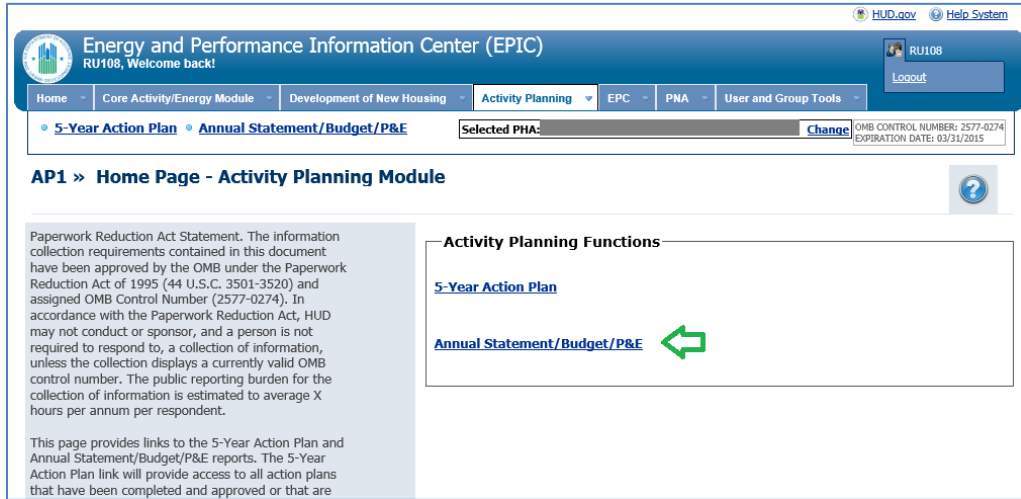


# QUICK REFERENCE GUIDE: *Creating a Budget from Scratch and Submitting it in EPIC*

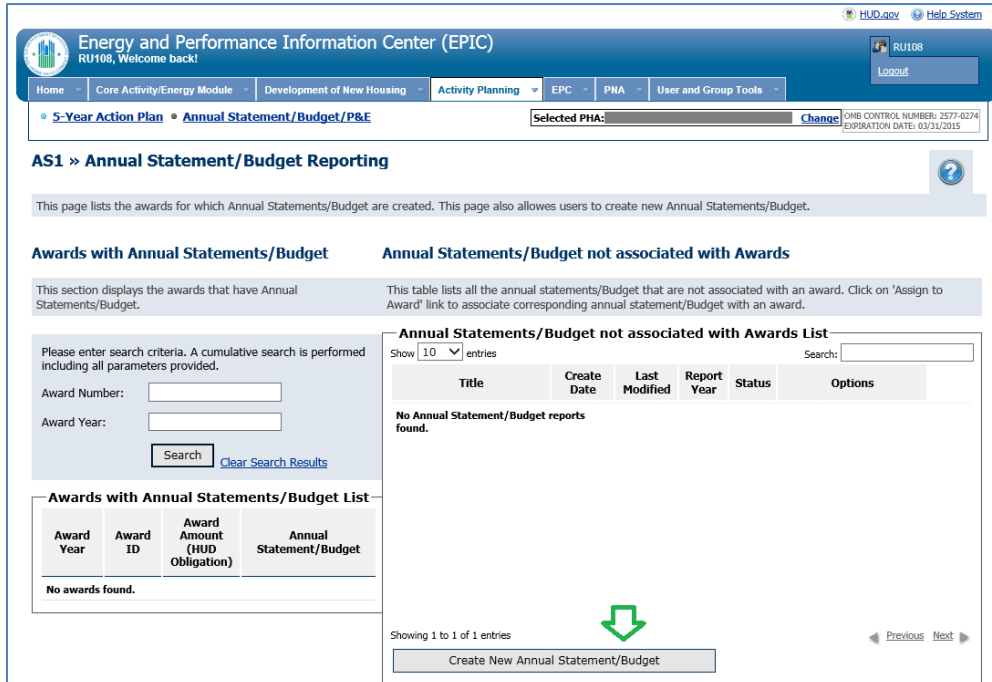
PHAs with approved 5-Year Action Plans in EPIC may submit Budgets in EPIC. Condensed instructions for creating a Budget from scratch are below. There is a separate Quick Reference Guide to assist PHAs that wish to link a previously-created, draft Budget to a grant award. PHAs that would like more detailed instructions on either task should consult the Activity Planning Module User Manual available at:

[https://portal.hud.gov/hudportal/HUD?src=/program\\_offices/public\\_indian\\_housing/programs/p/h/capfund](https://portal.hud.gov/hudportal/HUD?src=/program_offices/public_indian_housing/programs/p/h/capfund)

1. Select Annual Statement/Budget/P&E from the Activity Planning Module homepage.



2. Select the Create New Annual Statement/Budget link on the Annual Statement/Budget Reporting Page. (Note that if a user has already created a draft Budget, the user may click on the “Assign to Award” icon next to the draft Budget to associate it with an Award.)



- Enter the Title (e.g., 2017 Formula Grant), 5YAP Year (e.g., 2017), Applicable 5-Year Action Plan (i.e., an original or revised plan) and Award (Users will select the 2017 Grant Number from the selection box.) Select “Continue”. Note: If your HA has more than one approved 5YAP, make sure to select the version of the plan with the work activities you wish to add to the Budget.

- Select the work activity or activities for the Budget and then select “Complete”. Note that the work activities listed will be those for the selected year in the approved 5YAP version that you selected in the previous step.

AS Amount	WA Planned Amount	Balance
\$249,964.00	\$423,464.00	-\$173,500.00

Identifier	Dev/AMP	Activity	Amount
<input checked="" type="checkbox"/> ID0001	000001	Parking Lot Overlays and Sidewalks	\$125,000.00
<input checked="" type="checkbox"/> ID0002	000001	Four BR Accessible Unit	\$64,248.00
<input checked="" type="checkbox"/> ID0003	000001	Cedar Laundry Room	\$35,800.00
<input checked="" type="checkbox"/> ID0005	000001	HACA Admin Fees 2017	\$23,416.00
<input checked="" type="checkbox"/> ID0006	000001	Holly Building Envelope	\$173,500.00
<input checked="" type="checkbox"/> ID0026	000001	Architect/Engineer Design Fees	\$1,500.00

- Once a Budget is created, the user will be directed to the Activity List for Annual Statement/Budget Page. The user may select the Import Work Activities button at the bottom of the screen to import work activities from other years.

6. Once work activities have been added to the Budget, users can click on the Edit option next to an activity on the Activity List for Annual Statement/Budget Page to edit the work activity. Users may wish to edit certain elements of the work activity, such as the cost, and may do so using this functionality. Users should ignore the Budget Line Item Information section.
7. Once the Budget has been linked to a grant award and the Piggy Bank balances out (i.e., Annual Statement/Budget Amount is equal to Work Activity Planned Amount and Balance is \$0.00), a Submit Report button will appear at the bottom of the Activity List for Annual Statement/Budget Page. The user may then select Submit Report to submit the Budget to HUD.

**AS3 » Activity List for Annual Statement/Budget » 5 Year Action Plan for 2017 - 2021 Rev. 1**

[Go back to Statement Listing](#)

Piggy Bank		
AS Amount	WA Planned Amount	Balance
\$249,964.00	\$249,964.00	\$0.00

BLI Piggy Bank			
BLI Number	Budget Line item	Cumulative Amount	Percentage

**Legend**

AS » Annual Statement/Budget

WA » Work Activity

- » Edit Activity
- » Remove Activity
- » New Work Activity
- » Modified Work Activity

**Annual Statement/Budget Information**

1. Title:

2. Fiscal Year End:

3. Fiscal Year:

**Grant/Award Information:**

4. Award Number:

5. Cost:

**Work Activities**

Identifier	Activity	Amount	Options
ID0002	<a href="#">Four BR Accessible Unit</a>	\$64,248.00	
ID0005	<a href="#">HACA Admin Fees 2017</a>	\$10,716.00	
ID0006	<a href="#">Holly Building Envelope</a>	\$173,500.00	
ID0026	<a href="#">Architect/Engineer Design Fees</a>	\$1,500.00	

**Finished with all work activities?**

If you are done entering all work activities for this Award, Submit your Annual Statement/Budget and lock the report. If you are not yet done, select "Save Report" to save annual statement/Budget as draft. Use the View PDF link to inspect the report prior to submission.

[View PDF](#)