

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/

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.

The screenshot displays the EPIC Activity Planning Module homepage. At the top, the header includes the HUD.gov logo, a user profile for 'RU101', and a 'Logout' button. The navigation ribbon contains several tabs: 'Home', 'Core Activity/Energy Module', 'Development of New Housing', 'Activity Planning (CFP grant planning)', 'EPC', 'PNA', and 'User and Group Tools'. The 'Activity Planning (CFP grant planning)' tab is active, showing sub-links for '5-Year Action Plan' and 'Annual Statement/Budget/P&E'. A 'Selected PHA' dropdown menu is set to 'Housing Authority of [redacted]', with a 'Change' link below it. To the right, OMB control information is displayed: 'OMB CONTROL NUMBER: 2577-0274' and 'EXPIRATION DATE: 07/31/2017'. The main content area is titled 'AP1 » Home Page - Activity Planning Module'. On the left, a 'Paperwork Reduction Act Statement' provides legal context. On the right, under 'Activity Planning Functions', there are two links: '5-Year Action Plan' and 'Annual Statement/Budget/P&E'. A green arrow points to the 'Annual Statement/Budget/P&E' link.

Figure 1: Activity Planning Module Homepage (API)

- 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.)

The screenshot shows the EPIC interface for Annual Statement/Budget Reporting. The top navigation bar includes links for Home, Core Activity/Energy Module, Development of New Housing, Activity Planning (CFP grant planning), EPC, PNA, and User and Group Tools. The user is logged in as RU101. The page title is "AS1 » Annual Statement/Budget Reporting". Below the title, there are two main sections: "Awards with Annual Statements/Budget" and "Annual Statements/Budget not associated with Awards". The "Awards with Annual Statements/Budget" section contains a search form with fields for Award Number and Award Year, and a "Search" button. Below this is a table with the following data:

Award Year	Award ID	Award Amount (HUD Obligation)	Annual Statement/Budget
2017	50117	\$1,000,000.00	Edit
2017	50117	\$7,856,705.00	Edit
2018	50118	\$11,634,748.00	Edit
2019	50119	\$11,706,247.00	Edit
2017	50217	\$754,902.00	Edit

The "Annual Statements/Budget not associated with Awards" section shows a search bar and a table with columns: Title, Create Date, Last Modified, Report Year, Status, and Options. The table is currently empty, displaying "No Annual Statement/Budget reports found." Below the table is a "Create New Annual Statement/Budget" button.

Figure 2: Annual Statement/Budget Reporting Page (AS1)

- 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.

The screenshot displays the EPIC interface for the Annual Statements/Budget List page (AS2). The header includes the HUD.gov logo, user information (RU101), and navigation menus. The main content area features a table with the following data:

Statement	Plan Name
Annual Statement/Budget Original 5 Year Action Plan for the 2017 - 2021 Rev. 1	11/08/2019 12/12/2019 2017 Submitted View PDF Export Report Revise Statement Create New P&E Report

A green arrow points to the 'Revise Statement' link in the table. The page also includes a legend on the left with instructions for various actions like 'Revise the current statement', 'Edit the statement', and 'Submitted as final P&E'.

Figure 3: Annual Statements/Budget List Page (AS2)

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.

HUD.gov Help System

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

Home - Core Activity/Energy Module - Development of New Housing - Activity Planning (CFP grant planning) - EPC - PNA - User and Group Tools

5-Year Action Plan • Annual Statement/Budget/P&E Selected PHA: Housing Authority of [redacted] OMB CONTROL NUMBER: 2577-0274 EXPIRATION DATE: 07/31/2017

AS3 » Activity List for Annual Statement/Budget » 5 Year Action Plan for 2017 - 2021 Rev. 1

[Go back to Statement Listing](#)

Piggy Bank		
AS Amount	WA Planned Amount	Balance
\$1,000,000.00	\$1,000,000.00	\$0.00

BLI Piggy Bank			
BLI Number	Budget Line Item	Cumulative Amount	Percentage
1480	General Capital Activity	\$1,000,000.00	100%

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 LBP
2. Fiscal Year End: 06/30
3. Fiscal Year: 2017

Grant/Award Information:

4. Award Number: 50117
5. Cost: \$1,000,000.00

Work Activities

Show 10 entries Search: []

Identifier	Activity	Amount	BLI	Options
ID0074	LBP - Risk Assessment	\$100,000.00	1480	✎ ✖
ID0075	LBP - Hazard Controls	\$700,000.00	1480	✎ ✖
ID0076	LBP - Relocation	\$100,000.00	1480	✎ ✖
ID0077	LBP - Clearance Examinations	\$100,000.00	1480	✎ ✖

Figure 4: Activity List for Annual Statement/Budget (AS3)

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

Home - Core Activity/Energy Module - Development of New Housing - Activity Planning (CFP grant planning) - EPC - PNA - User and Group Tools

5-Year Action Plan • Annual Statement/Budget/P&E Selected PHA: Housing Authority of [redacted] OMB CONTROL NUMBER: 2577-0274 EXPIRATION DATE: 07/31/2017

AS4 » Work Activity Details » 5 Year Action Plan for 2017 - 2021 Rev. 1

[Go back to Work Activity Listing](#)

Piggy Bank		
AS Amount	WA Planned Amount	Balance
\$1,000,000.00	\$1,000,000.00	\$0.00

Work Activity Information

1. Title: LBP - Risk Assessment
2. Description: perform an LBP risk assessment and/or paint inspection at 100 units
3. Cost: \$100,000.00
4. Development/AMP: [redacted] ([redacted] 0001)

Component Categories from PNA [\(Click to Expand\)](#)

Work Categories [\(Click to Expand\)](#)

Other Measures [\(Click to Expand\)](#)

Save Cancel

Figure 5: Work Activity Details Page (AS4)

- Complete the “Other Measures” section by checking the box to the left of each appropriate category and entering the estimated cost. Then, click “Save”.

[Go back to Work Activity Listing](#)

Piggy Bank		
AS Amount	WA Planned Amount	Balance
\$1,000,000.00	\$1,000,000.00	\$0.00

Work Activity Information

1. Title:

2. Description:

3. Cost:

4. Development/AMP:

[Component Categories from PNA \(Click to Expand\)](#)

[Work Categories \(Click to Expand\)](#)

[Other Measures \(Click to Expand\)](#)

10. Other Measures:

	Other Measure Detail	Estimated Cost
<input type="checkbox"/>	Section 504/other accessibility measure	<input type="text"/>
<input type="checkbox"/>	Security - Hard Costs	<input type="text"/>
<input type="checkbox"/>	Security - Soft Costs	<input type="text"/>
<input type="checkbox"/>	energy/water conservation measure	<input type="text"/>
<input checked="" type="checkbox"/>	lead based paint related measure	<input type="text" value="100,000"/>

U.S. Department of Housing and Urban Development [Freedom of Information Act](#) [Privacy policy](#) [Web Policies](#)

Figure 6: Other Measures Section of the Work Activity Details Page (AS4)

- 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”.
- 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.)

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

Home - Core Activity/Energy Module - Development of New Housing - Activity Planning (CFP grant planning) - EPC - PNA - User and Group Tools

5-Year Action Plan • Annual Statement/Budget/P&E Selected PHA: Housing Authority of [redacted] OMB CONTROL NUMBER: 2577-0274 EXPIRATION DATE: 07/31/2017

AS2 » Annual Statements/Budget List

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
- Export Report

Annual Statements/Budget

Show 10 entries Search: [input]

Statement	Plan Name	Created Date	Last Modified	Report Year	Status	Options
Annual Statement/Budget Original	5 Year Action Plan for the 2017 - 2021 Rev. 1	11/08/2019	12/12/2019	2017	Submitted	View PDF Export Report
Annual Statement/Budget Rev. 1	5 Year Action Plan for the 2017 - 2021 Rev. 1	12/12/2019	12/12/2019	2017	Submitted	View PDF Export Report Revise Statement Create New P&E Report

Showing 1 to 2 of 2 entries

◀ Previous Next ▶

U.S. Department of Housing and Urban Development [Freedom of Information Act](#) [Privacy policy](#) [Web Policies](#)

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

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”.

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

Home - Core Activity/Energy Module - Development of New Housing - Activity Planning (CFP grant planning) - EPC - PNA - User and Group Tools

5-Year Action Plan • Annual Statement/Budget/P&E Selected PHA: Housing Authority of [redacted] OMB CONTROL NUMBER: 2577-0274 EXPIRATION DATE: 07/31/2017

PE7 » Award ID [redacted] 50117 » Confirm P&E Report Creation

PLEASE NOTE: You are about to create a new Performance and Evaluation report. It will be based on your most recent submitted Annual Statement. If you have made any significant changes that would affect your most recent Annual Statement (including adding/deleting work activities, changing budget line item amounts) you must submit a revised annual statement/Budget first before creating a new P&E report. If you try to create a new P&E report without submitting a revised Annual Statement/Budget in such a situation, you will not be able to accurately complete a P&E report and will not be able to save the information entered in the P&E report when you exit (i.e. the unsubmitted P&E report will be deleted). Are you sure you want to proceed further and create a P&E Report?

U.S. Department of Housing and Urban Development [Freedom of Information Act](#) [Privacy policy](#) [Web Policies](#)

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.

The screenshot shows the EPIC interface for a P&E report. The breadcrumb trail is: PE1 » Award ID [redacted] 50117 » Activity List of P&E Report for Period Ending N/A. The page is divided into several sections:

- LOCCS Information:** A table showing Total Amount of Award (\$1,000,000.00) and Award Balance Remaining (\$0.00).
- Fiscal Year Information:** A form with fields for Fiscal Year End (06/30), Fiscal Year (a dropdown menu highlighted with a green arrow), and Status (Draft).
- Work Activities for P&E Report:** A table with columns for Identifier, Activity, Amount, and Options. The table contains four rows of activities, each with an 'Edit Activity Details' link. The link for ID0074 is highlighted with a green arrow.

Identifier	Activity	Amount	Options
ID0074	LBP - Risk Assessment	\$100,000.00	Edit Activity Details
ID0075	LBP - Hazard Controls	\$700,000.00	Edit Activity Details
ID0076	LBP - Relocation	\$100,000.00	Edit Activity Details
ID0077	LBP - Clearance Examinations	\$100,000.00	Edit Activity Details

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”.

PE2 » Award ID 50117 » Work Activity Information ?

[Go back to P&E Activity Listing](#)

LOCCS Information	
Total Amount of Award	Award Balance Remaining (Not included in Annual Statement/Budget)
\$1,000,000.00	\$0.00

Work Activity Details

[Budget Line Items](#)

[Other Measures](#)

[Installation Information](#)

Work Activity Information (READ-ONLY)

1. Title:

2. Description:

3. Cost:

4. Grant Amount: Reference Only

Status As Of Report Date

5. Has your Budget Line Item information changed? YES NO

6. Funds Obligated: ←

7. Funds Expended: ←

8. Actual Cost: ←

9. Status of Work: ←

➔

Figure 10: Work Activity Information Page (PE2)

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”

HUD.gov Help System

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

Home Core Activity/Energy Module Development of New Housing Activity Planning (CFP grant planning) EPC PNA User and Group Tools

5-Year Action Plan Annual Statement/Budget/P&E Selected PHA: Housing Authority of [redacted] OMB CONTROL NUMBER: 2577-0274 EXPIRATION DATE: 07/31/2017

PE4 » Award ID [redacted] 50117 » Other Measures Information

Go back to P&E Activity Listing

LOCCS Information

Total Amount of Award	Award Balance Remaining (Not included in Annual Statement/Budget)
\$1,000,000.00	\$0.00

Work Activity Details
Budget Line Items
Other Measures
Installation Information

Work Activity Information - LBP - Risk Assessment
Work Activity Funds Obligated: \$50,000.00 Work Activity Funds Expended: \$25,000.00

1. Other Measures Information

Other Measure Detail	Estimated Cost	Obligated Cost	Expended Cost
<input checked="" type="checkbox"/> lead based paint related measure	\$100,000.00	50,000	25,000

« Previous Next » Cancel

Figure 11: Other Measures Information Page (PE4)

13. 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.

PE5 » Award ID ██████████ 50117 » Installation By Development/AMP ?

[← Go back to P&E Activity Listing](#)

LOCCS Information

Total Amount of Award	Award Balance Remaining (Not included in Annual Statement/Budget)
\$1,000,000.00	\$0.00

[Work Activity Details](#)

[Budget Line Items](#)

[Other Measures](#)


Installation Information

Work Activity Information - LBP - Risk Assessment

Work Activity Funds Obligated: \$50,000.00 Work Activity Funds Expended: \$25,000.00

1. Component Categories from PNA

2. Installations by Development/AMP

Installations	Manage Information
██████████0001	Manage Installation Items by Dev 
<ul style="list-style-type: none"> ↳ Contract Administration (1480) » Other Fees and Costs (0.00) 	

« Previous Save Cancel

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”.

PE6 » Award ID ██████████ 50117 » Installation Information for Development/AMP ██████████ 0001 ?

[← Go back to P&E Activity Listing](#)

[Work Activity Details](#)

[Budget Line Items](#)

[Other Measures](#)

[Installation Information](#)

Work Activity Information - LBP - Risk Assessment

Work Activity Funds Obligated: \$50,000.00 Work Activity Funds Expended: \$25,000.00

1. Installation Item

Installation Item	Quantity	Quantity Type	Type Of System
Contract Administration (1480) » Other Fees and Costs »	<input type="text" value="0.0"/>	<input type="text" value=""/>	<input type="text" value="Select"/>

2. Affected Developments/AMPs

	Building	
	██████████ 0001 [Select All] [Deselect All]	--
<input type="checkbox"/>	↳ TUIQ ISZIRM JV1 02 BIRMINGHAM, AL	
<input type="checkbox"/>	↳ TUIQ ISZIRM JV1 032 BIRMINGHAM, AL	
<input type="checkbox"/>	↳ TUIQ ISZIRM JV1 20 BIRMINGHAM, AL	
<input type="checkbox"/>	↳ TUIQ ISZIRM JV1 412 BIRMINGHAM, AL	
<input type="checkbox"/>	↳ TUIQ ISZIRM JV1 613 BIRMINGHAM, AL	
<input type="checkbox"/>	↳ TUIQ ISZIRM JV1 633 BIRMINGHAM, AL	

Figure 13: Installation Information for Development/AMP (PE6)

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”.

PE1 » Award ID ██████████ 50117 » Activity List of P&E Report for Period Ending 2019

Work Activity report saved!

← Go back to P&E Report Listing

LOCCS Information

Total Amount of Award	Award Balance Remaining (Not included in Annual Statement/Budget)
\$1,000,000.00	\$0.00

Legend
 » Edit Activity Details

Fiscal Year Information

1. Fiscal Year End: 06/30
 2. Fiscal Year: 2019
 4. Status: Draft

Work Activities for P&E Report

Identifier	Activity	Amount	Options
ID0074	LBP - Risk Assessment	\$100,000.00	Edit Activity Details
ID0075	LBP - Hazard Controls	\$700,000.00	Edit Activity Details
ID0076	LBP - Relocation	\$100,000.00	Edit Activity Details
ID0077	LBP - Clearance Examinations	\$100,000.00	Edit Activity Details

Finished with all work activities?

If you are finished reporting on all the work activities for this Award, contact PHA Executive Director to submit your Performance and Evaluation report and lock the report. If not finished, click the "Save Report" button to return to the P&E Report listing page.

[View PDF](#)

3. Mark P&E Report As Final.

This report could not be marked as final because:

- Amount left to be Expended is more than \$500
- Obligated amounts should be no less than the Award amount
- Expended amounts is less than the Obligated amounts

Save Report Submit Report

Figure 14: "Mark P&E Report As Final" Check Box on PE1 Page

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.**