QUICK REFERENCE GUIDE:  
Creating a Performance & Evaluation (P&E) Report in EPIC

PHAs that have an approved 5-Year Action Plan and that have submitted an Annual Statement/Budget can create a Performance & Evaluation (P&E) Report in EPIC. PHAs with Lead-Based Paint Capital Fund grants may be required to submit a P&E Report for these grants. Field Office staff may also require submission of P&E Reports throughout the lifecycle of a grant award by PHAs as part of risk-based monitoring and portfolio management; Field Office staff will notify PHAs in this category.

The P&E Report functionality in EPIC is similar to the Budget Revision functionality but collects additional information. This additional information may assist HUD staff in conducting grant closeout and risk-based monitoring activities.

The P&E Report will be based on the most recently submitted Budget or Budget Revision for the grant award. If PHAs have made any significant changes that would affect the most recent Budget, they must submit an Annual Statement/Budget Revision first before creating a new P&E report.

PHAs may follow these steps to create a P&E Report in EPIC:

1. Log in to EPIC at this link: [https://portalapps.hud.gov/app_epic/](https://portalapps.hud.gov/app_epic/)
   
   Navigate to the Activity Planning Module by selecting “Activity Planning (CFP grant planning)” in the ribbon at the top of the screen. Select “Annual Statement/Budget/P&E” from the Activity Planning Module homepage.

![Activity Planning Module Homepage (API)](image)

**Figure 1: Activity Planning Module Homepage (API)**

2. Select the “Edit” link next to the grant award for which you wish to create a P&E Report. (If you do not see the grant listed on the left side of the page, you have not yet created an Annual Statement/Budget for the award or haven’t yet linked the draft Annual Statement/Budget to the award; these are necessary prerequisites.)

3. If you are reporting on a Lead-Based Paint Capital Fund grant, you must create an Annual Statement/Budget or Budget Revision in which you report on the Lead-Based Paint related measures before you can create a P&E Report. To do so, select the “Revise Statement link” if it appears (i.e., if the most recent Budget or Budget Revision is in Submitted status). If no “Revise Statement” link appears, that indicates the most recent Budget is in Draft status; in this case, select the “Edit Statement” link.

   If you are not reporting on a Lead-Based Paint Capital Fund grant; the previously-submitted Annual Statement/Budget is current; and your work under the grant does not include any Section 505/accessibility measures, energy/water conservation measures, or lead-based paint related measures, you may skip ahead to Step 8.
4. If you selected “Revise Statement” above, you will see a Draft Annual Statement/Budget Revision appear; you should select the “Edit Statement” link next to the new Annual Statement/Budget Revision. If you selected “Edit Statement” in the step above, proceed.

5. Select each work activity one at a time. Upon selecting the link on the Work Activity name, you will be directed to the Work Activity Details page; on that page, click to expand the “Other Measures” section.
Figure 4: Activity List for Annual Statement/Budget (AS3)

Figure 5: Work Activity Details Page (AS4)
6. Complete the “Other Measures” section by checking the box to the left of each appropriate category and entering the estimated cost. Then, click “Save”.

7. Repeat Steps 5 and 6, above, for each work activity. Once you have completed the “Other Measures” section for each work activity and made any other necessary updates to the Annual Statement/Budget, select the “Submit Report” button to submit the Annual Statement/Budget or Annual/Statement/Budget Revision. You will receive a warning message indicating that this action will lock the statement; click “OK”.

8. Select the “Create New P&E Report” link. (If your agency has not yet submitted an Annual Statement/Budget for the grant, you will not see the “Create New P&E Report” link; submitting a Budget must be completed before creation of a P&E Report.)
9. You will be presented with an informational message asking you to confirm whether you would like to proceed further and create a P&E Report. Select “Create P&E Report”.

**Figure 7: Annual Statement/Budget List Page (AS2)**

**Figure 8: Confirm P&E Report Creation (PE7)**
10. In the drop-down box, select the Fiscal Year on which you are reporting. One by one, select the Edit Activity Details link next to each of the work activities that were executed during the fiscal year and follow the instructions below to provide the necessary information. You should report for all work activities that were executed during the fiscal year.

![Energy and Performance Information Center (EPIC) screenshot](image)

**Figure 9: Activity List for P&E Report Page (PE1)**

11. Upon selecting the “Edit Activity Details” link for a work activity, the Work Activity Information screen will display. Enter the amount of funds obligated, the amount of funds expended, the actual cost, and the status of work performed. These amount should match what has been reported in LOCCS at the time of your submission. Then, select “Next”.

![Activity List for P&E Report Page](image)
12. On the Other Measures Information page, please identify how much of the amount of the work activity was used to perform lead-based paint related measures and other measures by entering the Obligated Cost and Expended Cost. The Estimated Cost is populated based on the prior Annual Statement/Budget or Annual Statement/Budget Revision. After you have entered the necessary information, select “Next”
Select “Manage Installation Items by Dev” to identify the units within the development where the work was executed and to enter the quantity of work performed.
Figure 12: Installation By Development/AMP (PE5)

14. As appropriate, report information on the quantity of work performed and affected developments. Then, select “Save Selections”.
15. Confirm the information submitted for the work activity – funds obligated, funds expended, and units where work was performed. Then, select “Save”. Repeat the process outlined in the steps above to report on all work activities that were executed during the fiscal year.

16. PHAs will have an option to mark a P&E Report as “Final” in EPIC if the amount left to be expended does not exceed $500 and all awarded funds are recorded as obligated. If the P&E Report is being used to support grant closeout, the PHA must mark the P&E Report as “Final”.

*Figure 13: Installation Information for Development/AMP (PE6)*
17. You can either “Save Report” which will place it in a draft status, making it available for future editing, or “Submit Report” which will lock the P&E. **NOTE: EPIC does not notify the Field Office of submissions of P&E Reports; PHAs should always send an email to FO representatives informing them of their EPIC P&E Report submission.**