CON PLAN QUICK GUIDE

# Creating a Year 2-5 Annual Action Plan

## For Consortia Grantees

*April 2020*

# 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 YEAR 2-5 ANNUAL ACTION PLAN

## For *Consortia* Grantees

These instructions are for consortia grantees. State/entitlement and regional grantees and 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 copy's 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.

   If the Action Plan that is copies 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.
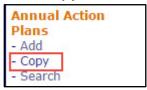
   **The system will automatically copy previous year projects without updating the project year. Grantees should remove previous year projects and create new projects for the new Action Plan.**

2. Adding a new Annual Action Plan: Adding a new plan produces a blank template 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 "Copy" under the Action Plan submenu.**

    Annual Action
    Plans
    - Add
    - Copy
    - Search

2.  **Click the "Select Source AAP" button.**

    **Copy Annual Action Plan**

    Copy | Cancel

    Source Plan: Select Source AAP

    Source AAP Program Year:*

    Source AAP Plan Version:*

    New AAP Program Year:*

    New AAP Plan Version:*

3.  The system will display a search screen. Click the "Search" button to locate the source plan to be copied, and then click the "Select" link in the "Action" column. Only one Annual Action Plan for each program year will be available. A plan will be displayed for selection only if it has a status of "Review Completed" and is associated with the "official" Consolidated Plan.

| Grantee Name | State | Year | Version | Title | Status | Action |
|---|---|---|---|---|---|---|
| GILBERT | AZ | 2019 | Version 1 | 2019 Annual Action Plan | Review Completed | View |
| GLENDALE | AZ | 2019 | Version 1 | 2019 Annual Action Plan | Review Completed | View |
| GLENDALE | AZ | 2018 | Version 1 | 2018-2019 Annual Action Plan | Review Completed | View |
| GLENDALE | AZ | 2017 | Amendment | 2017-2018 Annual Action Plan Amendment 1 | Review Completed | View |
| GLENDALE | AZ | 2017 | Version 1 | 2017-2018 Annual Action Plan | Review Completed | View |
| GLENDALE | AZ | 2016 | v1 | Test Do Not Enter Data | Open - in Progress | View |
| GLENDALE | AZ | 2016 | Version 1 | 2016-2017 Annual Action Plan | Review Completed | View |
| GLENDALE | AZ | 2018 | Amendment 1 | 2018 Action Plan - Amendment 1 | Review Completed | View |
| MARICOPA COUNTY | AZ | 2019 | Version 1 | 2019 Annual Action Plan | Review Completed | Amend \| View |
| MARICOPA COUNTY | AZ | 2016 | Version 1 | 2016-2017 Annual Action Plan | Review Completed | Amend \| View |

4. **Enter the new AAP program year and plan version. Click the "Copy" button.**

Source Plan: [Select Source AAP]

Source AAP Program Year:* 2015

Source AAP Plan Version:* Amendment 2

New AAP Program Year:* [          ]

New AAP Plan Version:* [          ]

Housing Trust Fund Subgrantee: No ▼

[Copy] | [Cancel]

5.  **Select whether any participating grantees are a Housing Trust Fund subgrantee, and then click "Copy."**

**Copy Annual Action Plan - page 2**

Copy | Cancel

Housing Trust Fund Subgrantee: No ▼

**Grantee(s) participating in the plan:**

| Name | City/State | DUNS | TIN | HTF Subgrantee |
|---|---|---|---|---|
| CHANDLER | Chandler, AZ | 07-752-4981 | 86-6000238 | ☐ |
| GLENDALE | Glendale, AZ | 07-752-3579 | 86-6000247 | ☐ |
| PEORIA | Peoria, AZ | 00-249-4128 | 86-6003634 | ☐ |
| TEMPE | Tempe, AZ | 07-446-6814 | 86-6000262 | ☐ |
| SCOTTSDALE | Scottsdale, AZ | 08-446-5238 | 86-6000735 | ☐ |
| GILBERT | Gilbert, AZ | 14-267-2570 | 86-6000246 | ☐ |
| AVONDALE | Avondale, AZ | 00-248-6884 | 86-6000233 | ☐ |
| SURPRISE | Surprise, AZ | 02-164-8936 | 86-6007796 | ☐ |

6.  **The new plan has been created and will appear on the Search Annual Action Plans screen. The default title of the plan appears as "AAP Copy." Grantees should update the title on the AD-26 Administration screen.**

| Grantee Name | State | Year | Version | Title | Status | Action |
|---|---|---|---|---|---|---|
| GLENDALE | AZ | 2016 | Version 1 | 2016-2017 Annual Action Plan | Review Completed | View |
| GLENDALE | AZ | 2018 | Amendment 1 | 2018 Action Plan - Amendment 1 | Review Completed | View |
| MARICOPA COUNTY | AZ | 2019 | Version 1 | 2019 Annual Action Plan | Review Completed | Amend \| View |
| MARICOPA COUNTY | AZ | 2018 | Version 1 | 2018-2019 Annual Action Plan | Review Completed | View |
| MARICOPA COUNTY | AZ | 2018 | Amendment 1 | 2018 Action Plan - Amendment 1 | Review Completed | Amend \| View |
| MARICOPA COUNTY | AZ | 2016 | v1 | Test Do Not Enter Data | Open - in Progress | View |
| MARICOPA COUNTY | AZ | 2017 | Version 1 | 2017-2018 Annual Action Plan | Review Completed | Amend \| View |
| MARICOPA COUNTY | AZ | 2016 | Version 1 | 2016-2017 Annual Action Plan | Review Completed | Amend \| View |
| MARICOPA COUNTY | AZ | 2017 | Amendment | 2017-2018 Annual Action Plan Amendment 1 | Review Completed | View |
| MARICOPA COUNTY | AZ | 2021 | 1 | AAP Copy | Open - in Progress | Edit \| View |

7.  **The Lead Entity should change the title from "AAP Copy" on the AD-26 Screen, which can be accessed by clicking "Edit" in the Action column for the corresponding Action Plan. This will change the title for all grantees.**

8.  **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

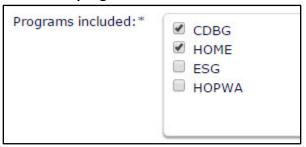*Only the Lead Entity can add a new Annual Action Plan*

1.  **Click "Add" under the Annual Action Plan submenu.**



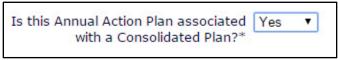2.  **Enter the AAP program year. This is the federal fiscal year in which their program begins.**

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.**

## 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

Housing Trust Fund Subgrantee: No ▼

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

Associate with ConPlan

6. **Ensure the programs included are correct. Edit the default selections as necessary.**
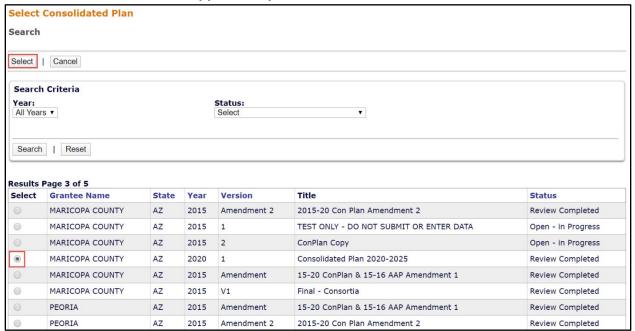


7. **Indicate that the Action Plan is associated with a Consolidated Plan by selecting "Yes" from the dropdown menu.**



8. **Click the "Associate with ConPlan" button.**



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. However, it is a best practice to make sure the selected Consolidated Plan has been approved by HUD.**

**Select Consolidated Plan**

**Search**

Select | Cancel

**Search Criteria**

**Year:**
All Years ▾

**Status:**
Select ▾

Search | Reset

**Results Page 3 of 5**

| Select | Grantee Name | State | Year | Version | Title | Status |
|--------|--------------|-------|------|---------|-------|--------|
| ○ | MARICOPA COUNTY | AZ | 2015 | Amendment 2 | 2015-20 Con Plan Amendment 2 | Review Completed |
| ○ | MARICOPA COUNTY | AZ | 2015 | 1 | TEST ONLY - DO NOT SUBMIT OR ENTER DATA | Open - in Progress |
| ○ | MARICOPA COUNTY | AZ | 2015 | 2 | ConPlan Copy | Open - in Progress |
| ● | MARICOPA COUNTY | AZ | 2020 | 1 | Consolidated Plan 2020-2025 | Review Completed |
| ○ | MARICOPA COUNTY | AZ | 2015 | Amendment | 15-20 ConPlan & 15-16 AAP Amendment 1 | Review Completed |
| ○ | MARICOPA COUNTY | AZ | 2015 | V1 | Final - Consortia | Review Completed |
| ○ | PEORIA | AZ | 2015 | Amendment | 15-20 ConPlan & 15-16 AAP Amendment 1 | Review Completed |
| ○ | PEORIA | AZ | 2015 | Amendment 2 | 2015-20 Con Plan Amendment 2 | Review Completed |

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.