

QUICK REFERENCE GUIDE: *Revising a Budget in EPIC, When Revisions to the 5-Year Action Plan are NOT Needed*

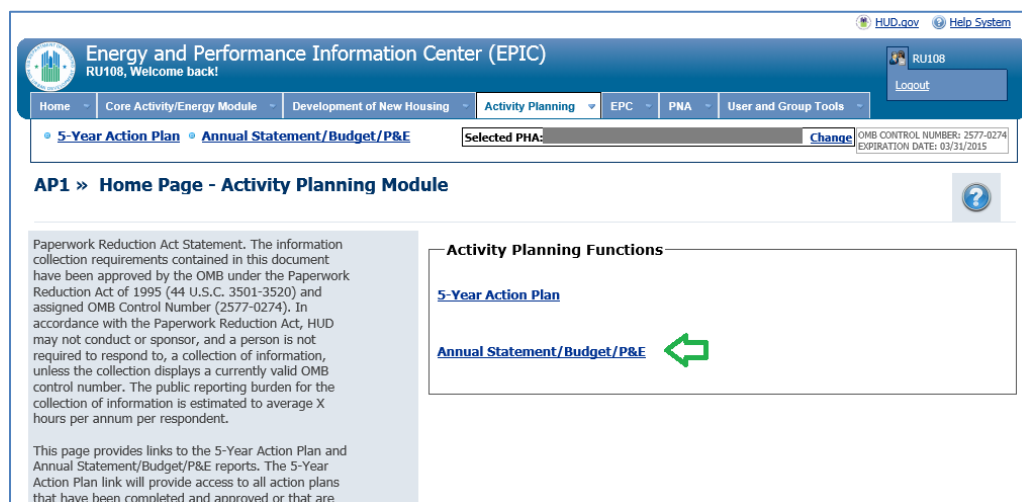
Once a PHA has submitted a Budget in EPIC, the PHA may determine that they need to revise that budget. These revisions may be prompted by a change in the PHA's plans or by an email notification that HUD identified an error in the budget submission (e.g., the budget submission allocated too high a percentage 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.



The screenshot displays the EPIC Activity Planning Module homepage. At the top, there is a navigation bar with tabs for 'Home', 'Core Activity/Energy Module', 'Development of New Housing', 'Activity Planning', 'EPC', 'PNA', and 'User and Group Tools'. Below this, there are links for '5-Year Action Plan' and 'Annual Statement/Budget/P&E'. A 'Selected PHA:' field with a 'Change' button is visible. The main content area is titled 'AP1 » Home Page - Activity Planning Module' and contains a 'Paperwork Reduction Act Statement' on the left and 'Activity Planning Functions' on the right. The 'Activity Planning Functions' section includes links for '5-Year Action Plan' and 'Annual Statement/Budget/P&E', with a green arrow pointing to the latter link.

- Select the Edit link next to the Budget.

Energy and Performance Information Center (EPIC)
RU101, Welcome back!

Home - Core Activity/Energy Module - Development of New Housing - Activity Planning - EPC - PNA - User and Group Tools

5-Year Action Plan - Annual Statement/Budget/P&E Selected PHA: [] Change OMB CONTROL NUMBER: 2577-0274 EXPIRATION DATE: 08/31/2017

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
2017	[REDACTED]	\$1,819,373.00	Edit

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 10 entries Search:

Title	Create Date	Last Modified	Report Year	Status	Options
No Annual Statement/Budget reports found.					

Showing 1 to 1 of 1 entries

[Previous](#) [Next](#)

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

Energy and Performance Information Center (EPIC)
RU101, Welcome back!

Home - Core Activity/Energy Module - Development of New Housing - Activity Planning - EPC - PNA - User and Group Tools

5-Year Action Plan - Annual Statement/Budget/P&E Selected PHA: [] Change OMB CONTROL NUMBER: 2577-0274 EXPIRATION DATE: 08/31/2017

AS2 » Annual Statements/Budget List » [REDACTED] » 5 Year Action Plan for 2017 - 2021

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:

Statement	Created Date	Last Modified	Report Year	Status	Options
Annual Statement/Budget Original	09/28/2017	09/28/2017	2017	Submitted	View PDF Revise Statement Create New P&E Report

Showing 1 to 1 of 1 entries

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

Energy and Performance Information Center (EPIC)
RU101, Welcome back!


Home | Core Activity/Energy Module | Development of New Housing | **Activity Planning** | EPC | PNA | User and Group Tools

5-Year Action Plan | **Annual Statement/Budget/P&E** | Selected PHA: | Change | OMB CONTROL NUMBER: 2577-0274 | EXPIRATION DATE: 08/31/2017

AS2 » Annual Statements/Budget List

Annual Statements/Budget

Show 10 entries | Search:

Statement	Created Date	Last Modified	Report Year	Status	Options
Annual Statement/Budget Original	09/28/2017	09/28/2017	2017	Submitted	View PDF
(DRAFT) Annual Statement/Budget Rev. 1	09/28/2017	09/28/2017	2017	Draft	Edit Statement  Delete Statement View PDF

Showing 1 to 2 of 2 entries | Previous | Next

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.

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

[Go back to Statement Listing](#)

Piggy Bank

AS Amount	WA Planned Amount	Balance
\$1,819,373.00	\$1,819,373.00	\$0.00

BLI Piggy Bank

BLI Number	Budget Line item	Cumulative Amount	Percentage
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Legend
AS » Annual Statement/Budget
WA » Work Activity
 Edit Activity
 Remove Activity
 New Work Activity
 Modified Work Activity


Annual Statement/Budget Information


1. Title: 2017 Formula Grant
 2. Fiscal Year End: 09/30
 3. Fiscal Year: 2017

Grant/Award Information:

4. Award Number:
 5. Cost: \$1,819,373.00

Work Activities


Identifier	Activity	Amount	Options
ID0001	Operations	\$354,843.00	
ID0006	Management Improvements	\$213,324.00	
ID001	Administration	\$281,937.00	
ID0016	General Capital Activity	\$969,269.00	

[Import Work Activities](#) 

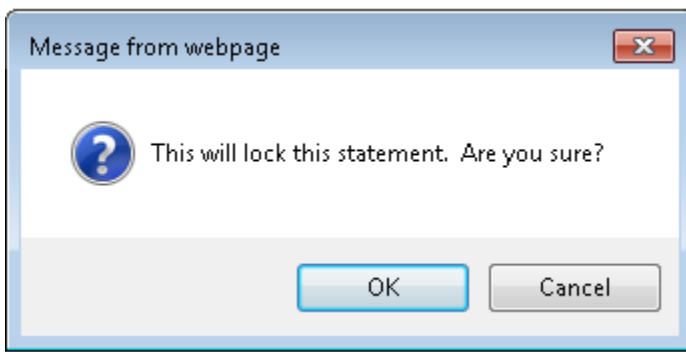
Finished with all work activities?

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](#) 

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



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

Energy and Performance Information Center (EPIC)
RU101, Welcome back!

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5-Year Action Plan • Annual Statement/Budget/P&E Selected PHA: Change OMB CONTROL NUMBER: 2577-0274 EXPIRATION DATE: 08/31/2017

AS2 » Annual Statements/Budget List » 5 Year Action Plan for 2017 - 2021

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Annual Statements/Budget

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Annual Statement/Budget Rev. 1	09/28/2017	09/28/2017	2017	Submitted	View PDF Revise Statement Create New P&E Report

Showing 1 to 2 of 2 entries

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