## QUICK REFERENCE GUIDE: Revising a Budget in EPIC, When Revisions to the 5-Year Action Plan <u>ARE</u> Needed

Once a PHA has submitted a Budget in EPIC, the PHA may determine that they need to revise that budget. These revisions may be prompted by a change in the PHA's plans or by an email notification that HUD identified an error in the budget submission (e.g., the budget submission allocated too high a percentage to BLI 1406, 1408, or 1410; included work activities crossing BLIs; or included a debt service or RAD BLI spread that differs from LOCCS). <u>This Quick</u> <u>Reference Guide provides step-by-step instructions on creating and submitting a budget revision</u> <u>when the changes require that the 5-Year Action Plan also be modified</u>. There is a separate Quick Reference Guide to assist PHAs that wish to create a budget revision when the changes do <u>not</u> demand revisions to the 5-Year Action Plan.

The following changes to budgets require also revising the 5-Year Action Plan:

- Changing the Work Category associated with a work activity, which is necessary to change the BLI associated with an activity. For example, changing a work activity to reflect the assignment of funds to BLI 9002 instead of BLI 9000.
- Changing the number of Work Categories associated with an activity. For example, changing a work activity that includes Work Categories under BLI 1410 and 1480 to only include Work Categories associated with BLI 1480. (Note that changes to the Work Activity <u>Sub-Categories</u> to reflect a change in the scope of a work activity do <u>not</u> require revising the 5-Year Action Plan, provided the changes are consistent with the description of the work activity.)
- *Changing the development number associated with a work activity*
- Adding work activities to the budget that are not yet approved in a 5-Year Action Plan

To make changes to a previously-submitted budget that require revising the 5-Year Action Plan:

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

|  |                                     | HUD.gov  |
|--|-------------------------------------|--|
| Energy and Performance Information<br>RU108, Welcome back!   | Center (EPIC)                       | RU108  |
| Home · Core Activity/Energy Module · Development of New Hor  | using ~ Activity Planning ~ EPC ~ F | PNA Viser and Group Tools  |
| • <u>5-Year Action Plan</u> • <u>Annual Statement/Budget/P&amp;E</u>   | Selected PHA:                       | Change<br>OMB CONTROL NUMBER: 2577-0274<br>EXPIRATION DATE: 03/31/2015 |
| AP1 » Home Page - Activity Planning Mod  | ule                                 | 0  |
| Paperwork Reduction Act Statement. The information<br>collection requirements contained in this document<br>have been approved by the OMB under the Paperwork<br>Reduction Act of 1995 (44 U.S.C. 3501-3520) and<br>assigned OMB Control Number (2577-0274). In<br>accordance with the Paperwork Reduction Act, HUD<br>may not conduct or sponsor, and a person is not | Activity Planning Functions         |  |
| required to respond to, a collection of information,<br>unless the collection displays a currently valid OMB<br>control number. The public reporting burden for the<br>collection of information is estimated to average X<br>hours per annum per respondent.  | Annual Statement/Budget/P&E         |  |
| This page provides links to the 5-Year Action Plan and<br>Annual Statement/Budget/P&E reports. The 5-Year<br>Action Plan Iink will provide access to all action plans<br>that have been completed and approved or that are   |                                     |  |

2. Select the Edit link next to the Budget.

| Energy and Performance Information Cent<br>RU101, Welcome back!                                      | er (EPIC)   |                              |                       | RU101  |
|--|---|------------------------------|-----------------------|--|
| Home V Core Activity/Energy Module V Development of New Housing                                      | Activity Planning V EPC S   | PNA 👻 User and               | Group Tools 💎         |  |
| • 5-Year Action Plan • Annual Statement/Budget/P&E   | Selected PHA:   |                              |                       | Change<br>OMB CONTROL NUMBER: 2577-0274<br>EXPIRATION DATE: 08/31/2017 |
| AS1 » Annual Statement/Budget Reporting  |   |                              |                       | 0  |
| This page lists the awards for which Annual Statements/Budget are creat                              | ed. This page also allowes users  | to create new Annua          | l Statements/Budg     | et.  |
| Awards with Annual Statements/Budget   | Annual Statements/Bu  | lget not associ              | ated with Awa         | ards   |
| This section displays the awards that have Annual<br>Statements/Budget.                              | This table lists all the annual sta<br>Award' link to associate corresp |                              |                       | l with an award. Click on 'Assign to<br>n award.                       |
| Please enter search criteria. A cumulative search is performed<br>including all parameters provided. | Annual Statements/B   | udget not asso               | ciated with Av        | Search:  |
| Award Number:  | Title   | Create Last<br>Date Modified | Report<br>Year Status | Options  |
| Award Year:  | No Annual Statement/Budget<br>reports found.                            |                              |                       |  |
| Search Clear Search Results  |   |                              |                       |  |
| Awards with Annual Statements/Budget List  |   |                              |                       |  |
| Award<br>Year Award ID Award Amount Annual<br>(HUD Statement/Budget<br>Obligation)                   |   |                              |                       |  |
| 2017 \$1,819,373.00 Edit   | 1   |                              |                       |  |
|  | Showing 1 to 1 of 1 entries   |                              |                       | Previous Next  |
|  | Create New Annua  | Statement/Budget             |                       |  |

3. Select the Revise Statement link. This will create a draft budget revision.

| Energy and Perform<br>RU101, Welcome back!             | nance Information Center (EPI                                    | C)             |               |                |           | RU101   |
|--|--|----------------|---------------|----------------|-----------|---|
| Home Core Activity/Energy Module                       | <ul> <li>Development of New Housing</li> <li>Activity</li> </ul> | Planning 🔻 EPC | ~ PNA ~ Us    | er and Group   | Tools 👻   |   |
| • <u>5-Year Action Plan</u> • <u>Annual S</u>          | Statement/Budget/P&E   | Selected PHA:  |               |                |           | Change OMB CONTROL NUMBER: 2577-0274<br>EXPIRATION DATE: 08/31/2017     |
| AS2 » Annual Statement                                 | s/Budget List »  | » 5 Yea        | r Action Pla  | n for 20       | )17 - 20  | 21  |
| Legend   | Annual Statements/Budget   |                |               |                |           | Search:   |
| This statement has been submitted and cannot be edited | Statement  | Created Date   | Last Modified | Report<br>Year | Status    | Options   |
| Revise the current statement<br>(copies the statement) | Annual Statement/Budget Original                                 | 09/28/2017     | 09/28/2017    | 2017           | Submitted | P View PDF  |
| Edit the statement (does not copy the statement)       |  |                |               |                |           | <ul> <li>Revise Statement</li> <li>Create New P&amp;E Report</li> </ul> |
| Submitted as final P&E                                 |  |                |               |                |           |   |
| 💥 Delete   |  |                |               |                |           |   |
| I Create P&E Report                                    |  |                |               |                |           |   |
| ₽ View PDF   |  |                |               |                |           |   |
|  | Showing 1 to 1 of 1 entries                                      |                |               |                |           | Previous Next   |

4. Select the Edit Statement icon next to the budget revision.

| Energy and Perforr<br>RU101, Welcome back!                | mance Information Center          | (EPI          | :C)            |                  |                |           | RU101  |
|---|-----------------------------------|---------------|----------------|------------------|----------------|-----------|--|
| Home Core Activity/Energy Module                          | e 🗢 Development of New Housing 👻  | Activity      | Planning 🔻 EPC | ~ PNA ~          | User and Group | Tools ~   |  |
| • <u>5-Year Action Plan</u> • <u>Annual</u>               | Statement/Budget/P&E              |               | Selected PHA:  |                  |                |           | Change OMB CONTROL NUMBER: 2577-027<br>EXPIRATION DATE: 08/31/2017 |
| AS2 » Annual Statemen                                     | ts/Budget List                    |               |                |                  |                |           | 0  |
| egend   | Annual Statements/Budge           | et—           |                |                  |                |           | Search:  |
| This statement has been<br>submitted and cannot be edited | Statement                         |               | Created Date   | Last<br>Modified | Report<br>Year | Status    | Options  |
| Revise the current statement<br>copies the statement)     | Annual Statement/Budget Original  |               | 09/28/2017     | 09/28/2017       | 2017           | Submitted | View PDF   |
| Edit the statement (does not copy the statement)          | (DRAFT) Annual Statement/Budget F | <u>lev. 1</u> | 09/28/2017     | 09/28/2017       | 2017           | Draft     | Edit Statement   |
| Submitted as final P&E                                    |                                   |               |                |                  |                |           | Delete Statement       P     View PDF                              |
| 🗙 Delete  |                                   |               |                |                  |                |           |  |
| F Create P&E Report                                       |                                   |               |                |                  |                |           |  |
| View PDF  |                                   |               |                |                  |                |           |  |
|   | Showing 1 to 2 of 2 entries       |               |                |                  |                |           | Mext   |

- 5. Depending upon the changes you wish to make to the budget, take the following actions:
  - If you wish to add a work activity to the budget but that work activity is not yet approved in a 5-Year Action Plan, skip this step and proceed to Step 6 below.
  - If you wish to change the Work Category associated with a work activity (which is necessary to change the BLI associated with an activity), to change the number of Work Categories associated with a work activity, or to change the development number associated with a work activity, you will need to first remove the work activity from the budget and then make the change(s) in the 5-Year Action Plan.

Begin by selecting the red "X" icon next to the name of the work activity requiring modification.

| AS3 » Activity List for Annual State  | ement/Budge                        | et » 5 Year Action   | Plan fo       | or 2017 - 2021           |         | 0 |
|---|------------------------------------|--|---------------|--------------------------|---------|---|
| Go back to Statement Listing       Piggy Bank       A5 Amount     WA Planned Amount       Balance       \$435,371.00     \$50.00       \$435,371.00       BLI Piggy Bank       BLI     Budget Line       Aumber     Cumulative       Amount     Cumulative       Amount     Budget Line | —Annual Sta                        | tement/Budget Infor<br>1. Title:<br>2. Fiscal Year End:<br>3. Fiscal Year:<br>Grant/Award Information:<br>4. Award Number:<br>5. Cost: |               | Formula Grant            |         |   |
| Legend         AS > Annual Statement/Budget         WA > Work Activity  | Work Activ<br>Identifier<br>ID0001 | Activity Modernization inspector Ork Activities  |               | <b>Amount</b><br>\$50.00 | Options |   |
|   | There is still an ou               |  | iis Annual St |                          |         |   |

You will receive a pop-up message asking: "Are you sure you want to remove this Work Activity from this Annual Statement/Budget?" Select OK.

| Message f | rom webpage  |
|-----------|--|
| ?         | Are you sure you want to remove this Work Activity from this Annual<br>Statement/Budget? |
|           | OK Cancel  |

You will be returned to the Activity List for Annual Statement/Budget Page. Select the "Save Report" button at the bottom of the screen.

6. Navigate to the 5-Year Action Plan by selecting the 5-Year Action Plan link at the top of the screen.

| Home        |     | Core Activity/Energy Module | Development of New Housing 👒 | Activity Planning | ▼ EP      | c ~ I | PNA 👻         | User and Group Tools | . ~    |   |  |  |
|-------------|-----|-----------------------------|------------------------------|-------------------|-----------|-------|---------------|----------------------|--------|---|--|--|
| <u>• 5-</u> | Yea | r Action Plan Annual State  | ement/Budget/P&E             | Se                | ected PH/ | A:    |               |                      | Change | MB CONTROL NUMBER: 2577-0274<br>EXPIRATION DATE: 08/31/2017 |  |  |
| AS2         | »   | Annual Statements/I         | Budget List »                | *                 | 5 Ye      | ar Ac | tion <b>F</b> | Plan for 2017        | - 202  | 21  |  |  |

7. Select the 5-Year Action Plan name or the Edit Plan icon next to the 5-Year Action Plan.

| Energy and Perform                                     | nance Information Center (EPI                                       | C)         |                 |                  |                |               | RU101   |
|--|---|------------|-----------------|------------------|----------------|---------------|---|
| Home Core Activity/Energy Module                       | Development of New Housing      Activity                            | Planning 🔹 | EPC 👻 F         | NA 👻 Usei        | r and Group To | ols 👻         |   |
| <u>5-Year Action Plan</u> • <u>Annual S</u>            | Statement/Budget/P&E  | Select     | ed PHA:         |                  |                | <u>Change</u> | OMB CONTROL NUMBER: 2577-027<br>EXPIRATION DATE: 08/31/2017 |
| 5YAP1 » 5-Year Action P                                | lan Reporting   |            |                 |                  |                |               | •   |
| Legend   | Five Year Action Plan   |            |                 |                  |                |               |   |
| » This plan has been submitted<br>and cannot be edited | Plan  | Туре       | Created<br>Date | Last<br>Modified | Report<br>Year | Status        | Options   |
| 🗣 » Create New   | 2018 5YAP is due on 04/17/2018, no<br>report has been submitted yet | 4          |                 |                  |                |               | $\mathbf{a}$  |
| 🖉 » Edit Plan  | 5-Year Action Plan for 2017-2021 (0/1)                              | Rolling    | 09/01/2017      | 09/29/2017       | 2017-2021      | Approved      | ≩ <b>≥</b> ≥  |
| 🚊 » Unsubmit Plan                                      |   |            |                 |                  |                |               |   |
| 🗱 » Delete   |   |            |                 |                  |                |               |   |
| 🤣 » Clone/Copy Forward                                 |   |            |                 |                  |                |               |   |
| ₽ » View   |   |            |                 |                  |                |               |   |
| 😕 » View PDF   |   |            |                 |                  |                |               |   |
| 🖓 » Comments   |   |            |                 |                  |                |               |   |

- 8. Make the necessary changes to the 5-Year Action Plan.
  - If you wish to add a work activity, do so by selecting the "Create New Work Activity" button at the bottom of the screen, inputting the necessary information, and saving your inputs. You will receive a warning message confirming plan revision; select "Continue".
  - If you wish to change the Work Category associated with a work activity (which is necessary to change the BLI associated with an activity), to change the number of Work Categories associated with a work activity, or to change the development number associated with a work activity, select the work activity name, enter your changes on the next screen, and save your changes. You will receive a warning message confirming plan revision; select "Continue".

| YAI   | P3 » Acti  | vities List  | for           |  |   | - 2017 t  | o 2021  |   | 2  |
|-------|--|--|---------------|--|---|---|---|---|--|
|       | Edit Plan Ir<br>View PDF   | back to Plans Listing           t Plan Information           w PDF           Piggy Bank           Work Activity Cost           timated         Consumed         Balance           \$100.00         \$435,371.00         -\$435,271.00           \$100.00         \$100.00         \$0.00           \$100.00         \$100.00         \$0.00           \$100.00         \$100.00         \$0.00           \$100.00         \$100.00         \$0.00           \$100.00         \$100.00         \$0.00           \$100.00         \$100.00         \$0.00           \$100.00         \$100.00         \$0.00           \$100.00         \$100.00         \$0.00           \$100.00         \$100.00         \$0.00 |               | Search for<br>Year   | s to View:  | ties records using a Year Rang  | e, Development/AMP, and   | l/or Work Activity                                      | name   |
|       |  |  | st            |  |   | Search Clear Sear   | rch   |   |  |
| Year  | Estimated  | Consumed   | Balance       | Year   | Identifie   | r Dev/AMP   | Activity  | Amount  | Options  |
| 2017  |  |  |               | 2017   | ID0001  | Not associated with any specific  | Modernization inspector   | \$50.00   | 2 🛸 🗶  |
| 2018  |  |  |               | 2017   | ID0002  | development<br>Not associated with any specifi  | Transfer to Operations  |   | 💿 🔿 👐 🤇  |
| 2020  |  |  |               |  | 100002  | development   | Transier to Operations  | \$435,321.00  | 🖉 🤝 👗 i  |
| 2021  | \$100.00   | \$100.00   | \$0.00        | 2018   | ID0003  | Not associated with any species<br>development  | Transfer to Operations  | \$100.00  | 2 🛸 🗶  |
| Total | \$500.00   | \$435,771.00   | -\$435,271.00 | 2019   | ID0004  | Not associated with any specific<br>development   | Transfer to Operations  | \$100.00  | 2 🛸 🗶  |
|       | egend —  |  |               | 2020   | ID0006  | Not associated with any specific<br>development   | Transfer to Operations  | \$100.00  | 2 💈 🗱  |
|       | Clone Work Ac<br>Delete Work A<br>View Work Act<br>Submitted Ann<br>Draft Annual S | tivity<br>ctivity<br>ivity Log<br>ual Statement/Budget   | lget          | 2021   | ID0005  | Not associated with any specific development  | Transfer to Operations  | \$100.00  | 2 3 🗙  |
| • 54  | <sup>&gt;</sup> <u>View Comm</u>   | <u>ents</u>  |               | New Work<br>estimated<br>displayed.<br>will be loc<br>This plan<br>• There are | Activity' I<br>amounts a<br>You can s<br>ked and ca | and plan information has b<br>outton. To funge work acti<br>are consumed, the plan wi<br>ubmit the plan by clicking<br>annot be edited until Field<br><b>bmitted because:</b><br>to submit for this plan. | vities, click on 'Funge<br>II be eligible for subm<br>the 'Submit Plan' but | Work Activities<br>ission and a 'Su<br>ton. Once a plar | ' bútton. When al<br>bmít Plan' button<br>i is submitted, it |

| Energy and Performance Information Center (EPIC)<br>RU101, Welcome back!   | RU101  |      |
|--|--|------|
| Home 🕤 Core Activity/Energy Module 🐃 Development of New Housing 🐃 Activity Planning 💌 EPC 🛸                                      | PNA ~ User and Group Tools ~                                     |      |
| • <u>5-Year Action Plan</u> • <u>Annual Statement/Budget/P&amp;E</u> Selected PHA:   | Change OMB CONTROL NUMBER: 2577-0<br>EXPIRATION DATE: 08/31/2017 | 0274 |
| 5YAP5 » Confirm Action Plan Revision   | 0  | )    |
| This will result in a revision to the Action Plan and would require further submission and an and create a revision of the plan. | pproval. Please click on 'Continue' button to proceed further    |      |
| Continue Cancel  |  |      |
| U.S. Department of Housing and Urban Development   | Freedom of Information Act Privacy policy Web Policie            | es   |

9. Upon selecting "Continue" on the screen above, you will be directed to the 5-Year Action Plan Reporting Page, where you will see a revision to the 5-Year Action Plan. The revision will be in Draft status. Select the link on the 5-Year Action Plan name for the revised plan or the Edit icon next to it.

| Home ~ Core A                        | ctivity/Energy Module               | Development of New Housing 👒       | Activity Plan | nning 🔻 | EPC 👻 PN        | IA 👻 Usera       | and Group Too  | ls ~          |  |
|--------------------------------------|-------------------------------------|------------------------------------|---------------|---------|-----------------|------------------|----------------|---------------|--|
| • <u>5-Year Actio</u>                | <u>n Plan</u> © <u>Annual Sta</u> t | tement/Budget/P&E                  |               | Selec   | ted PHA:        |                  |                | <u>Change</u> | OMB CONTROL NUMBER: 2577-<br>EXPIRATION DATE: 08/31/2017 |
| 5YAP1 » 5-'                          | Year Action Pla                     | n Reporting                        |               |         |                 |                  |                |               | (2   |
| Legend                               | Γ                                   | Five Year Action Plan              |               |         |                 |                  |                |               |  |
| » This plan ha<br>and cannot be edit |                                     | Plan                               |               | Туре    | Created<br>Date | Last<br>Modified | Report<br>Year | Status        | Options  |
| ቅ » Create New                       |                                     | 5-Year Action Plan for 2017-2021 R | tev. 1        | Rolling | 09/29/2017      | 09/29/2017       | 2017-2021      | Draft         | X P  |
| 🖉 » Edit Plan                        |                                     | 5-Year Action Plan for 2017-2021   | 0/1)          | Rolling | 09/01/2017      | 09/29/2017       | 2017-2021      | Approved      | P  |
| 🛅 » Unsubmit Pl                      | an                                  |                                    |               |         |                 |                  |                |               |  |
| 🗱 » Delete                           |                                     |                                    |               |         |                 |                  |                |               |  |
| 🧐 » Clone/Copy                       | Forward                             |                                    |               |         |                 |                  |                |               |  |
| 🖓 » View                             |                                     |                                    |               |         |                 |                  |                |               |  |
| 🔑 » View PDF                         |                                     |                                    |               |         |                 |                  |                |               |  |
| 🗘 » Comments                         |                                     |                                    |               |         |                 |                  |                |               |  |

10. Does the piggy bank balance? Before submitting the revised 5-Year Action Plan, the piggy bank must balance. If the piggy bank is in balance and the "Submit Plan" button is activated, skip to Step 11. If the piggy bank is out of balance, this may be due to a difference between the actual amount of the award to which the budget is linked and the estimated award amount included in the 5-Year Action Plan.

To remedy this, select Edit Plan Information.

| YAP           | 3 » Acti                 | vities List              | for  |   |                    |            | - 2017 to                                       | <b>2021</b>             |                   |      |       | 6  | 2 |
|---------------|--------------------------|--------------------------|--|---|--------------------|------------|---|-------------------------|-------------------|------|-------|----|---|
| 2             | Edit Plan Ir<br>View PDF | Plans Listing            | 4  |   | Search for<br>Year | s to View: | ies records using a Year Range                  | e, Development/AMP, and | /or Work Activity | name |       |    |   |
| -             |                          | Piggy Bank               |  |   |                    |            | Search Clear Sear                               | <mark>ch</mark>         |                   |      |       |    |   |
| Year          | Estimated                | Work Activity Co         | Balance                                      |   | Year               | Identifier | Dev/AMP   | Activity                | Amount            | (    | Optio | ns |   |
| 2017<br>2018  | \$100.00<br>\$100.00     | \$435,371.00<br>\$100.00 | -\$435,271.00<br>\$0.00                      | 4 | 2017               | ID0001     | Not associated with any specific development    | Modernization inspector | \$50.00           | 2    | 3     | ×  | I |
| 2019<br>2020  | \$100.00<br>\$100.00     | \$100.00<br>\$100.00     | \$0.00<br>\$0.00                             |   | 2017               | ID0002     | Not associated with any specific development    | Transfer to Operations  | \$435,321.00      | Ì    | З     | ×  | ξ |
| 2021<br>Iotal | \$100.00                 | \$100.00                 | \$0.00                                       | 1 | 2018               | ID0003     | Not associated with any specific development    | Transfer to Operations  | \$100.00          | 2    | 3     | ×  | Ľ |
| Pedi          | \$500.00                 | 433,771.00               | <i>,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,</i> | 4 | 2019               | ID0004     | Not associated with any specific development    | Transfer to Operations  | \$100.00          | Ì    | 3     | ×  |   |
|               | gend<br>Edit Work Activ  | vity                     |  | 4 | 2020               | ID0006     | Not associated with any specific development    | Transfer to Operations  | \$100.00          | 2    | C,    | ×  | I |
|               | Clone Work Ac            |                          |  |   | 2021               | ID0005     | Not associated with any specific<br>development | Transfer to Operations  | \$100.00          | ø    | 3     | ×  |   |
|               | Delete Work A            |                          |  |   |                    |            |   |                         |                   |      |       |    |   |
| 🗎 »           | View Work Act            | ivity Log                |  |   |                    |            |   |                         |                   |      |       |    |   |
| <b>*</b> »    | Submitted Ann            | ual Statement/Buo        | lget   |   |                    |            |   |                         |                   |      |       |    |   |
|               | Draft Annual S           | tatement/Budget          |  |   |                    |            |   |                         |                   |      |       |    |   |
| <b>.</b>      | Approved Wor             | k Activity               |  |   |                    |            |   |                         |                   |      |       |    |   |

| Energy and Performance Info                              | RU101              |                                       |               |                        |  |
|--|--------------------|---------------------------------------|---------------|------------------------|--|
| Home · Core Activity/Energy Module · Developm            | ent of New Housing | <ul> <li>Activity Planning</li> </ul> | ▼ EPC ~ PNA ~ | User and Group Tools 👻 |  |
| • <u>5-Year Action Plan</u> • <u>Annual Statement/Bu</u> | dget/P&E           | s                                     | elected PHA:  | Chang                  | OMB CONTROL NUMBER: 2577-0274<br>EXPIRATION DATE: 08/31/2017 |
| 5YAP2 » 5 Year Action Plan Detai                         | ls for             |                                       |               | -2017 to 2021.         | 0  |
| 5 Year Action Plan Details                               |                    |                                       |               |                        |  |
| 1. Type of Plan:   | Fixed Plan         | Rolling Plan                          |               |                        |  |
| 2. Fiscal Year End:                                      | 06/30              |                                       |               |                        |  |
| 3. 5 Year Action Plan Starting Year:                     | 2017               |                                       |               |                        |  |
| 4. Estimated Amounts by Plan Year                        |                    |                                       |               |                        |  |
| Year 2017:   | 435,371            |                                       |               |                        |  |
| Year 2018:   | \$100.00           |                                       | ×             |                        |  |
| Year 2019:   | \$100.00           |                                       |               |                        |  |
| Year 2020:   | \$100.00           |                                       |               |                        |  |
| Year 2021:   | \$100.00           |                                       |               |                        |  |
| Total Estimated 5 Year Action Plan Amount:               | \$435,771.00       |                                       |               |                        |  |
| Save and Continue Cancel                                 |                    |                                       |               |                        |  |

Adjust the Estimated Amounts by Plan Year and then select "Save and Continue".

- 11. Once all changes have been made and the piggy bank is in balance, the "Submit Plan" link should be activated. Select "Submit Plan."
- 12. Upon selecting "Submit Plan", you will receive a pop-up message indicating that the plan will become locked. Select "OK".

| -  | <u>Go back to Pla</u>                     | ns Listing               |         |    |             | tivities-  | ties records using a Year Rang                  | e Development/AMP and       | or Work Activity | name    |        |   |   |
|--|---|--------------------------|---------|----|-------------|------------|---|-----------------------------|------------------|---------|--------|---|---|
| 2  | Edit Plan Infor                           | mation                   |         | 30 |             | to View:   |   | e, bevelopment/Arir, and    | OF WORK ACCIVILY | IIdilic |        |   |   |
| P  | View PDF                                  |                          |         | 1  | Developm    | ent/AMP:   |   | ~                           |                  |         |        |   |   |
| ~  |   |                          |         | V  | Vork Activi | ty Name:   |   |                             |                  |         |        |   |   |
| (c.  | Pigg                                      | ıy Bank                  |         |    |             | [          | Search Clear Sear                               | ch                          |                  |         |        |   |   |
|  | Wor                                       | k Activity Cost          |         |    |             |            |   |                             |                  |         |        |   |   |
| Year   | Estimated                                 | Consumed                 | Balance |    | Year        | Identifier | r Dev/AMP                                       | Activity                    | Amount           | (       | Optior | s |   |
| 2017   | \$435,371.00<br>\$100.00                  | \$435,371.00<br>\$100.00 |         |    | 2017        | ID0001     | Not associated with any specific<br>development | Modernization inspector     | \$50.00          | 2       | З      | × |   |
| 2019   | \$100.00                                  | \$100.00                 | \$0.00  | 2  | 2017        | ID0002     | Not associated with any specific<br>development | Transfer to Operations      | \$435,321.00     | 2       | 3      | × | ٦ |
| 2020<br>2021   | \$100.00<br>\$100.00                      | \$100.00<br>\$100.00     |         | 2  | 2018        | ID0003     | Not associated with any specific<br>development | Transfer to Operations      | \$100.00         | 2       | 3      | × |   |
| Total  | \$435,771.00                              | \$435,771.00             | \$0.00  | 2  | 2019        | ID0004     | Not associated with any specific<br>development | Transfer to Operations      | \$100.00         | 2       | 3      | × | 1 |
|  | gend                                      |                          |         | 8  | 2020        | ID0006     | Not associated with any specific<br>development | Transfer to Operations      | \$100.00         | 2       | B      | × | 1 |
|  | Edit Work Activity<br>Clone Work Activity |                          |         | 泉  | 2021        | ID0005     | Not associated with any specific<br>development | Transfer to Operations      | \$100.00         | Ì       | 3      | × | 1 |
|  | Delete Work Activity                      |                          |         |    |             | Me         | essage from webpage                             |                             |                  | ×       |        |   |   |
| <b>3</b> »   | View Work Activity                        | Log                      |         |    |             |            |   |                             |                  |         |        |   |   |
|  | Submitted Annual S                        |                          |         |    |             |            | This will lock the plan.                        | Are you sure you want to su | bmit this plan?  |         |        |   |   |
|  | Draft Annual Staten                       | nent/Budget              |         |    |             |            |   | $\sim$                      |                  | _       |        |   |   |
| 🧶 »  | Approved Work Acti                        | ivity                    |         |    |             |            |   | ОК                          | Cancel           |         |        |   |   |
|  |   |                          |         |    |             |            |   |                             |                  |         |        |   |   |
| The work activities and plan information has been saved. To add another work activity, click on 'Create<br>New Work Activity' button. To funge work activities, click on 'Funge Work Activities' button. When all<br>estimated amounts are consumed, the plan will be eligible for submission and a 'Submit Plan' button is<br>displayed. You can submit the plan by clicking the 'Submit Plan' button. Once a plan is submitted, it<br>will be locked and cannot be edited until Field Office approves or rejects the plan. |   |                          |         |    |             |            |   |                             |                  |         |        |   |   |
| Create New Work Activity Funge Work Activities Submit Plan   |   |                          |         |    |             |            |   |                             |                  |         |        |   |   |

- 13. You will be returned to the 5-Year Action Plan Reporting page, on which you will see that the 5-Year Action Plan revision now has a status of "Submitted" and a lock icon. Reach out to your Field Office and ask them to approve the revised 5-Year Action Plan.
- 14. Once the revised 5-Year Action Plan is approved, you are ready to complete the budget revision process. Navigate to the Annual Statements/Budget List page by following the instructions in Steps 1 and 2 above. Select "Edit Statement" to edit the budget revision.

| Energy and Perforr<br>RU101, Welcome back!   | RU101                                  |              |                  |                |           |                                     |  |  |  |
|--|--|--------------|------------------|----------------|-----------|-------------------------------------|--|--|--|
| Home Core Activity/Energy Module   |  |              |                  |                |           |                                     |  |  |  |
| <u>5-Year Action Plan</u> Annual Statement/Budget/P&E     Selected PHA:     Change     OMB CONTROL NUMBER: 2577-     DEPERATION DATE: 08/31/2017 |  |              |                  |                |           |                                     |  |  |  |
| AS2 » Annual Statement   | ts/Budget List                         |              |                  |                |           | 0                                   |  |  |  |
| Legend   | Annual Statements/Budget               |              |                  |                |           | Search:                             |  |  |  |
| This statement has been<br>submitted and cannot be edited  | Statement                              | Created Date | Last<br>Modified | Report<br>Year | Status    | Options                             |  |  |  |
| Revise the current statement<br>(copies the statement)   | Annual Statement/Budget Original       | 09/28/2017   | 09/28/2017       | 2017           | Submitted | View PDF                            |  |  |  |
| Edit the statement (does not copy the statement)   | (DRAFT) Annual Statement/Budget Rev. 1 | 09/28/2017   | 09/28/2017       | 2017           | Draft     | Edit Statement     Delete Statement |  |  |  |
| Submitted as final P&E   |  |              |                  |                |           | View PDF                            |  |  |  |
| 🗱 Delete   |  |              |                  |                |           |                                     |  |  |  |
| Create P&E Report  |  |              |                  |                |           |                                     |  |  |  |
| View PDF   |  |              |                  |                |           |                                     |  |  |  |
|  | Showing 1 to 2 of 2 entries            |              |                  |                |           | Previous Next                       |  |  |  |

15. Whether you modified a work activity in the 5-Year Action Plan or added a new work activity to the 5-Year Action Plan, you now need to add that work activity or activities to the budget. Do so by selecting "Import Work Activities".

| 🧢 Go back to Statement Listing                               | Annual Stateme   | ent/Budget Information    | n               |         |
|--|------------------|---------------------------|-----------------|---------|
|  |                  | 1. Title: 2017            | 7 Formula Grant |         |
| Piggy Bank   |                  | 2. Fiscal Year End: 06/30 |                 |         |
| AS Amount WA Planned Amount Balance                          |                  | 00/50                     |                 |         |
| \$435,371.00 \$0.00 \$435,371.00                             |                  | 3. Fiscal Year: 2017      |                 |         |
|  | Gra              | nt/Award Information:     |                 |         |
| BLI Piggy Bank   |                  | 4. Award Number:          |                 |         |
| BLI Budget Line Cumulative<br>Number item Amount Percentage  |                  | 5. Cost: 4 425 2          |                 |         |
| Number item Amount Percentage                                |                  | 5. Cost: \$435,3          | 71.00           |         |
| Legend<br>AS » Annual Statement/Budget<br>WA » Work Activity | -Work Activities | Activity                  | Amount          | Options |
| 🖉 » Edit Activity  | Identifier       | ACUVILY                   | Amount          | Options |
| 🗶 » Remove Activity  |                  |                           |                 |         |
| · · ·  |                  |                           |                 |         |
| New Work Activity  |                  |                           |                 |         |
| New Work Activity New Work Activity New Work Activity        |                  |                           |                 |         |
| ☑ » New Work Activity ☑ w Modified Work Activity             |                  |                           |                 |         |
| <b>0</b>   |                  |                           |                 |         |
| <b>0</b>   |                  | _                         |                 |         |
| <b>0</b>   |                  |                           |                 |         |

16. Mark the check box next to the work activities you wish to add to the budget and select "Add Work Activities".

| Energy and Performance Info  |                          | 3 RU101   |                                 |                         |  |  |  |  |
|--|--------------------------|---|---------------------------------|-------------------------|--|--|--|--|
| Home  Core Activity/Energy Module  Developm  | ent of New Housing 👻     | Activity Planning V EPC V PNA V Use             | r and Group Tools 🔹             | Logout                  |  |  |  |  |
| S-Year Action Plan      Annual Statement/Budget/P&E     Selected PHA:     Change     ONB CONTROL NUMBER: 3577-0274     CPRIRATION DATE: 08/31/2017 |                          |   |                                 |                         |  |  |  |  |
| AS8 » Add Activities to Annual Statement/Budget  |                          |   |                                 |                         |  |  |  |  |
| Note that work activities imported into this<br>Statement/Budget.  | s Annual Statement/Bu    | dget using this function will be moved from the | ir current year into the year o | of this Annual          |  |  |  |  |
| Select one of the work activities from the list below t  | to import the work activ | vity into the Annual Statement/Budget           |                                 |                         |  |  |  |  |
| Select one of the work activities norm the list below i  | o import the work act    | nto the Annual Statement budget.                |                                 |                         |  |  |  |  |
| Piggy Bank   | Work Activit             | ties  |                                 |                         |  |  |  |  |
| AS Amount WA Planned Amount Balance  | Identifier               | Activity  | Amount                          | Year                    |  |  |  |  |
| \$435,371.00 \$50.00 \$435,321.00  | ☑ ID0001                 | Modernization inspector                         | \$50.00                         | 2017                    |  |  |  |  |
|  | ID0002                   | Transfer to Operations                          | \$435,321.00                    | 2017                    |  |  |  |  |
|  | D ID0003                 | Transfer to Operations                          | \$100.00                        | 2018                    |  |  |  |  |
|  | ID0004                   | Transfer to Operations                          | \$100.00                        | 2019                    |  |  |  |  |
|  | ID0006                   | Transfer to Operations                          | \$100.00                        | 2020                    |  |  |  |  |
|  | ID0005                   | Transfer to Operations                          | \$100.00                        | 2021                    |  |  |  |  |
| Add Work Activities Cancel   |                          |   |                                 |                         |  |  |  |  |
| U.S. Department of Housing and Urban Development   |                          |   | Freedom of Information Act Priv | acy policy Web Policies |  |  |  |  |

17. The newly-added work activity will appear in the budget with a light-bulb icon, indicating it has been modified. Once all necessary changes have been made and the piggy bank is in balance, select "Submit Report". (Note: If the piggy bank is not in balance, edit the amounts of work activities and/or add or subtract work activities to bring estimated and consumed amounts into balance. You will be unable to submit the budget until the piggy bank balances.)

| AS3 » Activity List for Annual Stateme           | nt/Budget » 5  | ear Action Plan f   | for 2017 - 2021 R   | ev. 1  |  |  |  |
|--|--|---|---|--|--|--|--|
| ← Go back to Statement Listing                   | Annual Statement,  | Budget Information  | n   |  |  |  |  |
|  |  | 1. Title: 2017  | 7 Formula Grant   |  |  |  |  |
| Piggy Bank                                       |  | 2. Fiscal Year End:<br>06/30  |   |  |  |  |  |
| AS Amount WA Planned Amount Balance              |  |   |   |  |  |  |  |
| \$435,371.00 \$0.00                              | c  | 2017  |   |  |  |  |  |
| BLI Piggy Bank                                   | Grant/A  | 4. Award Number:  | _   |  |  |  |  |
| BLI Budget Line Cumulative                       |  |   |   |  |  |  |  |
| Number item Amount Percentage                    |  | 5. Cost: \$435,3  | 371.00  |  |  |  |  |
| Legend<br>AS » Annual Statement/Budget           | Work Activities—   |   |   |  |  |  |  |
| WA » Work Activity                               | Identifier   | Activity  | Amount  | Options  |  |  |  |
|  | ID0001 Moderniz  | ation inspector   | \$435,371.00  | 2  |  |  |  |
| Remove Activity     New Work Activity            |  |   |   |  |  |  |  |
| » New Work Activity     » Modified Work Activity |  |   |   |  |  |  |  |
|  |  |   |   |  |  |  |  |
|  |  |   |   |  |  |  |  |
|  |  |   |   |  |  |  |  |
|  | Import Work Activi   | tion  |   |  |  |  |  |
| L  | Import work Activi   | lies  |   |  |  |  |  |
| <b>_</b> -1                                      | Finished with all w  | ork activities?   |   |  |  |  |  |
| If<br>d  | you are done entering all wo<br>one, select "Save Report" to s | rk activities for this Award, Subr<br>ave annual statement/Budget a | mit your Annual Statement/Budg<br>s draft. Use the View PDF link to | et and lock the report. If you are not yet inspect the report prior to submission. |  |  |  |
| ل  | View PDF   |   |   |  |  |  |  |
|  | Save Report  | Submit Report   |   |  |  |  |  |

18. Upon selecting "Submit Report", you will receive a pop-up message confirming the submission. Select OK to submit the budget revision.



19. You will be returned to the Annual Statement/Budget List screen, on which you will see that the budget revision has been submitted.

