QUICK REFERENCE GUIDE: Revising a Budget in EPIC, When Revisions to the 5-Year Action Plan are NOT 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). This Quick Reference Guide provides step-by-step instructions on creating and submitting a budget revision when no change to the 5-Year Action Plan is needed. There is a separate Quick Reference Guide to assist PHAs that wish to create a budget revision when the changes demand that the 5-Year Action Plan also be revised.

The following changes can be made directly to budgets without revising the 5-Year Action Plan:

- Changing the amounts for work activities
- Adding approved work activities to the budget
- Removing work activities from the budget
- Checking or un-checking sub-categories to reflect a change in the scope of the work; for example, if an approved work activity originally included “Roofs”, “Gutters - Downspouts”, and “Soffits”, the PHA may un-check the sub-category for “Gutters - Downspouts” in the budget. However, if the changes would be inconsistent with the description of the approved work activity, the PHA would need to make the revisions in the 5-Year Action Plan and obtain Field Office approval before adding the work activity to the budget; for example, for a roof replacement work activity, a PHA wishing to un-check “Roofs, “Gutters - Downspouts”, and “Soffits” and check “Exterior Lighting” would need to return to the 5-Year Action Plan.

To make changes to a previously-submitted budget that do not require revising the 5-Year Action Plan:

1. Select Annual Statement/Budget/P&E from the Activity Planning Module homepage.
2. Select the Edit link next to the Budget.

3. Select the Revise Statement link. This will create a draft budget revision.
4. Select the Edit Statement icon next to the budget revision.

5. Make the necessary changes in the budget revision.
   - Select “Import Work Activities” to add approved work activities to the budget.
   - Select the red “X” icon next to a work activity to remove it from the budget.
   - To modify a work activity that is already part of the budget, select the title of the work activity; you would do this if you wish to change the amount allocated to a work activity or to check or un-check sub-categories to reflect a change in the scope of the work (see pg. 1 for restrictions on this action).

Follow the prompts to make and save your changes. Use the buttons at the bottom of the screen to save the budget revision and, when you’re ready, to submit it.
6. Upon selecting “Submit Report”, you will receive a pop-up message confirming the submission. Select OK to submit the budget revision.

![Message from webpage]

This will lock this statement. Are you sure?

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