


# U. S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

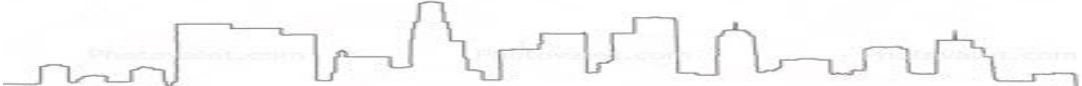
## CAPITAL FUND TRAINING

### ENERGY AND PERFORMANCE INFORMATION CENTER (EPIC) TRAINING





## EPIC: TOPICS


- Background
- Advantages of EPIC
- Implementation Plan



2





## BACKGROUND




### HISTORICAL BACKGROUND

- Offshoot of the Recovery Act Management and Performance System (RAMPS)
- Deployed Spring 2012
- Core Activity/Energy Module
- PIH working to enhance the system and the business process
- Consultation with Field Offices and PHAs

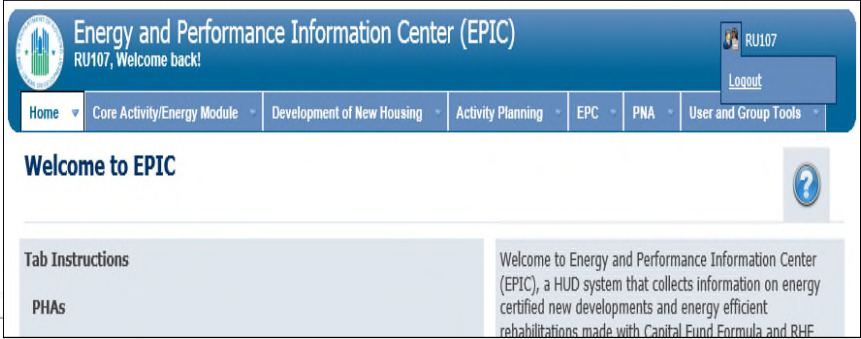


4




## BACKGROUND - TODAY

- **Functionality Today:**
  - Activity Planning Module: 5 Year Action Plan and Annual Statement/Budget (also maybe P&E Report)
  - Public Housing Development Module
  - EPC Module
  - PNA Module




The screenshot shows the Energy and Performance Information Center (EPIC) interface. At the top, it says "Energy and Performance Information Center (EPIC)" and "RU107, Welcome back!". There is a "Logout" button and a user profile icon for "RU107". Below this is a navigation menu with tabs: Home, Core Activity/Energy Module, Development of New Housing, Activity Planning, EPC, PNA, and User and Group Tools. The main content area says "Welcome to EPIC" and includes a "Tab Instructions" section with "PHAs" listed. A welcome message states: "Welcome to Energy and Performance Information Center (EPIC), a HUD system that collects information on energy certified new developments and energy efficient rehabilitations made with Capital Fund Formula and RHE".

5




## ADVANTAGES OF EPIC


# ADVANTAGES OF EPIC

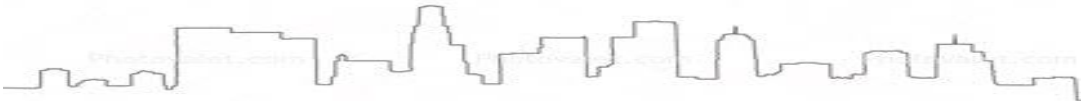


## ADVANTAGES OF ACTIVITY PLANNING MODULE IN EPIC




- Automates currently de-facto paper process
- Simplifies the BLI structure in LOCCS
- EPIC data updates LOCCS BLIs automatically
- Approvals/review minimized
  - FO approves 5 Year Action Plan
  - No review required on all approved 5 Year Action Plan items, PHA can revise amounts without further review
  - PHA can funge without further review






7

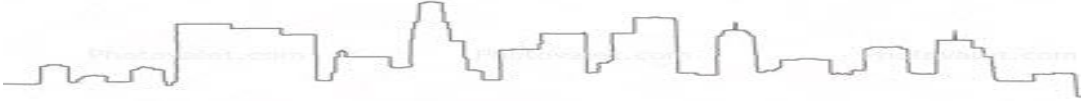


## UPCOMING ADVANTAGES OF ACTIVITY PLANNING MODULE IN EPIC




- PHAs will be able to seamlessly integrate submitted PNA data into 5 Year Action Plans
- Track status of plan approval
- Record communications related to plan comment feature)
- Track Environmental Reviews in EPIC (maybe)

WHAT'S  
NEXT?



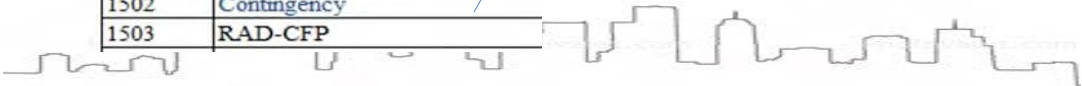
8




## SIMPLIFIED BLIS

1410	Adminstration
1411	Audit Cost
1430	Fees & Costs
1440	Site Acquisition
1450	Site Improvement
1460	Dwelling Structures
1465	Dwelling Equipment
1470	Non-Dwelling Structures
1475	Non-Dwelling Equipment
1485	Demolition
1490	Replacement Reserve
1492	MovingToWorkDemonstration
1495	Relocation Costs
1499	Development Activity
1500	Indian Housing Grants
1501	Collater Exp / Debt Srvc
1502	Contingency
1503	RAD-CFP

Line Item	Name
1406	Operations
1408	Management Improvement
1410	Adminstration
1480	General Capital Activity
1492	MovingToWorkDemonstration
1501	Collater Exp / Debt Srvc
1503	RAD-CFP
1504	RAD Investment Activity
9000	Debt Reserves
9001	Bond Debt Obligation
9002	Loan Debt Obligation
9900	Post Audit Adjustment



9




## WORK CATEGORIES

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



7. Work Categories:

- Administration (1410)
- Contract Administration (1480)
- Debt Service Bond Payment-Paid by HUD (9000)
- Debt Service Bond Payment-Paid by PHA (1501)
- Dwelling Unit (1480)
  - Dwelling Unit - Conversion (1480)
  - Dwelling Unit - Demolition (1480)
  - Dwelling Unit-Development (1480)
  - Dwelling Unit-Exterior (1480)
  - Dwelling Unit-Interior (1480)
  - Dwelling Unit-Site Work (1480)
  - MTW (1492)
- Management Improvement (1408)
- Non-Dwelling Construction - Mechanical (1480)


- Non-Dwelling Construction-New Construction (1480)
- Non-Dwelling Interior (1480)
- Operations (1406)
- RAD (1503)




10


# IMPLEMENTATION PLAN




## BETA TEST



- In Progress – Began August 2015
- Designed to test system, system support and business process
- PHAs input actual 5 Year Action Plans into EPIC
  - New plans in process or already approved plans
- Field Offices process/approve plans submitted in EPIC
- PHAs would link already awarded grants covered by 5 Year action plan years to an Annual Statement/Budget





12




## ADVANTAGES OF ACTIVITY PLANNING MODULE IN EPIC

- Automates currently de-facto paper process
- Simplifies the BLI structure in LOCCS
- EPIC data updates LOCCS BLIs automatically
- Approvals/review minimized
  - FO approves 5 Year Action Plan
  - No review required on all approved 5 Year Action Plan items, PHA can revise amounts without further review
  - PHA can funge without further review





13



## WORK FLOW

PHA

FO

HQ

PHA drafts/  
submits  
5-YAP

FO Staff  
Reviews 5-  
YAP

PHA  
Receives  
CFP Grant

FO  
Dir/Deputy  
Approves  
5-YAP

PHA Creates Anl  
Stmnt/Budget from 5-  
YAP

FO Staff  
Reviews 5-  
YAP

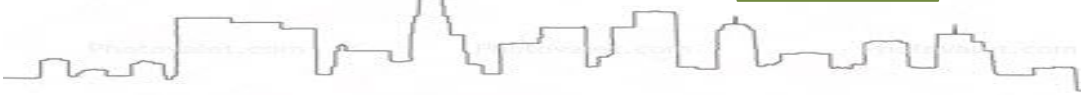
FO  
Dir/Deputy  
Approves  
5-YAP

PHA  
Receives  
CFP Grant


FO  
Dir/Deputy  
Approves  
5-YAP

PHA Creates Anl  
Stmnt/Budget from 5-  
YAP

HQ Spreads BLI  
Based on Anl  
Stmnt/Budget




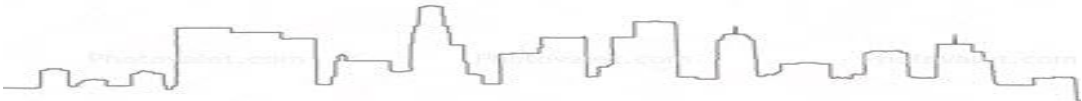
14




## WHAT'S DIFFERENT?

**PHA does not need to send a paper Annual Statement/Budget – instead it completes an Annual Statement/Budget in EPIC and links it to its grants**

**Once a PHA has linked an Annual Statement/Budget to a grant in EPIC (with certain exceptions), there is an automated process that will spread the BLIs in LOCCS via a batch routine that takes 1 or 2 days to process.**

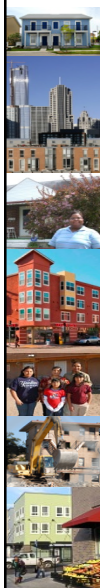
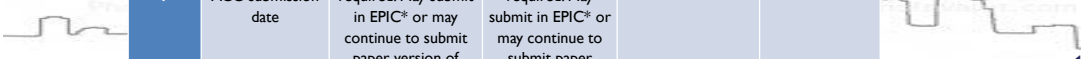
15



## ROLLING 5-YEAR ACTION PLANS: EPIC SUBMISSION REQUIREMENTS


\*PHAs may transition to EPIC early with Field Office permission. PHAs that transition early must submit a 5-Year Action Plan in EPIC covering 2017-2021.

PHA FYE	FY2017			FY2018	
	Timeline for Submission of 5-Year Action Plan in EPIC	5-Year Period Covered in FY 2017 EPIC 5-Year Action Plan Submission	FY 2017 Annual Statement / Budget Submission	5-Year Period Covered in FY 2018 5-Year Action Plan EPIC Submission	FY 2018 Annual Statement / Budget Submission
3/31/17	3/30/2017 encouraged; no later than 2017 ACC submission date	2017-2021	EPIC	2018-2022	EPIC
6/30/17	6/29/2017 encouraged; no later than 2017 ACC submission date	2017-2021	EPIC	2018-2022	EPIC
9/30/17	Before 2018 ACC submission date	EPIC submission not required. May submit in EPIC* or may continue to submit paper version of 50075.2	EPIC submission not required. May submit in EPIC* or may continue to submit paper version of 50075.1	2018-2022	EPIC
12/31/17	Before 2018 ACC submission date	EPIC submission not required. May submit in EPIC* or may continue to submit paper version of 50075.2	EPIC submission not required. May submit in EPIC* or may continue to submit paper version of 50075.1	2018-2022	EPIC

16







## FIXED 5-YEAR ACTION PLANS: 2017 EPIC SUBMISSION REQUIREMENTS

\*PHAs may transition to EPIC early with Field Office permission. PHAs that transition early must submit a 5-Year Action Plan in EPIC in accordance with the instructions for the years remaining on the paper-based plan.


PHA FYE	Timeline for Submission of 5-Year Action Plan in EPIC	Current Plan (FY2016)		FY2017 Submission		
		Years Covered by Prior, Paper-Based Fixed SYAP	Years Remaining On Prior, Paper-Based Plan	5-Year Period Covered in FY 2017 EPIC 5-Year Action Plan Submission	Years Covered by Work Activities	FY 2017 Annual Statement / Budget Submission
3/31	3/30/2017 encouraged; no later than 2017 ACC submission date	2012-2016	0	2017-2021	2017-2021	EPIC
		2013-2017	1	2017-2021	2017-2021	
		2014-2018	2	2014-2018	2017-2018	
		2015-2019	3	2015-2019	2017-2019	
		2016-2020	4	2016-2020	2017-2020	
6/30	6/29/2017 encouraged; no later than 2017 ACC submission date	2012-2016	0	2017-2021	2017-2021	EPIC
		2013-2017	1	2017-2021	2017-2021	
		2014-2018	2	2014-2018	2017-2018	
		2015-2019	3	2015-2019	2017-2019	
		2016-2020	4	2016-2020	2017-2020	
9/30	Before 2018 ACC submission date	2012-2016	0	EPIC submission not required. May submit in EPIC* or may continue to submit paper version of 50075.2	2017-2021	EPIC submission not required. May submit in EPIC* or may continue to submit paper version of 50075.1
		2013-2017	1			
		2014-2018	2			
		2015-2019	3			
		2016-2020	4			
12/31	Before 2018 ACC submission date	2012-2016	0	EPIC submission not required. May submit in EPIC* or may continue to submit paper version of 50075.2	2017-2021	EPIC submission not required. May submit in EPIC* or may continue to submit paper version of 50075.1
		2013-2017	1			
		2014-2018	2			
		2015-2019	3			
		2016-2020	4			



17



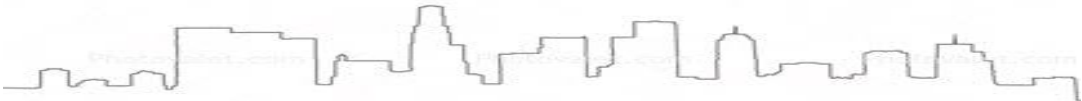
## FIXED 5-YEAR ACTION PLANS: 2018 EPIC SUBMISSION REQUIREMENTS

PHA FYE	Timeline for Submission of 5-Year Action Plan in EPIC	Current Plan (FY2017)		FY2018 Submission		
		Years Covered by Prior, Paper-Based Fixed SYAP	Years Remaining On Prior, Paper-Based Plan	5-Year Period Covered in FY 2018 EPIC 5-Year Action Plan Submission	Years Covered by Work Activities	FY 2018 Annual Statement / Budget Submission
3/31	Before 2018 ACC submission date	N/A; FY2017 Plan in EPIC		2017-2021	2017-2021	EPIC
				2017-2021	2017-2021	
				2014-2018	2017-2018	
				2015-2019	2017-2019	
				2016-2020	2017-2020	
6/30	Before 2018 ACC submission date	N/A; FY2017 Plan in EPIC		2017-2021	2017-2021	EPIC
				2017-2021	2017-2021	
				2014-2018	2017-2018	
				2015-2019	2017-2019	
				2016-2020	2017-2020	
9/30	Before 2018 ACC submission date	2013-2017	0	2018-2022	2018-2022	EPIC
		2014-2018	1	2018-2022	2018-2022	
		2015-2019	2	2015-2019	2018-2019	
		2016-2020	3	2016-2020	2018-2020	
		2017-2021	4	2017-2021	2018-2021	
12/31	Before 2018 ACC submission date	2013-2017	0	2018-2022	2018-2022	EPIC
		2014-2018	1	2018-2022	2018-2022	
		2015-2019	2	2015-2019	2018-2019	
		2016-2020	3	2016-2020	2018-2020	
		2017-2021	4	2017-2021	2018-2021	



18

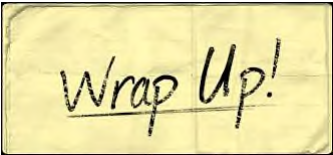
 **RESOURCES**

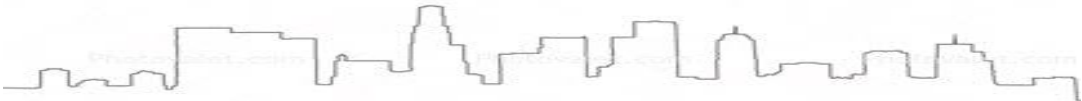
For more information and help,  
the EPIC Help Desk is:  
[EPICHelp@HUD.gov](mailto:EPICHelp@HUD.gov)



19

 **WRAP UP AND QUESTIONS**





20