



*Con Plan Quick Guide*

**Creating a Year 2-5  
Annual Action Plan**

*For State and Entitlement 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 YEAR 2-5 AAP – 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.

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

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

### I. CREATING AN 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.
3. Click "Copy" under the Action Plan submenu.



**Annual Action Plans**  
 - Add  
 - Copy  
 - Search

4. 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**

Copy | Cancel

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.

Search | Reset

Results Page 1 of 1

Grantee Name	State	Year	Version	Title	Status	Action
BUFFALO	NY	2014	v1	Buffalo 2014 AAP	Review Completed	View
BUFFALO	NY	2013	v.1	City of Buffalo 2013-14 Annual Action Plan	Open - In Progress	Edit   View
BUFFALO	NY	2016	v1	AAP Copy	Open - In Progress	Edit   View
BUFFALO	NY	2015	V1	Buffalo 2015 AAP	Review Completed	View
BUFFALO	NY	2014	V1 Amendment	AAP Amendment V1	Open - In Progress	Edit   View

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



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

1. Click “Add” under the Consolidated 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 year 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 ▼
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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 appropriate Consolidated Plan and click the "Select" button at the top of the screen.



**Select Consolidated Plan**

Search

|

**Search Criteria**

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

|

**Results Page 1 of 1**

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.