



Con Plan Quick Guide
**Creating a Year 2-5
Annual Action Plan**
For Consortia Grantees





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 2-5 YEAR ANNUAL ACTION PLAN – CONSORTIA GRANTEES

These instructions are for Consortia grantees. State/Entitlement grantees and Regional grantees should use the State/Entitlement and Regional grantee quick guides.

ONLY THE LEAD ENTITY CAN ADD THE YEAR 2-5 ANNUAL ACTION PLANS for ALL participating members in the Consortium.

When the Lead Entity creates the Action Plan template, it will automatically create Action Plan templates for each participating member.

Action Plans for years 2-5 are set up under the Action Plan submenu in IDIS. To add a new Action Plan, the Lead Entity can choose to either Copy the previous Action Plan or create a new Annual Action Plan.

1. Copying a previous Annual Action Plan entered into IDIS: Copying the Action Plan copies the source AAPs for all grantees 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.

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.

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

I. CREATING A NEW AAP BY COPYING A PREVIOUS AAP

**Only the Lead Entity can create a copy of the Annual Action Plan*

1. Click "Search" under the Action Plan submenu.





2. Make note of the program “Year” and “Version” name for the plan to be copied.

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



4. Enter the Source Action Plan’s Program Year and Version (identified in step 2). Enter the Program Year and Version for the new Plan. Do not indicate that the plan is an amendment. Once completed, click “Copy”.

Copy Annual Action Plan

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Source AAP Program Year: *

Source AAP Plan Version: *

New AAP Program Year: *

New AAP Plan Version: *

If Amendment: * ▼

5. The Action Plan has now been copied. Locate the copied Action Plan by clicking “Search” under the Action Plan submenu.

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Grantee Name	State	Year	Version	Title	Status	Action
SAN MATEO COUNTY	CA	2014	1	Year 2 Action Plan	Review Completed	View
SAN MATEO COUNTY	CA	2014	2	AAP Copy	Open - In Progress	Edit View
SOUTH SAN FRANCISCO	CA	2014	2	AAP Copy	Open - In Progress	View
SOUTH SAN FRANCISCO	CA	2014	1	Year 2 Action Plan	Review Completed	View



6. The Lead Entity can change the title from “AAP Copy” on the AD-26 Screen accessed by clicking “Edit” in the Action column for the corresponding Action Plan. This will change the title for all grantees.
7. Once all grantee Action Plans are complete, the Lead Entity will submit the Action Plans to HUD.

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

**Only the Lead Entity can add a new Annual Action Plan*

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



AD-26 Administration of the Annual Action Plan

Save | Cancel

AAP Program Year:*

AAP Title:*

AAP Plan Version:*

If Amendment: N/A ▼

Programs included:*
 CDBG
 HOME
 ESG
 HOPWA

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

Associate with ConPlan



2. Enter the AAP Program Year. This is the Federal fiscal year in which their program 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.
6. Ensure the programs included are correct. Edit the default selections as necessary.

Programs included:*

<input checked="" type="checkbox"/>	CDBG
<input checked="" type="checkbox"/>	HOME
<input type="checkbox"/>	ESG
<input type="checkbox"/>	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 associated Consolidated Plan and click the "Select" button at the top of the screen.



Select Consolidated Plan

Search

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Search Criteria

Year: All Years ▾ **Status:** Select ▾

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Select	Grantee Name	State	Year	Version	Title	Status
<input type="radio"/>	CHESTER COUNTY	PA	2013	1	Chester County Consolidated Plan	Review Completed
<input type="radio"/>	CHESTER COUNTY	PA	2014	1	SAMPLE	Open - in Progress
<input checked="" type="radio"/>	CHESTER COUNTY	PA	2013	2	ConPlan Copy	Open - in Progress

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 for the lead and participating grantees.