

# CPMP User Manual

This CPMP User Manual has been created to provide instruction on using the CPMP tool. You will be shown how to navigate to the different parts of the tool and use it to create Consolidated Plan material submissions. The manual, like the tool itself, is divided into the steps you need to follow.

- **Download the CPMP Tool**
- **Understand the Parts of the Tool - Organization of the Tool**
- **Step 1: Initialize the CPMP for the Grantee Program**
- **Step 2: Create the Strategic Plan**
- **Step 3: Create the first Program Year Action Plan**
- **Step 4: Create the first Program Year CAPER**
- **Step 5: Repeat Steps 3 and 4 for Subsequent Program Years**
- **Submission Instructions**

## CPMP Navigation

To navigate the CPMP, links and buttons have been created. Since at times, you are taken to another worksheet or document, you may also click the "Back Arrow" button on your toolbar to return to the document you came from.

[Example Link](#)

**Clickable Links.** Blue underlined text indicates a link. You may be taken to another place in the document, or another document completely.



**Custom Buttons.** Clicking on buttons will also take you to another place in the document, or another document completely.



**Microsoft Back Button.** You need to have your "Web" toolbar displayed in order to see the Back button. Both MS Excel and MS Word have Back Arrows on their Web Toolbars.

## Downloading the CPMP Tool

To download the CPMP tool, you need to have compatible zip software to uncompress the CPMP files. We recommend WinZip, which is included with Windows XP. If you do not have WinZip, you may download the latest version from the [WinZip Website](#) for free.

Follow WinZip's instructions to install the software. There are other zip programs available on the Internet that you may prefer to use. Several are available as freeware. Once your Zip software is functioning you may then proceed with downloading the tool.

The reason for zipping the tool is two-fold. First, the tool contains 16 different files. A zip utility allows HUD to package these files into one convenient download rather than 16 separate ones. Second, compressed via the zip package the total filesize for the download is less than 800K. Taken separately these files total more than 3 MB. The amount of time spent downloading will be appreciably less.

### Downloading the Tool:

1. Click the **CPMP Tool - Zip file** link on the **Consolidated Plan Management Process (CPMP) Tool** page.

2. In the File Download dialog box, choose the **Save** option.

3. Click the **Save In:** Drop-down arrow to navigate to the location in your directory structure that you would like to save the tool in. Some people like to save files to the Desktop, others put it in the "Downloaded Programs" file or wherever you are comfortable and can remember where it is.

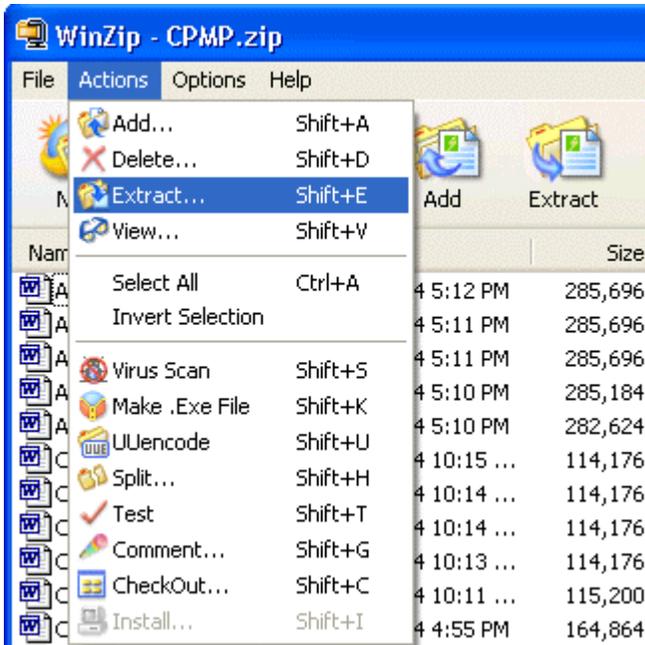
4. Click the **Save** button.

5. When the download is complete, click the **Open** button.

### Unzipping the Tool:

1. Depending on your preferences, WinZip will open either the WinZip Wizard or the WinZip Classic interface. If the Wizard opens, click the **WinZip Classic** button.



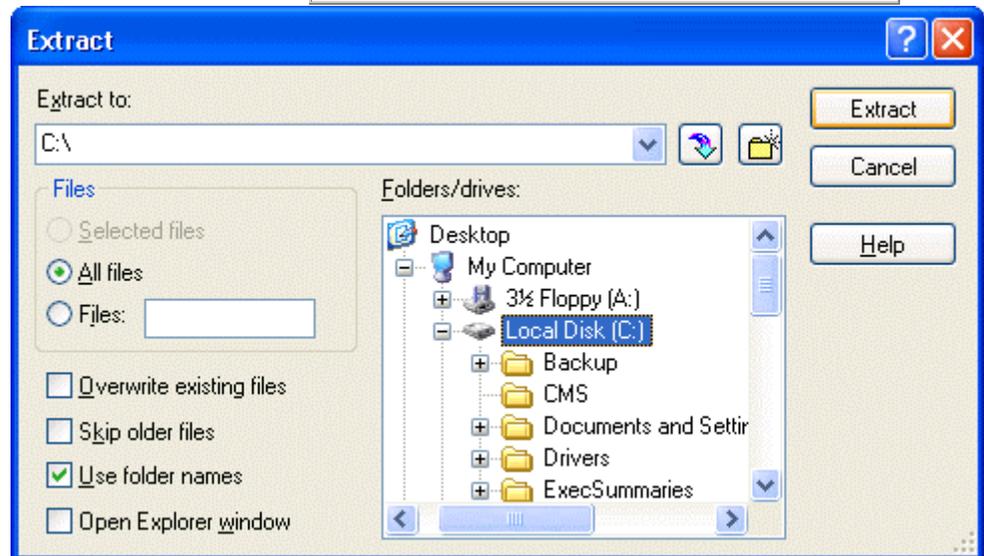


2. In WinZip Classic, click the **Actions** menu; then the **Extract** option.

3. Use the **Folders/drives**: window to navigate to where you want to house your copy of the CPMP.

**Note:** WinZip will automatically create a CPMP folder for you when you extract the files. For proper functionality, we recommend housing the CPMP tool on your Hard Drive.

4. When the correct location appears as the **Extract to:** option, click the **Extract** button. WinZip will extract the files to the location you've chosen.



**Note:** You do not have to use all of the files in the CPMP tool; you can pick and chose from files you may find helpful. Be aware though, that the files are linked together and if you delete any of them from the CPMP directory, you will lose full functionality.

### Opening the Tool:

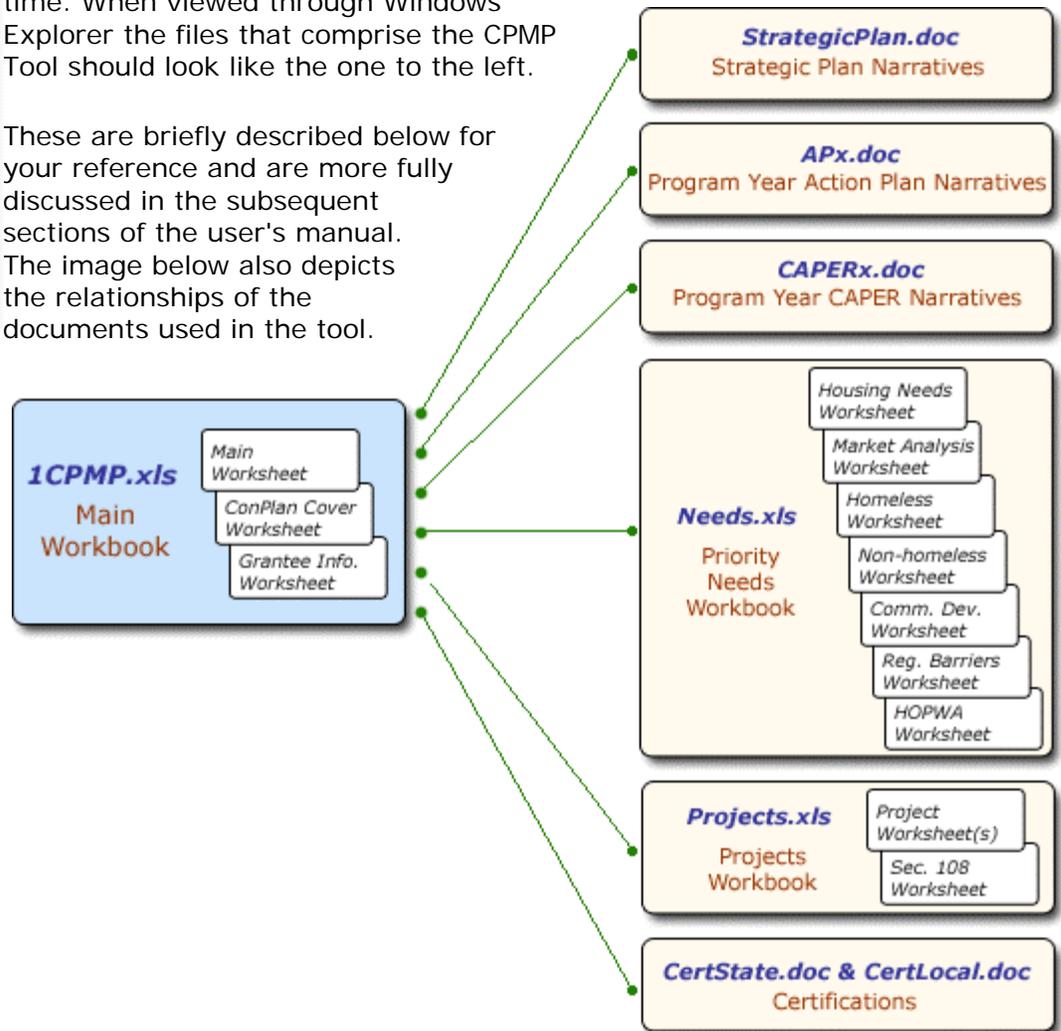
1. Use Windows Explorer to navigate to your copy of CPMP on your hard drive.
2. Double-click **1CPMP.xls** to begin using the CPMP tool.

## CPMP Organization



This CPMP tool has been created using Microsoft Excel and Microsoft Word. You'll need these applications in order to use the tool to create Consolidated Plan material submissions. The tool is comprised of 16 different files. Take a deep breath and relax. You will not be working with more than a few files at any given time. Also, you don't need to sit down and complete any given part of the tool in one sitting. That would be nearly impossible. It would be easier to work one part at a time. When viewed through Windows Explorer the files that comprise the CPMP Tool should look like the one to the left.

These are briefly described below for your reference and are more fully discussed in the subsequent sections of the user's manual. The image below also depicts the relationships of the documents used in the tool.



## 1CPMP.xls

1. **CPMP Main Worksheet** - This worksheet is used to navigate through the CPMP. By following the steps through this worksheet, you will be linked to all of the other Tool documents appropriately.
2. **ConPlan Cover Worksheet** - Completing this worksheet allows you to create the Consolidated Plan cover page. Some of the information you fill out on this page is automatically copied to other Tool documents.
3. **Grantee Info Worksheet** - Completing the Grantee Information form will copy this information in key places in the other documents. Using the CPMP, you need to complete the Grantee information only one time.

## StrategicPlan.doc

Step 2 of the CPMP leads you through creating the Strategic Plan. By clicking on each of the links for the different categories (General, Housing, Community Development, Homeless, Non-Homeless Special Needs), you are brought directly to the Strategic Plan document to complete the appropriate narratives.

## ActionPlans and CAPERs

Action Plans (Step 3) and CAPERs (Step 4) are linked in the same fashion as the Strategic Plan document. By clicking the links for the different categories, you are brought directly to the applicable Action Plan or CAPER document to complete the appropriate narratives.

## Needs.xls

All needs tables are included in the CPMP Tool. The Needs.xls workbook contains worksheets for each table.

Needs Table	Worksheet Name
Housing Needs Table	HSGNeed
Housing Market Analysis	HSGMarketAnalysis
Continuum of Care Homeless Population and Subpopulations Chart	Homeless
Non-Homeless Special Needs (Including HOPWA); Community Development Needs	NonHomeless CommunityDev
Questionnaire for HUD's Initiative on Removal of Regulatory Barriers	RegBarriers
HOPWA Performance Chart	HOPWA

You may reach these worksheets by clicking the appropriate buttons in 1CPMP.xls. The buttons are placed next to the narrative links tables.

## Projects.xls

This workbook contains all of the information previously provided in HUD's Community 2020 software Table 3 "List of Projects."

1. **Projects Worksheet** allows you to create a sheet for each project. This worksheet has key information and project descriptions, in addition to linking the project to the grantee's needs and goals. This list could then be used as reference to manually input projects into IDIS. You may document information about multiple projects. The New Project button lets you create worksheets for an additional projects.
2. **Section 108 Projects** This separate worksheet is for Section 108 projects.

## Certifications

There are two Word documents in the CPMP tool which you may use to create your certifications:

1. **CertLocal.doc**
2. **CertState.doc**

Both of these documents may be accessed by clicking buttons on 1CPMP.xls.

## Step 1: Initialize the CPMP for the Grantee Program

### Task 1: To Open the CPMP Main Worksheet:

1. Navigate to the **CPMP directory** on your computer.
2. Double-Click on the file called **1CPMP.xls**.  
MS Excel will launch and a message box will appear asking if you want to Enable Macros. Click **Yes**.

**Note:** While on most occasions, you want to disable most Macros because that is how viruses are perpetuated, for this application, the Macros are what give the tool life and help you to save time by prefilling certain elements.

3. You will be brought to the beginning of the **CPMP Main Worksheet** in the CPMP tool.
4. Click on the **Step 1** link. You will be brought to the **Step 1** section of the tool.



### Task 2: To Complete the Consolidated Plan Cover Worksheet:

1. Click on the **ConPlan Cover** button. You will be brought to the **Consolidated Plan Cover Worksheet**.

**Step 1: Initialize the CPMP Tool**

**Step 1 Tasks**

- 1. Create the Consolidated Plan Cover**
- 2. Complete the Grantee Information form**

**1. Create the Consolidated Plan Cover.** Complete the Consolidated Plan Cover page information on the Conplan Cover Worksheet in this workbook.

**2. Complete the Grantee Information.** Complete the Grantee Information Worksheet in this workbook.

Conplan Cover

Grantee Information

2. Complete the relevant information. All necessary fields that are colored light blue should be filled in with the appropriate information. Drop-down lists have been provided for certain standard information.

Consolidated Plan Management Process  
CPMP

Conplan Cover Sheet

**Jurisdiction** Alabama

**Consolidated Plan**

Strategic Plan for Years 2004 to 2009

Annual Action Plan and Consolidated Annual Performance and Evaluation Report

Presented to the U.S. Department of Housing and Urban Development

Albuquerque Field Office of Community Planning and Development

Strategic Plan Submission Date MM/DD/YY

**Note:** Certain fields in this worksheet are linked to other documents in the tool. By failing to fill in some fields, your personalized information may not be passed on to other tool documents.

3. Scroll down to the bottom of the worksheet and click on the **CPMP Main Worksheet** button. You will be returned to the **Step 1** section of the tool.



**Task 3: Complete the Grantee Information Worksheet:**

1. Click on the **Grantee Information** button. You will be brought to the **Grantee Information Worksheet**.
2. Complete the relevant information. All necessary fields that are colored light blue should be filled in with the appropriate information. Drop-down lists have been provided for certain standard information.

**Note:** Certain fields in this worksheet are linked to other documents in the tool. By failing to fill in certain information, you may encounter default values where you need a customized value.

3. Scroll down to the bottom of the worksheet and click on the **CPMP Main Worksheet** button. You will be returned to the **Step 1** section of the tool.
4. Choose "**File**" and select "**Save**". Or you may simply click on the diskette icon in your Word/Excel Toolbar. Please remember to save your work frequently. There is nothing more annoying than completing a bunch of fields only to lose your work. By saving frequently you minimize the amount of data that can be lost if something bad happens.



#### Task 4: Go to Step 2:

1. Click on the **Go to Step 2** button.

## Step 2: Create Your Strategic Plan

#### Task 1: To Go To Step 2:

1. If you already have **1CPMP.xls** open, skip to **Task 2**.
2. Open **1CPMP.xls**.
3. Click on the **Step 2** link. You will be brought to the **Step 2** section of the tool. You may also click on the **Go To Step 2** button if you are at a place where you can see it on your screen.



#### Task 2: To Create the Strategic Plan Document:

Complete the narratives for the **General** section of the Strategic Plan:

1. In the **Year 1** column of the table, click on the **Go to Narratives** link in the **General** row. You will be brought to the General section of the Strategic Plan document (**StrategicPlan.doc**).
2. The Strategic Plan document contains all of the Strategic Plan questions that are required by regulations. A fillable field follows each of the questions. Your cursor will be placed in the answer field for the first General question. *Complete all of the questions in this section unless they are marked Optional.*

### Step 2: Create Your Strategic Plan

**Step 2 Tasks**

1. Create the Strategic Plan document.
2. Complete the Needs Worksheets.

**1. Create the Strategic Plan Document.** Click on the narratives link that corresponds to the category for the Strategic Plan. You will be forwarded directly to the relevant questions in the Strategic Plan document.

CATEGORY	Year 1 Strategic Plan
GENERAL	<a href="#">Go to Narratives</a>
HOUSING	<a href="#">Go to Narratives</a>

**2. Complete the Needs Worksheets.** Complete the information in the Needs Workbook for the Strategic Plan. Click on the appropriate buttons below to open the indicated Worksheet:

Housing Market Analysis

Priority Housing Needs Worksheet

*Complete all of the questions in this section unless they are marked Optional.*

## GENERAL

### Executive Summary

The Executive Summary is optional, but encouraged. If you please provide a brief overview that includes major initiatives proposed throughout the 3-5 year strategic planning period.

3-5 Year Strategic Plan Executive Summary:

**Note:** You may copy information into the answer field from another source if necessary.

3. Choose "File" and select "Save". Or you may simply click on the diskette icon in your Word/Excel Toolbar. Please remember to save your work frequently.
4. From the Strategic Plan in MS Word, click on the **Microsoft Back** button on your toolbar. You will be returned to the **Step 2** section of the tool.



 **Note:** You must have your "Web" toolbar displayed to see the Microsoft Back button.

*Complete the narratives for the **Housing** section of the Strategic Plan:*

4. As you did before for the **General** section, click on the **Go To Narratives** link in the **Housing** row of the first column of the table.
5. Your cursor will be placed in the answer field for the first **Housing** question. *Complete all of the questions in this section unless they are marked **Optional**.*
6. From the Strategic Plan in MS Word, click on the **Microsoft Back** button on your toolbar. You will be returned to the Step 2 section of the tool.

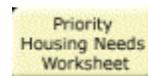
*Complete the remaining narratives of the Strategic Plan:*

7. Repeat this process until you have addressed each of the remaining sections of the Strategic Plan - Homeless, Community Development, Non-Homeless Special Needs. When you have answered the questions for all of these sections, you will have completed the narrative portion of the Strategic Plan.

**Note:** Remember to save your CPMP Documents frequently! You will most likely be updating them again later.

### Task 3: To Complete the Needs Worksheets:

1. While you are completing the narratives, you may complete the applicable Needs tables. In the **Housing** row, click on the **Priority Housing Needs Worksheet** button. You will be brought to the **HSGNeeds** worksheet in **Needs.xls**.
2. Complete the relevant information. All necessary fields that are colored blue should be filled in with the appropriate information.



- Click on the **Microsoft Back** button on your Microsoft Excel toolbar. You will be returned to the **Step 2** section of the tool in **1CPMP.xls**.

Housing Needs Table		Grantee: Jurisdic			
		Only complete blue sect			
Housing Needs		Current % of People	Current Number of People	Year 1	
				Goal	Actual
0% MFI	A. Elderly	2. NUMBER OF PEOPLE	100%		
		3. Any housing problems		0	
		4. Cost Burden > 30%		0	
		5. Cost Burden >50%		0	

**Please Note:** It is not expected that all elements of any "Needs Table" be completed with any single submission. Rather the tables have been constructed to grow as the length of participation with the Formula Grant Programs continues. The graphic below indicates the elements that pertain to identifying needs for purposes of the Strategic Plan.

Housing Needs		Current % of People	Current Number of People
2. NUMBER OF PEOPLE		100%	
3. Any housing problems			0
4. Cost Burden > 30%			0
5. Cost Burden >50%			0
2. NUMBER OF PEOPLE		100%	
3. Any housing problems			0
4. Cost Burden > 30%			0
5. Cost Burden >50%			0
2. NUMBER OF PEOPLE		100%	

#### Task 4: Go to Step 3:

- Click on the **Go to Step 3** button.

## Step 3: Create Your First Action Plan

#### Task 1: To Open the CPMP Main Worksheet:

- If you have **1CPMP.xls** already open, skip to **Task 2**.
- Navigate to the **CPMP** directory on your computer.
- Double-Click on the file called **1CPMP.xls**.  
MS Excel will launch and a message box will appear asking if you want to Enable Macros. Click **Yes**.
- You will be brought to the beginning of the **CPMP Main Worksheet** in the **CPMP** tool.



- Click on the **Step 3** link. You will be brought to the **Step 3** section of the tool.

**Task 2: Create the Action Plan Document**

Respond to narrative questions to build the **First Program Year Action Plan (AP1.doc)**. You can get to these questions and the location to fill in the answer by clicking the appropriate links on the **CPMP Main Worksheet**.

Complete the narratives for the **SF 424** section of the Action Plan document:

- In the **Year 1** column of the **Step 3** table, click the **Go to 424** link in the **Year 1 Action Plan** row. You will be brought to the **SF 424** section of the **First Program Year Action Plan** document (**AP1.doc**).

### Step 3: Create Your Action Plan

**Step 3 Tasks**

1. Create the Action Plan document.
2. Update the Needs Worksheets.
3. Create your Projects.
4. Create your Certification Documents.
5. Submit the CPMP to HUD.

**1. Create the Action Plan Document.** Click on the narratives link that corresponds to the category and year for the Action Plan you are working on. You will be forwarded directly to the relevant questions in the specific Action Plan document.

Category	Year 1 Action Plan	Year 2 Action Plan	Year 3 Action Plan	Year 4 Action Plan	Year 5 Action Plan
SF 424	<a href="#">Go to 424</a>				

- The **Action Plan** document contains the **SF 424** information and all of the Action Plan questions that are required by regulations. Your cursor will be placed in the answer field for the first fillable field in the **SF 424** section. The gray fields are to be completed in this section. Complete all of the applicable information in the tables.

## First Program Year Action Plan

The CPMP First Annual Action Plan includes the SF 424 and Narrative Responses to Action Plan questions that CDBG, HOME, HOPWA, and ESG grantees must respond to each year in order to be compliant with the Consolidated Planning Regulations. The Executive Summary narratives are optional.

SF 424

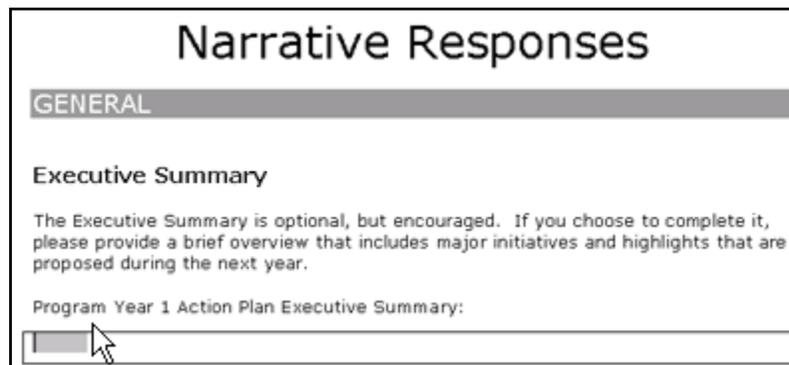
Applicant Identifier		Type of Submission	
Date Submitted	State Identifier	Application	Pre-application
Date Received by state	Federal Identifier	<input type="checkbox"/> Construction	<input type="checkbox"/> Construction
Date Received by HUD		<input type="checkbox"/> Non Construction	<input type="checkbox"/> Non Construction

**Note:** Some of the information in the **SF 424** section will be prefilled from the **Grantee Information Worksheet**.

- When you are finished, click on the **Microsoft Back** button on your MS Word toolbar. You will be returned to the **Step 3** section of the **1CPMP.xls**.

 **Note:** You must have your "Web" toolbar displayed to see the Microsoft Back button.

- Complete the narratives for the **General** section of the **Action Plan**:  
In the **Year 1** column of the **Step 3** table, click on the **Go To Narratives** link in the **General** row.
- Your cursor will be placed in the answer field for the first **General** question. Complete all of the questions in this section unless they are marked **Optional**.



**Narrative Responses**

**GENERAL**

**Executive Summary**

The Executive Summary is optional, but encouraged. If you choose to complete it, please provide a brief overview that includes major initiatives and highlights that are proposed during the next year.

Program Year 1 Action Plan Executive Summary:

- Click on the **Microsoft Back** button on your toolbar. You will be returned to the **Step 3** section of the tool.

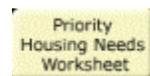
Complete the remaining narratives of the **Action Plan**:

- Repeat this process until you have addressed each of the remaining sections of the **First Program Year Action Plan** - Housing, Homeless, Community Development, Non-Homeless Special Needs. When you have answered the questions for all of these sections, you will have completed the narrative portion of the Action Plan.
- Choose "File" and select "Save". Or you may simply click on the diskette icon in your Word/Excel Toolbar. Please remember to save your work frequently.



### Task 3: To Update the Needs Worksheets:

- While you are completing the Action Plan narratives, you may update the applicable Needs tables. In the **Housing** row, click on the **Priority Housing Needs Worksheet** button. You will be brought to the **HSGNeeds worksheet** in **Needs.xls**.
- Complete the necessary information for this worksheet.

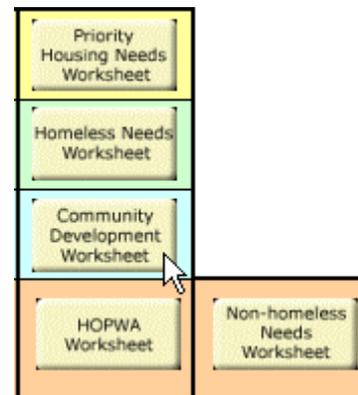


Housing Needs Table		Grantee: <b>Jurisdic</b>				
		<b>Only complete blue sect</b>				
U% MF	A. Elderly	Housing Needs	Current % of People	Current Number of People	Year 1	
					Goal	Actual
		2. NUMBER OF PEOPLE	100%			
		3. Any housing problems		0		
		4. Cost Burden > 30%		0		
		5. Cost Burden >50%		0		

**Please Note:** It is not expected that all elements of any "Needs Table" be completed with any single submission. Rather the tables have been constructed to grow as the length of participation with the Formula Grant Programs continues. Thus, as the graphic below indicates, these are the "Action Plan Columns". The "Goal" for Year 1 will be completed the first time the Grantee uses the tool. Next year, for purposes of the Action Plan, the Year 2 data will be added and so on.

3-5 Year Quantities													
	Year 1		Year 2		Year 3		Year 4*		Year 5*		Cumulative	% of Goal	
	Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual			Goal
											0	0	####
											0	0	####
											0	0	####
											0	0	####
											0	0	####
											0	0	####

3. Click on the **Microsoft Back** button on your Microsoft Excel toolbar. You will be returned to the **Step 3** section of the tool in **1CPMP.xls**.
4. Click on the button for the next Needs table you wish to update. You will be brought to the appropriate table in the **Needs.xls** document.
5. Repeat these steps until you have updated all of the necessary Needs tables.



**Note:** Remember to save your CPMP Documents frequently!

Ta

**sk 4: Create Your Projects.**

This workbook performs the functions formerly known as "Table 3", project-level information. The departure from the old Table 3 to the new "Projects" workbook is that a project may live for one or more years. You need not necessarily go back next year to redefine the same project, you can simply enter data for that program year.

1. From **1CPMP.xls**, click the **Projects Workbook** button.

**3. Create your projects.** Use the Projects Workbook to add your Project information to the Action Plan (formerly Table 3: Listing of Proposed Projects).

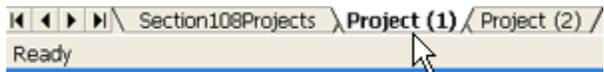


**4. Create your Certification Documents.** Use the appropriate document for your certification.

- MS Excel will launch and a message box will appear asking if you want to Enable Macros. Click **Yes**.
- You will be brought to the **Project(1)** worksheet in **Projects.xls**.

<b>New Project</b>		Grantee Name: <b>Jurisdiction</b>	
Project Name:			
Description:	IDIS Project #:	UOG Code:	UOG Code
<b>Location:</b> Enter location, address, zip codes, census tracts or other elements that will help to identify the location of the project		<b>Priority Need Category</b> Select one: Priority Need Category	
		Explanation:	

- Complete the necessary information on this worksheet.
- You may create multiple projects if necessary. When you have completed the first project, click the **New Project** button at the top of the worksheet. A new blank project will be created on the "Project (2)" worksheet. The project you previously created is accessible by clicking on the "Project (1)" tab.



- In **Projects.xls** there is a **Section 108 Projects** worksheet. If you have Section 108 projects to report on, you may click on the **Section 108 Projects** tab in Excel while you are in **Projects.xls**. If you are in **1CPMP.xls**, click on the **Section 108 Report Worksheet** button next to the **Projects Workbook** button.

Section 108 Projects Worksheet					Grantee Name	
PROJECT DESCRIPTION						
Grantee Name	ST	Section 108 Project Number	Project Name	EDI or BEDI Grant Number (if applicable)	108 Loan Amount	108 Amount Advanced Through 1/31/04
BIRMINGHAM	AL	B-01-MC-01-0002			400,000	400,000
MOBILE	AL	B-01-MC-01-0006			1,275,000	350,000
LITTLE ROCK	AR	B-37-MC-05-0004		B-00-BD-00-0000	3,000,000	1,240,000

**Note:** Remember to save your CPMP Documents frequently!

- When you have finished updating and creating your projects, click on the **Microsoft Back** button on your Microsoft Excel toolbar. You will be returned to the **Step 3** section of the tool in **1CPMP.xls**.

**Task 5: Create Your Certification Documents.**

1. From **1CPMP.xls**, click the **Local Certifications** button or the **State Certifications** button. You will be brought to the selected document (**CertLocal.doc** or **CertState.doc**).

**3. Create your projects.** Use the Projects Workbook to add your Project information to the Action Plan (formerly Table 3: Listing of Proposed Projects).

**4. Create your Certification Documents.** Use the appropriate document for your certification.

2. There are checkboxes and fillable fields for you to complete in the documents. Complete all of the necessary information.
3. When you have finished creating your certifications, click on the **Microsoft Back** button on your Microsoft Word toolbar. You will be returned to the **Step 3** section of the **CPMP Main Worksheet** in **1CPMP.xls**.

**Note:** Original Signatures are required for Certifications. In addition to the soft copy, hard copies of these documents must be signed and mailed in to HUD.

**Task 6: Submit the CPMP to HUD**

1. At this time, you have initialized the CPMP, created the Strategic Plan and the First Program Year Action Plan. The CPMP in its entirety may be submitted to HUD in a Zip file.
2. You have several options for submitting the CPMP to HUD.
  - a. Soft copy Submission by **Email**
  - b. Soft copy Submission on CD
  - c. Hard copy Submission

**Task 7: Perform the Actions Outlined in the Strategic Plan and Action Plan.**

1. During the next Program Year, take steps to carry out the necessary actions identified in your plans.
2. At the end of the Program Year, go to **Step 4** to complete your CAPER for Program Year Year 1.
3. From **1CPMP.xls**, click on the **"Go to Step 4"** Button.

**Step 4: Create Your First CAPER**

**Task 1: To Open the CPMP Main Worksheet:**

1. If **1CPMP.xls** is already open, click on the **Go To Step 4** button and then skip to **Task 2**.
2. Navigate to the **CPMP Directory** on your computer.
3. Double-Click on the file called **1CPMP.xls**.  
MS Excel will launch and a message box will appear asking if you want to Enable Macros. Click **Yes**.
4. You will be brought to the beginning of the **CPMP Main Worksheet** in the CPMP tool.
5. Click on the **Step 4** link. You will be brought to the **Step 4** section of the tool.



**Task 2: Create the CAPER Document**

1. Respond to narrative questions to build the **First Program Year CAPER (CAPER1.doc)**. You can get to these questions and the location to fill in the answer by clicking the appropriate links on the **CPMP Main Worksheet**.

*Complete the narratives for the **General** Section of the **CAPER**:*

2. In the **Year 1** column of the **Step 4** table, click on the **Go to Narratives** link in the **General** row. You will be brought to the **General** section of the **First Program Year CAPER** document (**CAPER1.doc**).

**Step 4: Create your CAPER**

**Step 4 Tasks**

1. Create the CAPER document.
2. Update the Needs Worksheets.
3. Update your Projects.
4. Submit the CPMP to HUD.

**1. Create the CAPER Document.** Click on the narratives link that corresponds to the category and program year for the CAPER you are working on. You will be forwarded directly to the relevant questions in the appropriate CAPER document.

Category	Year 1 CAPER	Year 2 CAPER	Year 3 CAPER	Year 4 CAPER	Year 5 CAPER
GENERAL	<a href="#">Go to Narratives</a>				
HOUSING	<a href="#">Go to Narratives</a>				

3. The **CAPER** document contains the narrative **CAPER** questions that are required by regulations. Your

**GENERAL**

**Executive Summary**

This module is optional but encouraged. If you choose to complete it, provide a brief overview that includes major initiatives and highlights that were proposed and executed throughout the first year.

Program Year 1 CAPER Executive Summary response:

cursor will be placed in the answer field for the first fillable field in **General** section. *Complete all of the questions in this section unless they are marked Optional.*

- Click on the **Microsoft Back** button on your MS Word toolbar. You will be returned to the **Step 3** section of the **1CPMP.xls**.

← **Note:** You must have your "Web" toolbar displayed to see the Microsoft Back button

*Complete the narratives for the **Housing** section of the **CAPER**:*

- In the first column of the table, click on the **Go To Narratives** link in the **Housing** row.
- Your cursor will be placed in the answer field for the first **Housing** question. *Complete all of the questions in this section unless they are marked Optional.*
- Click the **Microsoft Back** button on your MS Word toolbar. You will be returned to the **Step 4** section of the tool in **1CPMP.xls**.

*Complete the remaining narratives of the **CAPER**:*

- Repeat this process until you have addressed each of the remaining sections of the CAPER - Homeless, Community Development, Non-Homeless Special Needs. When you have answered the questions for all of these sections, you will have completed the Narrative portion of the CAPER.
- Choose "File" and select "Save". Or you may simply click on the diskette icon in your Word/Excel Toolbar. Please remember to save your work frequently.



**Task 3: To Update the Needs Worksheets:**

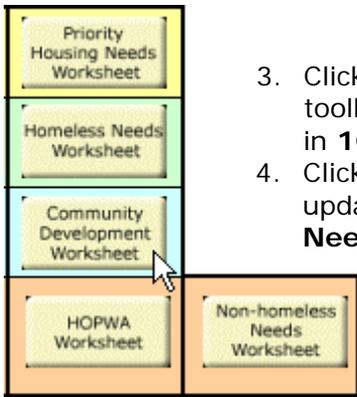
- While you are completing the CAPER narratives, you may update the applicable Needs tables. In the Housing Row, click on the **Priority Housing Needs Worksheet** button. You will be brought to the **HSGNeeds worksheet** in **Needs.xls**.
- Complete the necessary information for this Worksheet.



Housing Needs Table		Grantee: <b>Jurisdic</b>				
		<b>Only complete blue sect</b>				
U% MF-I	A. Elderly	Housing Needs	Current % of People	Current Number of People	Year 1	
					Goal	Actual
		2. NUMBER OF PEOPLE	100%			
		3. Any housing problems		0		
		4. Cost Burden > 30%		0		
		5. Cost Burden >50%		0		

**Please Note:** It is not expected that all elements of any "Needs Table" be completed with any single submission. Rather the tables have been constructed to grow as the length of participation with the Formula Grant Programs continues. Thus, as the graphic below indicates, these are the "CAPER Columns". The "Actual" for Year 1 will be completed when the Grantee makes its first CAPER submission. Next year, for purposes of the CAPER, the Year 2 data will be added and so on.

3-5 Year Quantities													
Year 1		Year 2		Year 3		Year 4*		Year 5*		Cumulative		% of Goal	
Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual		
										0	0	####	
										0	0	####	
										0	0	####	
										0	0	####	
										0	0	####	
										0	0	####	
										0	0	####	



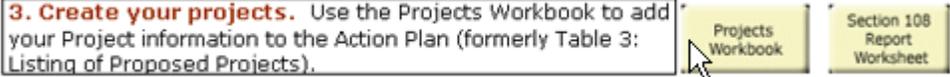
- Click on the **Microsoft Back** button on your Microsoft Excel toolbar. You will be returned to the Step 4 section of the tool in **1CPMP.xls**.
- Click on the button for the next Needs table you wish to update. You will be brought to the appropriate table in the **Needs.xls** document.

5. Repeat these steps until you have updated all of the necessary Needs tables.

**Note:** Remember to save your CPMP Documents frequently!

**Task 4: Update Your Projects.**

- From **1CPMP.xls**, click the **Projects Workbook** button.



- You will be brought to the most recent project worksheet in **Projects.xls**. You will see all of

<b>New Project</b>		Grantee Name: <b>Jurisdiction</b>	
<b>Project Name:</b>			
<b>Description:</b>		IDIS Project #:	UOG Code: UOG Code
<b>Location:</b>		<b>High Priority Needs</b>	
Enter location, address, zip codes or other elements that will help to identify the location of the project		1	
		2	
		3	
		<b>Medium Priority Needs</b>	

- the projects that have been created on different, numbered tabs in the workbook.
3. Update the necessary information on the **project worksheets** and the **Section 108 Project Worksheet**.

**Note:** Remember to save your CPMP Documents frequently!

4. When you have finished updating your projects, click on the **Microsoft Back** button on your Microsoft Excel toolbar. You will be returned to the Step 4 section of the tool in **1CPMP.xls**.

#### **Task 5: Submit the CPMP to HUD**

1. At this time, you have accomplished certain tasks identified in the Strategic Plan and the First Program Year Action Plan which were submitted to HUD. You have also completed the First Program Year CAPER. The CPMP in its entirety may be submitted to HUD in a Zip file.
2. You have several options for submitting the CPMP to HUD.
  1. Soft copy Submission by **eMail**
  2. Soft copy Submission on CD
  3. Hard copy Submission

**Note:** Original Signatures are required on some of the CPMP documents. In addition to the soft copy, hard copies of these documents must be signed and mailed in to HUD.

#### **Task 6: Go To Step 5**

1. From **1CPMP.xls**, click on the **Go to Step 5** button.

## Step 5: Repeat Steps 3 and 4 for Subsequent Program Years

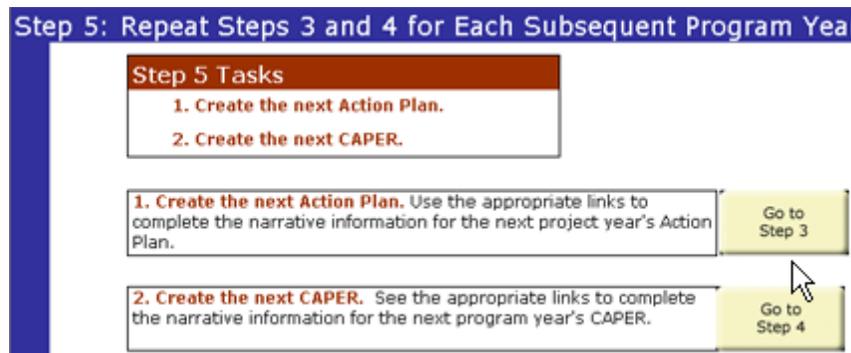
### Task 1: To Open the CPMP Main Worksheet:

1. If **1CPMP.xls** is already open and you are in the **Step 4 Section**, click on the **Go To Step 5 button** and then skip to **Task 2**.
2. Navigate to the **CPMP Directory** on your computer.
3. Double-Click on the file called **1CPMP.xls**.  
**MS Excel** will launch, and you will be brought to the beginning of the CPMP tool.
4. Click on the **Step 5 link**. You will be brought to the **Step 5 Section** of the tool.



### Task 2: Create the next Program Year Action Plan

1. Click on the **Go To Step 3 button**. You will be brought to the **Step 3 Section** of the tool in **1CPMP.xls**.
2. Follow the tasks outlined in **Step 3**, but in the **Step 3 Table** click on the next program year column links.
3. You will be brought to the narrative sections in the appropriate documents.



### Task 3: Create the next Program Year CAPER

1. Click on the **Go To Step 4 button**. You will be brought to the **Step 4 Section** of the tool in **1CPMP.xls**.
2. Follow the tasks outlined in **Step 4**, but in the **Step 4 Table** click on the next program year column links.
3. You will be brought to the narrative sections in the appropriate documents.

## Submitting the CPMP Tool

You can submit your Consolidated Planning materials almost entirely in electronic format. Please be sure to save all of the different documents in your CPMP folder for simplicity.

### Soft Copy Submission by eMail:

A special CPMP mailbox has been created to receive CPMP submissions up to 5 megabytes. If you are including large files like graphical maps, you may have to send multiple eMails to submit the entire CPMP. Compress your files with WinZip or another zip program before eMailing to reduce file size. Remember, the certifications and SF 424 portion of the Action Plan require signatures and must be mailed to your local Field Office regardless of whether you send a soft copy.

### Compressing your files:

1. Open **WinZip**. There are different ways to open WinZip. It depends on your operating system. One way to open WinZip is to go to your Start menu, and look through your Program files.

**Note:** If you have Windows XP, you can use Windows Explorer to navigate to the files you want to compress, select them all; then right-click and select the WinZip submenu. Finally select the Add to Zip File option.

2. Depending on your preferences, WinZip will open either the WinZip Wizard or the WinZip Classic interface. If the Wizard opens, click the button for **WinZip Classic**.

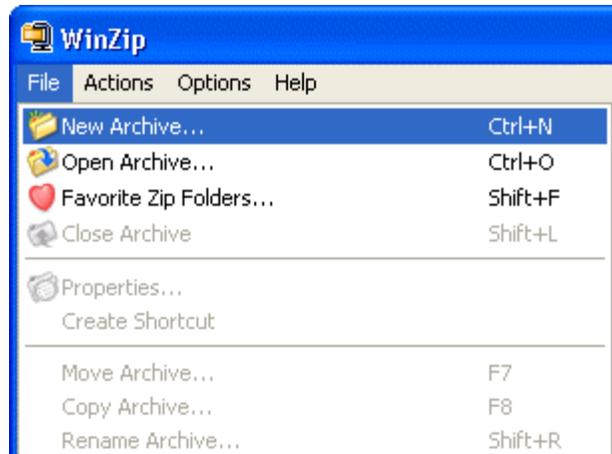
3. In WinZip Classic, click the **File** menu; then select the **New Archive** option.



4. Click the **Save in:** drop-down arrow and navigate to where you'd like to save your zip file.

5. Type the name of your zip file in the **file name:** box then click the **OK** button. We recommend the following naming convention be used for the file name:

[state abbreviation, jurisdiction name].  
These two elements would be concatenated to create the file name.

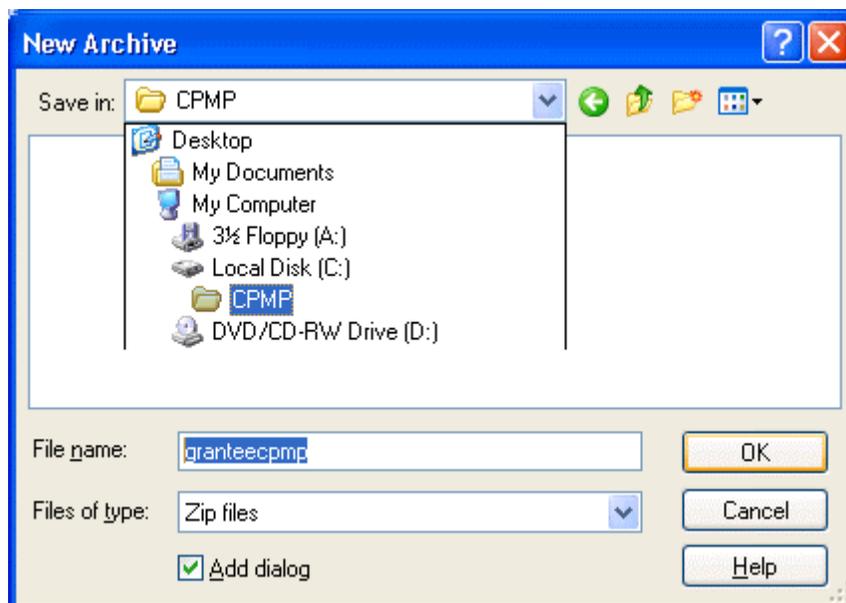


**Example:**

Dallas, Texas = TXDallas.zip

Indianapolis, Indiana = INIndianapolis.zip

California State Program = CACalifornia.zip



6. Select the files you want to compress.

**Note:** To select several files, click the first file then push the Shift button on your keyboard and select the rest of the files you want to add.

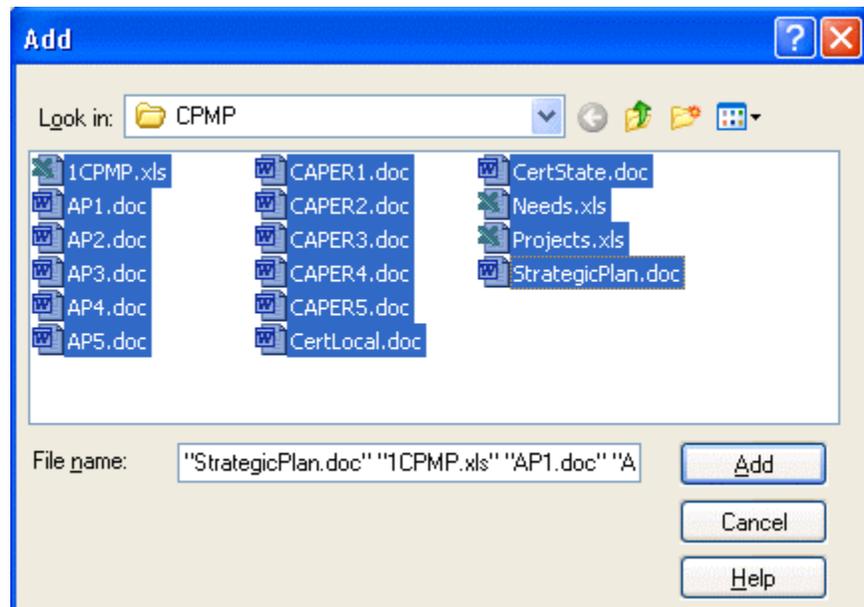
7. Click the **Add** button.

8. **eMail** your zip file to HUD (cpmp@hud.gov)

**Soft Copy Submission by Delivery:**

If you have the facilities, you may burn the materials to a compact disc (CD) and send that in.

**Hard Copy Submission:**



As always, you may submit materials in hard copy through the mail or delivery.