

## QUICK REFERENCE GUIDE: *Linking a Previously-Created, Draft Budget to a Grant Award in EPIC*

*PHAs with approved 5-Year Action Plans in EPIC may submit Budgets in EPIC. Condensed instructions for linking a previously-created, draft Budget to a grant award are below. There is a separate Quick Reference Guide to assist PHAs that wish to create a Budget from scratch. 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. On the Annual Statement/Budget Reporting page, draft Budgets that are not yet linked to grant awards are listed on the right side of the screen. Click on the “Assign to Award” icon next to a Budget to associate a Budget with an Award. The Assign to Award icon is a green circle with a plus sign in the middle; it looks like this:



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5-Year Action Plan Annual Statement/Budget/P&E Selected PHA: Change OMB CONTROL NUMBER: 2577-0274 EXPIRATION DATE: 03/31/2015

### AS1 » Annual Statement/Budget Reporting

This page lists the awards for which Annual Statements/Budget are created. This page also allows users to create new Annual Statements/Budget.

#### Awards with Annual Statements/Budget

This section displays the awards that have Annual Statements/Budget.

Please enter search criteria. A cumulative search is performed including all parameters provided.

Award Number:

Award Year:

[Clear Search Results](#)

#### Awards with Annual Statements/Budget List

Award Year	Award ID	Award Amount (HUD Obligation)	Annual Statement/Budget
No awards found.			

#### Annual Statements/Budget not associated with Awards

This table lists all the annual statements/Budget that are not associated with an award. Click on 'Assign to Award' link to associate corresponding annual statement/Budget with an award.

#### Annual Statements/Budget not associated with Awards List

Show  entries Search:

Title	Create Date	Last Modified	Report Year	Status	Options
<a href="#">2015 Formula Grant</a>	07/10/2015	07/10/2015	2015	Draft	
<a href="#">2014 Formula Grant</a>	07/10/2015	07/10/2015	2014	Draft	

2. Upon selecting the Assign to Award icon, the Associate Annual Statement/Budget with Award page is displayed. Select the radio button for the award and then click the Complete button to assign an award to the Budget.

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### AS7 » Associate Annual Statement/Budget with Award

Select one of the Awards from the list below to associate to the Annual Statement/Budget. This process will update the Annual Statement/Budget estimated amount to reflect the amount of the Award.

**Piggy Bank**

AS Amount	WA Planned Amount	Balance
\$50,000.00	\$50,000.00	\$0.00

**List of Awards**

Select	Award ID	Amount
<input checked="" type="radio"/>	50114	\$95,052.00

- Upon selecting a grant award and selecting Complete, the user will be returned to the Annual Statement/Budget Reporting Page. The Budget will now be displayed on the left side of the screen in the table for “Awards with Annual Statements/Budget List”.

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### AS1 » Annual Statement/Budget Reporting

This page lists the awards for which Annual Statements/Budget are created. This page also allows users to create new Annual Statements/Budget.

**Awards with Annual Statements/Budget**

This section displays the awards that have Annual Statements/Budget.

Please enter search criteria. A cumulative search is performed including all parameters provided.

Award Number:

Award Year:

[Clear Search Results](#)

**Awards with Annual Statements/Budget List**

Award Year	Award ID	Award Amount (HUD Obligation)	Annual Statement/Budget
2014	50114	\$95,052.00	<a href="#">Edit</a>

**Annual Statements/Budget not associated with Awards**

This table lists all the annual statements/Budget that are not associated with an award. Click on 'Assign to Award' link to associate corresponding annual statement/Budget with an award.

**Annual Statements/Budget not associated with Awards List**

Show  entries Search:

Title	Create Date	Last Modified	Report Year	Status	Options
<a href="#">2015 Formula Grant</a>	07/10/2015	07/10/2015	2015	Draft	<input type="button" value="Assign to Award"/> <input type="button" value="Delete"/> <input type="button" value="Refresh"/> <input type="button" value="Add"/>

Showing 1 to 1 of 1 entries

- Select the Edit link next to the award in the table for Awards with Annual Statements/Budget list (see screenshot above). Then, on the Annual Statements/Budget List Page for the specific award, select “Edit Statement”. Edit work activities and amounts and import work activities as needed. Users should ignore the Budget Line Item Information section.

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5-Year Action Plan • Annual Statement/Budget/P&E Selected PHA: [REDACTED] Change OMB CONTROL NUMBER: 2577-0274 EXPIRATION DATE: 03/31/2015

AS2 » Annual Statements/Budget List » [REDACTED] 50114

**Legend**

- This statement has been submitted and cannot be edited
- Revise the current statement (copies the statement)
- Edit the statement (does not copy the statement)
- Submitted as final P&E
- Delete
- Create P&E Report
- View PDF

**Annual Statements/Budget**

Show 10 entries Search: [REDACTED]

Statement	Created Date	Last Modified	Report Year	Status	Options
(DRAFT) Annual Statement/Budget Original	07/10/2015	07/10/2015	2014	Draft	<a href="#">Edit Statement</a> <a href="#">Delete Statement</a> <a href="#">View PDF</a>

Showing 1 to 1 of 1 entries Previous Next

- 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. Select Submit Report to submit the Budget to HUD.

AS3 » Activity List for Annual Statement/Budget

[Go back to Statement Listing](#)

**Piggy Bank**

AS Amount	WA Planned Amount	Balance
\$95,052.00	\$95,052.00	\$0.00

**BLI Piggy Bank**

BLI Number	Budget Line item	Cumulative Amount	Percentage
1480	General Capital Fund	\$95,052.00	100%

**Legend**

- AS = Annual Statement/Budget
- WA = Work Activity
- Edit Activity
- Remove Activity
- New Work Activity
- Modified Work Activity

**Annual Statement/Budget Information**

- Title: 2014 Formula Grant
- Fiscal Year End: 06/30
- Fiscal Year: 2014

**Grant/Award Information:**

- Award Number: [REDACTED] 50114
- Cost: \$95,052.00

**Work Activities**

Identifier	Activity	Amount	Options
ID0001	Roof installation	\$50,000.00	
ID0006	Roof installation	\$45,052.00	

Import Work Activities

**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](#)

Save Report Submit Report