

QUICK REFERENCE GUIDE:

Creating a 5-Year Action Plan by Using the Copy Forward Feature in EPIC

PHAs with an approved 5-Year Action Plan in EPIC may easily create a new 5-Year Action Plan for a new reporting period by using the “Copy Forward” feature. This feature enables PHA staff to carry forward work activities from the prior approved plan, so that they don’t have to re-enter this information. Condensed instructions on using this feature are below.

There is a separate Quick Reference Guide to assist PHAs that need to create a 5-Year Action Plan from scratch. PHA staff may also consult the Activity Planning Module User Manual. The Quick Reference Guides and User Manual are available at:

https://portal.hud.gov/hudportal/HUD?src=/program_offices/public_indian_housing/programs/p/h/capfund

1. The EPIC system works best in the Internet Explorer browser with Compatibility View Settings turned on. Using a different browser or using Internet Explorer without Compatibility View Settings will cause multiple issues in EPIC, including with this task. Before proceeding, please verify that you are using the Internet Explorer browser, and follow the instructions below to check or change your Compatibility View Settings.
 - A. Open a new Internet Explorer browser window. Access the “Tools” menu in Internet Explorer by selecting the gear icon at the top right (if displayed) or the “Tools” drop-down box at the top right or in the ribbon. From the menu, select “Compatibility View settings”.

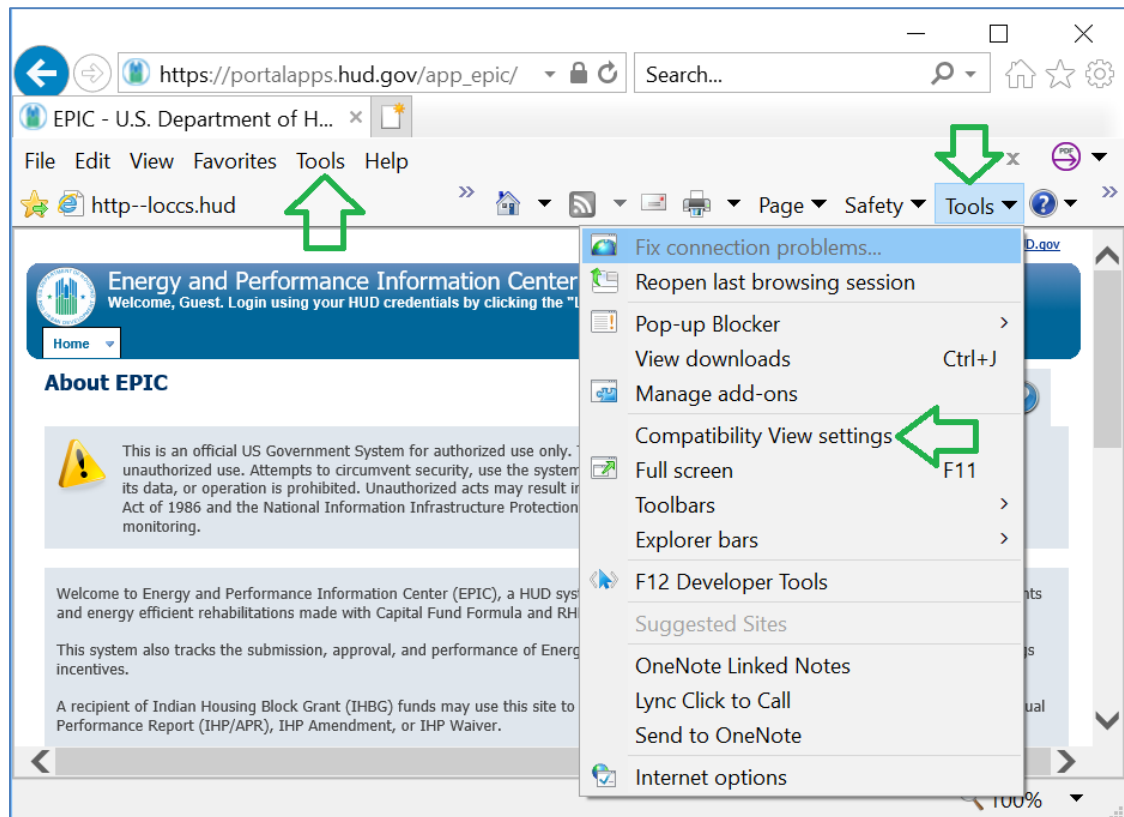


Figure 1: Tools Menu in Internet Explorer

- B. In the box at the top, type “hud.gov” and then select the “Add” button. The hud.gov website should then move into the box at the bottom of the window, indicating that it is a website you’ve added to Compatibility View. Select “Close.”

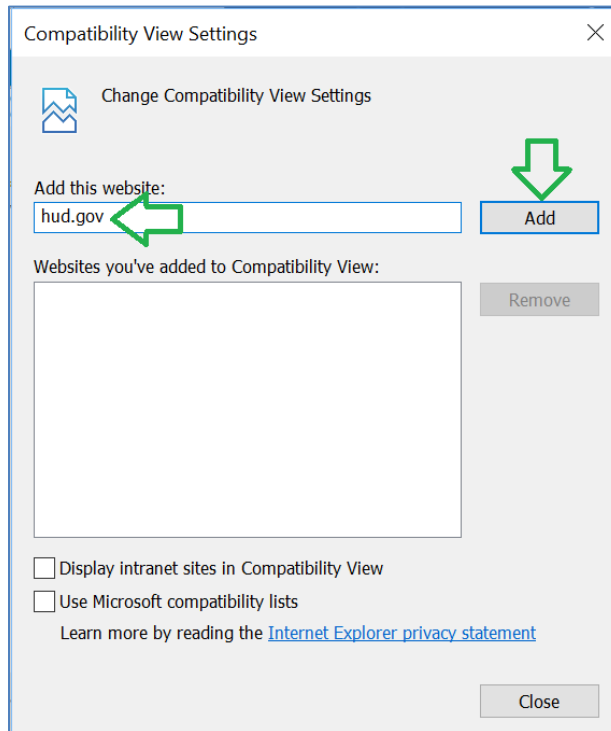


Figure 2: Compatibility View Settings Window

2. Log in to EPIC and navigate to the Activity Planning Module. Select “5-Year Action Plan” from the Activity Planning Module homepage.

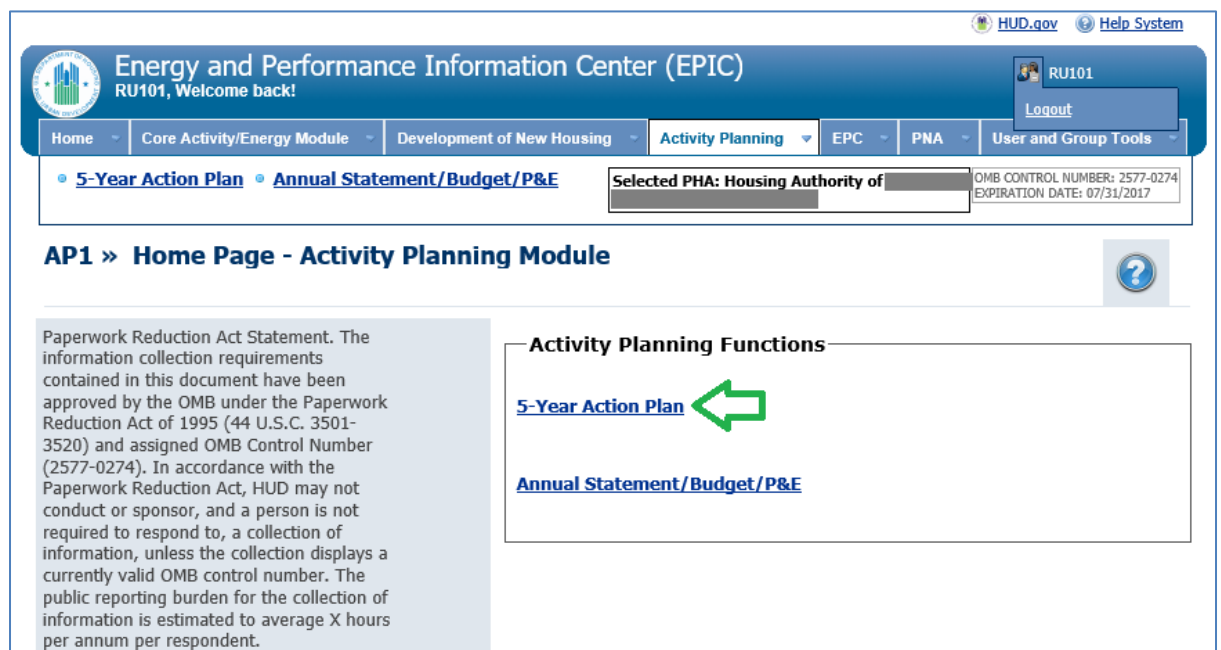


Figure 3: Activity Planning Module Homepage

- If your PHA's latest 5-Year Action Plan has been approved, select the Clone/Copy Forward icon for that plan. As the legend indicates, the icon looks like this:



Icon 1: Copy Forward

The screenshot shows the Energy and Performance Information Center (EPIC) interface. The user is logged in as RU101. The page title is "5YAP1 » 5-Year Action Plan Reporting". A legend on the left lists actions: "This plan has been submitted and cannot be edited", "Create New", "Edit Plan", "Unsubmit Plan", "Delete", and "Clone/Copy Forward". The main table, titled "Five Year Action Plan", has columns: Plan, Type, Created Date, Last Modified, Report Year, Status, and Options. A row shows a plan for 2017-2021 with status "Approved" and a green "Copy Forward" icon in the Options column. A red warning message states: "2018 5YAP is due on 07/18/2018, no report has been submitted yet".

Plan	Type	Created Date	Last Modified	Report Year	Status	Options
5-Year Action Plan for 2017-2021 (0/1)	Rolling	07/28/2017	04/12/2018	2017-2021	Approved	[Icons: Edit, Copy Forward, Delete, Print]

Figure 4: 5-Year Action Plan Reporting Page with Copy Forward Icon

NOTE: If you don't see a Copy Forward icon, it may be because the latest 5-Year Action Plan in EPIC has not been approved. For example, in the screenshot below, the PHA's original 5-Year Action Plan was approved but the latest revision has not been approved. PHA staff will not be able to copy forward a plan until the latest draft has been submitted and approved or deleted so that the original approved plan will also be the latest plan.

The screenshot shows the same EPIC interface as Figure 4. The legend on the left is identical. The main table, titled "Five Year Action Plan", has columns: Plan, Type, Created Date, Last Modified, Report Year, Status, and Options. Two rows are visible. The top row is a "Draft" plan with a red "Delete" icon in the Options column. The bottom row is an "Approved" plan with a green "Copy Forward" icon in the Options column.

Plan	Type	Created Date	Last Modified	Report Year	Status	Options
5-Year Action Plan for 2017-2021 Rev. 1	Rolling	12/21/2017	12/21/2017	2017-2021	Draft	[Icons: Edit, Delete, Print]
5-Year Action Plan for 2017-2021 (0/1)	Rolling	07/28/2017	12/21/2017	2017-2021	Approved	[Icons: Edit, Copy Forward, Print]

Figure 5: 5-Year Action Plan Reporting Page Without Copy Forward Icon

- Select “Continue” when a warning message displays.

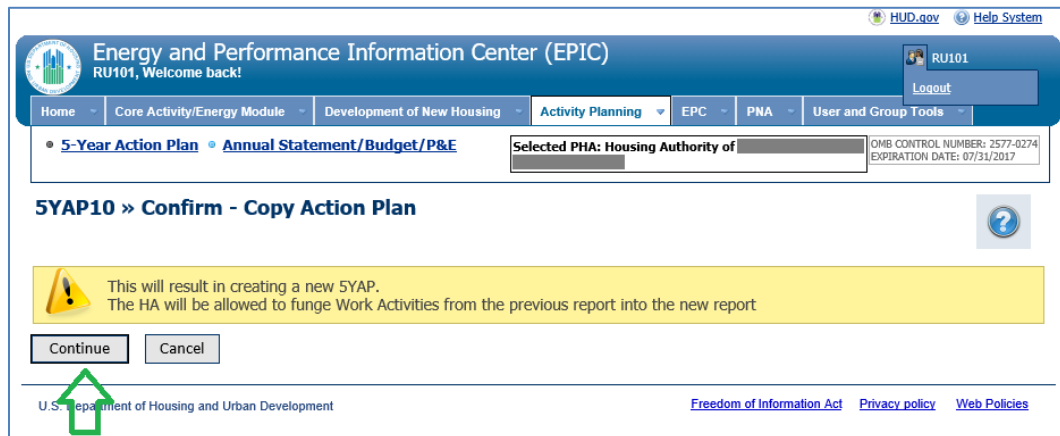


Figure 6: Confirm - Copy Action Plan Page

- In the Five Year Action Plan Information “Summary” box, make any necessary changes to the Type of Plan (Fixed or Rolling) and 5-Year Action Plan starting year.

Update the estimated amounts by plan year as needed and enter the estimated amount for the final year(s) of the plan. In entering estimated amounts, PHAs must enter for all future years the same amount received for the most recent grant year, subject to several exceptions, including that PHAs must adjust estimated amounts for the expiration or reduction of eligibility for RHF and DDTF grants. (See [Notice PIH 2016-21](#)).

Figure 7: 5-Year Action Plan Details Page - Summary Section

- The “Unused Work Activities” section of the page displays un-used work activities (i.e., work activities not connected to a submitted budget) that are associated with a year of the current 5-Year Action Plan that will be dropped in the new 5-Year Action Plan. Work Activities associated with other plan years do not display here and will be automatically retained in the new plan.

For example, in the screenshot below, this PHA is copying forward their 2017-2021 plan to 2018-2022. The PHA submitted a budget including all 2017 work activities except for the Management Improvements work activity. The new plan won’t include 2017 among the plan years, but the PHA has the option to keep the unused 2017 Management Improvements activity and move it into their new plan. The work activities for 2018-2021 in the current plan will automatically be retained.

For any used work activities that you wish to retain in the new plan, select the check box next to the Work Activity or select the “All” checkbox. Then select “Move Down”.

Unused Work Activities

<input checked="" type="checkbox"/> All	Identifier	Year	Priority	Activity	Dev/AMP	Amount
<input checked="" type="checkbox"/>	ID0006	2017	2	Management Improvements	Not associated with any specific development	\$213,324.00

Move Down ▼ Move Up ▲

Work Activities queued to associate with 5YAP

<input type="checkbox"/> All	Identifier	Year	Activity	Dev/AMP	Amount
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Copy Forward Cancel

Figure 8: 5-Year Action Plan Details Page - Work Activities Sections

- The un-used work activities selected and “moved down” in Step 6 will now display in the section of the screen for “Work Activities queued to associate with a 5YAP”. Select the check-box next to each work activity or select the “All” check-box.

Unused Work Activities

<input type="checkbox"/> All	Identifier	Year	Priority	Activity	Dev/AMP	Amount

Move Down ▼
Move Up ▲

Work Activities queued to associate with 5YAP

<input checked="" type="checkbox"/> All	Identifier	Year	Activity	Dev/AMP	Amount
<input checked="" type="checkbox"/>	ID0006	2017	Management Improvements	Not associated with any specific development	\$213,324.00

Copy Forward
Cancel

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

Figure 9: 5-Year Action Plan Details Page - Work Activities Sections

8. Select the “Copy Forward” button at the bottom of the screen.
9. Review the information on the Review Summary page. If everything is correct, select “Complete”. Remember, the only work activities displayed here are the un-used activity associated with the plan year(s) being dropped; all other work activities will automatically be retained.

1 5 Year Action Plan Information
 2 Review Summary

Summary

1. Type of Plan: Rolling

2. Five Year Action Plan starting year: 2018

3. Estimated amounts by plan year

Year 2018: \$1,950,032.00

Year 2019: \$1,950,032.00

Year 2020: \$1,950,032.00

Year 2021: \$1,950,032.00

Year 2022: \$1,950,032.00

Total Estimated 5 Year Action Plan Amount: \$9,750,160.00

Work Activity Actions

The following work activities will be included in the New/ Modified Five Year Plan.

Identifier	Activity	Dev/AMP	From Year	To Year	Amount
ID0006	Management Improvements	Not associated with any specific development	2017	2018	\$213,324.00

Figure 10: 5-Year Action Plan Review Summary Page

10. You will be returned to the 5-Year Action Plan homepage, which will now show the new plan in Draft status. You may select the plan name or the edit icon next to the plan to view the information, make any updates, and add work activities for the latest plan year(s) prior to submitting the plan for Field Office review.

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: Housing Authority of [REDACTED] OMB CONTROL NUMBER: 2577-0274 EXPIRATION DATE: 07/31/2017

5YAP1 » 5-Year Action Plan Reporting

Legend

- » This plan has been submitted and cannot be edited
- » Create New
- » Edit Plan
- » Unsubmit Plan
- » Delete
- » Clone/Copy Forward

Five Year Action Plan

Plan	Type	Created Date	Last Modified	Report Year	Status	Options
5-Year Action Plan for 2018-2022	Rolling	04/12/2018	04/12/2018	2018-2022	Draft	
5-Year Action Plan for 2017-2021 (0/1)	Rolling	07/28/2017	04/12/2018	2017-2021	Approved	

Figure 11: 5-Year Action Plan Reporting Page with New Plan Displayed