolidated Plan's Start Year: *" with a text box, "Source Consolidated Plan's Version: *" with a text box, "New Consolidated Plan's Start Year: *" with a text box, "New Consolidated Plan's End Year: *" with a text box, "New Consolidated Plan's Version: *" with a text box, and "If Amendment: *" with a dropdown menu showing "N/A".

5. A copy of the Consolidated Plan has now been created. Locate the copied Consolidated Plan by clicking “Search” under the Consolidated Plan submenu.



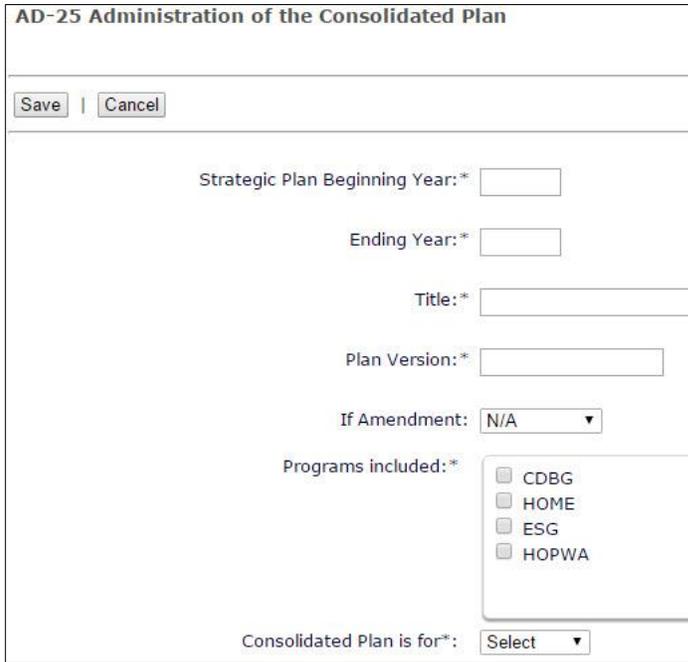
Results Page 1 of 1							
Grantee Name	State	Year	Version	Title	Status	Action	
BUFFALO	NY	2016	2016	ConPlan Copy	Open - in Progress	Edit View	
BUFFALO	NY	2013	2013_02	2013-2017_Amendment 1	Review Completed	View	
BUFFALO	NY	2013	2013	City of Buffalo 2013-2017 Consolidated Plan	Review Completed	View	

6. Grantees should update the title from “ConPlan Copy” on the AD-25 screen accessed by clicking “Edit” in the Action column for the corresponding Consolidated Plan.

CREATING A CONSOLIDATED PLAN FOR STATE AND ENTITLEMENT GRANTEES

II. CREATING A NEW PLAN BY ADDING A NEW CONSOLIDATED PLAN

1. Click “Add” under the Consolidated Plan submenu.

A screenshot of a web form titled 'AD-25 Administration of the Consolidated Plan'. At the top left, there are 'Save' and 'Cancel' buttons. The form contains several input fields: 'Strategic Plan Beginning Year: *' with a text box, 'Ending Year: *' with a text box, 'Title: *' with a text box, 'Plan Version: *' with a text box, and 'If Amendment: N/A' with a dropdown arrow. Below these is a section for 'Programs included: *' with four checkboxes: 'CDBG', 'HOME', 'ESG', and 'HOPWA'. At the bottom, there is a field 'Consolidated Plan is for: *' with a 'Select' dropdown arrow.

2. Enter the Strategic Plan Beginning Year and Ending Year. Enter the first program year of the Con Plan. This is the Federal fiscal year in which the plan begins. Enter the last program year of the Con Plan. This is the Federal fiscal year in which the last program year begins.
3. Enter a Title. HUD has not provided any guidance for the title. The title will be displayed on the on the cover and at the top of each page of the printed report. The title can be changed after the plan is created.
4. Enter the Plan Version. This field identifies different versions of a plan for the same Beginning Year. The version cannot be edited after the plan has been created.

CREATING A CONSOLIDATED PLAN FOR STATE AND ENTITLEMENT GRANTEES

5. Identify if the Plan is an Amendment. The default is n/a. When a Substantial Amendment is indicated, the system will provide a dialog box in which the user can explain the changes being made.

If Amendment:	N/A ▼
	N/A
	Minor
	Substantial

6. Ensure the programs included are correct. Grantees can change the default selection if it is incorrect. At least one selection must be indicated.

Programs included:*	<input checked="" type="checkbox"/> CDBG <input checked="" type="checkbox"/> HOME <input type="checkbox"/> ESG <input type="checkbox"/> HOPWA
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7. Select the Type of Plan. State and entitlement grantees will choose Grantee.

Consolidated Plan is for*:	Select ▼
	Select
	Grantee
	Consortia
	Regional

CREATING A CONSOLIDATED PLAN FOR STATE AND ENTITLEMENT GRANTEES

8. Click the “Select Public Housing Agency” button.

Select Public Housing Agency

The system will display a search screen. Search for the public housing agencies operating within the jurisdiction by agency name, code, or by clicking “Search” to see all the public housing agencies in the state. In the results, click the checkbox next to each public housing agency that operates within the jurisdiction and click the “Select” button.

- Grantees must select at least one PHA in order to create the Con Plan.
- States must select any PHA that administers public housing or Section 8 on a statewide basis and all PHAs that certify consistency with the state Consolidated Plan.

AD-15 Select Public Housing Agency

Select | Cancel

Search Criteria

Agency Name: Code:

Search | Reset

Name of Public Housing Agencies

Results Page of

Organization Name	Code	City, State/Territory
<input type="checkbox"/> 1260 Housing Development Corporation	PA889	PA
<input type="checkbox"/> ALLEGHENY COUNTY HOUSING AUTHORITY	PA006	PA
<input type="checkbox"/> ALTOONA HOUSING AUTHORITY	PA031	PA
<input type="checkbox"/> Adams County Housing Authority	PA091	PA
<input type="checkbox"/> Allentown Housing Authority	PA004	PA

9. When finished, click the “Save” button at the bottom of the screen to create the Consolidated Plan template. Locate the new Consolidated Plan by clicking “Search” under the Consolidated Plan submenu.