Creating Affiliate Records in AMIS

Office of Certification Policy and Evaluation (OCPE)

Resources

- Full guidance on Organization Board Records found under Step 2: Apply at www.cdfifund.gov/cdficert.

Entities Relevant to CDFI Certification Review

- How you define the relationship between your Applicant organization and its Affiliates as it pertains to CDFI Certification

- Two ways an Affiliate may be relevant to your CDFI Certification Application:
  - Relevant to Primary Mission
  - Subject to Collective Review

Presentation Structure

Creating an Affiliate Record

Completing Entity Relevance to Certification Review Section of Affiliate Record

Changing Relevance to Certification Review Form Status for Submission

Modifying Relevance to Certification Review Form

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