



*Con Plan Quick Guide*  
**Creating a Year 2-5  
Annual Action Plan**  
*For Regional 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 – REGIONAL GRANTEES

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

Action Plans for years 2-5 are set up under the Action Plan category in IDIS. To add a new Action Plan, Regional Plan grantees must Copy the previous Action Plan. All members (lead and participating) are responsible for creating their own Action Plan.

1. Copying a previous Action Plan entered into IDIS: Copying a plan copies all data from the source Action Plan 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.

If the Action Plan that is copied is associated with a Consolidated Plan in the system, the copy will be associated with the same plan. 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.**

### I. CREATING A NEW AAP BY COPYING A PREVIOUS AAP

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



2. Make note of the Program Year and Version name for the plan to be copied. Click "Copy" under the Action Plan submenu.





3. Enter the Source Action Plan’s Program Year and Version (identified in step 2). Enter the Program Year and Version for the new Action 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: \*

4. 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
BUFFALO	NY	2014	v1	Buffalo 2014 AAP	Review Completed	<a href="#">View</a>
BUFFALO	NY	2013	v.1	City of Buffalo 2013-14 Annual Action Plan	Open - In Progress	<a href="#">Edit</a>   <a href="#">View</a>
BUFFALO	NY	2016	v1	AAP Copy	Open - In Progress	<a href="#">Edit</a>   <a href="#">View</a>
BUFFALO	NY	2015	V1	Buffalo 2015 AAP	Review Completed	<a href="#">View</a>
BUFFALO	NY	2014	V1 Amendment	AAP Amendment V1	Open - In Progress	<a href="#">Edit</a>   <a href="#">View</a>

5. Grantees should change the title from “AAP Copy” on the AD-26 Screen accessed by clicking “Edit” in the Action column in the corresponding Action Plan.