



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

# How to Request an Amendment in AMIS

May 2026

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## 1.0 Introduction to Amendments in AMIS

### Overview

This document will guide Organizations on 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 NACA FA Award
  - Performance Goal and Measure Benchmark Change Request
  - Supplemental Deadline Extension
- CDFI NACA TA Award for Uncertified Organizations
  - 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 that are not CMF or CDFI NACA FA/TA program Awards

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.



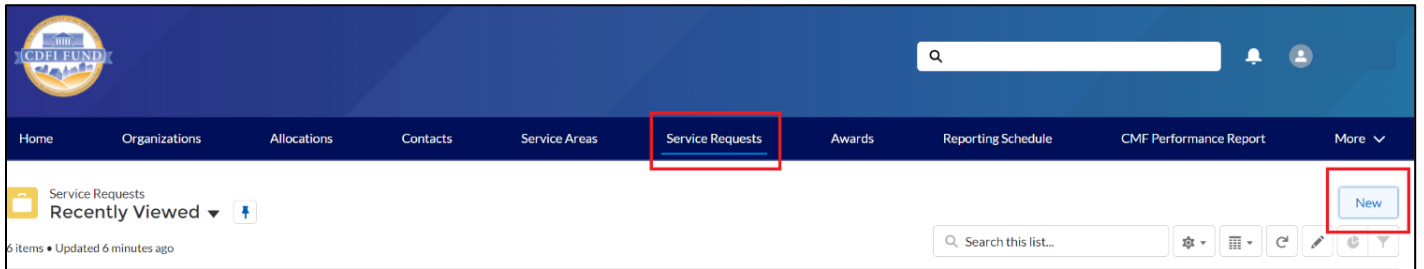
## 2.0 How to Submit a Fiscal Year End Change Amendment Request

### Create Service Request

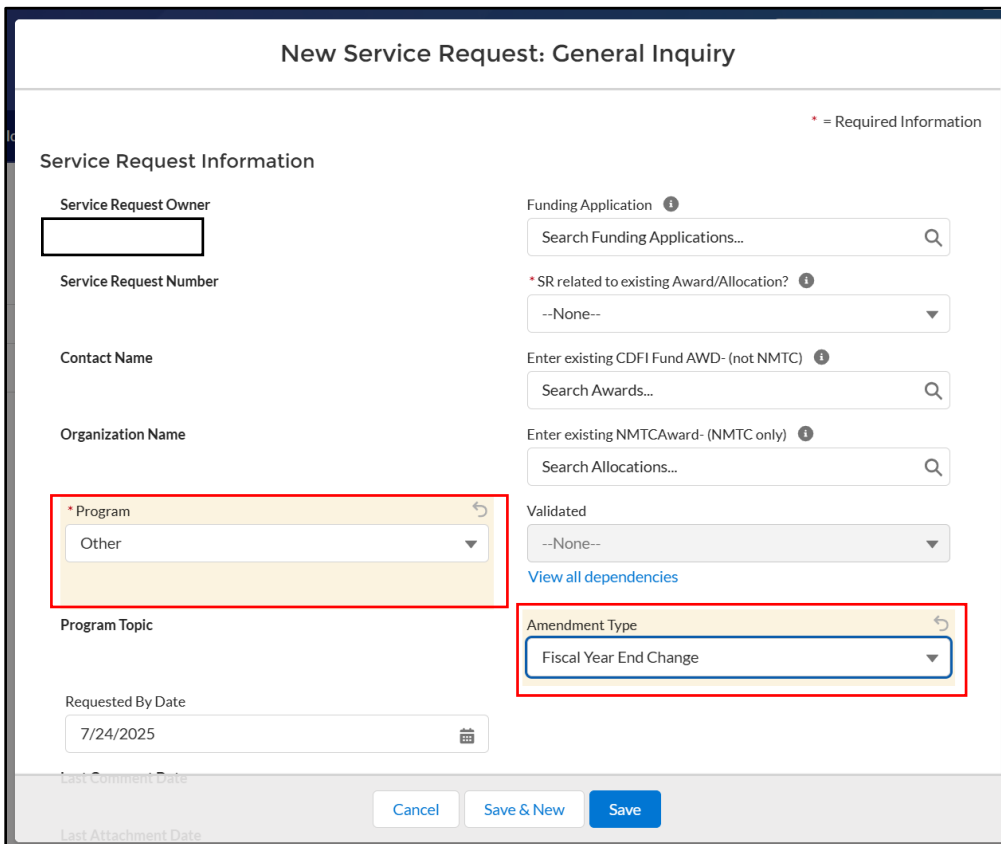
Create a Service Request in AMIS to begin the Amendment process.

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

1. Open AMIS, select “Service Requests” and select “New”.



2. Set “Program” equal to “Other”
3. Set “Amendment Type” equal to “Fiscal Year End Change”

The image shows the 'New Service Request: General Inquiry' form. The form is divided into two columns. The left column contains fields for 'Service Request Owner', 'Service Request Number', 'Contact Name', 'Organization Name', 'Program' (set to 'Other', highlighted with a red box), 'Program Topic', and 'Requested By Date' (set to 7/24/2025). The right column contains fields for 'Funding Application', '\* SR related to existing Award/Allocation?' (set to '--None--'), 'Enter existing CDFI Fund AWD- (not NMTC)', 'Enter existing NMTC Award- (NMTC only)', 'Validated' (set to '--None--'), and 'Amendment Type' (set to 'Fiscal Year End Change', highlighted with a red box). There are also search bars for 'Search Funding Applications...', 'Search Awards...', and 'Search Allocations...'. At the bottom, there are buttons for 'Cancel', 'Save & New', and 'Save'.

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

## New Service Request: General Inquiry

### Additional Information

\* Status Completed Date

New 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

5. 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	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

<p><b>Service Request Owner</b></p> <p>CDFI <span style="float: right;">✎</span></p> <p><b>Service Request Number</b></p> <p>00081613</p> <p><b>Contact Name</b></p> <p>.....</p> <p><b>Organization Name</b></p> <p>.....</p>	<p><b>Contact Phone</b></p> <p>.....</p> <p><b>Contact Email</b></p> <p>.....</p> <p><b>Funding Application</b> ⓘ</p> <p>..... <span style="float: right;">✎</span></p> <p><b>SR related to existing Award/Allocation?</b> ⓘ</p> <p>Yes <span style="float: right;">✎</span></p>
--	--

## Complete the Material Event Form

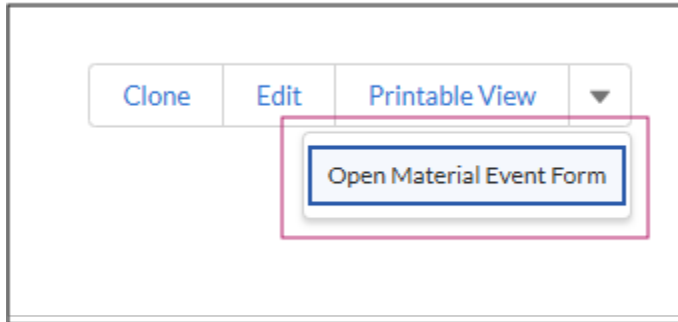
1. On the Service Request page, select the dropdown menu on the upper right-hand corner of the page.

 Service Request  
ME Test1

Clone Edit Printable View 

Priority Status Service Request Number  
Medium New 00081384

2. Select Open Material Event Form to complete the form.



3. Complete a Material Events form.

## CERTIFICATION OF MATERIAL EVENTS FORM V2

**For All CDFI Fund Programs**

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OMB Approval No. 1559-0037  
CDFI Form: 0036  
Paperwork Reduction Act Notice

This submission requirement is provided to CDFI Fund Awardees, applicants, and certified CDEs and CDFIs, to report potential Material Events to the CDFI Fund. CDFI Fund Awardees, applicants, and certified CDEs and CDFIs, are not required to respond to this collection of information unless it displays a currently valid OMB number. The estimated average burden associated with this collection of information is 0.25 hours. Comments concerning the accuracy of this burden estimate and suggestions for reducing this burden should be directed to the Department of the Treasury, Community Development Financial Institutions Fund, 1500 Pennsylvania Ave., N.W., Washington, DC 20220.

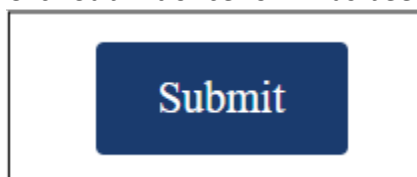
Any information contained in this collection, including any attachments or supplements hereto, is subject to disclosure to law enforcement agencies for law enforcement purposes. The CDFI Fund is an equal opportunity provider.

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**What is a "Material Event"?**

A "Material Event" is an occurrence specified in any applicable Assistance, Award, Allocation, or Bond Loan Agreement, or Agreement to Guarantee between the Community Development Financial Institutions Fund (CDFI Fund) and an Award Recipient/Allocatee/Borrower. Certified organizations, award Recipients and Borrowers should consult each applicable agreement to determine which events must be reported. At a minimum, a Material Event includes any change in an organization's condition that may lead to or cause the actual violation of terms and conditions of an Assistance, Award, Allocation, or Bond Loan Agreement, Agreement to Guarantee, regulation, or law. Certified Community Development Entities (CDEs) and Community Development Financial Institutions (CDFIs) must also report any event or condition that may cause the entity to no longer meet one or more certification criteria.

4. Click Submit once form has been filled out.



5. You will be redirected back to the Service Request page once you click Submit.

## Create the Amendment

1. Select “Related” on the Service Request.

The screenshot shows the 'Service Request test' page. The navigation bar includes 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 service request details are: Priority: Medium, Status: New, Service Request Number: 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 in a red box. 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 'Amendments (0)' section is visible at the bottom, with a 'New' button highlighted in a red box. The 'Service Request Comments Public (0)' section has a 'New' button. The 'Attachments (0)' section has an 'Upload Files' button. The 'Amendments (0)' section also has an 'Upload Files' button and 'Or drop files' text.

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

**New Amendment**

Information

\*Amendment Name

\*Service Request

5. Select Save

**Enter Amendment Information**

1. Open the newly created Amendment

 Amendments (1)

Amendment Name

[Demo Org Fiscal Year End Change - 12/31](#)

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

Amendment Name	TestME
Organization	<a href="#">Affordable Equity Fund, LLC</a>
Service Request	00081384
Award	
Allocation	
Program	
Award Control Number	
Amendment Type	Fiscal Year End Change
Award Status	
Award Year	
Amendment Status	Awaiting Organization
Attestation	<input type="text"/>
Attestation Signature	
Staff Attestation	<input type="text"/>
Staff Attestation Signature	

New Fiscal Year End Month:

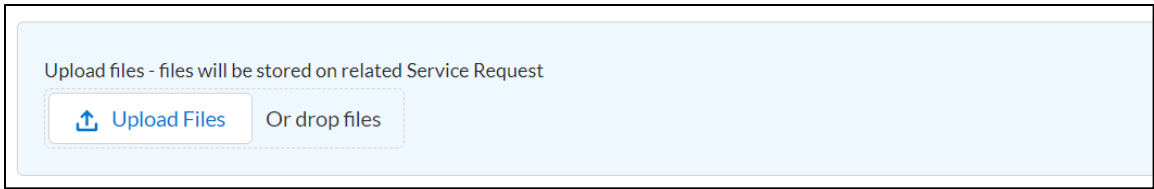
New Fiscal Year End Day:

3. Select "Save".

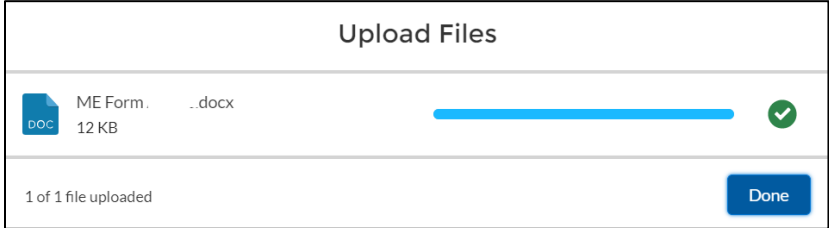
You will see Success! Update Saved notification once you save the requested Month and Day into "New Fiscal Year End" fields.



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



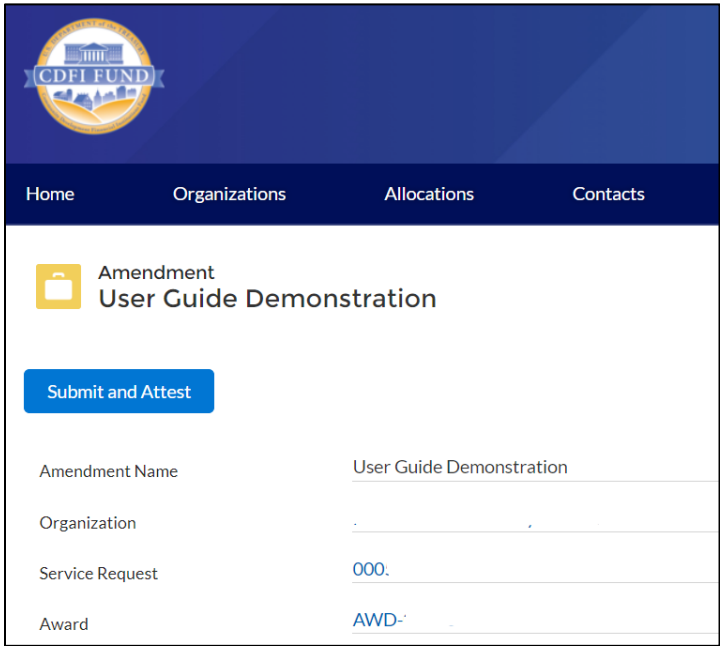
5. Click Done once desired file has been uploaded



### 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”



2. Review the Amendment Attestation

3. Select Continue if 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

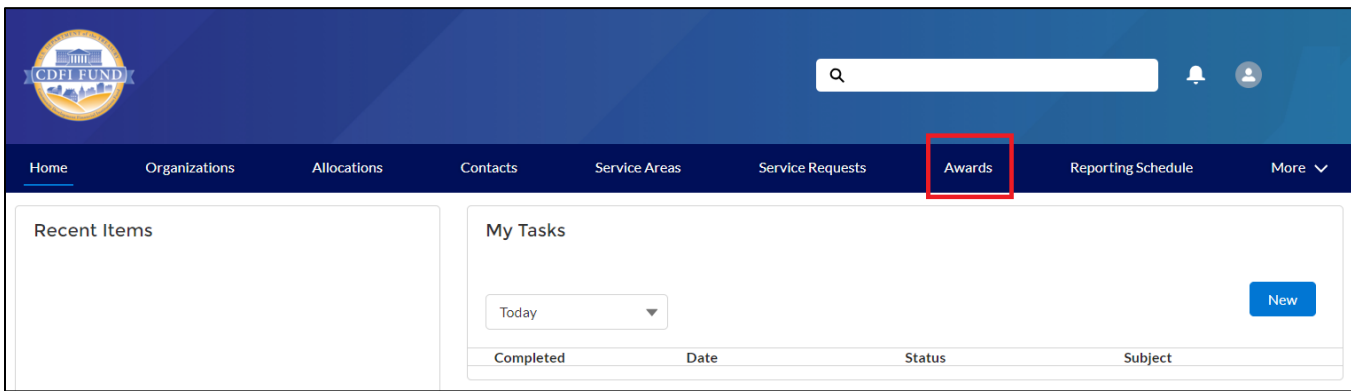
The Amendment is required to be Submitted and Attested for original submission and for every modification to the Amendment request during the entirety of Amendment processing.

### 3.0 How to Submit a CDFI NACA 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

Home Organizations Allocations Contacts Service Areas Service Requests **Awards** Reporting Schedule More ▾

Awards All ▾ [Printable View](#)

6 items LIST VIEWS Search this list... [Settings] [Grid] [Refresh] [Edit] [Delete] [Filter]

	Award Year ▾	Award Progra... ▾	Award Amount \$ ▾	Award Status ▾
1	2017			Closed Out ▾
2	2018			Closed Out ▾
3	2019			Closed Out ▾

Recently Viewed (Pinned list)

3. Select the desired Award from the List View to open the Award page
4. Navigate to the Related Tab and locate the Service Request section

Home Organizations Allocations Contacts Service Areas Service Requests **Awards** Reporting Schedule More ▾

Award AWD-0000 [Edit](#) [New Performance Report](#) [Payment Request](#) ▾

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

[Detail](#) **Related**

Organization	Award Name
Award Program: CDFI	Closeout Date

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

The screenshot shows the CDFI Fund portal interface. At the top, there is a navigation bar with tabs for Home, Organizations, Allocations, Contacts, Service Areas, Service Requests, Awards, Reporting Schedule, and More. Below the navigation bar, the main content area displays an award summary for 'Award AWD-0000'. It includes buttons for 'Edit', 'New Performance Report', and 'Payment Request'. A table below shows columns for 'Organization', 'Total Award/Loan Amount', and 'Total Pending Payments \$0.00'. There are two tabs: 'Detail' and 'Related'. Under 'Related', there is a section for 'Notes & Attachments (4)' with an 'Upload Files' button and a 'View All' link. Below that is a section for 'Service Requests (0)' with a 'New' button highlighted by a red box.

6. Set "Program" equal to "CDFI/NACA Program"
7. Set "Amendment Type" equal to "Performance Goals and Measures"

The screenshot shows the 'New Service Request: General Inquiry' form. The form is titled 'New Service Request: General Inquiry' and includes a legend for '\* = Required Information'. The form is divided into several sections: 'Service Request Information', 'Funding Application', 'SR related to existing Award/Allocation?', 'Enter existing CDFI Fund AWD- (not NMTC)', 'Enter existing NMTCAward- (NMTC only)', 'Validated', and 'View all dependencies'. The 'Program' dropdown menu is highlighted with a red box and set to 'CDFI/NACA Program'. The 'Amendment Type' dropdown menu is also highlighted with a red box and set to 'Performance Goals & Measures'. Other fields include 'Service Request Owner', 'Service Request Number', 'Contact Name', 'Organization Name', 'Requested By Date' (set to 7/24/2025), and 'Last Comment Date'. At the bottom, there are buttons for 'Cancel', 'Save & New', and 'Save'.

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

### New Service Request: General Inquiry

**Additional Information**

\* Status Completed Date  
 ▼  
[View all dependencies](#)

\* Service Request Origin  
 ▼

Priority  
 ▼

**Description Information**

\* Subject

\* Description

**Resolution**

Resolution

**Web Information**

Web Email Web Company

9. Select Save to create the Service Request.

**Service Request**  
PG&M Demo

▼

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 <span style="font-size: 0.8em;">?</span>

## 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 Contact Phone: [Redacted]  
 Service Request Number: 00081613 Contact Email: [Redacted]  
 Contact Name: [Redacted] Funding Application: [Redacted]

2. Locate the Amendment Section
3. Create a new Amendment by Selecting "New".

Service Request  
PG&M Demo

Clone Edit Printable View

Priority: Medium Status: New Service Request Number: 00051397

Please create an Amendment and submit it when completed. Navigate to Related tab and click on the New button within the Amendments section.

Detail **Related**

Material Events (0)

Amendments (0) **New**

Service Request Comments Public (0) New

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 Comments Public (0) New

Attachments (0) Upload Files

Upload Files  
Or drop files

Amendments (0) **New**

4. Enter a "Amendment Name" such as *[My Organization] [Award ID] PG&M Amendment*

### New Amendment

**Information**

\*Amendment Name

\*Service Request

5. Select Save


## Enter Amendment Information

1. Open the newly created Amendment

 Amendments (1)


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

2. Review the Award information



Q

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

 Amendment  
**PG&M Award Amendment**

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
Requested Period Benchmark (\$): 6,512,967	Requested Benchmark (%): 25	FA Period Benchmark: 6512967
Name: PGM-039209	Pop-Yr: 2	Benchmark: 50
Requested Period Benchmark (\$): 13,025,933	Requested Benchmark (%): 50	FA Period Benchmark: 13025933
Name: PGM-039210	Pop-Yr: 3	Benchmark: 90
Requested Period Benchmark (\$): 23,446,679	Requested Benchmark (%): 90	FA Period Benchmark: 23446679
<input type="checkbox"/> Request Deadline Extension		
Overall PG&M Justification (5,000 character limit):		
<p>Salesforce Sans 12 B I U     </p>		
<div style="border: 1px solid #ccc; height: 40px;"></div>		
<input type="button" value="Save"/>		

4. Make modifications to editable fields as needed
5. Insert a justification detailing the reasons for requesting this change in the field “Overall PG&M Justification”
6. 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 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)

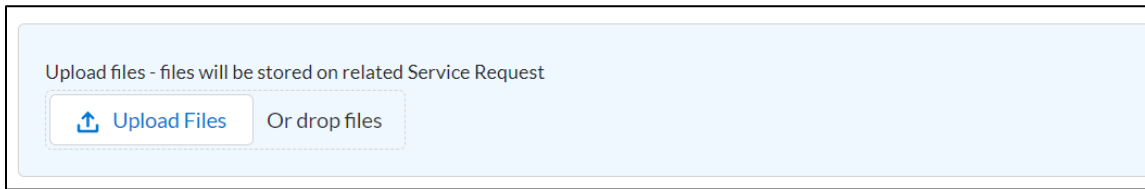
Each PG&M Group will contain fields prefixed with “Requested”. “Requested” fields are fields that are potentially available for an Amendment. If a “Requested” field is not editable, it cannot be requested for change via the Amendment tool.

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

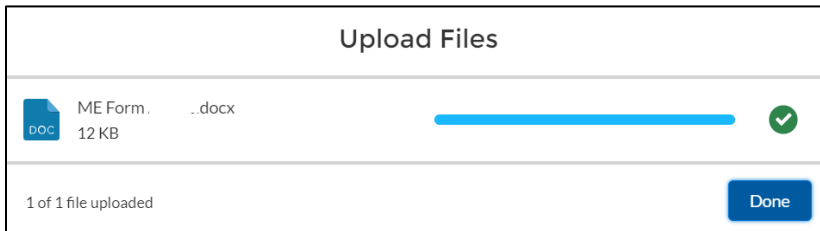
- If the Period of Performance date is in the past, the period dollar or number field will not be editable
- Year 3 Benchmark percentages remain locked at 90%

## Upload Documents as Needed

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



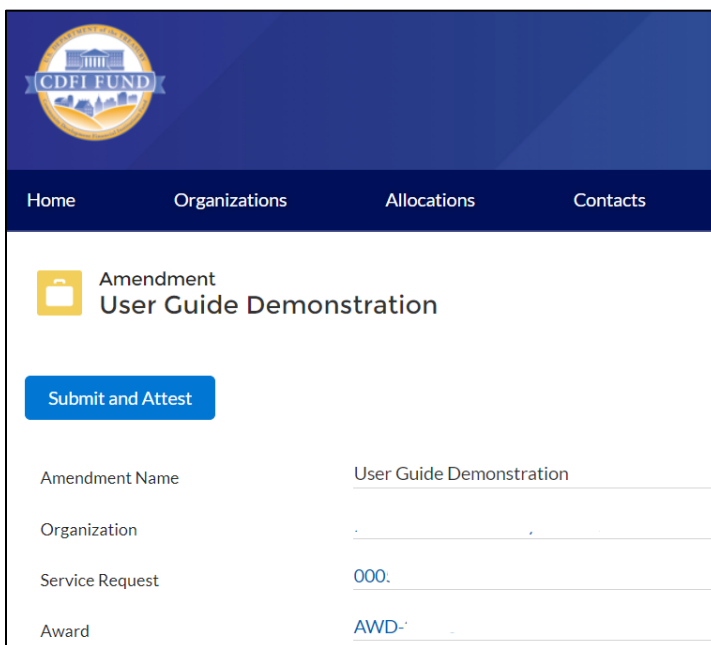
2. Upload artifacts as needed.



## Submit and Attest

The Amendment will not be sent to CDFI 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”



2. Review the Amendment Attestation

3. Select Continue if 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.

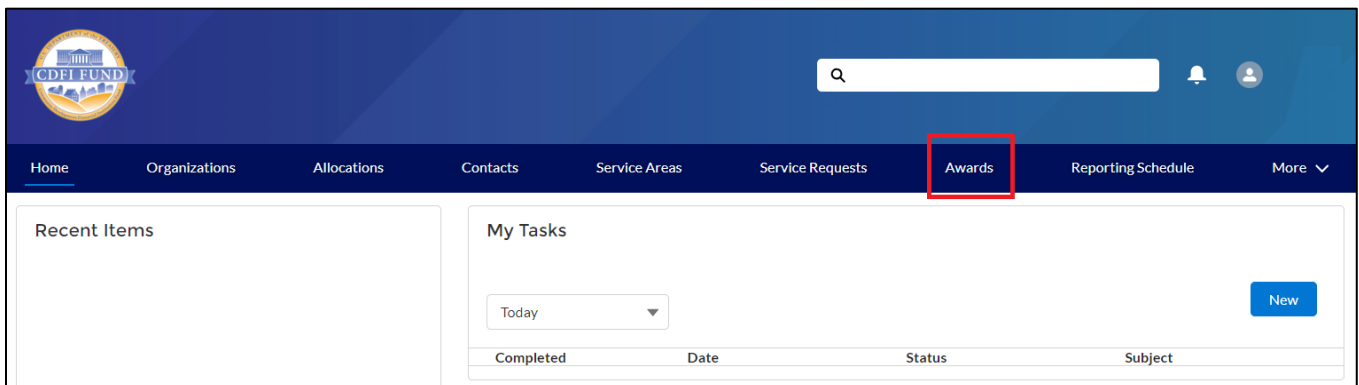
The Amendment is required to be Submitted and Attested for original submission and for every modification to the Amendment request during the entirety of Amendment processing.

## 4.0 How to Submit a CDFI NACA 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

Home Organizations Allocations Contacts Service Areas Service Requests **Awards** Reporting Schedule More ▾

Awards All ▾ [Printable View](#)

6 items LIST VIEWS Search this list... [Settings] [Grid] [Refresh] [Edit] [Delete] [Filter]

	Award Year ▾	Award Progra... ▾	Award Amount \$ ▾	Award Status ▾
1	2017			Closed Out ▾
2	2018			Closed Out ▾
3	2019			Closed Out ▾

Recently Viewed (Pinned list)

3. Select the desired Award from the List View to open the Award page
4. Navigate to the Related Tab and locate the Service Request section

Home Organizations Allocations Contacts Service Areas Service Requests **Awards** Reporting Schedule More ▾

Award AWD-0000 [Edit](#) [New Performance Report](#) [Payment Request](#) ▾

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

[Detail](#) **Related**

Organization Award Name  
Award Program: Closeout Date  
CDFI

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

6. Set “Program” equal to “CDFI/NACA Program”
7. Set “Amendment Type” equal to “Performance Goals and Measures”

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

**New Service Request: General Inquiry**

**Additional Information**

\* Status Completed Date  
 New    
[View all dependencies](#)

\* Service Request Origin  
 Web

Priority  
 Medium

**Description Information**

\* Subject

\* Description

**Resolution**

Resolution

**Web Information**

Web Email Web Company

9. Select Save to create the Service Request.

**Service Request**  
PG&M Demo

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 <input type="text"/> <input type="button" value="v"/>	Contact Phone <input type="text"/>
Service Request Number 00081613	Contact Email <input type="text"/>
Contact Name <input type="text"/>	Funding Application <input type="text"/> <input type="button" value="v"/>

## 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	Contact Phone
Service Request Number 00081613	Contact Email
Contact Name	Funding Application

2. Locate the Amendment Section
3. Create a new Amendment by Selecting “New”.

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

Service Request  
Test SF 1 July 2025 1:04 AM

Clone Edit Printable View

Priority: Medium    Status: New    Service Request Number: 00081273

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 (3)** Upload Files

Test text for testing text. Jul 2, 2025 • 27B • txt

Test text for testing text. Jul 2, 2025 • 27B • txt

Test text for testing text. Jul 2, 2025 • 27B • txt

**Amendments (1)** New

Amendment Name

Test Amendment

4. Enter a “Amendment Name” such as *[My Organization] [Award ID] PG&M Amendment*

### New Amendment

**Information**

\*Amendment Name

\*Service Request

5. Select Save


## Enter Amendment Information

1. Open the newly created Amendment

 Amendments (1)


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

2. Review the Award information



🔍

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

 Amendment **Demo TA**

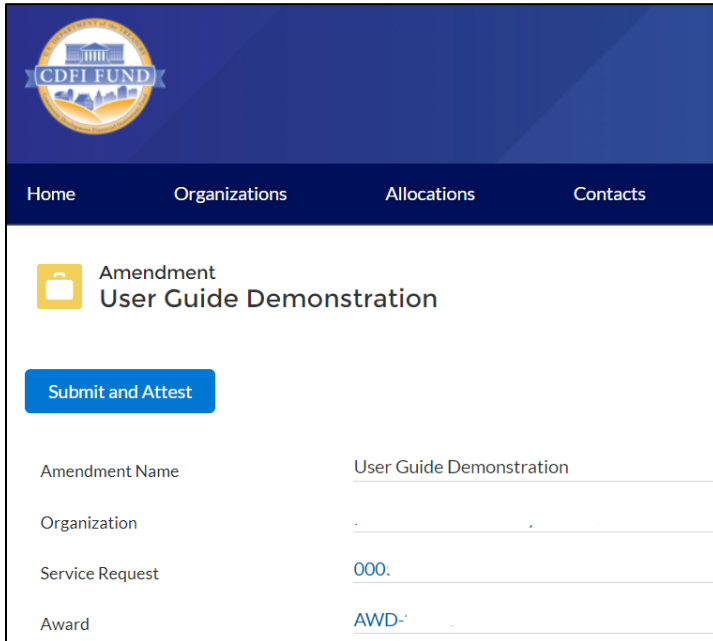
Amendment Name	Demo TA
Organization	
Service Request	<a href="#">00081613</a>
Award	
Allocation	



## Submit and Attest

The Amendment will not be sent to CDFI 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"

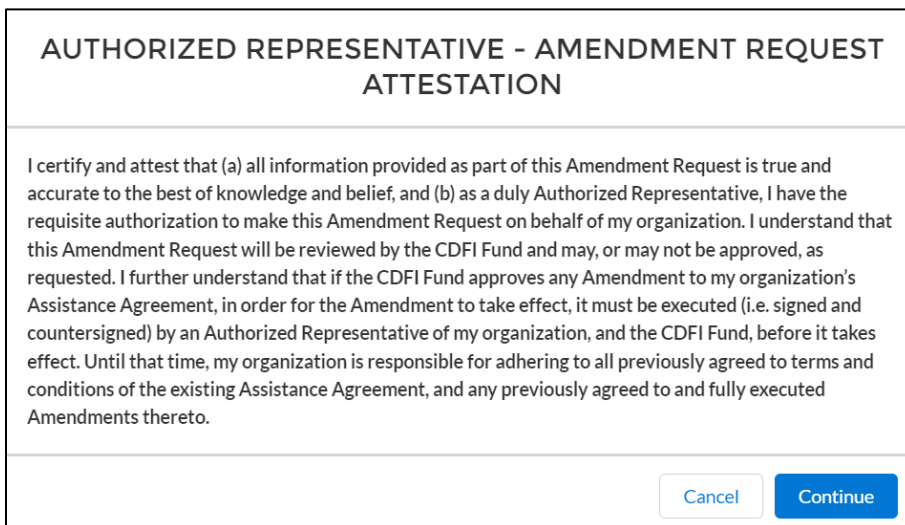


The screenshot shows the CDFI Fund website interface. At the top left is the CDFI Fund logo. Below it is a navigation bar with links for Home, Organizations, Allocations, and Contacts. The main content area is titled "Amendment User Guide Demonstration" and features a prominent blue "Submit and Attest" button. Below the button is a form with the following fields:

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

### 2. Review the Amendment Attestation

### 3. Select Continue if 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.

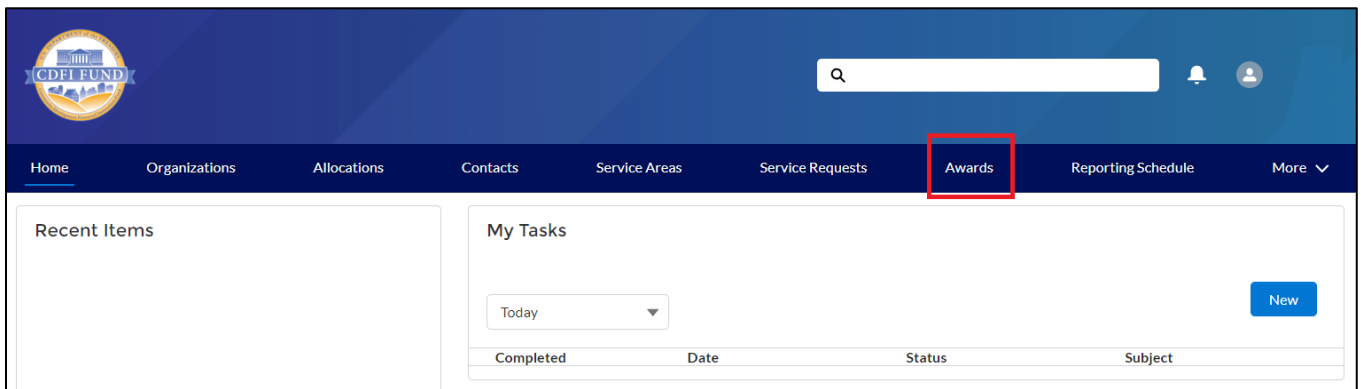
## 5.0 How to Submit a Capital Magnet Fund (CMF) Amendment Request

### Create Service Request

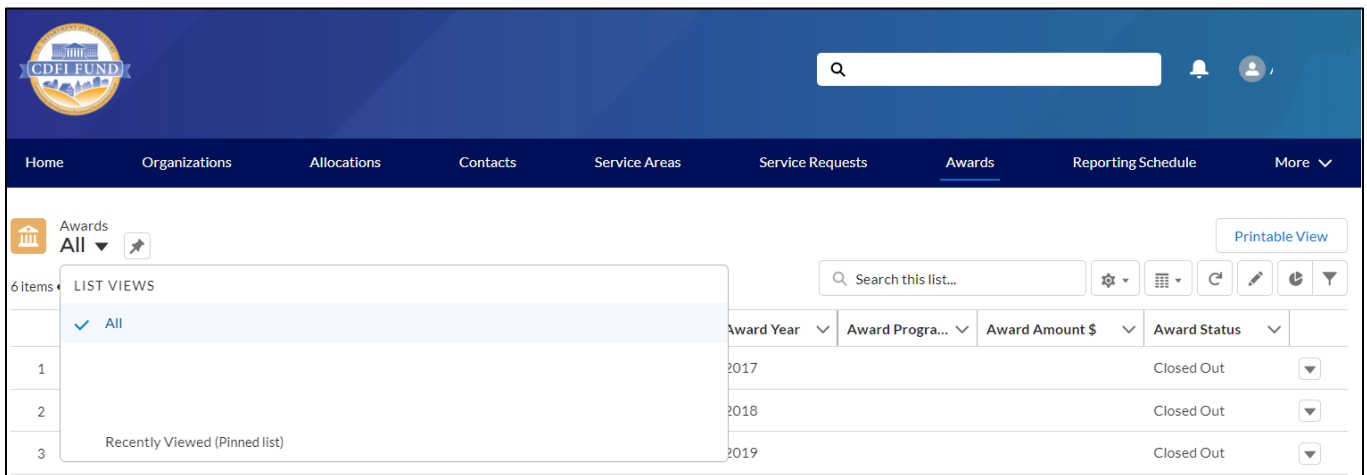
Create a Service Request in AMIS to begin the Amendment process.

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 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, there is a search bar and navigation icons. Below the navigation bar, the main content area displays the 'Award AWD-0000' page. The page includes a header with the award name and ID, and a sub-header with 'Organization', 'Total Award/Loan Amount', and 'Total Pending Payments \$0.00'. The 'Detail' and 'Related' tabs are visible, with 'Related' highlighted by a red box. Below the tabs, there are fields for 'Organization', 'Award Name', 'Award Program', and 'Closeout Date'.

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

The screenshot shows the CDFI FUND system interface, similar to the previous one. The 'Award AWD-0000' page is displayed. The 'Detail' and 'Related' tabs are visible, with 'Related' highlighted. Below the tabs, there is a section for 'Notes & Attachments (4)' with an 'Upload Files' button and four document icons. At the bottom of the page, there is a section for 'Service Requests (0)' with a 'New' button highlighted by a red box.

6. Set “Program” equal to “**Capital Magnet Fund**”

7. Set “Amendment Type” equal to “**Performance Goals and Measures**”

### New Service Request: General Inquiry

\* = Required Information

**Service Request Information**

<b>Service Request Owner</b> Brooklyn Hooker	<b>Funding Application</b> Search Funding Applications...
<b>Service Request Number</b>	* SR related to existing Award/Allocation? --None--
<b>Contact Name</b>	Enter existing CDFI Fund AWD- (not NMTC) AWD-00006633
<b>Organization Name</b>	Enter existing NMTCAward- (NMTC only) Search Allocations...
* Program --None--	Validated --None-- <a href="#">View all dependencies</a>
<b>Program Topic</b>	Amendment Type --None--
<b>Requested By Date</b> 7/18/2025	
<b>Last Comment Date</b>	
<b>Last Attachment Date</b>	

**Additional Information**

\* Status

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

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

### New Service Request: General Inquiry

**Additional Information**

\* Status Completed Date  
 View all dependencies

\* Service Request Origin

Priority

**Description Information**

\* Subject

\* Description

**Resolution**

Resolution

**Web Information**

Web Email Web Company

Web Name Web Phone

9. Select Save to create the Service Request.

The screenshot shows a web application interface for a service request. At the top, there is a navigation bar with a search bar and user profile. Below the navigation bar, there are tabs for Home, Organizations, Allocations, Contacts, Service Areas, Service Requests, Awards, Reporting Schedule, CMF Performance Report, and More. The main content area displays the details of a service request titled "Test SF 1 July 2025 1:04 AM". The request is in "New" status with a "Medium" priority and a "Service Request Number" of "00081273". An orange banner provides instructions on how to create or edit an amendment. Below this, there are two tabs: "Detail" (selected) and "Related". The "Detail" tab shows a form with fields for "Service Request Owner" (CMF), "Service Request Number" (00081273), "Contact Name", "Organization Name", "Program" (Capital Magnet Fund), "Contact Phone", "Contact Email", "Funding Application" (A-000516), "SR related to existing Award/Allocation?" (Yes), and "Enter existing CDFI Fund AWD- (not NMTC)" (AWD-00006633). Each field has an edit icon.

# Create the Amendment

1. Select "Related" on the Service Request.

The screenshot shows the 'Service Request' detail page for 'Test SF 1 July 2025 1:04 AM'. The page includes a navigation bar with options like Home, Organizations, Allocations, Contacts, Service Areas, Service Requests, Awards, Reporting Schedule, CMF Performance Report, and More. Below the navigation bar, there are buttons for 'Clone', 'Edit', and 'Printable View'. The main content area displays the service request details: Priority (Medium), Status (New), and Service Request Number (00081273). 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.' Below this, there are two tabs: 'Detail' and 'Related', with 'Related' highlighted by a red box. The 'Related' tab shows a form with fields for Service Request Owner (CMF), Service Request Number (00081273), Contact Name, Organization Name, Program (Capital Magnet Fund), Contact Phone, Contact Email, Funding Application (A-000516), SR related to existing Award/Allocation? (Yes), and Enter existing CDFI Fund AWD- (not NMTC) (AWD-00006633).

2. Locate the Amendment Section
3. Create a new Amendment by Selecting "New".

This screenshot shows the same 'Service Request' detail page, but with the 'Amendments' section expanded. The 'Amendments (1)' section is visible, showing a list of amendments with a 'New' button highlighted by a red box. The 'Amendments' section also includes a 'View All' link. The 'Attachments (3)' section is also visible, showing three attachments with a 'View All' link. The 'Service Request Comments Public (0)' section is also visible, showing a 'New' button. The 'Amendment Name' field is visible, with the value 'Test Amendment' and a dropdown arrow. The 'View All' link is also visible at the bottom of the 'Amendments' section.

4. 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

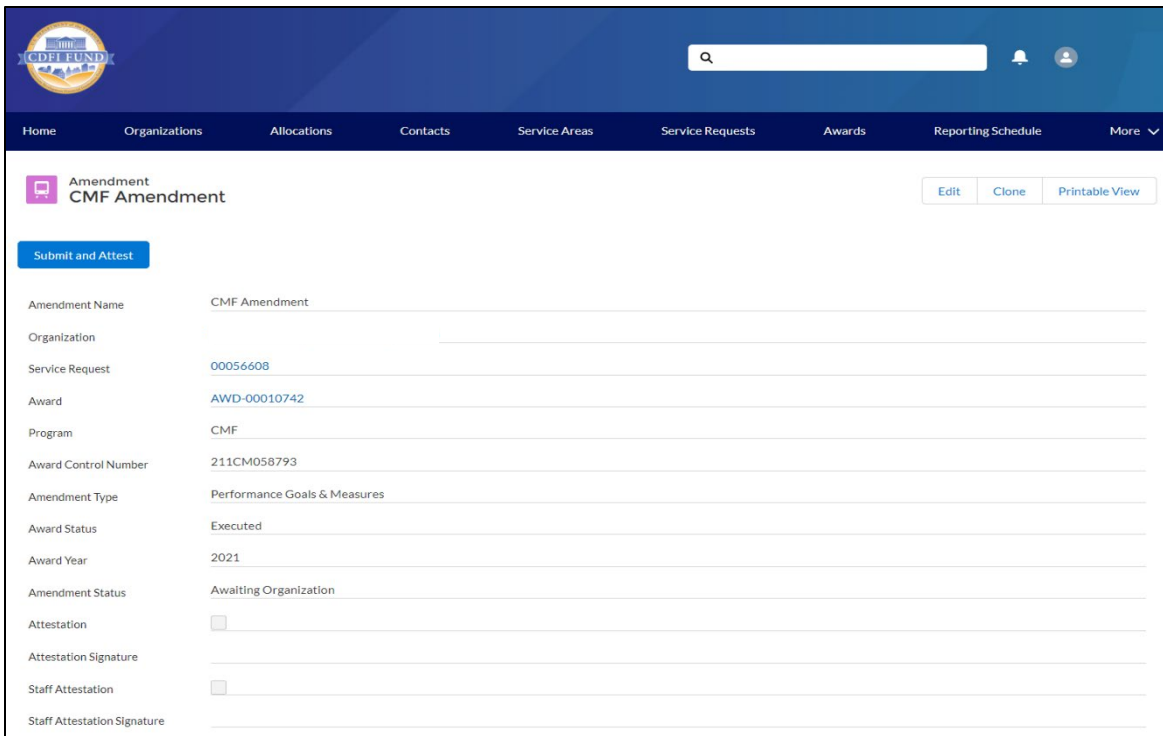
5. Select Save

### Enter Amendment Information

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

✕ Amendments (1)

Amendment Name
<a href="#" style="color: #0070C0; text-decoration: underline;">PG&amp;M Award Amendment</a>



Amendment  
CMF Amendment

Submit and Attest

Amendment Name: CMF Amendment

Organization:

Service Request: 00056608

Award: AWD-00010742

Program: CMF

Award Control Number: 211CM058793

Amendment Type: Performance Goals & Measures

Award Status: Executed

Award Year: 2021

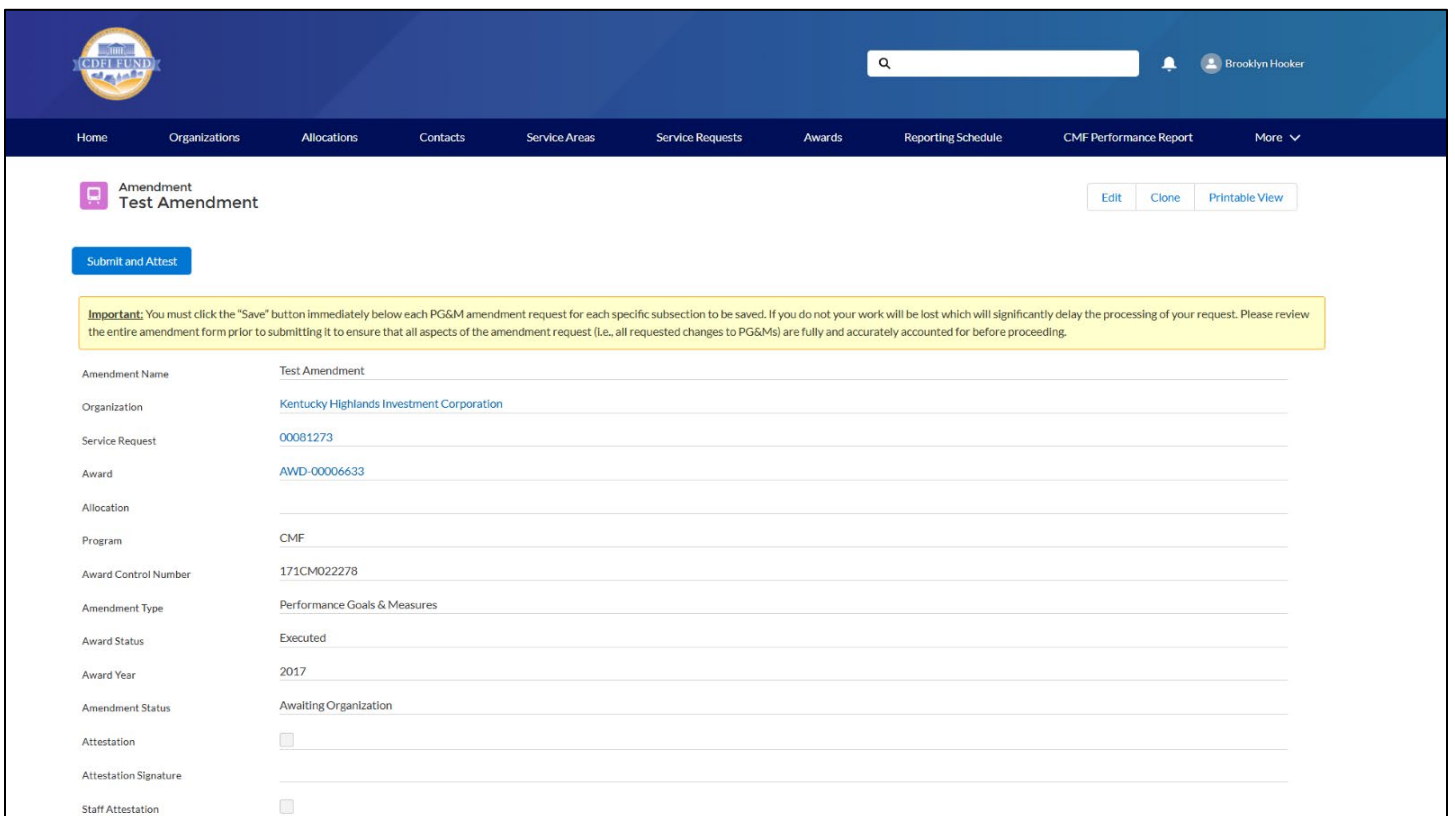
Amendment Status: Awaiting Organization

Attestation:

Attestation Signature:

Staff Attestation:

Staff Attestation Signature:



Amendment  
Test Amendment

Submit and Attest

**Important:** You must click the "Save" button immediately below each PG&M amendment request for each specific subsection to be saved. If you do not your work will be lost which will significantly delay the processing of your request. Please review the entire amendment form prior to submitting it to ensure that all aspects of the amendment request (i.e., all requested changes to PG&Ms) are fully and accurately accounted for before proceeding.

Amendment Name: Test Amendment

Organization: Kentucky Highlands Investment Corporation

Service Request: 00081273

Award: AWD-00006633

Allocation:

Program: CMF

Award Control Number: 171CM022278

Amendment Type: Performance Goals & Measures

Award Status: Executed

Award Year: 2017

Amendment Status: Awaiting Organization

Attestation:

Attestation Signature:

Staff Attestation:

Staff Attestation Signature:

The CMF Amendment page is broken down into the following sections that can be requested for amendment. Note that each section has its own Save button. **You must click Save for each individual section for which you are requesting a change.**

If you select an item to request 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
- Enter the Justification text
- Select Save

A form titled "Project Completion Date" with two input fields at the top: "Project Completion Date" (containing "9/15/2027") and "Requested Project Completion Date". Below these is a text area for "(EXTERNALLY VISIBLE) CDFI Fund Feedback:". The main section is a rich text editor for "Justification (5,000 character limit)" with a toolbar containing options for font (Salesforce Sans), size (12), bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, and insert link. A blue "Save" button is located at the bottom left.

### Geographic Area Removal

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

A form titled "Geographic Area: Arizona" with "Geographic Service Type: Service Area" on the right. It features a checkbox labeled "Remove Geographic Area?". Below is a rich text editor for "Justification:" with a toolbar similar to the previous form. At the bottom is a text area for "(EXTERNALLY VISIBLE) CDFI Fund Feedback:" and a blue "Save" button.

### Geographic Area Addition

- Select all Geographic Areas you request to add to the Award
- Enter Justification text for adding these areas
- Select Save for the geographic area addition

Please 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

(EXTERNALLY VISIBLE) CDFI Fund Feedback:

Save

### Performance Goal and Measure Benchmarks

- Identify the PG&M Benchmark(s) you wish to request 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 for 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

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

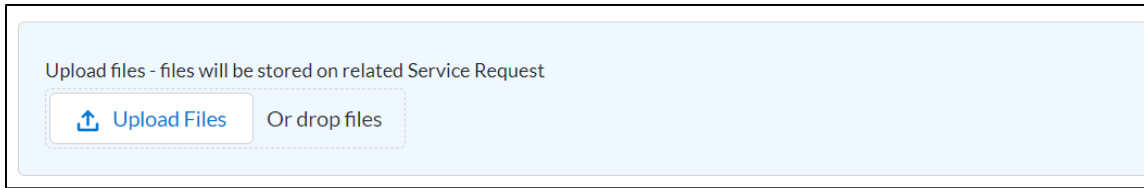
(EXTERNALLY VISIBLE) CDFI Fund Feedback (text):

Save

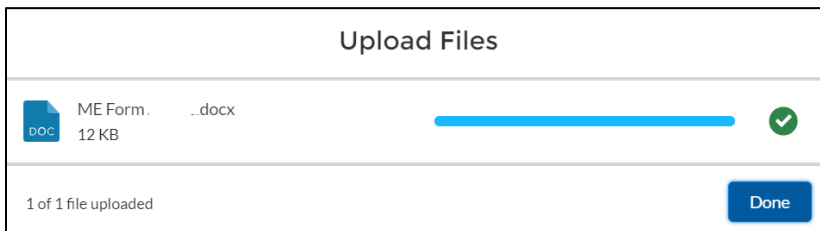
2. Make required changes to the Amendment section and “Save”.

### Upload Documents as Needed

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



2. Upload documents as needed.



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

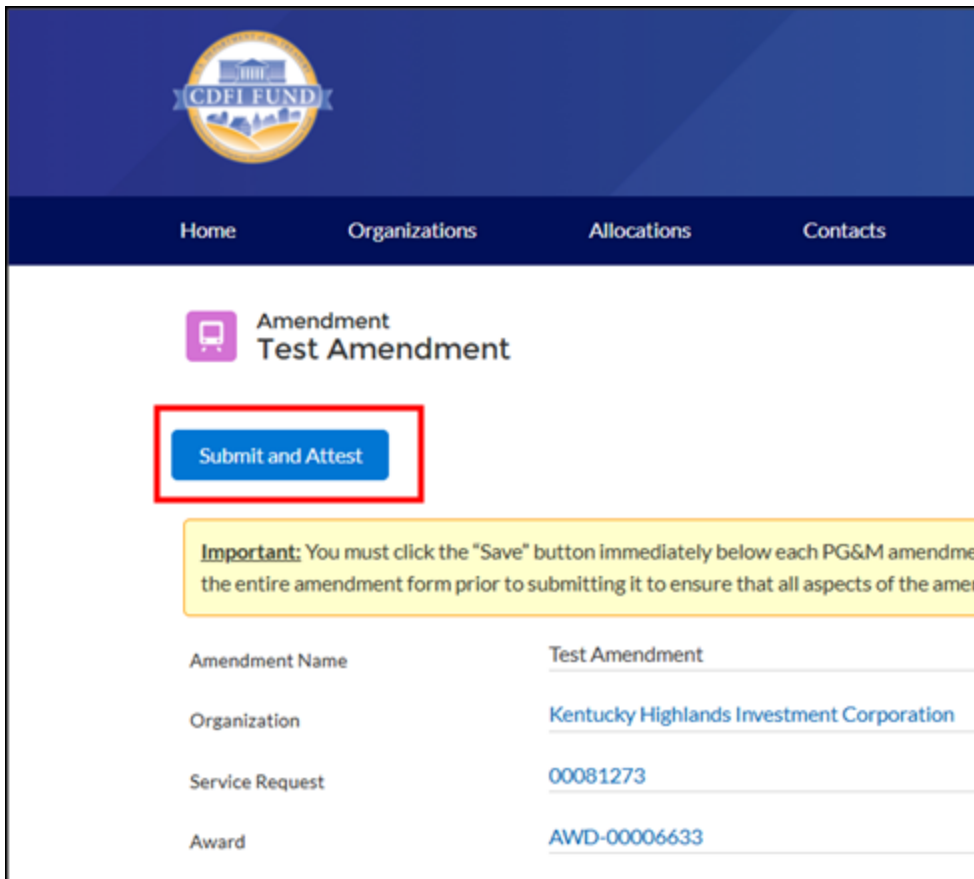
The Amendment will not be sent to the CMF team until it is Submitted. Only Submit and Attest once all information pertaining to the Amendment Request has been entered.

Note: Only users who have been designated 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 subsection 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 Test Amendment**

**Submit and Attest**

**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 saved.

Amendment Name	Test Amendment
Organization	Kentucky Highlands Investment Corporation
Service Request	00081273
Award	AWD-00006633

3. Review the Amendment Attestation.
4. Select Continue if 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 referencing the Amendment Status. Once submitted, the Amendment Status will become "Initial Review".

## CMF Recommended Benchmark

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, modify the “Requested Benchmark” to match the “CDFI Fund Approvable Benchmark”. Save all changes. Select “Submit and Attest” after making any changes.

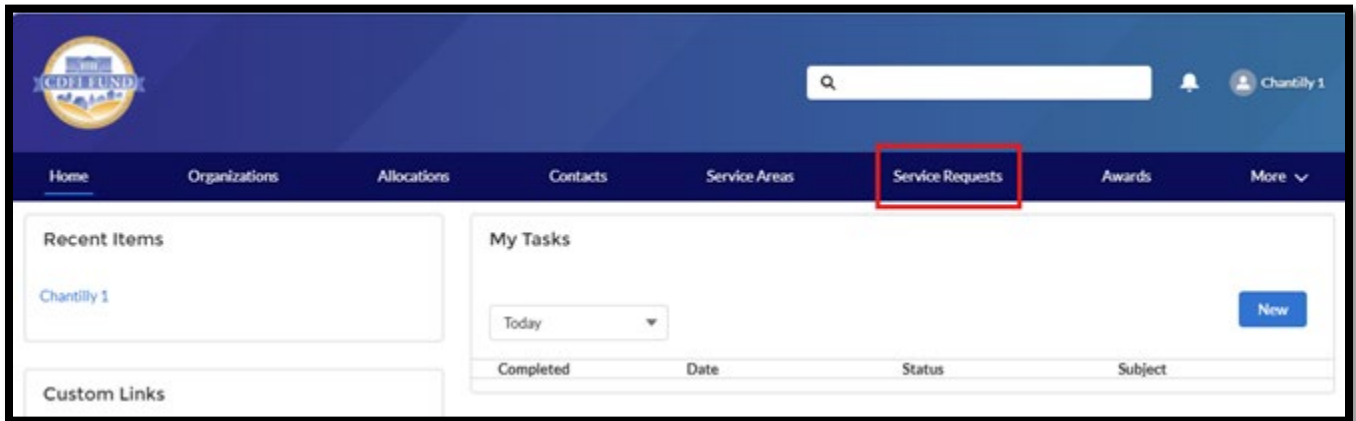
Name: PGM-040072	PG&M Goals: 3.2(d)(iii)	Benchmark: 100	Declarative Business Statement: Homeownership Housing - Of all Affordable Housing units produced or supported with Eligible Project Costs, the total percentage for Low-Income, Very Low-Income, or Extremely Low-Income Families (%) or located in Areas of Economic Distress (%).
Requested Benchmark (numeric):			
<input type="text" value="75"/>			
* Justification (5,000 character limit):			
<div style="border: 1px solid #ccc; padding: 5px;"><p>Salesforce Sans 12 B I U   </p><p>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.</p></div>			
[EXTERNALLY VISIBLE] CDFI Fund Approvable Benchmark (numeric):			
<input type="text" value="85"/>			
[EXTERNALLY VISIBLE] CDFI Fund Feedback (text):			
<input type="text" value="The Community Development Financial Institutions Fund (CDFI Fund) plays an important role in generating"/>			
<input type="button" value="Save"/>			

## 6.0 How to Submit a Sub-CDE Enjoinment Processing Amendment Request

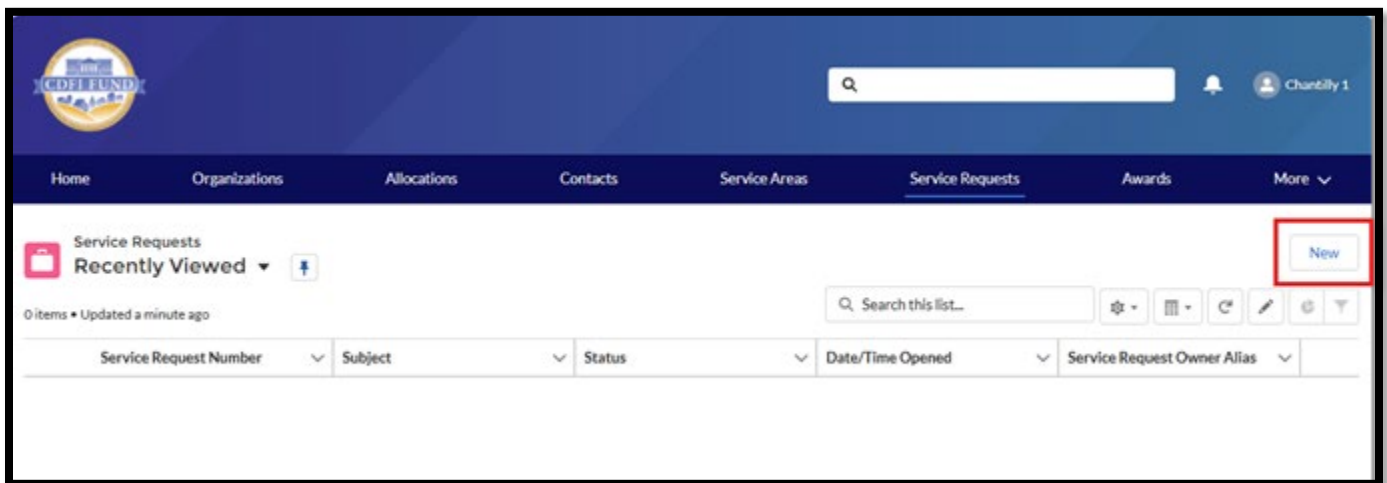
### Create a Service Request

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 “Service Request”



2. Click “New” to create a new Service Request for this Organization



3. Set “Amendment Type” equal to “Sub-CDE Enjoinment”
4. Fill in all the required information

## New Service Request: General Inquiry

\* = Required Information

### Service Request Information

Service Request Owner

 TestUser Org06POC01

Service Request Number

Contact Name

Organization Name

\* Program

NMTC Program

Program Topic

Requested By Date

2/24/2026

Last Comment Date

Last Attachment Date

Funding Application 

Search Funding Applications...


\* SR related to existing Award/Allocation? 

--None--

Complete this field.

Enter existing CDFI Fund AWD- (not NMTC) 

Search Awards...

Enter existing NMTCAward- (NMTC only) 

 NMTCAward-001393

Validated

--None--

[View all dependencies](#)

Amendment Type

Sub-CDE Enjoinment

Additional Information

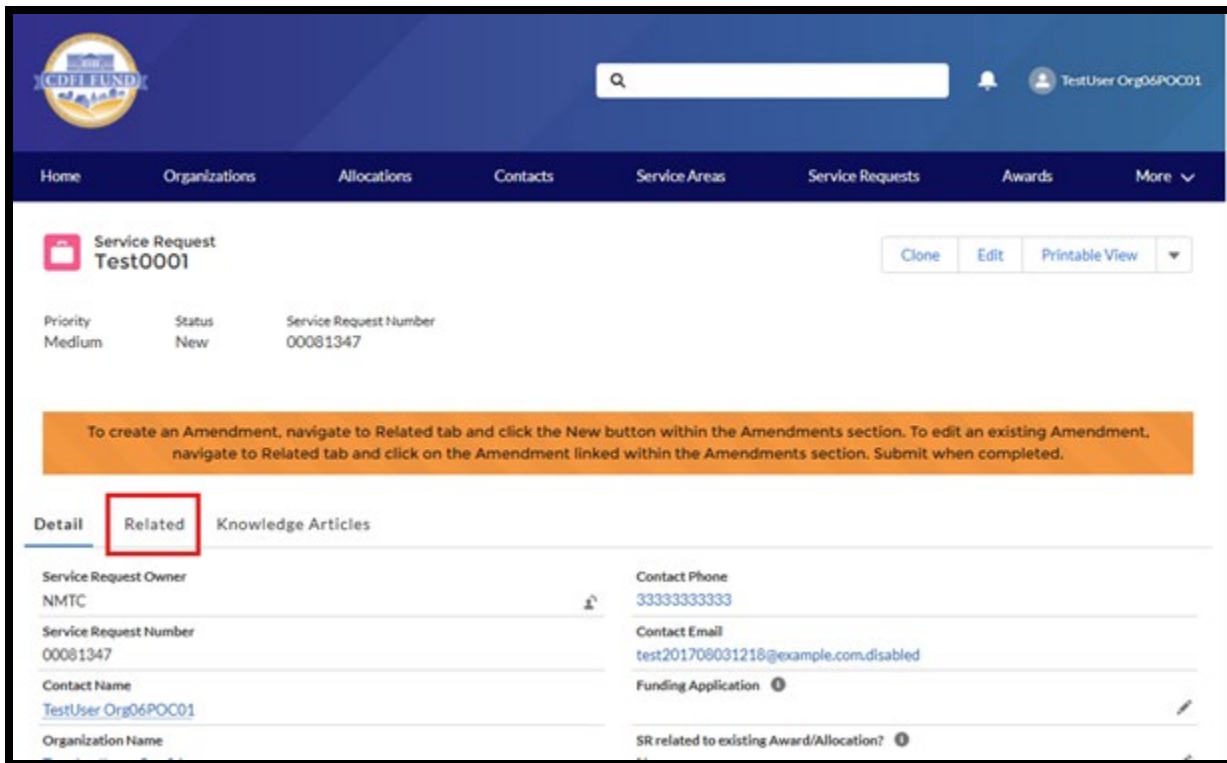
Cancel

Save & New

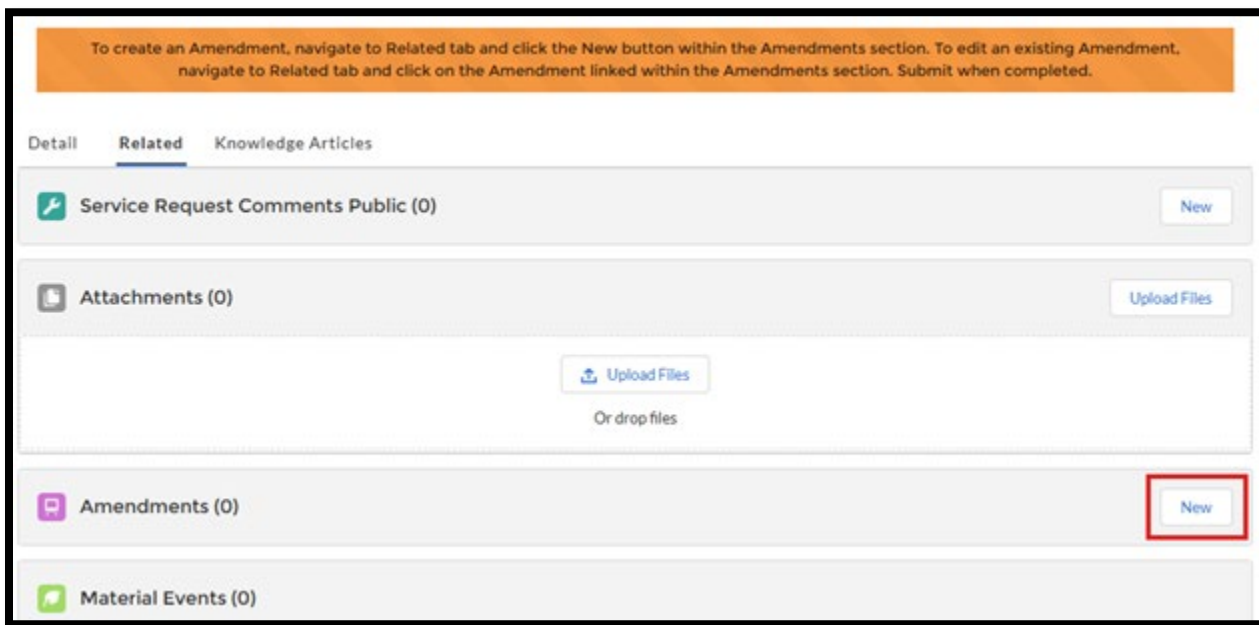
Save

5. Enter values for "Subject" and "Description" that capture the purpose of the request.





2. Locate the Amendment Section
3. Create a new Amendment by Selecting “New”.



4. Enter an “Amendment Name” such as *[My Organization] [Award Control Number]* e.g., Test Org 24NMAXXXXXX.

**New Amendment**

\* = Required Information

\* Amendment Name ↩  
  
 Complete this field.

\* Service Request  
 ×

Organization

Award

Allocation

5. Select “Save”

## Enter Amendment Information

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

Amendments (1)		New
Amendment Name	Test0001	▼
		View All

The Sub-CDE Amendment page is divided into the following sections:

- Amend CDE Section – list of certified Sub-CDE eligible to be added to the Allocation Agreement.
- Amendment Information – general information about the amendment.
- Upload files – place to upload Legal Opinion and other related documents.
- Amendment Letters – draft of the amendment documents produced by the CDFI Fund

Amendment  
Test Organization - 24NMAXXXXXX

Edit Clone Printable View

Submit and Attest

AMEND CDE Save Proposed Changes

<input type="checkbox"/> Changed	Subsidiary Name	Control Number	EIN
<input type="checkbox"/>	WC-D CDE #2 LLC	03NMC001559	75-3127619
<input type="checkbox"/>	WC-D CDE #3 LLC	03NMC001560	75-3127620
<input type="checkbox"/>	WC-D CDE #4 LLC	03NMC001561	75-3127624
<input type="checkbox"/>	WC-D CDE #5 LLC	03NMC001562	75-3127626
<input type="checkbox"/>	WC-D CDE #6 LLC	03NMC001563	75-3127628
<input type="checkbox"/>	WC-D CDE #7 LLC	03NMC001564	75-3127630
<input type="checkbox"/>	WC-D CDE #8	03NMC001565	75-3127635
<input type="checkbox"/>	WC-D CDE #1 LLC	03NMC001558	75-3127615
<input type="checkbox"/>	WC-D CDE #9	12NMC006689	46-1027433

1 / 1

Amendment Name: Test Organization - 24NMAXXXXXX

Organization: Test Org 2025

Service Request: 00081367

Award: \_\_\_\_\_

Allocation: NMTCAward-001726

Program: NMTC

Award Control Number: 24NMA001557

Amendment Type: Sub-CDE Enjoinment

Award Status: Active

Award Year: 2024

Amendment Status: Awaiting Organization

Attestation:

Attestation Signature: \_\_\_\_\_

Staff Attestation:

Staff Attestation Signature: \_\_\_\_\_

Upload files - files will be stored on related Service Request

[Upload Files](#) Or drop files

Amendment Letters (0)

2. Check one or more checkbox of the Sub-CDE Enjoinment that needs amendment. **You must click Save Proposed Changes to capture the Sub-CDEs to be enjoined to the Allocation Agreement.**

Amendment Test0001

Submit and Attest

Step 3

Step 2

AMEND CDE

Changed	Subsidiary Name	Control Number	EIN
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

Save Proposed Changes

Step 1

3. Review the Amendment Request Attestation.
4. Select Continue if 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.

5. 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:



## 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, including the upload of draft legal opinions or other supporting documents.

Note: Only users who have been designated an Authorized Representative” in AMIS will have the ability to Submit and Attest the Amendment Record. 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.

## CDFI Staff Amendment Review

After the CDFI staff is done reviewing and approving the Amendment request, they will share the Amendment Letter with the Authorized Representative, or the user that created the Amendment request. The letter will contain the proposed added Sub-CDEs and the previously added Sub-CDEs.

The letter will have blank signature blocks for each Proposed Enjoined Sub-CDE.

Signed By: \_\_\_\_\_  
Date Signed: \_\_\_\_\_  
Title: \_\_\_\_\_

Signed By: \_\_\_\_\_  
Date Signed: \_\_\_\_\_  
Title: \_\_\_\_\_

Effective Date: 2/26/2026

The CDFI Fund will insert the Effective Date upon receipt of this fully executed amendment letter and a final legal opinion. We will then send you a fully executed copy of the amendment letter, which will include the Effective Date of the amendment.

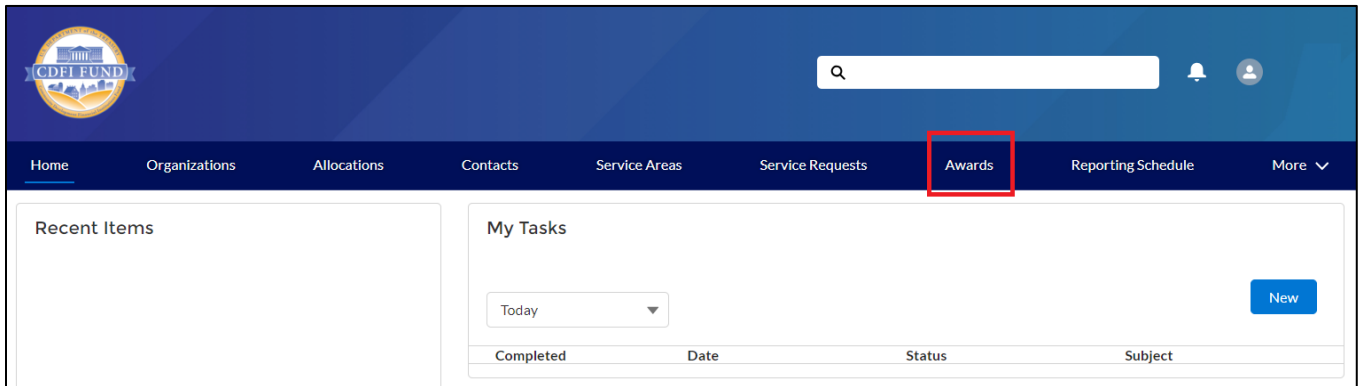
The user will be notified that the Amendment letter will need to be signed with a wet signature and uploaded to the Notes and Attachment section of the Amendment record

## 7.0 How to Submit a Generic Amendment Request

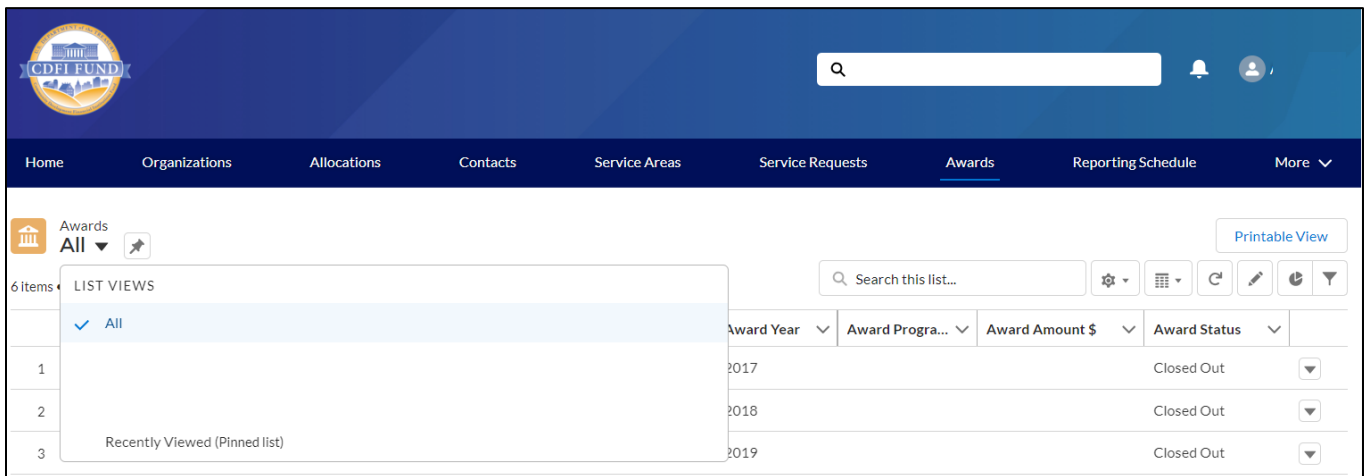
### Create Service Request

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 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, there is a search bar and navigation icons. Below the navigation bar, the main content area displays the details for Award AWD-0000. The award name is AWD-0000, and the total pending payments are \$0.00. The 'Related' tab is highlighted with a red box, indicating the next step in the process.

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

The screenshot shows the CDFI FUND system interface. At the top, there is a search bar and navigation icons. Below the navigation bar, the main content area displays the details for Award AWD-0000. The award name is AWD-0000, and the total pending payments are \$0.00. The 'Related' tab is highlighted with a blue underline. Below the 'Related' tab, there is a section for 'Notes & Attachments (4)' with an 'Upload Files' button. At the bottom, there is a section for 'Service Requests (0)' with a 'New' button highlighted by a red box, indicating the next step in the process.

6. Set “Program” equal to the Program of the Award

7. Set “Amendment Type” equal to “Performance Goals and Measures”



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: 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

2. Locate the Amendment Section
3. 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

4. Enter a "Amendment Name" such as *[My Organization] [Award ID] PG&M Amendment*

### New Amendment

**Information**

\* Amendment Name

\* Service Request

5. Select Save

### Enter Amendment Information

1. Open the newly created Amendment

Amendments (1)

Amendment Name

[PG&M Award Amendment](#)

2. Review the Award information and enter a detailed Amendment Request

The screenshot shows the 'Amendment Gen1' form in the CDFI FUND system. The form is titled 'Amendment Gen1' and includes several fields: 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 (checkbox), Attestation Signature, Staff Attestation (checkbox), and Staff Attestation Signature. A rich text editor is located at the bottom of the form, with a 'Save' button below it.

### 3. Select Save

## Upload Documents as Needed

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

The screenshot shows the File Upload section with the text 'Upload files - files will be stored on related Service Request'. Below this text is a button with a plus icon and the text 'Upload Files', followed by the text 'Or drop files'.

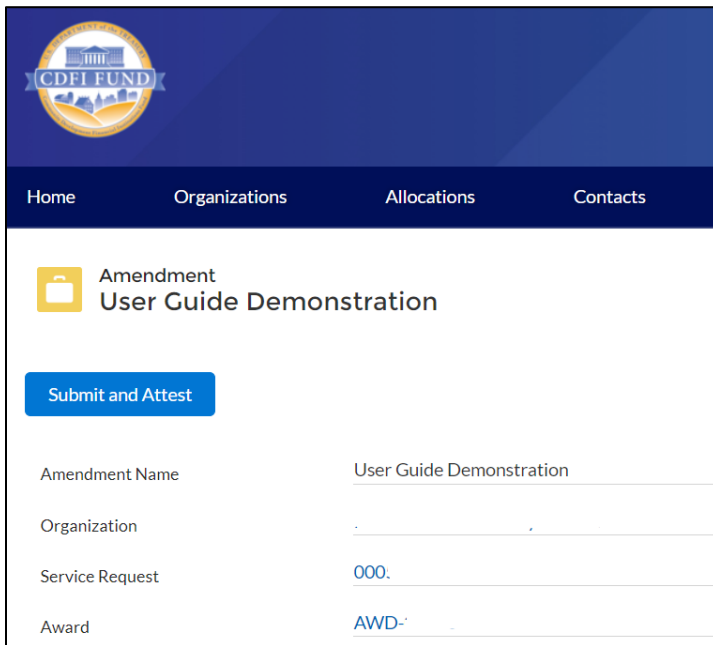
2. Upload artifacts as needed.

The screenshot shows the 'Upload Files' dialog box. It displays a file named 'ME Form. .docx' (12 KB) with a progress bar and a green checkmark indicating successful upload. At the bottom, it says '1 of 1 file uploaded' and has a 'Done' button.

## Submit and Attest

The Amendment will not be sent to CDFI 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 left is the CDFI Fund logo. Below it is a navigation bar with links for Home, Organizations, Allocations, and Contacts. The main content area is titled "Amendment User Guide Demonstration" and features a prominent blue "Submit and Attest" button. Below the button is a form with the following fields:

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

2. Review the Amendment Attestation
3. Select Continue if authorized

### 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.

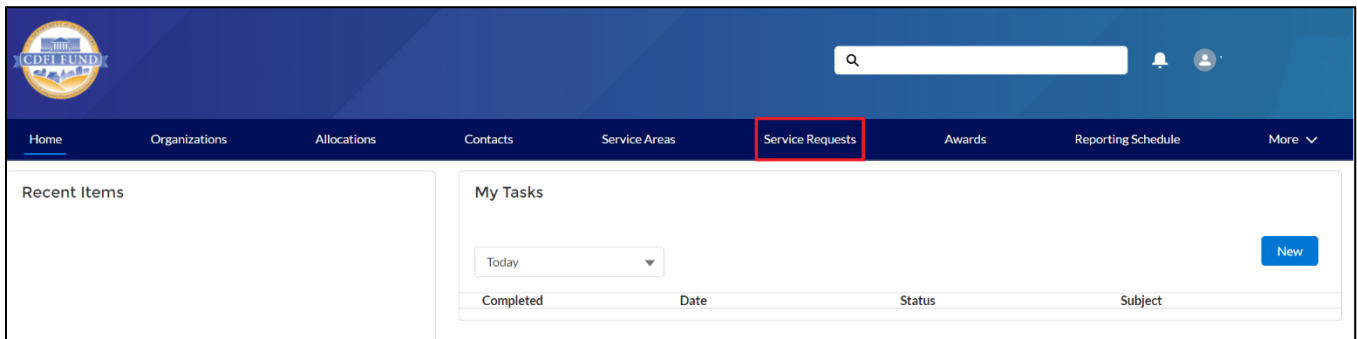
The Amendment is required to be Submitted and Attested for original submission and for every modification to the Amendment request during the entirety of Amendment processing.

## 8.0 Tasks After Submitting an Amendment

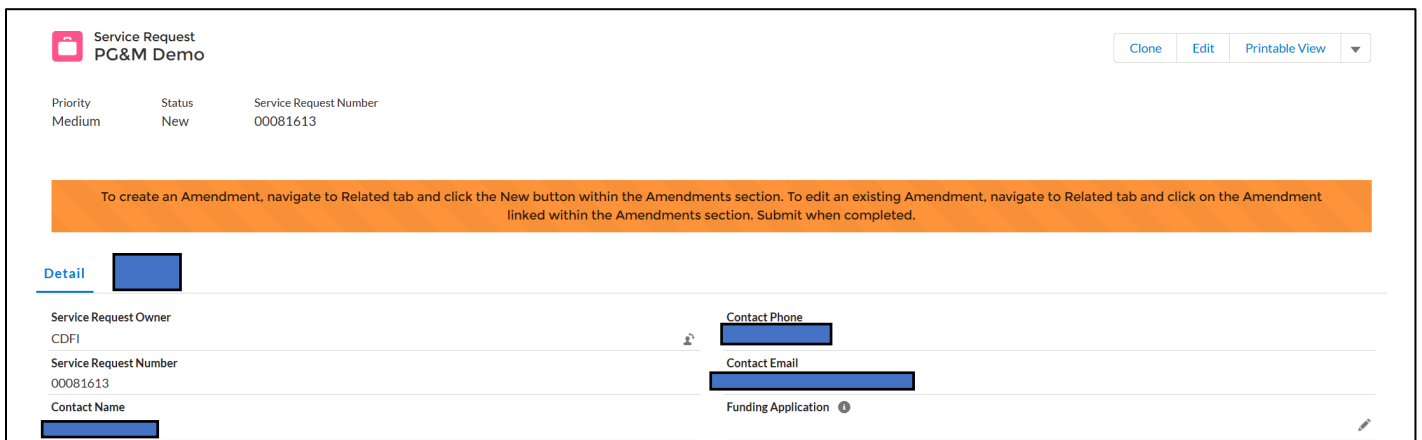
### Communication with CDFI

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

1. Open AMIS
2. Select Service Requests



3. Open the desired Service Request
4. Select Related



5. Locate the section for Service Request Comments Public.
6. Select New

Service Request  
TEST FYE 7/9/2025 - 2

Clone Edit Printable View

Priority	Status	Service Request Number
Medium	Assigned	00081591

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 (1) Upload Files

TEST DOC  
Jul 9, 2025 • 12KB • docx

View All

## 7. Enter message and select Save

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. 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 (Non- Sub-CDE Amendments)

Amendments in AMIS provide the functionality for digitally signing. The submitter of the Amendment will be notified if they are required to digitally sign any documents related to processing the Amendment.

1. Open the Service Request that contains the Amendment.
2. Open the Amendment
3. 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>	AWD-00010742	Jake Butterworth	10/5/2023 1:15 PM

[View All](#)

4. Open the Amendment Letter record by selecting the Amendment Letter Name
5. Review the Letter

Amendment Letter  
CMF Amendment

**DETAILS** RELATED

Amendment Letter Name: CMF Amendment  
Owner: Jake Butterworth  
Amendment: CMF Amendment  
Award: AWD-00010742

DEPARTMENT OF THE TREASURY  
WASHINGTON, D.C. 20220  
October 05, 2023  
VIA ELECTRONIC MAIL

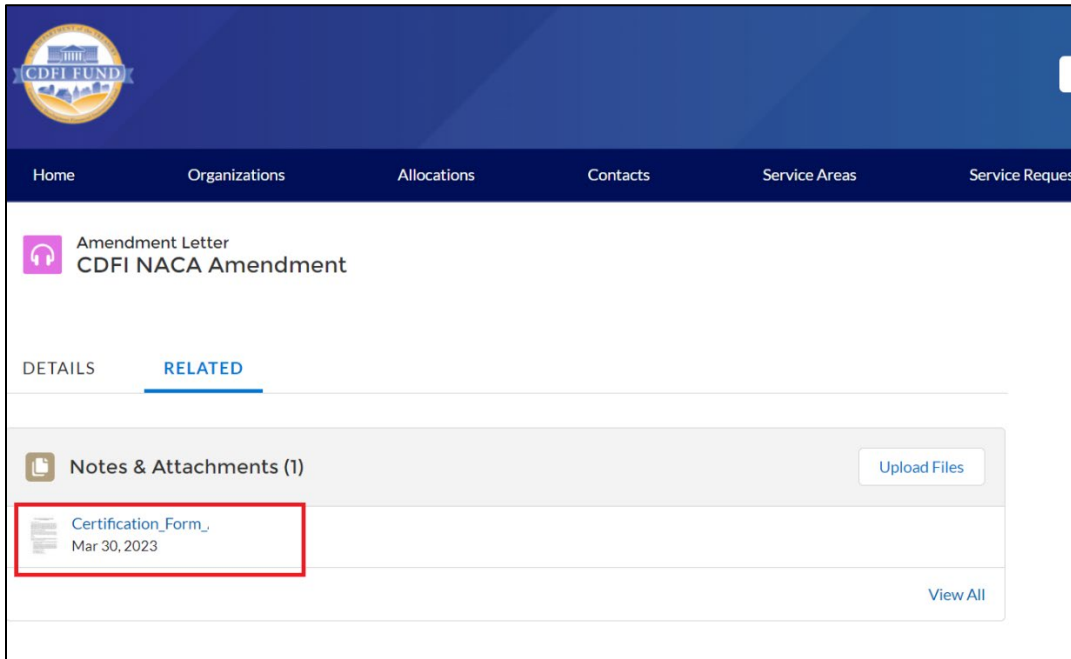
6. Select “Related”

Amendment Letter  
CDFI NACA Amendment

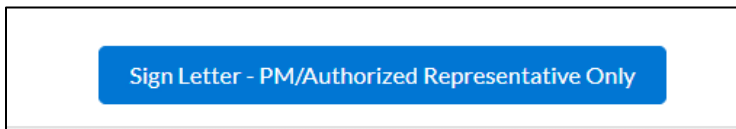
**DETAILS** RELATED

Amendment Letter Name: CDFI NACA Amendment  
Owner: Jake f  
Amendment: Demo  
Award: AWD-000

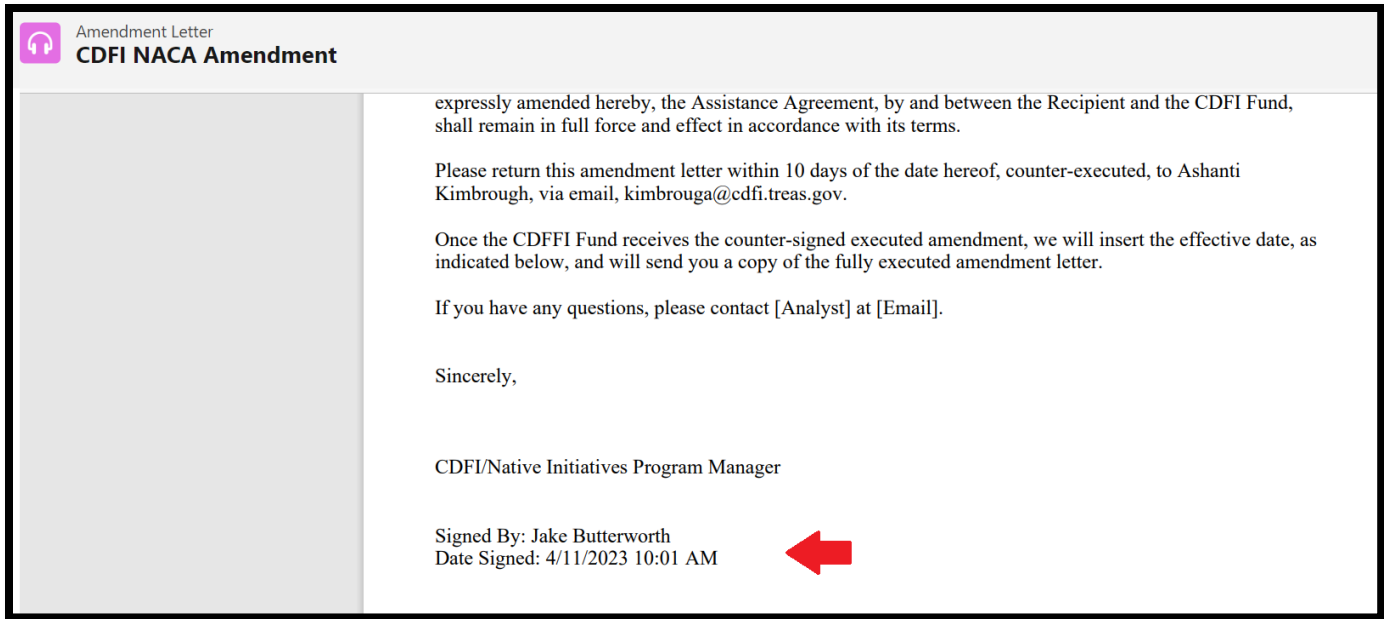
7. Locate the “Notes and Attachments” section
8. Select the attachment to open in viewer



9. Review attachment
10. Locate the Sign Letter button at the bottom of the Amendment Letter Details tab



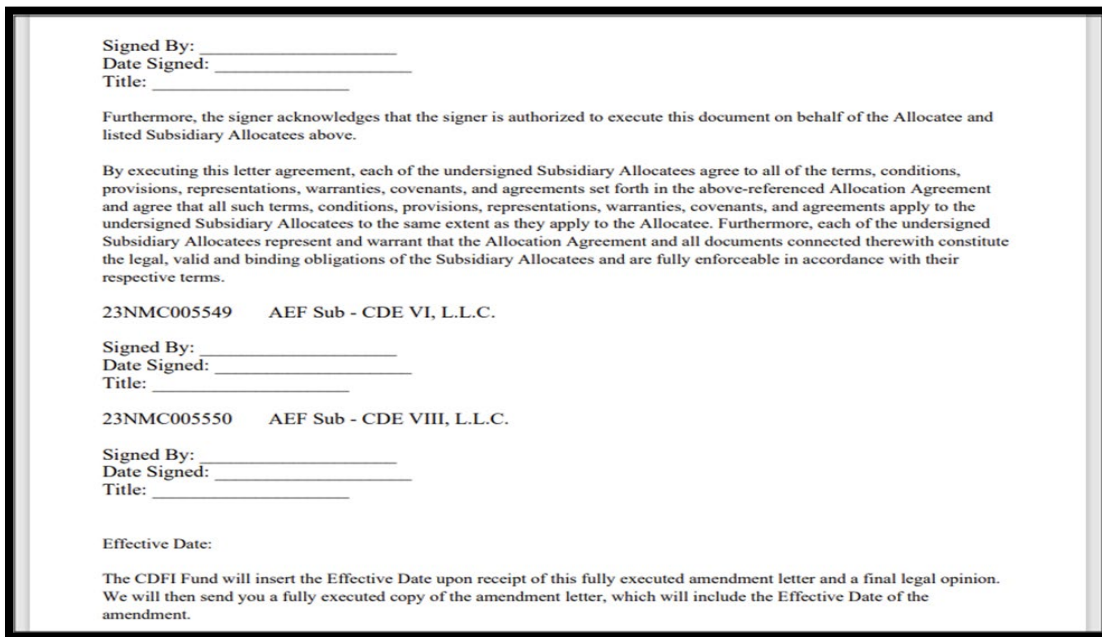
11. Select “Sign Letter – PM/Authorized Representative Only” button to digitally sign
12. Confirm your signature has been added to letter



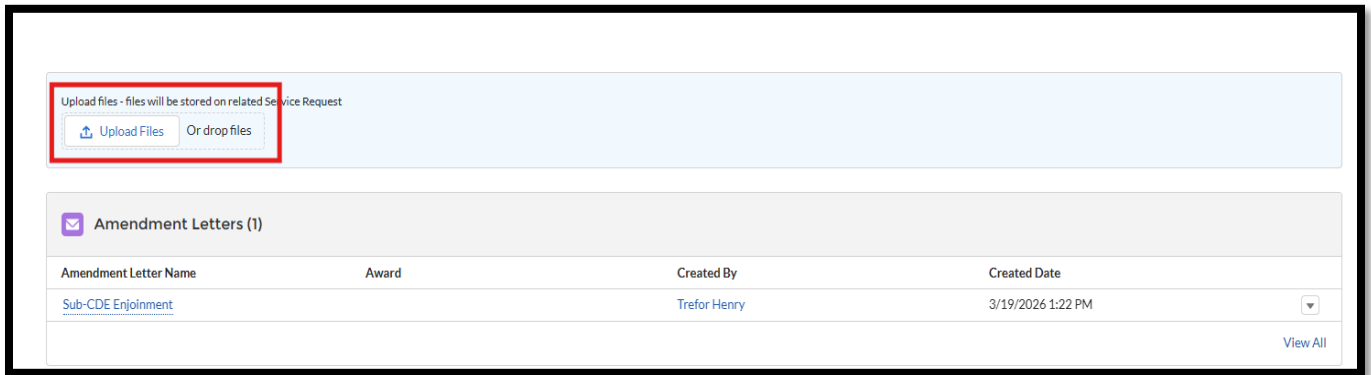
### Signing Letters (Sub-CDE Amendment)

For Sub-CDE amendments only, the letter signing process is different from the standard amendment signing process.

After the amendment letter has been generated by the CDFI Fund’s Office of Legal Counsel (OLC) and shared with the external user, the external user must review the letter, manually sign it outside of the system.

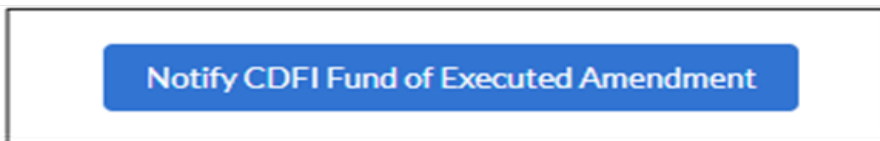


The user must then upload the signed copy back into the amendment record under the Notes and Attachments section.



Once the signed letter has been uploaded, the external user must click the “Notify OLC of Executed Amendment button”. This button does not digitally sign the letter. It sends an email notification to CDFI Staff confirming that the signed amendment letter has been uploaded and is ready for OLC review.

1. Locate the Notify CDFI Fund of Executed Amendment
2. Click Notify CDFI Fund of Executed Amendment to send a notification email to the OLC that the Amendment Letter has been executed.



After the button is selected, the user will remain on the same page and will see a confirmation message indicating that the notification was sent successfully.

3. Confirm your notification has been successfully sent.



#### Important Notes

- This process applies to Sub-CDE amendments only.
  - The Notify OLC of Executed Amendment button does not apply a digital signature.
  - The letter must be manually signed and uploaded before the notification is sent.
  - A success message confirms the notification was sent to OLC.
4. Once received and reviewed, OLC will enter an effective date and return the executed document to the user via email or the Service Request.