



U.S. Department of Treasury  
Community Development Financial Institutions Fund

# How to Request an Amendment in AMIS

July 2025

# Table of Contents

1.0	Introduction to Amendments in AMIS	4
	Overview	4
	Supported Amendment Requests using the Amendments Interface	4
	High-Level Workflow	4
2.0	How to Submit a Fiscal Year End Change Amendment Request	5
	Log into AMIS and Create Service Request	5
	Create the Amendment	9
	Enter Amendment Information	10
	Submit and Attest	12
3.0	How to Submit a CDFI Program or NACA Program FA Amendment Request	14
	Create Service Request	14
	Create the Amendment	17
	Enter Amendment Information	19
	FA Amendment Request PG&M Guidelines	20
	Upload Documents as Needed	21
	Submit and Attest	21
4.0	How to Submit a CDFI Program or NACA Program TA Amendment Request	23
	Create Service Request	23
	Create the Amendment	26
	Enter Amendment Information	28
	Upload Documents as Needed	29
	Submit and Attest	30
5.0	How to Submit a Capital Magnet Fund (CMF) Amendment Request	32
	Create Service Request	32
	Create the Amendment	36
	Enter Amendment Information	37
	Project Completion Date	38
	Geographic Area Removal	40
	Geographic Area Addition	40
	Performance Goal and Measure Benchmarks	41
	Upload Documents as Needed	41
	Submit and Attest	43
	Providing Additional Information & CMF Recommended Benchmarks	44
6.0	How to Submit a Generic Amendment Request	46
		2

Create Service Request	46
Create the Amendment	49
Enter Amendment Information	50
Upload Documents as Needed	51
Submit and Attest	52
7.0 Tasks After Submitting an Amendment	54
Communication with the CDFI Fund	54
Providing Additional Information	55
Signing Letters	55
Notification of Completion	58

## 1.0 Introduction to Amendments in AMIS

### Overview

This document will guide Organizations in how to request an Amendment in AMIS.

### Supported Amendment Requests using the Amendments Interface

Amendment Types currently supported via the AMIS Amendments interface:

- Organization Fiscal Year End Change Request
- CDFI Program or NACA Program FA Award
  - Performance Goal and Measure Benchmark Change Request
- CDFI Program or NACA Program TA Award for Uncertified Organizations<sup>1</sup>
  - Certification Submission Deadline Extension Request
  - Certification Deadline Extension Request
- Capital Magnet Fund
  - Project Completion Date Change Request
  - Performance Goal and Measure Benchmark Change Request
  - Geographic Area Change Request
- Generic
  - Utilized for Award amendment requests to include BEA, NMTC and SDL

Utilizing Service Request, an organization will create a new amendment-focused request. The organization will select the type of Amendment Request as well as the associated program (if applicable). A customized intake form, called Amendment, will guide the Organization in providing all relevant information and necessary attachments. When an organization has finished completing their initial intake form, they will submit with any required documents.

### High-Level Workflow

Documented here is a high-level workflow that Amendment Requests will follow.



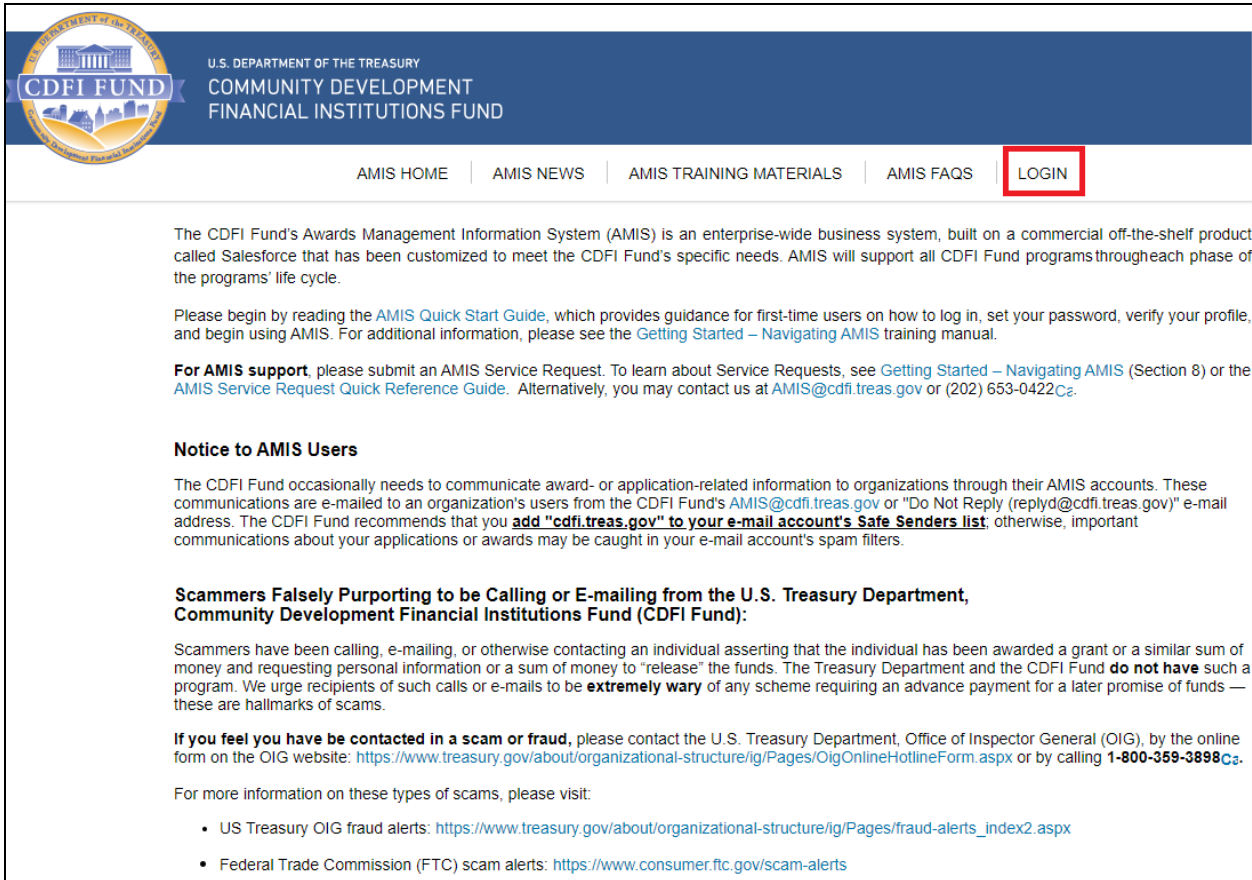
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<sup>1</sup> Note: CDFI Program and NACA Program TA Awards for Certified Organizations cannot be amended.

## 2.0 How to Submit a Fiscal Year End Change Amendment Request

### Log into AMIS and Create Service Request

1. Navigate to: [amis.cdfifund.gov](https://amis.cdfifund.gov).
2. Click the LOGIN link. The AMIS Login page displays.



The CDFI Fund's Awards Management Information System (AMIS) is an enterprise-wide business system, built on a commercial off-the-shelf product called Salesforce that has been customized to meet the CDFI Fund's specific needs. AMIS will support all CDFI Fund programs through each phase of the programs' life cycle.

Please begin by reading the [AMIS Quick Start Guide](#), which provides guidance for first-time users on how to log in, set your password, verify your profile, and begin using AMIS. For additional information, please see the [Getting Started – Navigating AMIS](#) training manual.

**For AMIS support**, please submit an AMIS Service Request. To learn about Service Requests, see [Getting Started – Navigating AMIS](#) (Section 8) or the [AMIS Service Request Quick Reference Guide](#). Alternatively, you may contact us at [AMIS@cdfi.treas.gov](mailto:AMIS@cdfi.treas.gov) or (202) 653-0422 C<sub>2</sub>.

**Notice to AMIS Users**

The CDFI Fund occasionally needs to communicate award- or application-related information to organizations through their AMIS accounts. These communications are e-mailed to an organization's users from the CDFI Fund's [AMIS@cdfi.treas.gov](mailto:AMIS@cdfi.treas.gov) or "Do Not Reply ([replyd@cdfi.treas.gov](mailto:replyd@cdfi.treas.gov))" e-mail address. The CDFI Fund recommends that you **add "[cdfi.treas.gov](mailto:AMIS@cdfi.treas.gov)" to your e-mail account's Safe Senders list**; otherwise, important communications about your applications or awards may be caught in your e-mail account's spam filters.

**Scammers Falsely Purporting to be Calling or E-mailing from the U.S. Treasury Department, Community Development Financial Institutions Fund (CDFI Fund):**

Scammers have been calling, e-mailing, or otherwise contacting an individual asserting that the individual has been awarded a grant or a similar sum of money and requesting personal information or a sum of money to "release" the funds. The Treasury Department and the CDFI Fund **do not have** such a program. We urge recipients of such calls or e-mails to be **extremely wary** of any scheme requiring an advance payment for a later promise of funds — these are hallmarks of scams.

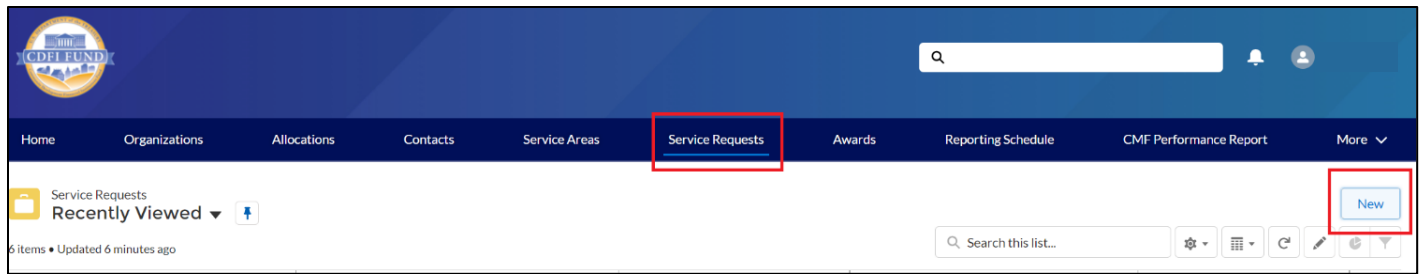
**If you feel you have been contacted in a scam or fraud**, please contact the U.S. Treasury Department, Office of Inspector General (OIG), by the online form on the OIG website: <https://www.treasury.gov/about/organizational-structure/ig/Pages/OigOnlineHotlineForm.aspx> or by calling **1-800-359-3898 C<sub>3</sub>**.

For more information on these types of scams, please visit:

- US Treasury OIG fraud alerts: [https://www.treasury.gov/about/organizational-structure/ig/Pages/fraud-alerts\\_index2.aspx](https://www.treasury.gov/about/organizational-structure/ig/Pages/fraud-alerts_index2.aspx)
- Federal Trade Commission (FTC) scam alerts: <https://www.consumer.ftc.gov/scam-alerts>

3. Enter your username (e.g., email address) and password and click SIGN IN.





6. Set “Program” equal to “Other”

7. Set “Amendment Type” equal to “Fiscal Year End Change”

The image shows a form titled 'New Service Request: General Inquiry'. It contains several fields for entering request information. The 'Service Request Owner' field is empty. The 'Service Request Number' field is empty. The 'Contact Name' field is empty. The 'Organization Name' field is empty. The '\* Program' dropdown menu is set to 'Other' and is highlighted with a red box. The 'Program Topic' field is empty. The 'Requested By Date' field is set to 7/24/2025. The 'Funding Application' field is empty. The '\* SR related to existing Award/Allocation?' dropdown menu is set to '--None--'. The 'Enter existing CDFI Fund AWD- (not NMTC)' field is empty. The 'Enter existing NMTC Award- (NMTC only)' field is empty. The 'Validated' dropdown menu is set to '--None--'. The 'Amendment Type' dropdown menu is set to 'Fiscal Year End Change' and is highlighted with a red box. At the bottom of the form, there are buttons for 'Cancel', 'Save & New', and 'Save'. There are also fields for 'Last Comment Date' and 'Last Attachment Date' at the bottom left.

8. Enter values for “Subject” and “Description” that capture the purpose of the request.

## New Service Request: General Inquiry

### Additional Information

\* Status

New

Completed Date

View all dependencies

\* Service Request Origin

Web

Priority

Medium

### Description Information

\* Subject

\* Description

### Resolution

Resolution

### Web Information

Web Email

Web Company

Cancel

Save & New

Save

9. Select Save to create the Service Request.

Home
Organizations
Allocations
Contacts
Service Areas
Service Requests
Awards
Reporting Schedule
CMF Performance Report
More

Service Request test

Clone Edit Printable View

Priority

Medium

Status

New

Service Request Number

00081613

To create an Amendment, navigate to Related tab and click the New button within the Amendments section. To edit an existing Amendment, navigate to Related tab and click on the Amendment linked within the Amendments section. Submit when completed.

Detail Related

Service Request Owner

CDFI

Service Request Number

00081613

Contact Name

Organization Name

Contact Phone

Contact Email

Funding Application

SR related to existing Award/Allocation?

Yes

For additional information on how to create Service Requests, please review Section 8 of our training manual, [Getting Started - Navigating AMIS](#)



## Create the Amendment

### 1. Select “Related” on the Service Request.

The screenshot shows the 'Service Request test' page. The top navigation bar includes links for Home, Organizations, Allocations, Contacts, Service Areas, Service Requests, Awards, Reporting Schedule, CMF Performance Report, and More. The page header shows 'Service Request test' with 'Clone', 'Edit', and 'Printable View' buttons. Below the header, the 'Priority' is 'Medium', 'Status' is 'New', and 'Service Request Number' is '00081613'. An orange instruction box states: 'To create an Amendment, navigate to Related tab and click the New button within the Amendments section. To edit an existing Amendment, navigate to Related tab and click on the Amendment linked within the Amendments section. Submit when completed.' The 'Detail' and 'Related' tabs are visible, with 'Related' highlighted. The 'Related' section contains fields for 'Service Request Owner' (CDFI), 'Service Request Number' (00081613), 'Contact Name', 'Organization Name', 'Contact Phone', 'Contact Email', 'Funding Application', and 'SR related to existing Award/Allocation?' (Yes).

### 2. Locate the Amendment Section.

### 3. Create a new Amendment by selecting “New.”

The screenshot shows the 'Service Request test' page with the 'Related' tab selected. The 'Related' section contains three sub-sections: 'Service Request Comments Public (0)' with a 'New' button, 'Attachments (0)' with an 'Upload Files' button, and 'Amendments (0)' with a 'New' button. The 'Amendments (0)' section is highlighted with a red box.

### 4. Enter an “Amendment Name” such as *[My Organization] Fiscal Year End Change - [New Date]*.

New Amendment

Information

\* Amendment Name

Demo Org Fiscal Year End Change - 12/31

\* Service Request

00051395

×

Cancel


Save & New

Save


5. Select Save.

## Enter Amendment Information

1. Open the newly created Amendment

 Amendments (1)
Amendment Name
<a href="#">Demo Org Fiscal Year End Change - 12/31</a>

2. Enter new requested Month and Day into “New Fiscal Year End” fields.


**Amendment**  
**Demo Org Fiscal Year End Change - 12/31**

Submit and Attest

Amendment Name	Demo Org Fiscal Year End Change - 12/31
Organization	
Service Request	00051395
Award	
Program	
Award Control Number	
Amendment Type	Fiscal Year End Change
Award Status	
Award Year	
Amendment Status	Awaiting Organization
Attestation	<input type="checkbox"/>
Attestation Signature	
Staff Attestation	<input type="checkbox"/>
Staff Attestation Signature	

Please fill out the Material Events Form

New Fiscal Year End Month:

Select an Option ▼

New Fiscal Year End Day:


Select an Option ▼

Save

3. Select “Save.”

4. Locate the File Upload section at the bottom of the Amendment page.

Upload files - files will be stored on related Service Request

 Upload Files
Or drop files

5. Complete a Certification of Material Events form and upload any supporting documents. Guidance on submitting a Certification of Material Events form is available here:

<https://www.cdfifund.gov/media/8014836/download?inline>

A. On the Service Request record, locate and click on the arrow pointing down button next to ‘Printable View’.

**Service Request**  
Test ME + Amendment

Priority: Medium, Status: New, Service Request Number: 00084574

Buttons: Clone, Edit, Printable View, **Open Material Event Form**

Detail	Related
Service Request Owner: NMTC	Contact Phone: [Redacted]
Service Request Number: 00084574	Contact Email: <a href="mailto:gonzaleso@cdfi.treas.gov.test">gonzaleso@cdfi.treas.gov.test</a>
Contact Name: <a href="#">Test Gonzales</a>	Funding Application: [Redacted]
Organization Name: <a href="#">Test Applicant Org 04</a>	SR related to existing Award/Allocation?: Yes
Program: NMTC Program	Enter existing CDFI Fund AWD- (not NMTC): [Redacted]
Program Topic: Amendment (post-closing)	Enter existing NMTCAward- (NMTC only): <a href="#">NMTCAward-001118</a>

B. Click on 'Open Material Event Form' button and complete all the questions marked by a red asterisk.

**Service Request**  
Test ME + Amendment

Priority: Medium, Status: New, Service Request Number: 00084574

Buttons: Clone, Edit, Printable View, **Open Material Event Form**

Detail	Related
Service Request Owner: NMTC	Contact Phone: [Redacted]
Service Request Number: 00084574	Contact Email: <a href="mailto:gonzaleso@cdfi.treas.gov.test">gonzaleso@cdfi.treas.gov.test</a>
Contact Name: <a href="#">Test Gonzales</a>	Funding Application: [Redacted]
Organization Name: <a href="#">Test Applicant Org 04</a>	SR related to existing Award/Allocation?: Yes
Program: NMTC Program	Enter existing CDFI Fund AWD- (not NMTC): [Redacted]
Program Topic: Amendment (post-closing)	Enter existing NMTCAward- (NMTC only): <a href="#">NMTCAward-001118</a>

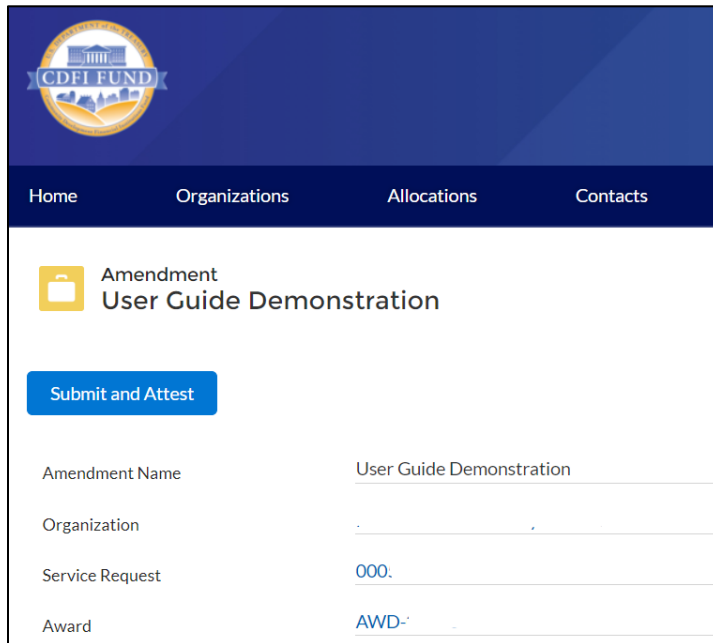
C. Once you have completed all the required sections along with any applicable section to your situation, you can click on 'Submit' to validate and lock the Material Event Form record.

**Submit**

Submit and Attest

The Amendment will not be sent to the CDFI Fund until it is Submitted. Only Submit and Attest once all information pertaining to the Amendment Request has been entered. Only users who have been designated “Authorized Representatives” will have the ability to Submit and Attest.

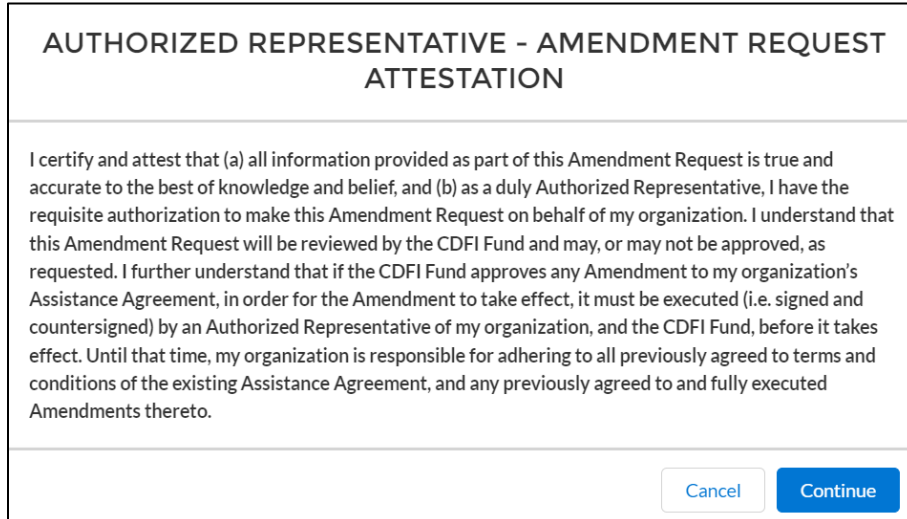
1. Select “Submit and Attest.”



The screenshot shows the CDFI Fund website interface. At the top is a blue header with the CDFI Fund logo on the left and navigation links: Home, Organizations, Allocations, and Contacts. Below the header is a white section titled "Amendment User Guide Demonstration" with a yellow folder icon. A blue button labeled "Submit and Attest" is prominently displayed. Below this button are four input fields: "Amendment Name" (containing "User Guide Demonstration"), "Organization" (empty), "Service Request" (containing "000."), and "Award" (containing "AWD-").

2. Review the Amendment Attestation.

3. Select Continue to attest.



The screenshot shows a form titled "AUTHORIZED REPRESENTATIVE - AMENDMENT REQUEST ATTESTATION". The form contains a paragraph of text: "I certify and attest that (a) all information provided as part of this Amendment Request is true and accurate to the best of knowledge and belief, and (b) as a duly Authorized Representative, I have the requisite authorization to make this Amendment Request on behalf of my organization. I understand that this Amendment Request will be reviewed by the CDFI Fund and may, or may not be approved, as requested. I further understand that if the CDFI Fund approves any Amendment to my organization's Assistance Agreement, in order for the Amendment to take effect, it must be executed (i.e. signed and countersigned) by an Authorized Representative of my organization, and the CDFI Fund, before it takes effect. Until that time, my organization is responsible for adhering to all previously agreed to terms and conditions of the existing Assistance Agreement, and any previously agreed to and fully executed Amendments thereto." At the bottom right of the form are two buttons: "Cancel" and "Continue".

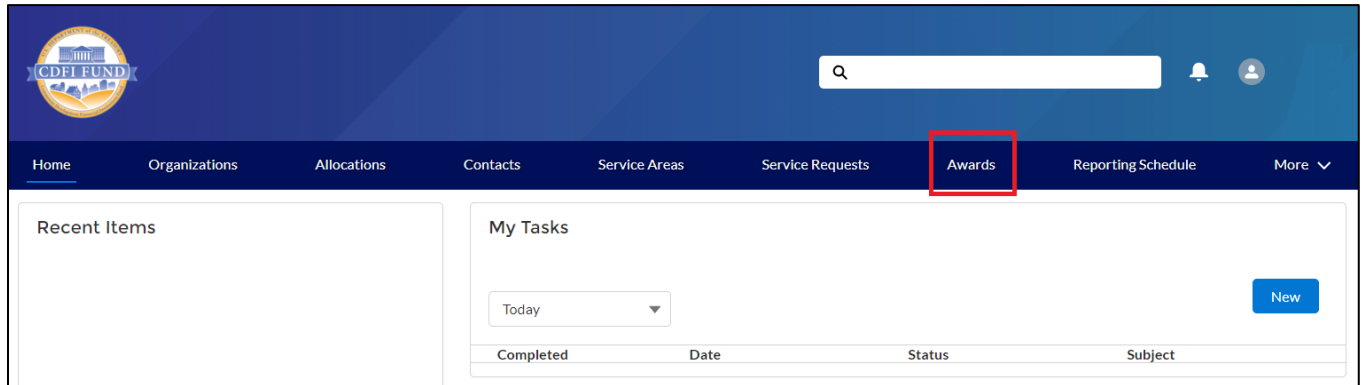
The Amendment is required to be Submitted and Attested for original submission and for every modification to the Amendment request during the entirety of Amendment processing.

### 3.0 How to Submit a CDFI Program or NACA Program FA Amendment Request

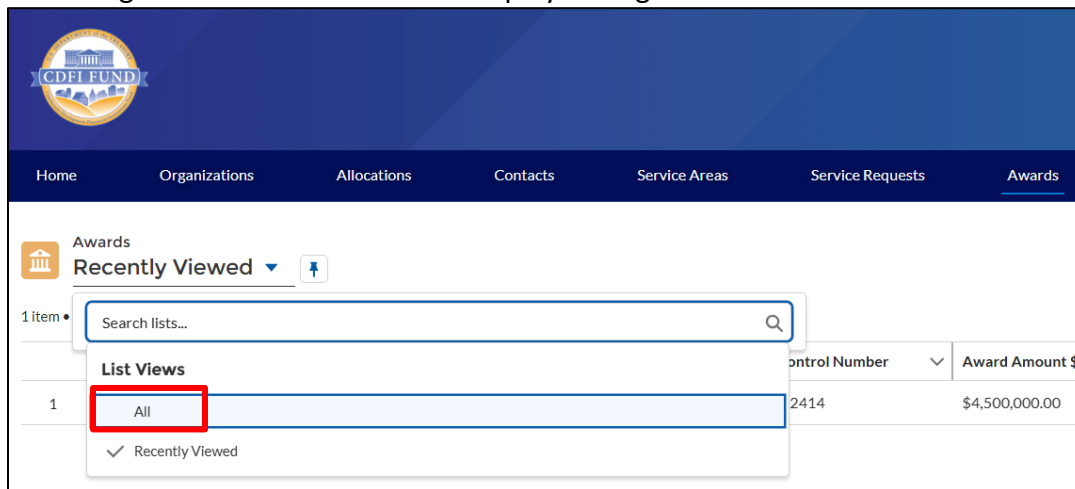
#### Create Service Request

Create a Service Request in AMIS to begin the Amendment process.  
For additional information on how to create Service Requests, please review Section 8 of the training manual, [Getting Started - Navigating AMIS](#)

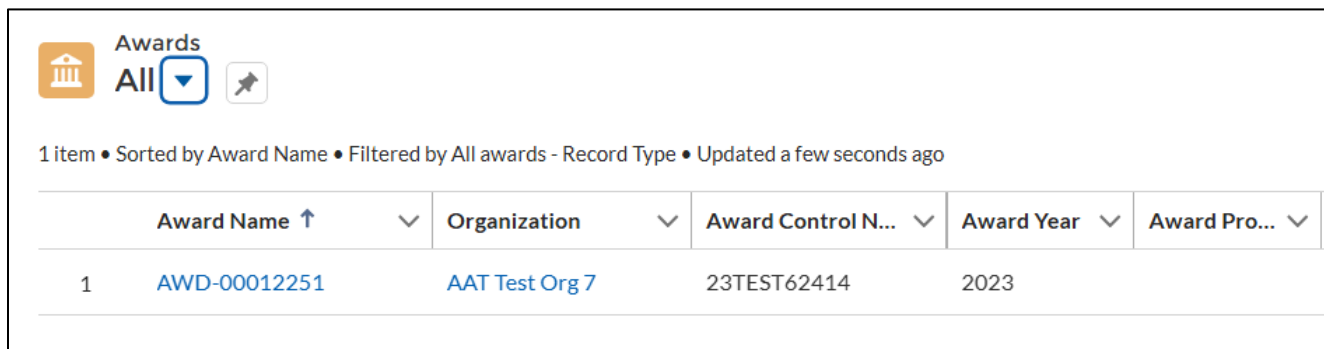
1. Open AMIS and select “Awards.”



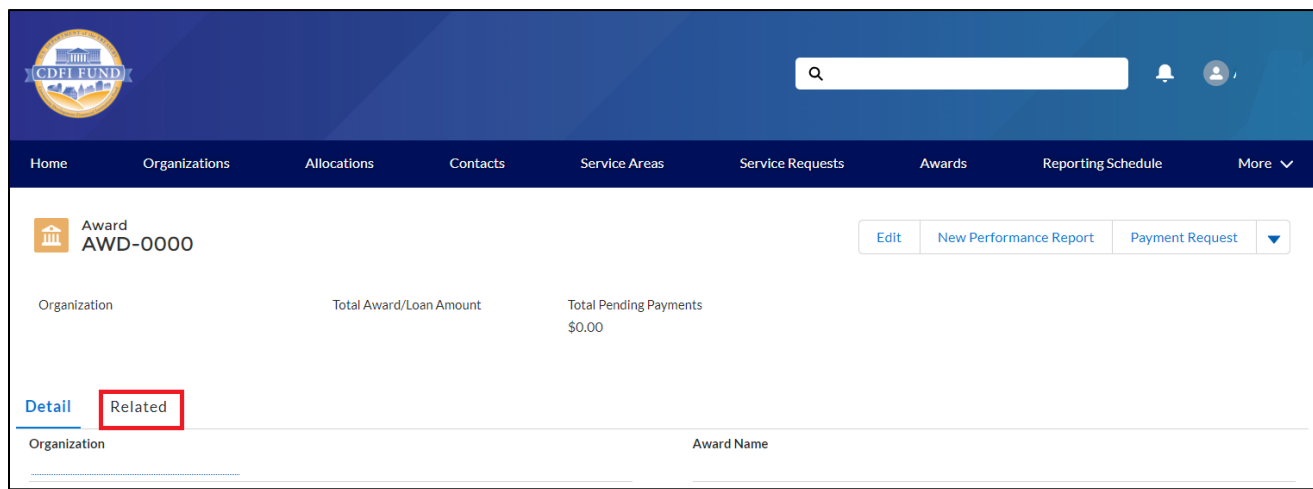
2. Change the List View to “All” to display all Organization Awards.



3. Select the desired Award by clicking on the Award Name starting with “AWD” from the List View to open the Award page.



4. Navigate to the Related Tab and locate the Service Request section.



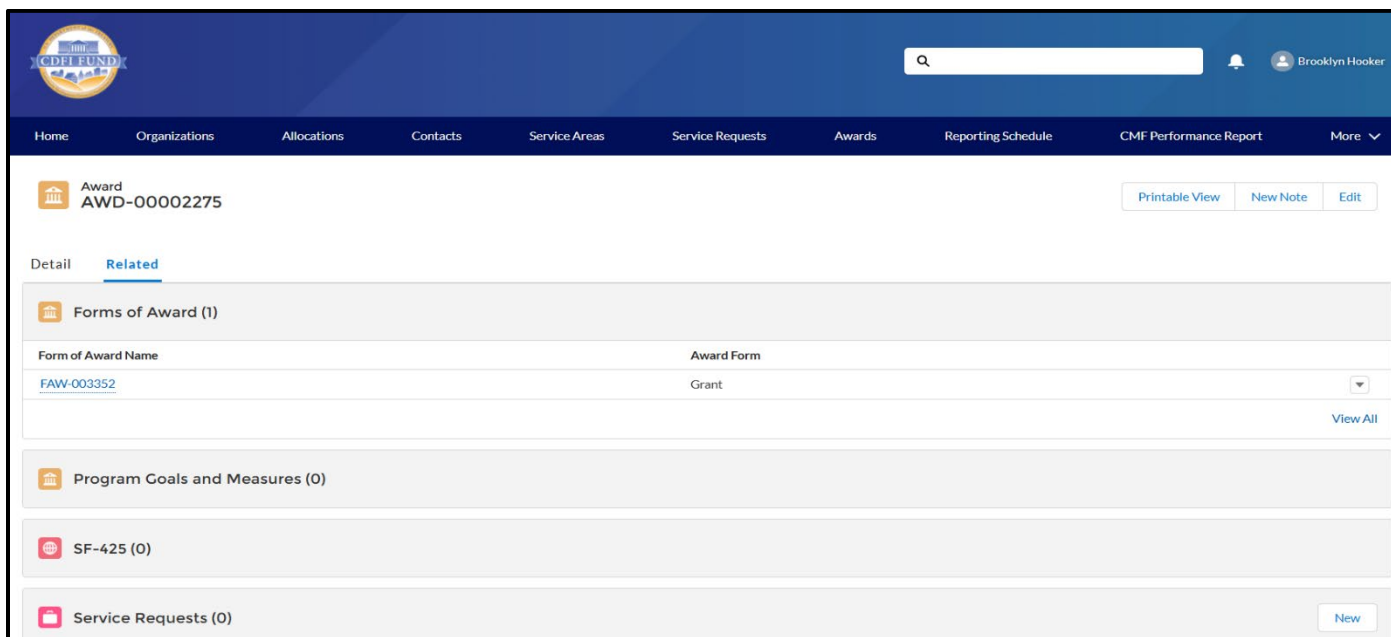
**Award AWD-0000**

Organization: \_\_\_\_\_ Total Award/Loan Amount: \_\_\_\_\_ Total Pending Payments: \$0.00

[Detail](#) **[Related](#)**

Organization	Award Name
_____	_____

5. Select “New” to create a new Service Request for this Award.



**Award AWD-00002275**

[Printable View](#) [New Note](#) [Edit](#)

[Detail](#) **[Related](#)**

**Forms of Award (1)**

Form of Award Name	Award Form
<a href="#">FAW-003352</a>	Grant

[View All](#)

**Program Goals and Measures (0)**

**SF-425 (0)**

**Service Requests (0)** [New](#)

6. Fill out the required information for a Service Request:
- Set “Program” equal to **“CDFI/NACA Program.”**
  - Set “Amendment Type” equal to **“Performance Goals and Measures.”**
  - Set “SR related to existing Award/Allocation?” to **“Yes.”**
  - The Award information will be pre-populated.

New Service Request: General Inquiry

\* = Required Information

Service Request Information

Service Request Owner

TestUser Org25AR01

Service Request Number

Contact Name

Organization Name

\* Program

CDFI/NACA Program

Program Topic

Requested By Date

7/30/2025

Last Comment Date

Funding Application

Search Funding Applications...

\* SR related to existing Award/Allocation?

Yes

Enter existing CDFI Fund AWD- (not NMTC)

AWD-00008593

Enter existing NMTC Award- (NMTC only)

Search Allocations...

Validated

--None--

[View all dependencies](#)

Amendment Type

Performance Goals & Measures

Cancel

Save & New

Save

- Enter values for "Subject" and "Description" that capture the purpose of the request. Note: This is not where you will enter the Performance Goal justification. Instead, you will enter a short summary of the request.



### New Service Request: General Inquiry

#### Additional Information

\* Status

New

Completed Date

View all dependencies

\* Service Request Origin

Web

Priority

Medium

#### Description Information

\* Subject

\* Description

#### Resolution

Resolution

#### Web Information

Web Email

Web Company

Cancel

Save & New

Save

8. Select Save to create the Service Request. You will then see this screen.

Service Request

PG&M Demo

Clone

Edit

Printable View

Priority

Medium

Status

New

Service Request Number

00081613

To create an Amendment, navigate to Related tab and click the New button within the Amendments section. To edit an existing Amendment, navigate to Related tab and click on the Amendment linked within the Amendments section. Submit when completed.

Detail

Related

Service Request Owner

CDFI

Contact Phone

Service Request Number

00081613

Contact Email

Contact Name

Funding Application

## Create the Amendment

1. Select "Related" on the Service Request.

**Service Request**  
**PG&M Demo**

[Clone](#)
[Edit](#)
[Printable View](#)

Priority

Status

Service Request Number

Medium

New

00081613

To create an Amendment, navigate to Related tab and click the New button within the Amendments section. To edit an existing Amendment, navigate to Related tab and click on the Amendment linked within the Amendments section. Submit when completed.

Detail

Related

Service Request Owner

Contact Phone

CDFI

Service Request Number

Contact Email

00081613

Contact Name

Funding Application

## 2. Locate the Amendment Section and create a new Amendment by Selecting “New.”

**Service Request**  
**PG&M Demo**

[Clone](#)
[Edit](#)
[Printable View](#)

Priority

Status

Service Request Number

Medium

New

00081613

To create an Amendment, navigate to Related tab and click the New button within the Amendments section. To edit an existing Amendment, navigate to Related tab and click on the Amendment linked within the Amendments section. Submit when completed.

Detail

Related

Service Request Comments Public (0)

New

Attachments (0)

Upload Files

Upload Files

Or drop files

Amendments (0)

New

## 3. Enter a “Amendment Name” such as *[My Organization] [Award Control Number] PG&M [Number] Amendment*, e.g., Test Org 181FA0505321 PG&M 1-1 Amendment.

New Amendment

Information

\* Amendment Name

\* Service Request

00051397

Cancel

Save & New

Save

## 4. Select Save.

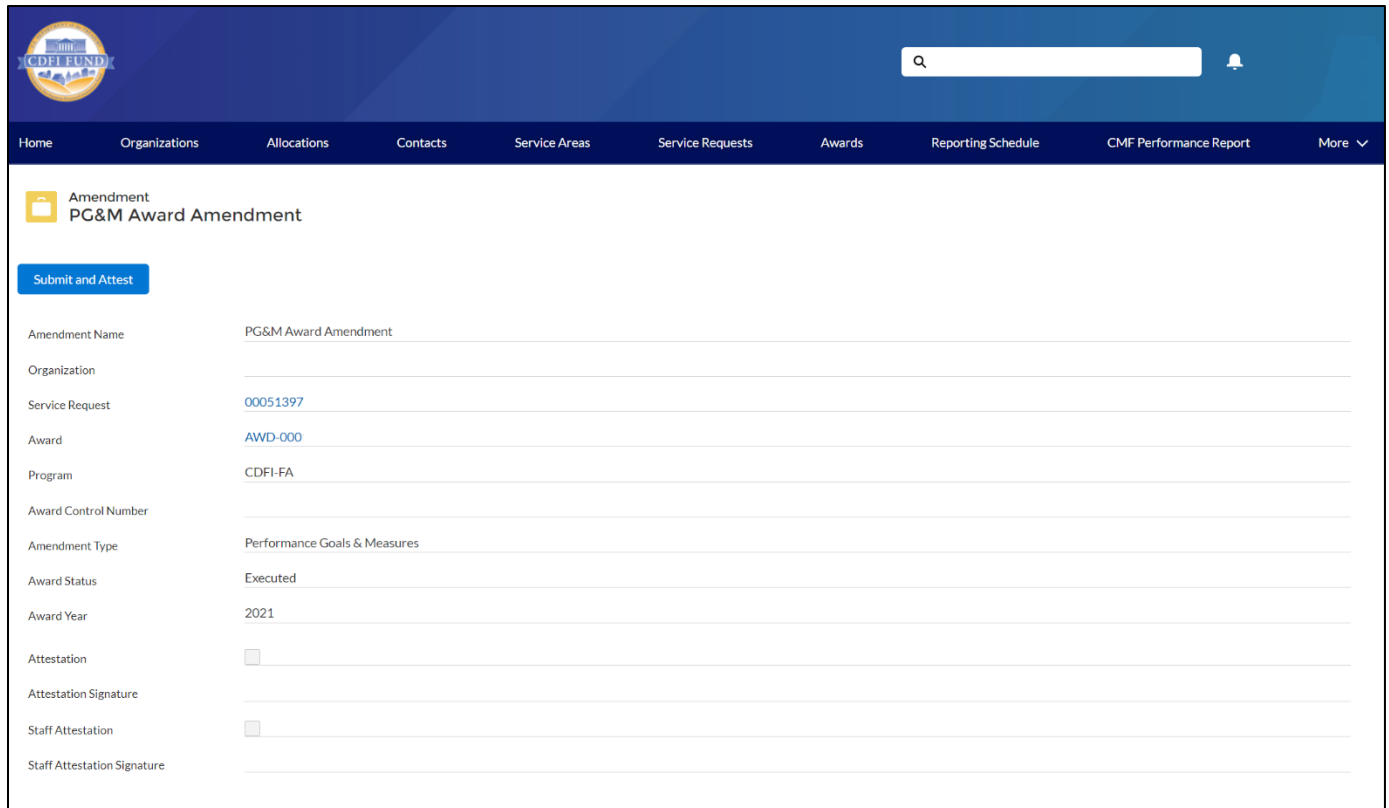
## Enter Amendment Information

1. Open the newly created Amendment by selecting the Amendment Name hyperlink:



Amendments (1)	
Amendment Name	
<a href="#">PG&amp;M Award Amendment</a>	

2. This will open the following page:



**Amendment PG&M Award Amendment**

[Submit and Attest](#)

Amendment Name	PG&M Award Amendment
Organization	
Service Request	00051397
Award	AWD-000
Program	CDFI-FA
Award Control Number	
Amendment Type	Performance Goals & Measures
Award Status	Executed
Award Year	2021
Attestation	<input type="checkbox"/>
Attestation Signature	
Staff Attestation	<input type="checkbox"/>
Staff Attestation Signature	

3. Scroll down on the Amendment page to view Award PG&Ms

PG&M Goals: 1-1

Declarative Business Statement: Increase Volume of Financial Products

FA Total Benchmark: 26051866

Requested Total Benchmark (\$):

26,051,866

Name: PGM-039208

Pop-Yr: 1

Benchmark: 25

FA Period Benchmark: 6512967

Requested Period Benchmark (\$):

6,512,967

Requested Benchmark (%):

25

Name: PGM-039209

Pop-Yr: 2

Benchmark: 50

FA Period Benchmark: 13025933

Requested Period Benchmark (\$):

13,025,933

Requested Benchmark (%):

50

Name: PGM-039210

Pop-Yr: 3

Benchmark: 90

FA Period Benchmark: 23446679

Requested Period Benchmark (\$):

23,446,679

Requested Benchmark (%):

90

☐ Request Deadline Extension

Overall PG&M Justification (5,000 character limit):

Salesforce Sans 12 B I U

Save

- Make modifications to editable fields as needed.
- Insert a justification detailing the reasons for requesting this change in the field “Overall PG&M Justification.”
- Select “Save” to save your changes and see updated Benchmark values

## FA Amendment Request PG&M Guidelines

The Amendment will display the Performance Goals and Measures with the following information from the Award:

- The Goal Numeric Identifier
- The Goal Description, aka the Declarative Business Statement
- The Total Amount (Dollar or Number) of the Goal for the Award
- Each Period of Performance Year’s (PoP-Yr) Benchmark values (Dollar, Number, Percentage)

Each PG&M Group will contain fields prefixed with “Requested.” “Requested” fields are fields that are potentially available for an Amendment. Non-numeric changes to PG&Ms (for example, the addition or substitution of a New Geographic Area for PG&M 1-3) must be described in the Overall PG&M Justification field.

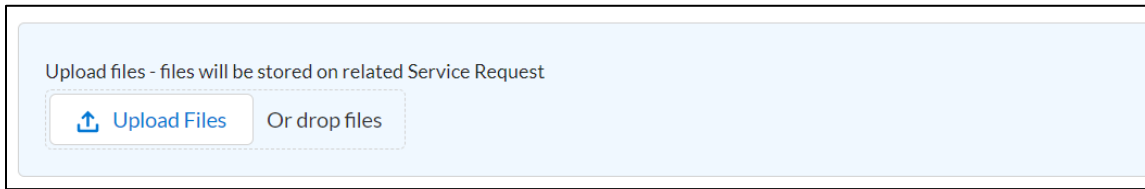
Program Rules that determine when “Requested” fields are not editable:

- If the Period of Performance date is in the past, the period dollar or number field will not be editable.
- Year 3 Benchmark percentages remain locked at 90%. To request a change to a Year 3 Benchmark, you must instead adjust the Requested Total Benchmark.

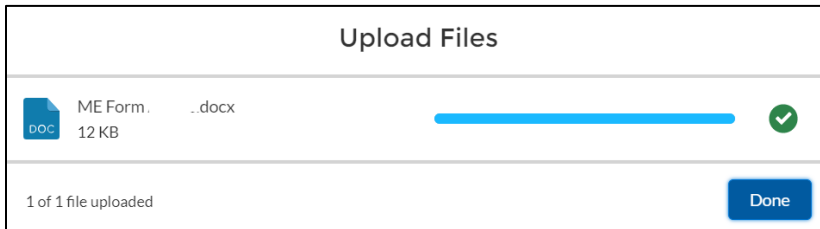
For more information on completing your FA Amendment Request, see Amendment Request Instructions for Recipients (Fiscal Year 2024 Awards and Later).

## Upload Documents as Needed

1. Locate the File Upload section at the bottom of the Amendment page.



2. Upload documents as needed.



## Submit and Attest


The Amendment will not be sent to the CDFI Team until it is Submitted. Only Submit and Attest once all information pertaining to the Amendment Request has been entered.

Only users who have been designated **as an “Authorized Representative” in AMIS** will have the ability to Submit and Attest **the Amendment record.**


**Note:** All users under an Organization can now see all Service Requests associated with that Organization. Therefore, the Amendment record can be started by a non-Authorized Representative, but it must be submitted by an Authorized Representative.

If the Amendment object is not open already, open it (navigate to the appropriate Service Request, then go to the “Related” menu to find the Amendment object, and click on its hyperlinked name).

1. Review all subsections to make sure that all requests are captured. (Recall that when inputting Amendment requests and justification text, the “Save” button needs to be clicked after EACH subsection to save your work.)
2. Select “Submit and Attest.”



[Home](#)
[Organizations](#)
[Allocations](#)
[Contacts](#)


**Amendment**  
**User Guide Demonstration**

Amendment Name	User Guide Demonstration
Organization	
Service Request	000.
Award	AWD-

3. Review the Amendment Attestation and select Continue if the attestation text is true.

**AUTHORIZED REPRESENTATIVE - AMENDMENT REQUEST  
ATTESTATION**

I certify and attest that (a) all information provided as part of this Amendment Request is true and accurate to the best of knowledge and belief, and (b) as a duly Authorized Representative, I have the requisite authorization to make this Amendment Request on behalf of my organization. I understand that this Amendment Request will be reviewed by the CDFI Fund and may, or may not be approved, as requested. I further understand that if the CDFI Fund approves any Amendment to my organization's Assistance Agreement, in order for the Amendment to take effect, it must be executed (i.e. signed and countersigned) by an Authorized Representative of my organization, and the CDFI Fund, before it takes effect. Until that time, my organization is responsible for adhering to all previously agreed to terms and conditions of the existing Assistance Agreement, and any previously agreed to and fully executed Amendments thereto.

The Amendment is required to be Submitted and Attested for original submission and for every modification to the Amendment request during the entirety of Amendment processing.

Successful submission of an Amendment can be verified by closing the Amendment, re-opening it, and referencing the Amendment Status. Once submitted, the Amendment Status will become "Initial Review."

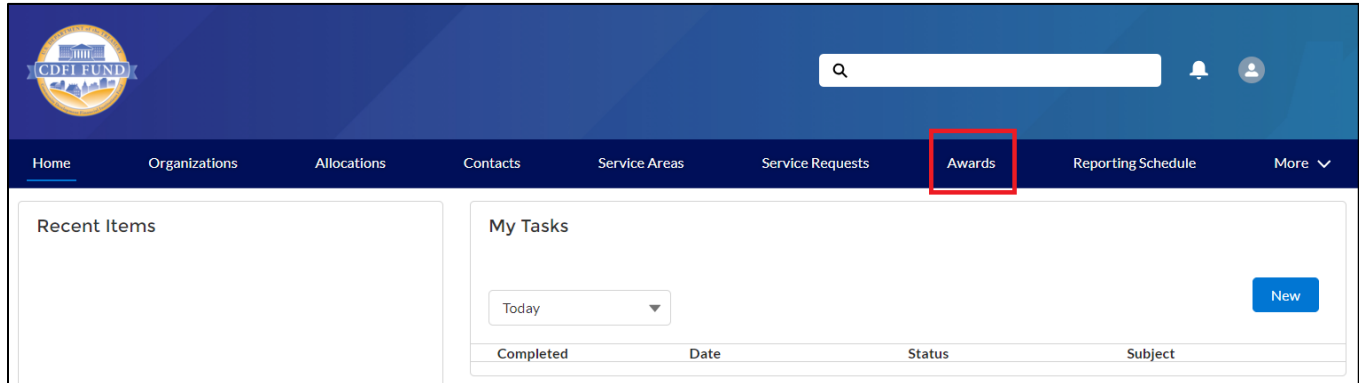
## 4.0 How to Submit a CDFI Program or NACA Program TA Amendment Request

### Create Service Request

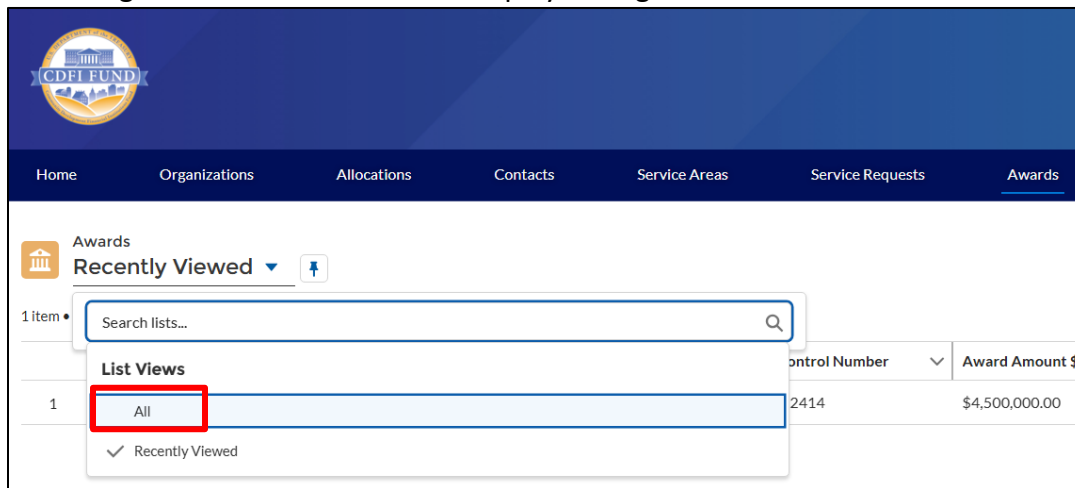
Create a Service Request in AMIS to begin the Amendment process.

For additional information on how to create Service Requests, please review Section 8 of the training manual, [Getting Started - Navigating AMIS](#).

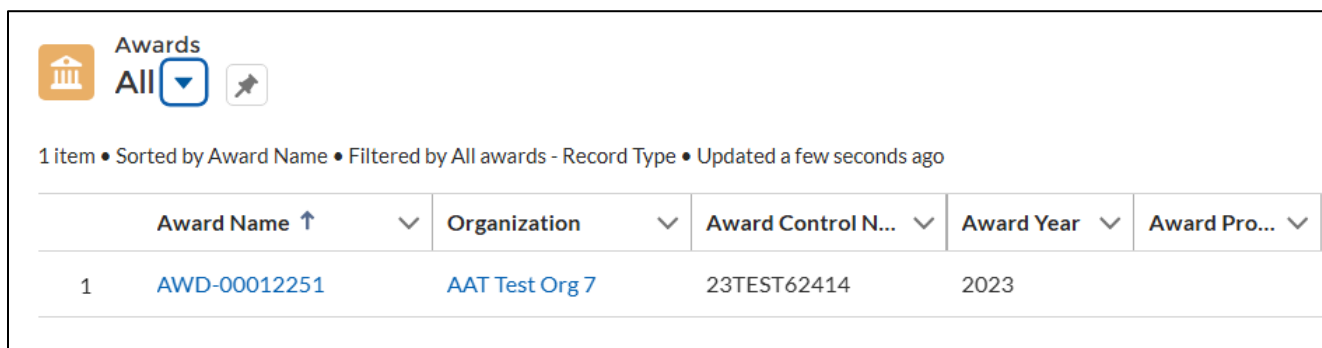
1. Open AMIS and select “Awards.”



2. Change the List View to “All” to display all Organization Awards.



3. Select the desired Award by clicking on the Award Name starting with “AWD” from the List View to open the Award page.



4. Navigate to the Related Tab and locate the Service Request section

The screenshot shows the CDFI Fund system interface. At the top is a navigation bar with links: Home, Organizations, Allocations, Contacts, Service Areas, Service Requests, Awards, Reporting Schedule, and More. Below the navigation bar, the main content area displays 'Award AWD-0000'. To the right of the award ID are buttons for 'Edit', 'New Performance Report', and 'Payment Request'. Below this, there are fields for 'Organization', 'Total Award/Loan Amount', and 'Total Pending Payments' (showing \$0.00). At the bottom, there are two tabs: 'Detail' and 'Related'. The 'Related' tab is highlighted with a red rectangular box. Below the tabs, there is a table with columns 'Organization' and 'Award Name'.

5. Select “New” to create a new Service Request for this Award

The screenshot shows the CDFI Fund system interface for 'Award AWD-00002275'. The user is logged in as 'Brooklyn Hooker'. The navigation bar is the same as in the previous screenshot. Below the navigation bar, the main content area displays 'Award AWD-00002275'. To the right of the award ID are buttons for 'Printable View', 'New Note', and 'Edit'. Below this, there are tabs for 'Detail' and 'Related'. The 'Related' tab is selected. Below the tabs, there are four sections: 'Forms of Award (1)', 'Program Goals and Measures (0)', 'SF-425 (0)', and 'Service Requests (0)'. The 'Forms of Award (1)' section is expanded, showing a table with columns 'Form of Award Name' and 'Award Form'. The table has one row with 'FAW-003352' and 'Grant'. To the right of the table is a 'View All' link. The 'Service Requests (0)' section has a 'New' button.

6. Fill out the required information for a Service Request:
- Set “Program” equal to “**CDFI/NACA Program.**”
  - Set “Amendment Type” equal to “**Performance Goals and Measures.**”
  - Set “SR related to existing Award/Allocation?” to “**Yes.**”
  - The Award information will be pre-populated.



New Service Request: General Inquiry

\* = Required Information

Service Request Information

Service Request Owner

TestUser Org25AR01

Funding Application

Search Funding Applications...

Service Request Number

\* SR related to existing Award/Allocation?

Yes

Contact Name

Enter existing CDFI Fund AWD- (not NMTC)

AWD-00008593

Organization Name

Enter existing NMTCAward- (NMTC only)

Search Allocations...

\* Program

CDFI/NACA Program

Validated

--None--

[View all dependencies](#)

Program Topic

Amendment Type

Performance Goals & Measures

Requested By Date

7/30/2025

Last Comment Date

Cancel

Save & New

Save

- Enter values for "Subject" and "Description" that capture the purpose of the request. Note: This is not where you will enter the Performance Goal justification. Instead, you will enter a short summary of the request.

### New Service Request: General Inquiry

#### Additional Information

\* Status

New

Completed Date

View all dependencies

\* Service Request Origin

Web

Priority

Medium

#### Description Information

\* Subject

\* Description

#### Resolution

Resolution

#### Web Information

Web Email

Web Company

Cancel

Save & New

Save

8. Select Save to create the Service Request. You will then see this screen.

Service Request

PG&M Demo

Clone

Edit

Printable View

Priority

Medium

Status

New

Service Request Number

00081613

To create an Amendment, navigate to Related tab and click the New button within the Amendments section. To edit an existing Amendment, navigate to Related tab and click on the Amendment linked within the Amendments section. Submit when completed.

Detail

Related

Service Request Owner

CDFI

Contact Phone

Service Request Number

00081613

Contact Email

Contact Name

Funding Application

## Create the Amendment

1. Select "Related" on the Service Request.

**Service Request**  
**PG&M Demo**

[Clone](#)
[Edit](#)
[Printable View](#)

Priority

Status

Service Request Number

Medium

New

00081613

To create an Amendment, navigate to Related tab and click the New button within the Amendments section. To edit an existing Amendment, navigate to Related tab and click on the Amendment linked within the Amendments section. Submit when completed.

Detail

Related

Service Request Owner

Contact Phone

CDFI

Service Request Number

Contact Email

00081613

Contact Name

Funding Application

- Locate the Amendment Section and create a new Amendment by selecting “New.”

**Service Request**  
**PG&M Demo**

[Clone](#)
[Edit](#)
[Printable View](#)

Priority

Status

Service Request Number

Medium

New

00081613

To create an Amendment, navigate to Related tab and click the New button within the Amendments section. To edit an existing Amendment, navigate to Related tab and click on the Amendment linked within the Amendments section. Submit when completed.

Detail

Related

**Service Request Comments Public (0)**

[New](#)

**Attachments (0)**

[Upload Files](#)

[Upload Files](#)

Or drop files

**Amendments (0)**

[New](#)

- Enter a “Amendment Name” such as *[My Organization] [Award Control Number] PG&M [Number] Amendment* , e.g., Test Org 181TA0505321 PG&M 3-1 Amendment.

New Amendment

Information

\* Amendment Name

\* Service Request

00051397

×

Cancel

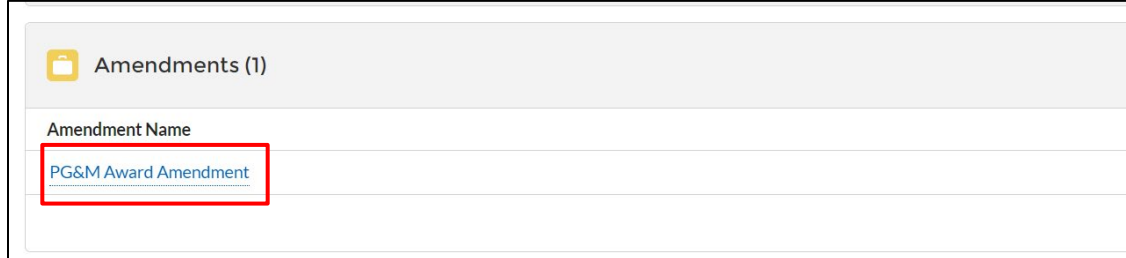
Save & New

Save

- Select Save.

## Enter Amendment Information

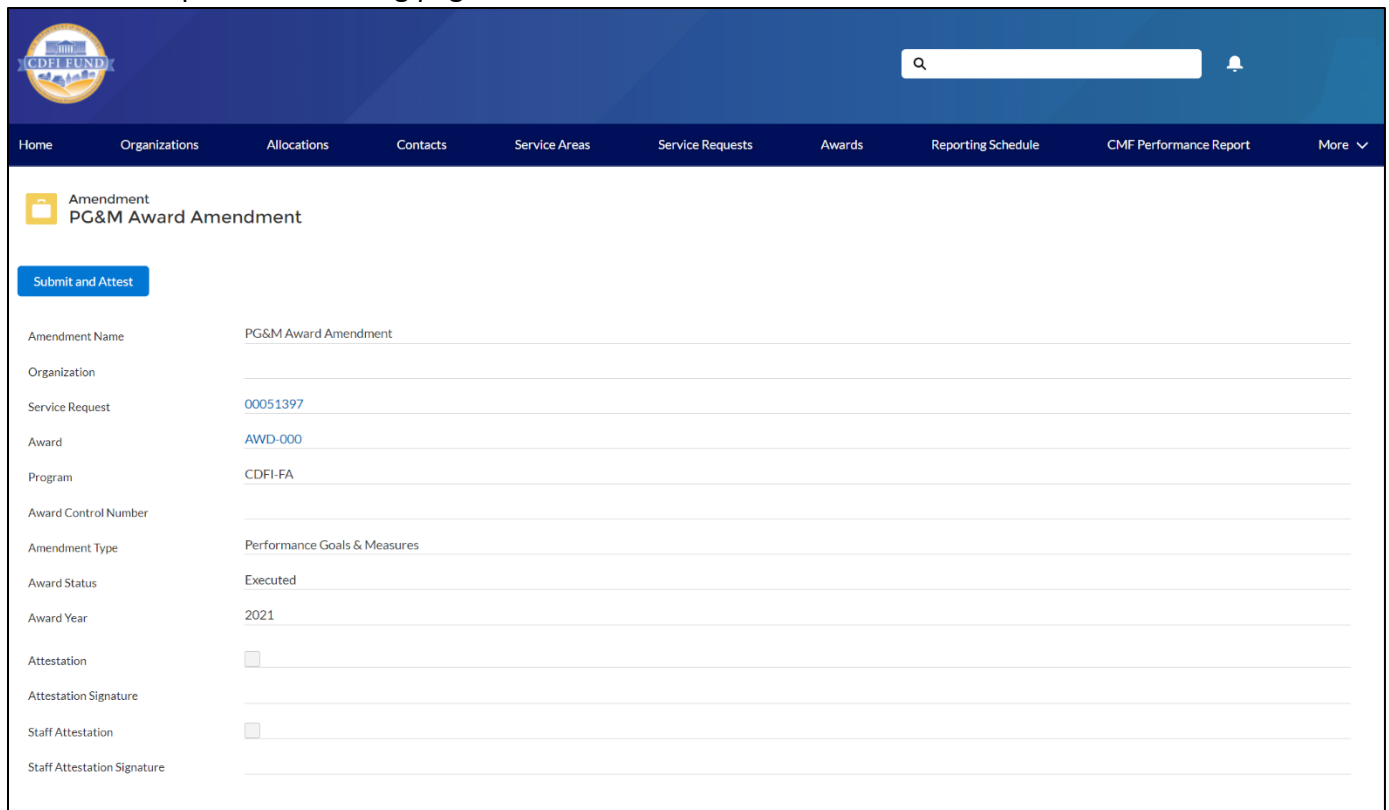
1. Open the newly created Amendment by selecting the Amendment Name hyperlink:



Amendments (1)

Amendment Name
<a href="#">PG&amp;M Award Amendment</a>

2. This will open the following page:









Amendment  
PG&M Award Amendment

[Submit and Attest](#)

Amendment Name	PG&M Award Amendment
Organization	
Service Request	<a href="#">00051397</a>
Award	<a href="#">AWD-000</a>
Program	CDFI-FA
Award Control Number	
Amendment Type	Performance Goals & Measures
Award Status	Executed
Award Year	2021
Attestation	<input type="checkbox"/>
Attestation Signature	
Staff Attestation	<input type="checkbox"/>
Staff Attestation Signature	

3. Scroll down on the Amendment page to view the Period of Performance and current Certification Submission Deadline and Certification Deadline.

Period of Performance Yr 0 End Date	
12/31/2024	
Period of Performance Yr 1 End Date	
12/31/2025	
Period of Performance Yr 2 End Date	
12/31/2026	
Period of Performance Yr 3 End Date	
12/31/2027	
Period of Performance Yr 4 End Date	
	
Period of Performance Yr 5 End Date	
	
CDFI Certification Status: Not Certified	
Certification Submission Deadline: 12/31/2026 <input type="checkbox"/> Request Application Extension	Certification Deadline: 12/31/2027 <input type="checkbox"/> Request Certification Extension


- Click the checkbox next to Request Application Extension and/or Request Certification Extension, as applicable.
- Insert a justification detailing the reasons for requesting this change in the field "Overall PG&M Justification."
- Select "Save" to save your changes.

For more information on completing your TA Amendment Request, see Amendment Request Instructions for Recipients (Fiscal Year 2024 Awards and Later).

### Upload Documents as Needed

- Locate the File Upload section at the bottom of the Amendment page.

Upload files - files will be stored on related Service Request

 Upload Files
 Or drop files

- Upload documents as needed.

Upload Files

ME Form. .docx

12 KB

1 of 1 file uploaded

Done

Submit and Attest

The Amendment will not be sent to the CDFI Team until it is Submitted. Only Submit and Attest once all information pertaining to the Amendment Request has been entered.

Only users who have been designated **as an “Authorized Representative” in AMIS** will have the ability to Submit and Attest **the Amendment record.**

**Note:** All users under an Organization can now see all Service Requests associated with that Organization. Therefore, the Amendment record can be started by a non-Authorized Representative, but it must be submitted by an Authorized Representative.

If the Amendment object is not open already, open it (navigate to the appropriate Service Request, then go to the “Related” menu to find the Amendment object, and click on its hyperlinked name).

1. Review all subsections to make sure that all requests are captured. (Recall that when inputting Amendment requests and justification text, the “Save” button needs to be clicked after EACH subsection to save your work.)
2. Select “Submit and Attest.”

CDFI FUND

Home

Organizations

Allocations

Contacts

Amendment

User Guide Demonstration

Submit and Attest

Amendment Name

User Guide Demonstration

Organization

Service Request

000.

Award

AWD-

3. Review the Amendment Attestation and select Continue if the attestation text is true.

## AUTHORIZED REPRESENTATIVE - AMENDMENT REQUEST ATTESTATION

I certify and attest that (a) all information provided as part of this Amendment Request is true and accurate to the best of knowledge and belief, and (b) as a duly Authorized Representative, I have the requisite authorization to make this Amendment Request on behalf of my organization. I understand that this Amendment Request will be reviewed by the CDFI Fund and may, or may not be approved, as requested. I further understand that if the CDFI Fund approves any Amendment to my organization's Assistance Agreement, in order for the Amendment to take effect, it must be executed (i.e. signed and countersigned) by an Authorized Representative of my organization, and the CDFI Fund, before it takes effect. Until that time, my organization is responsible for adhering to all previously agreed to terms and conditions of the existing Assistance Agreement, and any previously agreed to and fully executed Amendments thereto.

Cancel

Continue

The Amendment is required to be Submitted and Attested for original submission and for every modification to the Amendment request during the entirety of Amendment processing.

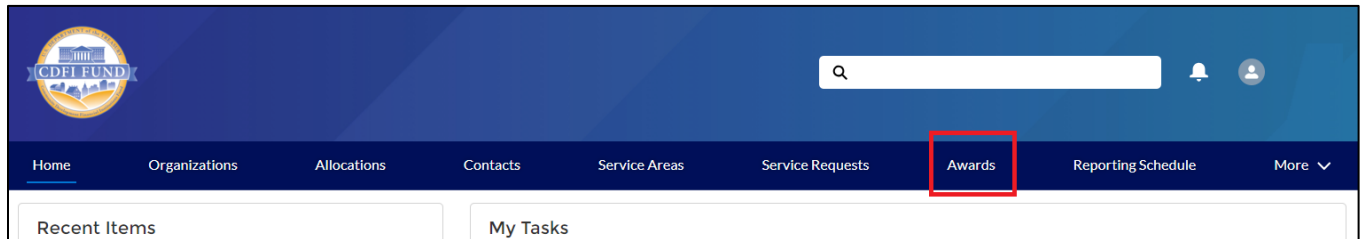
Successful submission of an Amendment can be verified by closing the Amendment, re-opening it, and referencing the Amendment Status. Once submitted, the Amendment Status will become "Initial Review."

## 5.0 How to Submit a Capital Magnet Fund (CMF) Amendment Request

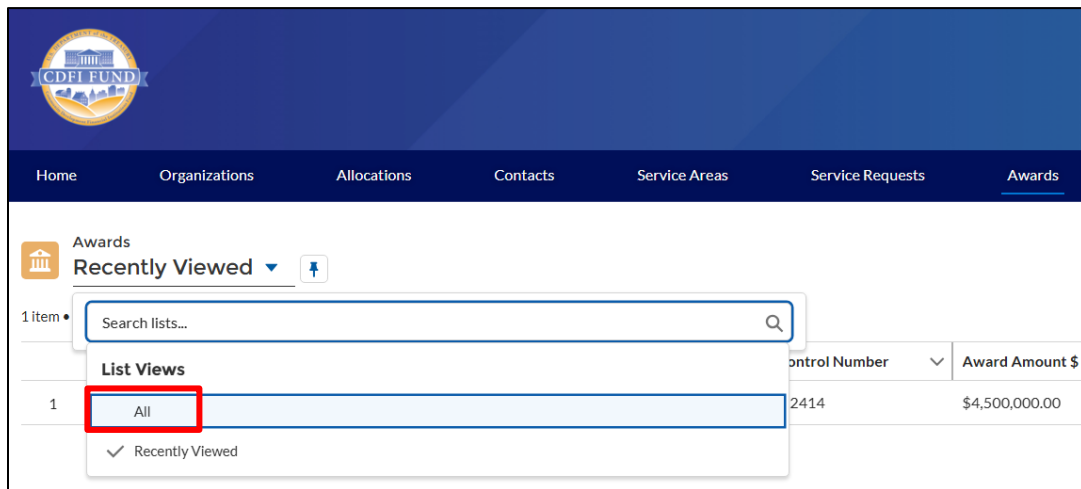
### Create Service Request

Create a Service Request in AMIS to begin the Amendment process using the steps below. For additional information on how to create Service Requests, please review Section 8 of the training manual, [Getting Started – Navigating AMIS](#).

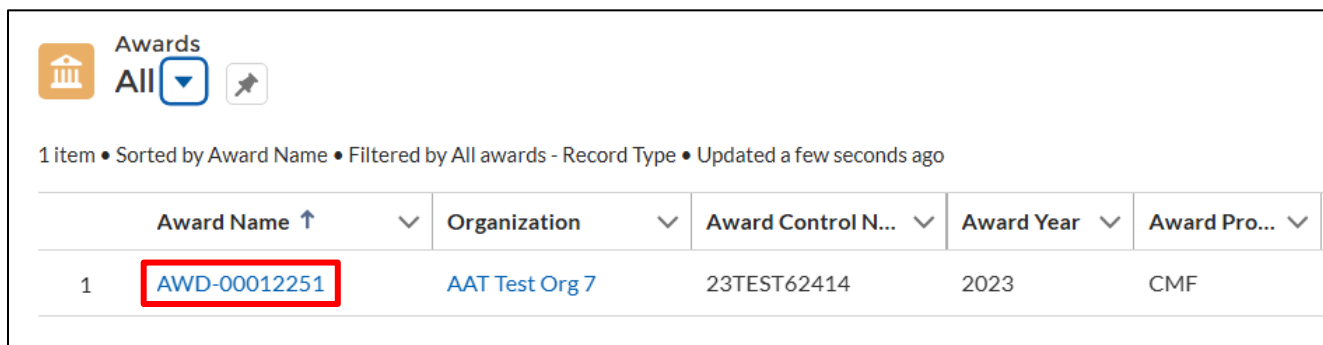
1. Open AMIS and select “Awards”



2. Change the List View to “All” to display all Organization Awards



3. Select the desired Award by clicking on the Award Name starting with “AWD” from the List View to open the Award page.





4. Navigate to the Related Tab and locate the Service Request section

The screenshot shows the CDFE Fund system interface. At the top is a navigation bar with links: Home, Organizations, Allocations, Contacts, Service Areas, Service Requests, Awards, Reporting Schedule, and More. Below the navigation bar, the main content area displays 'Award AWD-0000'. To the right of the award name are buttons for 'Edit', 'New Performance Report', and 'Payment Request'. Below this, there are fields for 'Organization', 'Total Award/Loan Amount', and 'Total Pending Payments' (showing \$0.00). At the bottom, there are two tabs: 'Detail' and 'Related'. The 'Related' tab is highlighted with a red box. Below the tabs, there is a table with columns 'Organization' and 'Award Name'.

5. Select “New” to create a new Service Request for this Award

The screenshot shows the CDFE Fund system interface for 'Award AWD-00002275'. At the top is a navigation bar with links: Home, Organizations, Allocations, Contacts, Service Areas, Service Requests, Awards, Reporting Schedule, CMF Performance Report, and More. Below the navigation bar, the main content area displays 'Award AWD-00002275'. To the right of the award name are buttons for 'Printable View', 'New Note', and 'Edit'. Below this, there are tabs for 'Detail' and 'Related'. The 'Related' tab is selected. Below the tabs, there are several sections: 'Forms of Award (1)', 'Program Goals and Measures (0)', 'SF-425 (0)', and 'Service Requests (0)'. The 'Service Requests (0)' section is highlighted with a red box, and a 'New' button is visible in the bottom right corner of this section.

6. Fill out the required information for a Service Request:
  - a. Set "Program" equal to "**Capital Magnet Fund**"
  - b. Set "Amendment Type" equal to "**Performance Goals and Measures.**"
  - c. Set "SR related to existing Award/Allocation?" to "**Yes**"
  - d. The Award information will be pre-populated.

Geographic Area County FIPS Code State

### New Service Request: General Inquiry

\* = Required Information

#### Service Request Information

Service Request Owner AR Test AR	Funding Application Search Funding Applications...
Service Request Number	* SR related to existing Award/Allocation? Yes
Contact Name	Enter existing CDFI Fund AWD- (not NMTC) AWD-00012251
Organization Name	Enter existing NMTC Award- (NMTC only) Search Allocations...
* Program Capital Magnet Fund	Validated --None-- <a href="#">View all dependencies</a>
Program Topic	Amendment Type Performance Goals & Measures
Requested By Date 7/23/2025	

Cancel Save & New Save

7. Enter values for “Subject” and “Description” that capture the purpose of the request. Note: This is not where you will enter the Performance Goal justification. Instead, you will enter a short summary of the request (e.g., Subject: “Amendment for FY 2020 CMF Award,” Description: “Requesting to extend the Project Completion Date by one year”).

New Service Request: General Inquiry

Additional Information

\* Status

New

Completed Date

\* Service Request Origin

Web

Priority

Medium

Description Information

\* Subject

\* Description

Resolution

Resolution

Web Information

Web Email

Web Company

Web Name

Web Phone

Cancel

Save & New

Save

8. Select Save to create the Service Request. You will then see this screen.

Service Request

FY 2023 test

Clone

Edit

Printable View

Priority

Status

Service Request Number

Medium

Closed

00069241

To create an Amendment, navigate to Related tab and click the New button within the Amendments section. To edit an existing Amendment, navigate to Related tab and click on the Amendment linked within the Amendments section. Submit when completed.

Detail

Related

Service Request Owner

Service Request Number

00069241

Contact Name

AR Test AR

Organization Name

AAT Test Org 7

Contact Phone

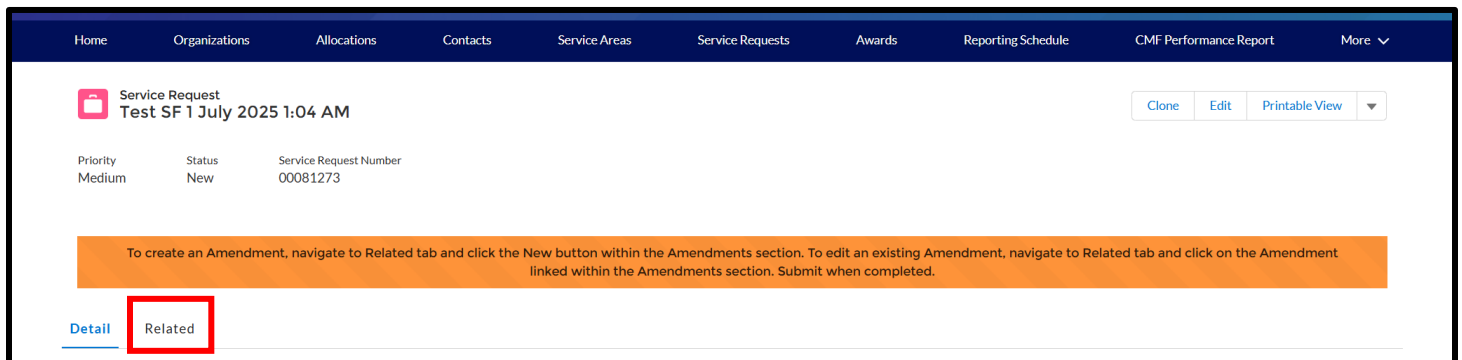
Contact Email

Funding Application

SR related to existing Award/Allocation?

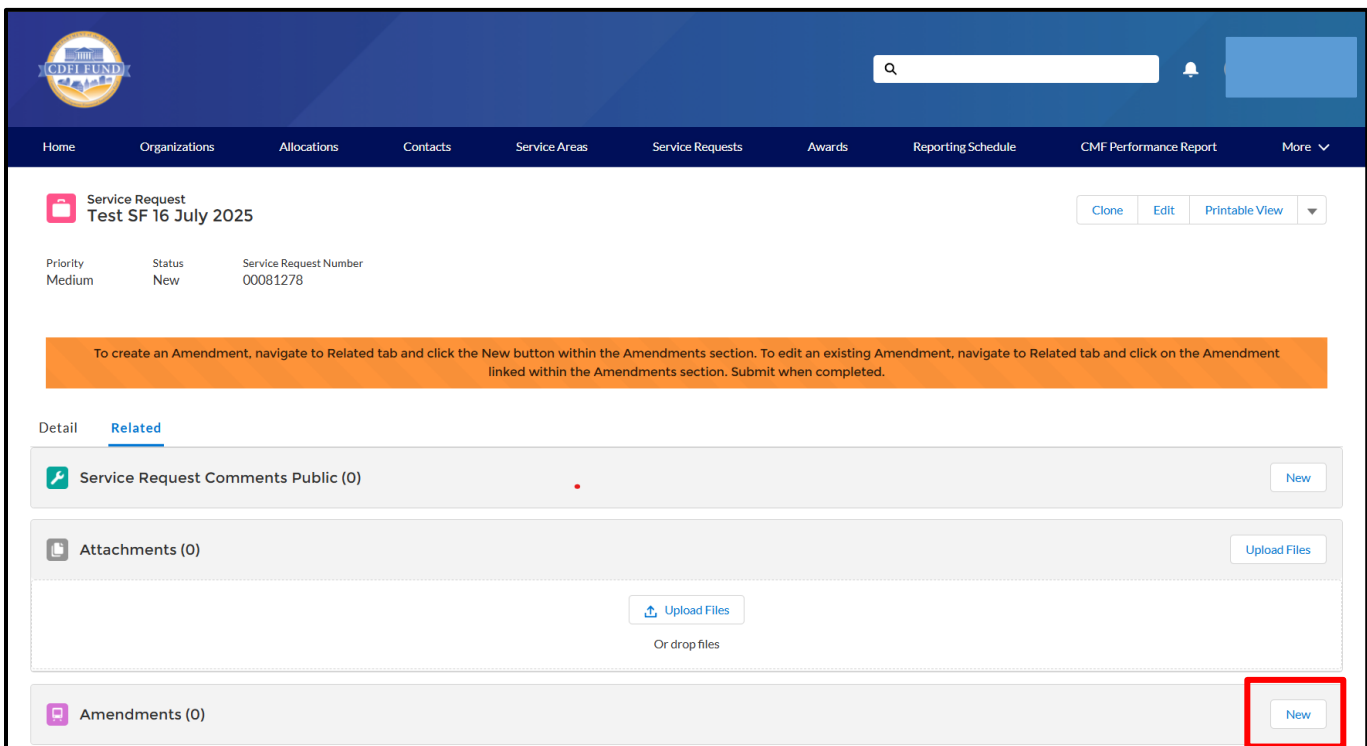
## Create the Amendment

1. Select “Related” on the Service Request.



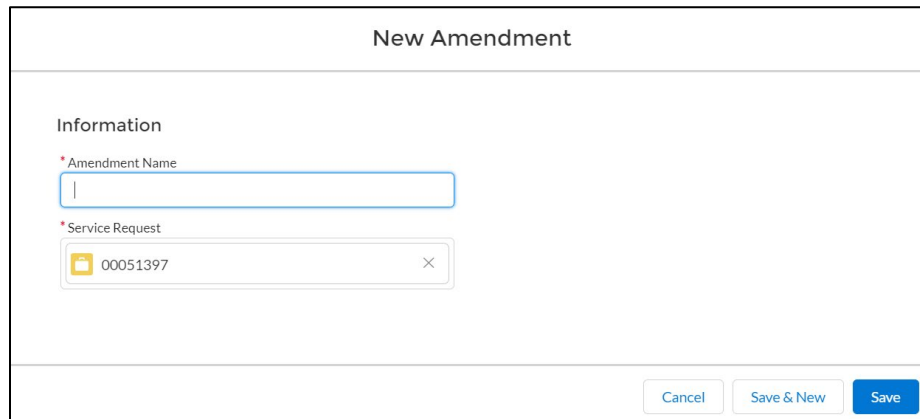
The screenshot shows the 'Service Request' page for 'Test SF 1 July 2025 1:04 AM'. The page has a dark blue header with navigation links: Home, Organizations, Allocations, Contacts, Service Areas, Service Requests, Awards, Reporting Schedule, CMF Performance Report, and More. Below the header, there's a section for the service request details: Priority (Medium), Status (New), and Service Request Number (00081273). An orange banner provides instructions on how to create or edit an amendment. At the bottom, there are two tabs: 'Detail' and 'Related'. The 'Related' tab is highlighted with a red box.

2. Locate the Amendment Section and create a new Amendment by Selecting “New.”



The screenshot shows the 'Service Request' page for 'Test SF 16 July 2025'. The page has a dark blue header with navigation links: Home, Organizations, Allocations, Contacts, Service Areas, Service Requests, Awards, Reporting Schedule, CMF Performance Report, and More. Below the header, there's a section for the service request details: Priority (Medium), Status (New), and Service Request Number (00081278). An orange banner provides instructions on how to create or edit an amendment. Below the banner, there are three sections: 'Service Request Comments Public (0)', 'Attachments (0)', and 'Amendments (0)'. The 'Amendments (0)' section has a 'New' button highlighted with a red box.

3. Enter a "Amendment Name" such as *[My Organization] [Award Control Number] PG&M Amendment [Type]*, e.g., Test Org 181CM0505321 PG&M Amendment Rural



New Amendment

Information

\* Amendment Name

\* Service Request

00051397

Cancel Save & New Save

4. Select Save

#### Enter Amendment Information

1. Open the newly created Amendment by selecting the Amendment Name hyperlink:



Amendments (1)

Amendment Name
PG&M Award Amendment

2. This will open the following page:

3. The CMF Amendment page is broken down into sections for each amendable Performance Goal.

There are three types of potential amendments (click hyperlink to jump to applicable section):

- [Project Completion Date](#)
- Geographic Areas ([Removal](#) and [Addition](#))
- [Performance Goals and Measure Benchmark](#)

**Note: Each** amendment request section has its own Save button. **You must click Save for each individual section for which you are requesting a change.** If you request an amendment and type a justification, but do not click the Save button immediately below the justification text box, your work will NOT be saved. You will know that your work has been saved when you see a green banner across the top of the page that looks like this:



#### Project Completion Date

- Enter the Requested Project Completion Date by typing in the date (MM/DD/YYYY) or selecting the date on using the calendar button on the right side of the field
- Enter the Justification text
- Select Save

*Note: Extensions are limited to one year, per the CMF Program Amendments Guide and Intake Steps*

Project Completion Date	Requested Project Completion Date
<div>9/15/2027</div>	<div></div>
(EXTERNALLY VISIBLE) CDFI Fund Feedback:	
<div></div>	
Justification (5,000 character limit):	
<div><div>Salesforce Sans12BBIUSListulListulListulLinkImageText</div><div></div></div>	
<div>Save</div>	

## Geographic Area Removal

- Check the “Remove Geographic Area” box for the geographic area you are requesting to remove from the Award
- Enter Justification text for Geographic Area Removal.
- Select Save for each removal request

Geographic Area: Arizona

Geographic Service Type: Service Area

☐ Remove Geographic Area?

Justification:

Salesforce Sans ▼12 ▼**B I U S**

(EXTERNALLY VISIBLE) CDFI Fund Feedback:

Save

## Geographic Area Addition

- Select all Geographic Areas you are requesting to add to the Award. Do this by clicking the state or territory abbreviation in the “Available” column, then clicking the left arrow to move it to the “Selected” column. If you make an error, you can select a state in the “Selected” column and click the right arrow to move it back to the “Available” column.
- Enter Justification text for adding these areas
  - Note there is just one justification box for all addition requests; be sure to provide an explanation for each geographic area you are requesting to add
- Select Save for the geographic area addition

*Note the maximum number of States for an Award are as follows:*

- 2017 – 2019: 10 States
- 2020 and forward: 15 States



Request New Areas ⓘ

Available

AK  
AL  
AR  
AZ  
CA  
CO

Selected

Justification (5,000 character limit):

Salesforce Sans 12
B I U
List Bulleted List Numbered List
Link Image

(EXTERNALLY VISIBLE) CDFI Fund Feedback:

Save

## Performance Goal and Measure Benchmarks

- Identify the PG&M Benchmark(s) you are requesting an amendment for
- Enter a new value into the field “Requested Benchmark (numeric)”
- Enter Justification text for why this change is requested
- Select Save for each benchmark request

*Please note that certain PG&Ms only accept benchmark values of “0” or “1.” See the PG&M declarative business statement below as an example.*

Name:PGM-040049
PG&M Goals: 3.2(a)
Benchmark: 0
Declarative Business Statement: The Recipient may use its CMF Award to Capitalize an Affordable Housing Fund (Yes=1 and No=0).

Requested Benchmark (numeric):

Justification (5,000 character limit):

Salesforce Sans 12
B I U
List Bulleted List Numbered List
Link Image

(EXTERNALLY VISIBLE) CDFI Fund Approvable Benchmark (numeric):

(EXTERNALLY VISIBLE) CDFI Fund Feedback (text):

Save

## Upload Documents as Needed

1. Locate the File Upload section at the bottom of the Amendment page.



## Submit and Attest

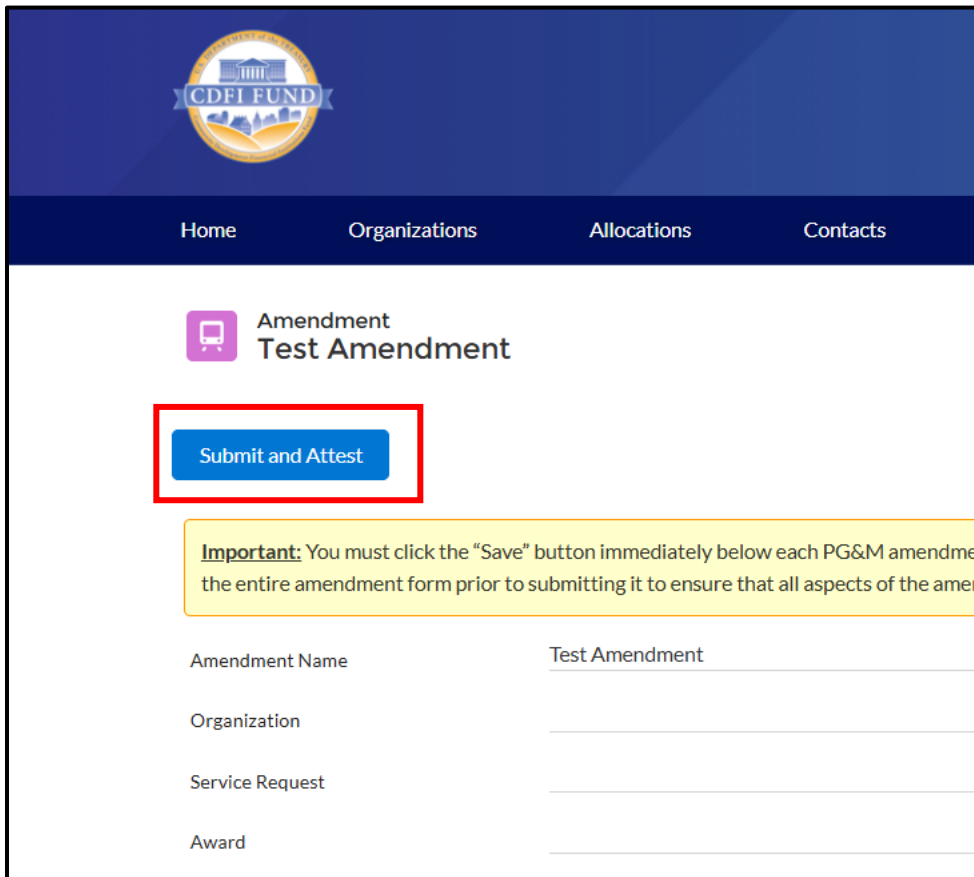
The Amendment will not be sent to the CMF Team until it is Submitted. Only Submit and Attest once all information pertaining to the Amendment Request has been entered.

Only users who have been designated **as an “Authorized Representative” in AMIS** will have the ability to Submit and Attest **the Amendment record.**

**Note:** All users under an Organization can now see all Service Requests associated with that Organization. Therefore, the Amendment record can be started by a non-Authorized Representative, but it must be submitted by one.

If the Amendment object is not open already, open it (navigate to the appropriate Service Request, then go to the “Related” menu to find the Amendment object, and click on its hyperlinked name).

4. Review all subsections to make sure that all requests are captured. (Recall that when inputting Amendment requests and justification text, the “Save” button needs to be clicked after EACH subsection to save your work.)
5. Select “Submit and Attest”



The screenshot displays the CDFI Fund AMIS interface. At the top is a dark blue header with the CDFI Fund logo and navigation links: Home, Organizations, Allocations, and Contacts. Below the header, the main content area shows a purple icon and the text 'Amendment Test Amendment'. A red rectangular box highlights a blue button labeled 'Submit and Attest'. Below this button is a yellow warning box with the text: 'Important: You must click the “Save” button immediately below each PG&M amendment the entire amendment form prior to submitting it to ensure that all aspects of the amendment are captured.' Underneath the warning box is a form with four labeled input fields: 'Amendment Name' (containing 'Test Amendment'), 'Organization', 'Service Request', and 'Award'.

6. Review the Amendment Attestation and select Continue if the attestation text is true.

**AUTHORIZED REPRESENTATIVE - AMENDMENT REQUEST  
ATTESTATION**

I certify and attest that (a) all information provided as part of this Amendment Request is true and accurate to the best of knowledge and belief, and (b) as a duly Authorized Representative, I have the requisite authorization to make this Amendment Request on behalf of my organization. I understand that this Amendment Request will be reviewed by the CDFI Fund and may, or may not be approved, as requested. I further understand that if the CDFI Fund approves any Amendment to my organization's Assistance Agreement, in order for the Amendment to take effect, it must be executed (i.e. signed and countersigned) by an Authorized Representative of my organization, and the CDFI Fund, before it takes effect. Until that time, my organization is responsible for adhering to all previously agreed to terms and conditions of the existing Assistance Agreement, and any previously agreed to and fully executed Amendments thereto.

Cancel

Continue

The Amendment is required to be Submitted and Attested for original submission and for every modification to the Amendment request during the entirety of Amendment processing.

Successful submission of an Amendment can be verified by closing the Amendment, re-opening it, and referencing the Amendment Status. Once submitted, the Amendment Status will become "Initial Review."

### Providing Additional Information & CMF Recommended Benchmarks

The submitter of the amendment will be notified if the Amendment is returned via an AMIS-generated email. Amendments may be returned for a few different reasons, including inability to amend or if the request has a material competitive impact.

When an Amendment is returned, it will be editable again in order for the Recipient to make updates or provide additional information to the Amendment record.

CMF Staff processing the submitted Amendment Request have the option to add a recommendation and return the Amendment for review. Staff recommendations can include an alternative recommended benchmark value as well as information on why the CDFI recommendation is different than the requested value.

To move forward with the Amendment, for each PGM request:

1. Modify the "Requested Benchmark" to match the "CDFI Fund Approvable Benchmark."
2. Update the "Justification" text as needed.
3. Press "Save"

After all PGM requests have been updated, select "Submit and Attest" after making any changes, following the guide [above](#).

Name: PGM-040072	PG&M Goals: 3.2(d)(ii)	Benchmark: 100	Declarative Business Statement: Homeownership Housing - Of all Affordable Housing units produced or supported with Eligible Project Costs, the total percentage for Low-Income, Very Low-Income, or Extremely Low-Income Families (%) or located in Areas of Economic Distress (%).
------------------	------------------------	----------------	---

Requested Benchmark (numeric):

75

\* Justification (5,000 character limit):

Salesforce Sans
12
B
I
U
S
List
Link
Image
Text

The Community Development Financial Institutions Fund (CDFI Fund) plays an important role in generating economic growth and opportunity in some of our nation's most distressed communities. By offering tailored resources and innovative programs that invest federal dollars alongside private sector capital, the CDFI Fund serves mission-driven financial institutions that take a market-based approach to supporting economically disadvantaged communities. These mission-driven organizations are encouraged to apply for CDFI Certification and participate in CDFI Fund programs that inject new sources of capital into neighborhoods that lack access to financing.

(EXTERNALLY VISIBLE) CDFI Fund Approvable Benchmark (numeric):

85

(EXTERNALLY VISIBLE) CDFI Fund Feedback (text):

The Community Development Financial Institutions Fund (CDFI Fund) plays an important role in generating

Save

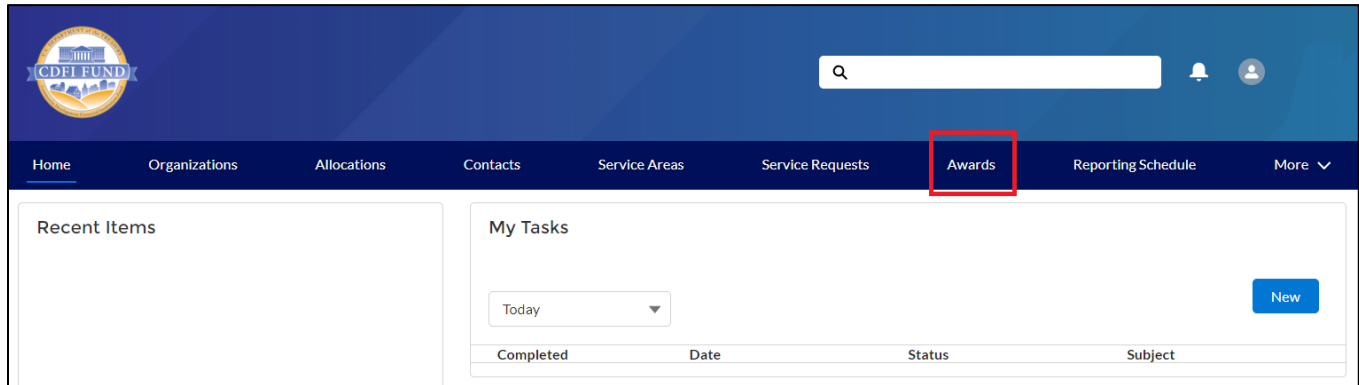
An Amendment may also be rejected outright if it falls out of allowable reasons for making a change. In such instances, the submitter of the amendment will receive a notification via email, the related Service Request will be closed, and instructions will be provided for next steps.

## 6.0 How to Submit a Generic Amendment Request

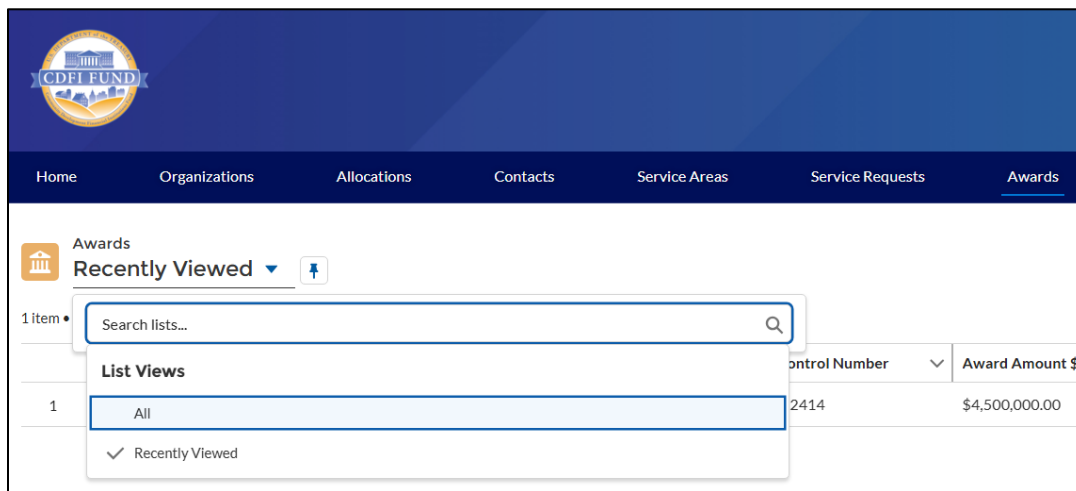
### Create Service Request

Create a Service Request in AMIS to begin the Amendment process using the steps below. For additional information on how to create Service Requests, please review Section 8 of the training manual, [Getting Started – Navigating AMIS](#).

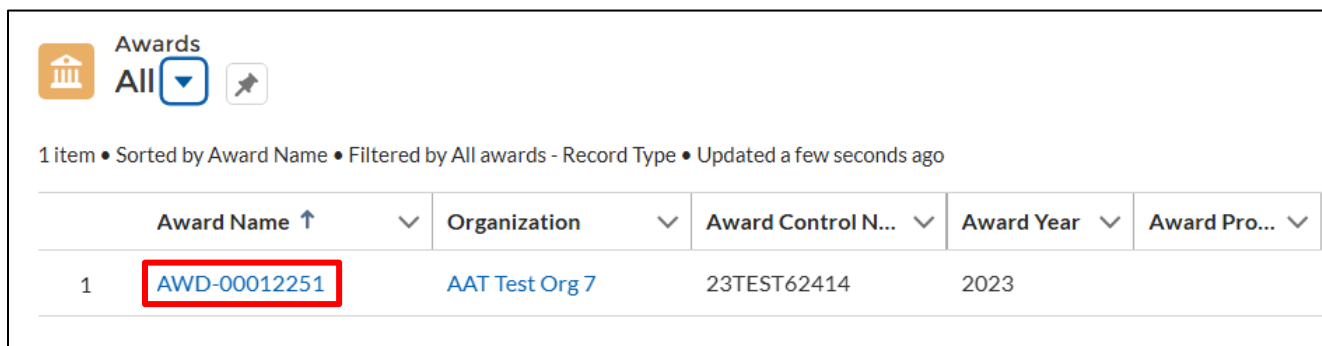
#### 1. Open AMIS and select “Awards”



#### 2. Change the List View to “All” to display all Organization Awards



#### 3. Select the desired Award by clicking on the Award Name starting with “AWD” from the List View to open the Award page.



4. Navigate to the Related Tab and locate the Service Request section

The screenshot shows the CDF Fund system interface. At the top is a navigation bar with links: Home, Organizations, Allocations, Contacts, Service Areas, Service Requests, Awards, Reporting Schedule, and More. Below the navigation bar, the main content area displays 'Award AWD-0000'. To the right of the award name are buttons for 'Edit', 'New Performance Report', and 'Payment Request'. Below this, there are fields for 'Organization', 'Total Award/Loan Amount', and 'Total Pending Payments' (showing \$0.00). At the bottom, there are two tabs: 'Detail' and 'Related'. The 'Related' tab is highlighted with a red box. Below the tabs, there is a table with columns for 'Organization' and 'Award Name'.

5. Select “New” to create a new Service Request for this Award

The screenshot shows the CDF Fund system interface for 'Award AWD-00002275'. The navigation bar is the same as in the previous screenshot. Below the navigation bar, the main content area displays 'Award AWD-00002275'. To the right of the award name are buttons for 'Printable View', 'New Note', and 'Edit'. Below this, there are tabs for 'Detail' and 'Related'. The 'Related' tab is selected. Below the tabs, there are several sections: 'Forms of Award (1)', 'Program Goals and Measures (0)', 'SF-425 (0)', and 'Service Requests (0)'. The 'Service Requests (0)' section is highlighted with a red box, and a 'New' button is visible in the bottom right corner of this section.

6. Fill out the required information for a Service Request:
- Set “Program” equal to applicable program
  - Set “Amendment Type” equal to “**Performance Goals and Measures.**”
  - Set “SR related to existing Award/Allocation?” to “**Yes**”
  - The Award information will be pre-populated.

**New Service Request: General Inquiry**

\* = Required Information

**Service Request Information**

Service Request Owner  
AR Test AR

Service Request Number

Contact Name

Organization Name

\* Program  
Capital Magnet Fund

Program Topic

Requested By Date  
7/23/2025

Funding Application ⓘ  
Search Funding Applications...

\* SR related to existing Award/Allocation? ⓘ  
Yes

Enter existing CDFI Fund AWD- (not NMTC) ⓘ  
AWD-00012251

Enter existing NMTC Award- (NMTC only) ⓘ  
Search Allocations...

Validated  
--None--

[View all dependencies](#)

Amendment Type ⓘ  
Performance Goals & Measures

[Cancel](#) [Save & New](#) [Save](#)

7. Enter values for “Subject” and “Description” that capture the purpose of the request. Note: This is not where you will enter the Performance Goal justification. Instead, you will enter a short summary of the request.

**New Service Request: General Inquiry**

**Additional Information**

\* Status  
New

Completed Date

[View all dependencies](#)

\* Service Request Origin  
Web

Priority  
Medium

**Description Information**

\* Subject

\* Description

**Resolution**

Resolution

**Web Information**


Web Email

Web Company

[Cancel](#) [Save & New](#) [Save](#)



8. Select Save to create the Service Request. You will then see this screen.

 Service Request  
PG&M Demo

[Clone](#) [Edit](#) [Printable View](#) ▼

Priority  
Medium

Status  
New

Service Request Number  
00081613

To create an Amendment, navigate to Related tab and click the New button within the Amendments section. To edit an existing Amendment, navigate to Related tab and click on the Amendment linked within the Amendments section. Submit when completed.

Detail

Related

Service Request Owner  
CDFI

Service Request Number  
00081613

Contact Name


Contact Phone

Contact Email

Funding Application ⓘ

## Create the Amendment

1. Select “Related” on the Service Request.

 Service Request  
PG&M Demo

[Clone](#) [Edit](#) [Printable View](#) ▼

Priority  
Medium

Status  
New

Service Request Number  
00081613

To create an Amendment, navigate to Related tab and click the New button within the Amendments section. To edit an existing Amendment, navigate to Related tab and click on the Amendment linked within the Amendments section. Submit when completed.

Detail

Related

Service Request Owner  
CDFI

Service Request Number  
00081613

Contact Name

Contact Phone

Contact Email

Funding Application ⓘ

2. Locate the Amendment Section and create a new Amendment by Selecting “New.”

**Service Request**  
test

Clone Edit Printable View

Priority: Medium Status: New Service Request Number: 00081613

To create an Amendment, navigate to Related tab and click the New button within the Amendments section. To edit an existing Amendment, navigate to Related tab and click on the Amendment linked within the Amendments section. Submit when completed.

Detail **Related**

Service Request Comments Public (0) [New](#)

Attachments (0) [Upload Files](#)

[Upload Files](#)  
Or drop files

Amendments (0) [New](#)

3. Enter a "Amendment Name" such as *[My Organization] [Award Control Number] PG&M Amendment [Type]*, e.g., Test Org 181CM0505321 PG&M Amendment Rural

**New Amendment**

Information

\* Amendment Name

\* Service Request

[Cancel](#) [Save & New](#) [Save](#)

4. Select Save

## Enter Amendment Information

1. Open the newly created Amendment by selecting the Amendment Name hyperlink:

Amendments (1)

Amendment Name

[PG&M Award Amendment](#)

2. This will open the following page:

**Amendment Gen1** Edit Clone Printable View

Amendment Name: Gen1

Organization:

Service Request: 00056602

Award: AWD-000

Program: BEA

Award Control Number:

Amendment Type: Performance Goals & Measures

Award Status: Executed

Award Year: 2021

Amendment Status:

Attestation: ☐

Attestation Signature:

Staff Attestation: ☐

Staff Attestation Signature:

\*Amendment Request (5,000 character limit):

Salesforce Sans 12 B I U

Save

### 3. Select Save

## Upload Documents as Needed

1. Locate the File Upload section at the bottom of the Amendment page.

Upload files - files will be stored on related Service Request

Upload Files Or drop files

2. Upload documents as needed.

**Upload Files**

ME Form. .docx 12 KB

1 of 1 file uploaded Done

**Note: Files uploaded to the Amendment will be stored and accessible from the related Service Request. They will not be visible on the Amendment page.**

## Submit and Attest

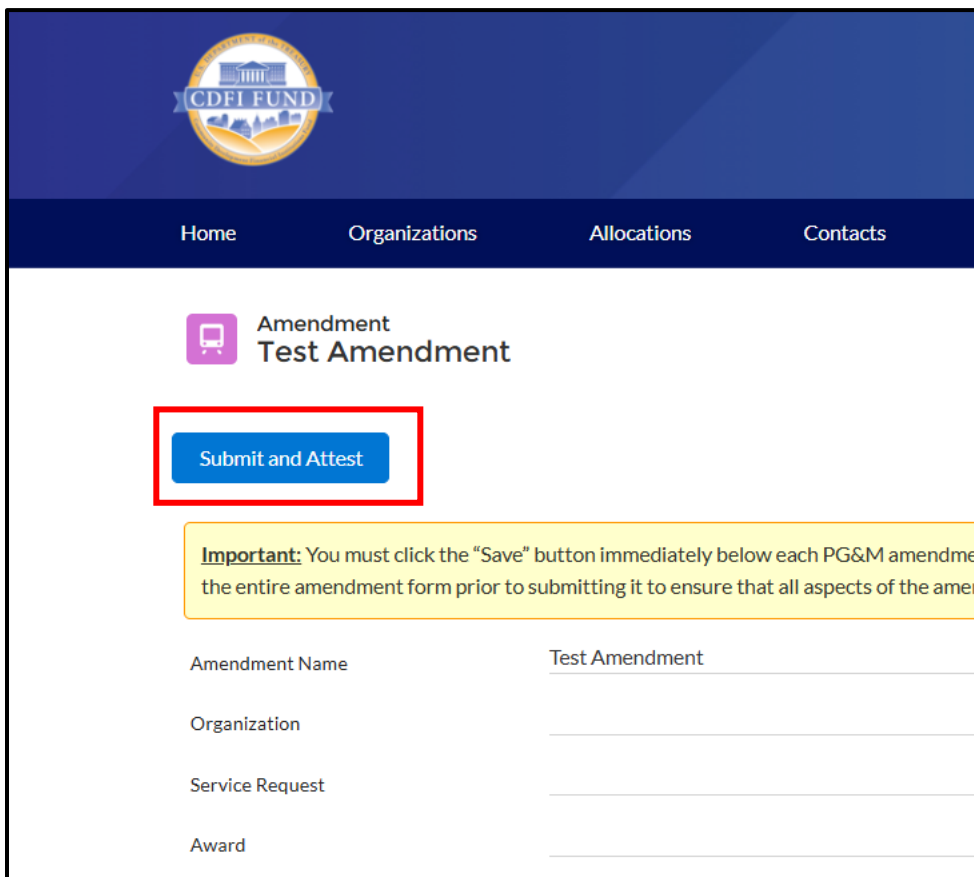
The Amendment will not be sent to the CDFI Fund until it is Submitted. Only Submit and Attest once all information pertaining to the Amendment Request has been entered.

Only users who have been designated as an “Authorized Representative” in AMIS will have the ability to Submit and Attest the Amendment record.

**Note:** All users under an Organization can now see all Service Requests associated with that Organization. Therefore, the Amendment record can be started by a non-Authorized Representative, but it must be submitted by one.

If the Amendment object is not open already, open it (navigate to the appropriate Service Request, then go to the “Related” menu to find the Amendment object, and click on its hyperlinked name).

1. Review all subsections to make sure that all requests are captured. (Recall that when inputting Amendment requests and justification text, the “Save” button needs to be clicked after EACH subsection to save your work.)
2. Select “Submit and Attest”



The screenshot displays the CDFI Fund AMIS interface. At the top is a dark blue header with the CDFI Fund logo and navigation links: Home, Organizations, Allocations, and Contacts. Below the header, the main content area shows a purple icon and the text 'Amendment Test Amendment'. A red rectangular box highlights a blue button labeled 'Submit and Attest'. Below this button is a yellow warning box with the text: 'Important: You must click the “Save” button immediately below each PG&M amendment the entire amendment form prior to submitting it to ensure that all aspects of the amendment are captured.' At the bottom, there is a form with four labeled input fields: 'Amendment Name' (containing 'Test Amendment'), 'Organization', 'Service Request', and 'Award'.

3. Review the Amendment Attestation and select Continue if the attestation text is true.

AUTHORIZED REPRESENTATIVE - AMENDMENT REQUEST ATTESTATION
<p>I certify and attest that (a) all information provided as part of this Amendment Request is true and accurate to the best of knowledge and belief, and (b) as a duly Authorized Representative, I have the requisite authorization to make this Amendment Request on behalf of my organization. I understand that this Amendment Request will be reviewed by the CDFI Fund and may, or may not be approved, as requested. I further understand that if the CDFI Fund approves any Amendment to my organization's Assistance Agreement, in order for the Amendment to take effect, it must be executed (i.e. signed and countersigned) by an Authorized Representative of my organization, and the CDFI Fund, before it takes effect. Until that time, my organization is responsible for adhering to all previously agreed to terms and conditions of the existing Assistance Agreement, and any previously agreed to and fully executed Amendments thereto.</p>
<div><div>Cancel</div><div>Continue</div></div>

The Amendment is required to be Submitted and Attested for original submission and for every modification to the Amendment request during the entirety of Amendment processing.

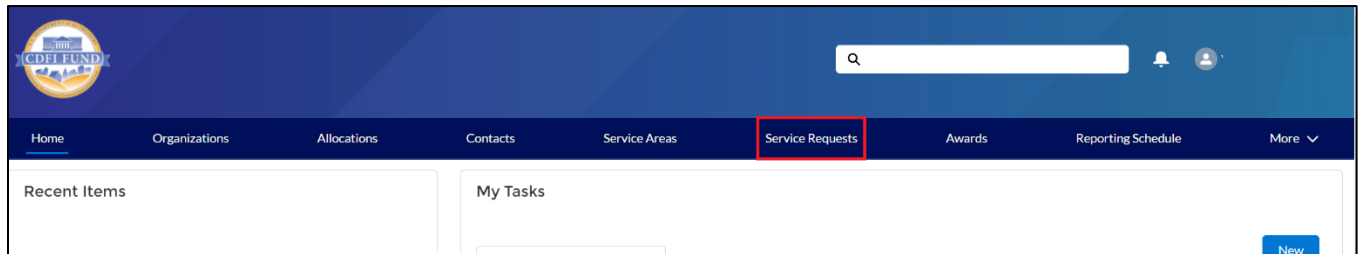
Successful submission of an Amendment can be verified by closing the Amendment, re-opening it, and referencing the Amendment Status. Once submitted, the Amendment Status will become "Initial Review."

## 7.0 Tasks After Submitting an Amendment

### Communication with the CDFI Fund

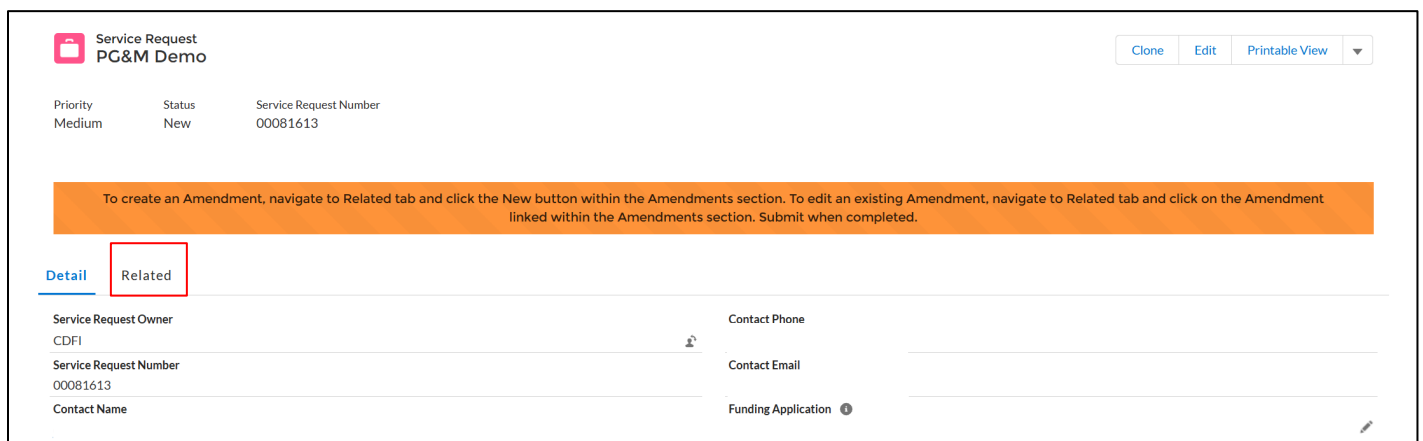
Communication with the CDFI Fund during an Amendment follows the same process as other Service Requests.

#### 1. Open AMIS and select Service Requests

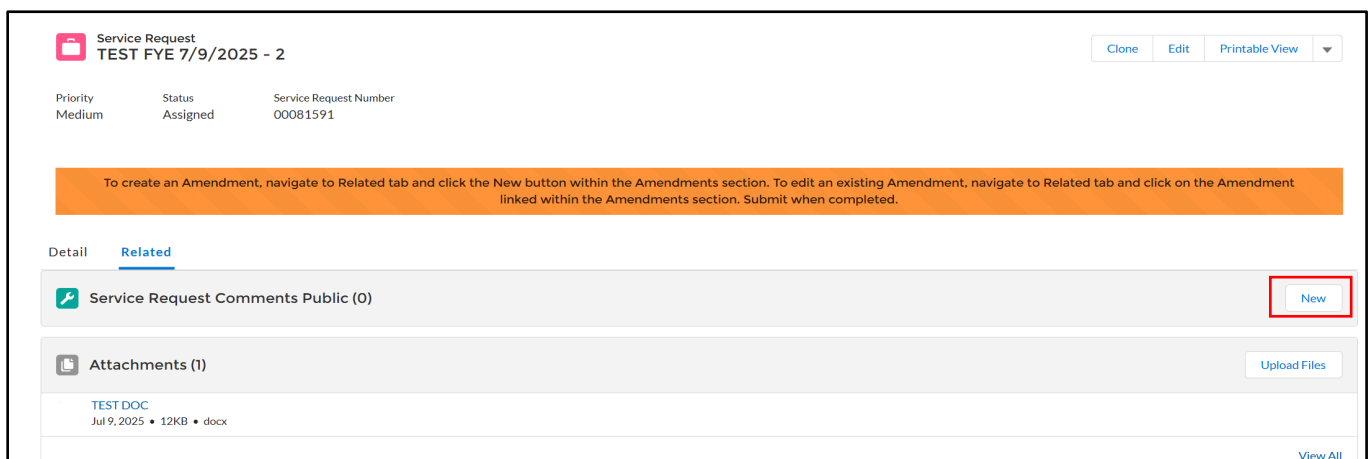


#### 2. Open the applicable Service Request related to the Amendment request (do not open a new Service Request)

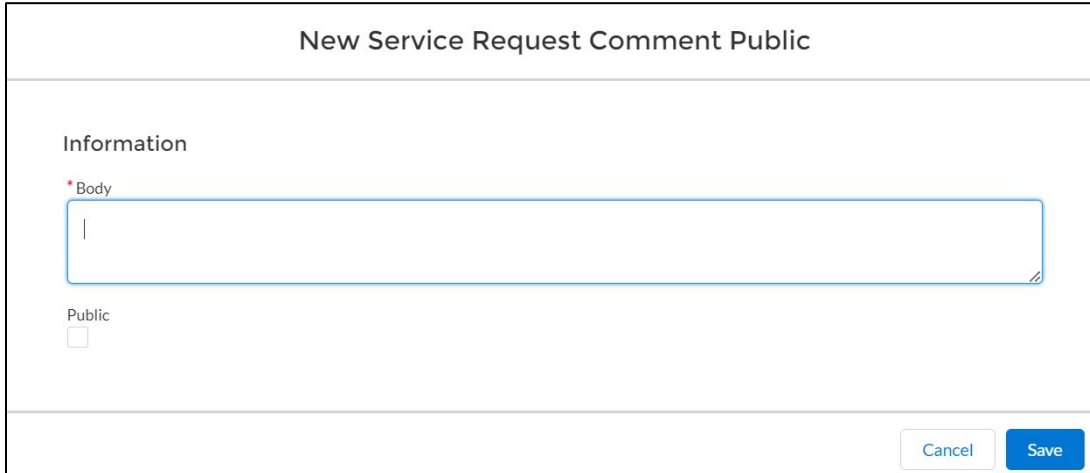
#### 3. Select "Related" tab.



#### 4. Locate the section for Service Request Comments Public and select New.



5. Enter message and select “Save.” Upon pressing Save, the Analyst assigned to your Service Request will be alerted you have submitted a new message.



New Service Request Comment Public

Information

\* Body

Public

Cancel Save

### Providing Additional Information

The submitter of the amendment will be notified if the Amendment is returned via an AMIS-generated email. Amendments may be returned for a few different reasons.

When an Amendment is returned, it will be editable again in order to make updates or provide additional information.

Make the recommended changes as per the Service Request Public Comments and re-submit the Amendment.

An Amendment may also be rejected outright if it falls outside of allowable reasons for making a change. In such instances, the submitter of the amendment will receive a notification, the related service request will be closed, and instructions will be provided for next steps.

### Signing Letters

Amendments in AMIS provide the functionality for digitally signing. The Authorized Representative submitter of the Amendment will be notified via email if they are required to provide a digital signature for any documents related to processing the Amendment. To sign the amendment letter, complete the following steps:

1. Open the Service Request that contains the Amendment and then open the Amendment record within that Service Request.  
*Note: The link to the amendment will be in the email sent to the Authorized Representative*
2. Review the Amendment Letter and other accompanying documentation (if applicable). To review the Amendment Letter, scroll to the bottom of the page and locate the “Amendment Letters” section at the bottom of the Amendment Form

Amendment Letters (1)			
Amendment Letter Name	Award	Created By	Created Date
<a href="#">CMF Amendment</a>	<a href="#">AWD-00010742</a>	<a href="#">Jake Butterworth</a>	10/5/2023 1:15 PM


[View All](#)


3. Open the Amendment Letter record by selecting the Amendment Letter Name.

Amendment Letters (1)			
Amendment Letter Name	Award	Created By	Created Date
<a href="#">CMF Amendment</a>	<a href="#">AWD-00010742</a>	<a href="#">Jake Butterworth</a>	10/5/2023 1:15 PM


[View All](#)

4. Review the Letter.





[Home](#)
[Organizations](#)
[Allocations](#)
[Contacts](#)
[Service Areas](#)
[Service Requests](#)
[Awards](#)
[Reporting Schedule](#)
[More](#)


**Amendment Letter**  
**CMF Amendment**






[DETAILS](#)
[RELATED](#)

Amendment Letter Name  
CMF Amendment


Owner  
[Jake Butterworth](#)

Amendment  
[CMF Amendment](#)

Award  
[AWD-00010742](#)






Read aloud

1 of 2



DEPARTMENT OF THE TREASURY  
WASHINGTON, D.C. 20220

COMMUNITY DEVELOPMENT  
FINANCIAL INSTITUTIONS FUND

October 05, 2023

**VIA ELECTRONIC MAIL**



5. To review other accompanying documentation, select “Related.”

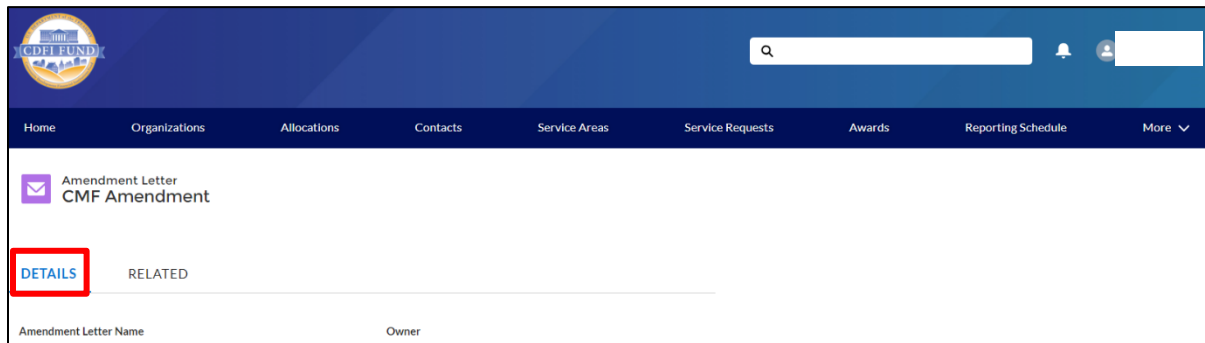
The screenshot shows the CDFI Fund portal interface. At the top is a dark blue header with the CDFI Fund logo on the left and navigation links: Home, Organizations, Allocations, Contacts, and Service Areas. Below the header, the page title is 'Amendment Letter CDFI NACA Amendment' with a pink icon. Two tabs are visible: 'DETAILS' and 'RELATED', with 'RELATED' highlighted by a red box. The main content area displays a table with three rows: 'Amendment Letter Name' with value 'CDFI NACA Amendment', 'Amendment' with value 'Demo', and 'Award' with value 'AWD-000'. To the right of the first row, the 'Owner' is listed as 'Jake f' with a link icon.

6. Locate the “Notes and Attachments” section. Select the attachment to open in viewer.

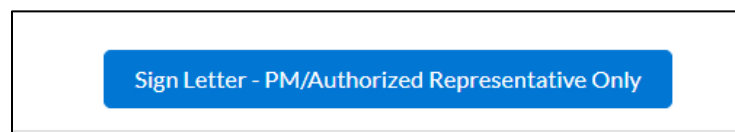
This screenshot shows the same CDFI Fund portal, but the 'RELATED' tab is now active. Below the tabs, there is a section titled 'Notes & Attachments (1)' with a document icon. To the right of this section is an 'Upload Files' button. A red box highlights the attachment 'Certification\_Form\_' dated 'Mar 30, 2023'. At the bottom right of the attachment list is a 'View All' link.

7. Review attachment. If you have any questions regarding the content of the Amendment Letter or the revised Schedule 1, reach out to CDFI Fund staff via the Service Request associated with the Amendment, **BEFORE** signing. If you have no questions, proceed to the next step.

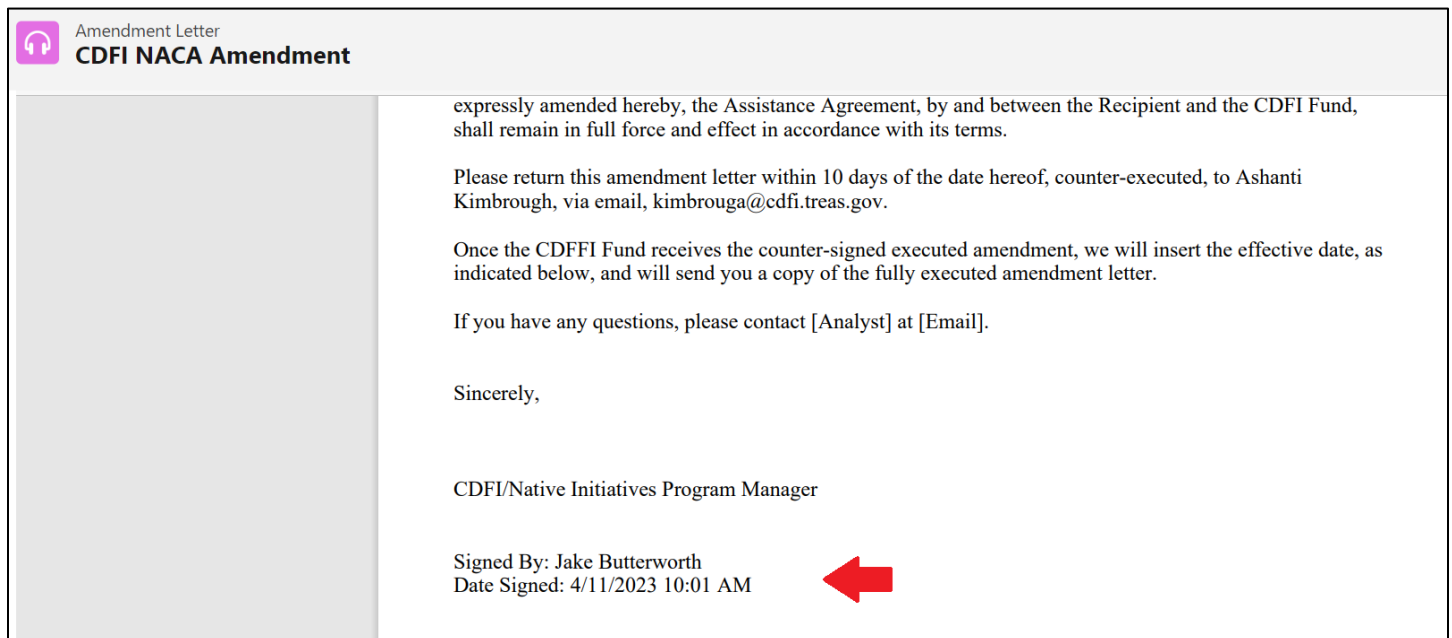
8. Return to the Amendment Letter by clicking on the “Details” tab and scrolling down to the letter.



9. Locate the Sign Letter button at the bottom of the Amendment Letter Details tab. Click “Sign Letter – PM/Authorized Representative Only” button to digitally sign.



10. Confirm your signature has been added to letter.



## Notification of Completion

After signature, the amendment will return to the CDFI Fund for the Program Manager signature and placement of the Effective Date of the Agreement. Once these steps have been complete and the CDFI Fund implements the AMIS changes, the Authorized Representative will receive an AMIS-generated email with a subject that includes, “CDFI Fund Amendment Request Completed” notifying of successful implementation, with the fully executed Amendment Letter and other accompanying documentation attached to the email. No further action is required.