COMMUNITY DEVELOPMENT
FINANCIAL INSTITUTIONS FUND

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AMIS Training Manual

AE101: Getting Started – Navigating AMIS
(for CDFI Fund External Users)

August 2026

Contents

1 Introduction 5
1.1 Purpose 5
1.2 Scope 5
2 Accessing AMIS 5
2.1 Logging into AMIS – First Visit (for Users without an AMIS Account) 5
2.2 Logging into AMIS – Subsequent Visits 9
2.3 Permissions and Security 12
2.4 Session Timeout 12
2.5 Resetting Your Password 12
3 User Profile 13
3.1 Editing Your Contact Record 13
3.2 Log Out of AMIS 15
4 Overview of the Home Page 15
5 Tabs, Objects, and Records 16
5.1 Access Existing Lists of a Record 17
5.2 Create/Edit a Record 19
5.3 View Details of a Record 21
5.4 In-Line Editing of a Record 21
5.5 View Related Lists of a Record 23
6 Update Organization and Program Profiles 24
6.1 Update Your Organization Profile 25
6.2 Grants.gov 26
6.3 Add/Update Contacts 27
6.4 Assign a Profile to a Contact 28
6.5 Add/Update Program Profiles 29
6.6 Add/Update Affiliates 31
7 CIMS5 32
7.1 How to Access CIMS5 33
7.1.1 Public Viewer 33
7.1.2 Authenticated User 33
7.2 Basic CIMS5 Functionality 34
7.2.1 CIMS5 Controls 34
7.2.2 Control Layer Visibility within a Selection 36
7.2.4 Search for a Location 38
7.2.5 View Program Eligibility and Demographic Information for Individual Census Tracts 38
7.2.6 Exporting Maps 39
7.3 Help within CIMS 42
7.4 Target Markets in CIMS5 43
7.4.1 Contiguity for CDFI Certification and BEA program 43
7.4.2 CDFI Investment Areas, NMTC Eligible Areas, BEA Eligible Areas 43
7.4.3 How to Create and Manage Target Market Maps 45
7.4.4 Validating Maps and Generating PDF Report 50
7.5 Bulk Address Geocoding 53
8 Global Search 66
8.1 Wildcards 66
8.2 Boolean Operators 67

9 Service Requests 68
9.1 Service Request Lifecycle 68
9.2 Service Requests Actions 69
9.2.1 Create a Service Request 69
9.2.2 Respond to an Information Request 72
9.2.3 Validate a Service Request 77
10 External Contacts 79
10.1 Request Access to an Additional Organization 79
10.2 Access Additional Organizations as an External Contact 81
10.3 Grant Organization Access to an External Contact 82
11 Appendices 86
11.1 Acronyms 86

Figures

Figure 1: AMIS New User Registration Page 6
Figure 2: AMIS User Registration Email 7
Figure 3: AMIS User Password Change Screen 7
Figure 4: AMIS Home Page 8
Figure 5: AMIS Landing Page 9
Figure 6: AMIS Login Page 10
Figure 7: AMIS Home Page 11
Figure 8: AMIS Login Page – Forgot Password Link 12
Figure 9: AMIS Contact/User Profile 13
Figure 10: AMIS Contact/User Profile - Edit Button 13
Figure 11: AMIS Contact/User Profile - Edit Screen 14
Figure 12: AMIS Logout Screen 15
Figure 13: AMIS Home Page 15
Figure 14: Records and Objects 16
Figure 15: Award Record and Object 16
Figure 16: Organizations Home Page 17
Figure 17: Default - Recently Viewed Filter 17
Figure 18: All Organizations View 18
Figure 19: Organizations List View 18
Figure 20: Organization Edit Page 19
Figure 21: Organization Edit Page – Required Information 20
Figure 22: AMIS Field-Level Help Link (Information Icon) 20
Figure 23: Save Button 20
Figure 24: Organization Detail Page 21
Figure 25: In-Line Editing 22
Figure 26: Non-Editable Field 22
Figure 27: Organization Related Lists (Child Records) 23
Figure 28: Notes & Attachments Related List 24
Figure 29: Upload File Confirmation 24
Figure 30: Organization Detail Page 25
Figure 31: Organization Edit Page 26

Figure 32: Contacts Related List 27
Figure 33: Contact Edit Page 27
Figure 34: Contacts Related List 28
Figure 35: Contact Detail Page 28
Figure 36: Manage External User Page 29
Figure 37: Program Profiles Related List 30
Figure 38: Program Profile Edit Page 30
Figure 39: Affiliates Related List 31
Figure 40: Affiliates Edit Page 32
Figure 41: Landing Page for CIMS Public Viewers 33
Figure 42: Program Profiles Section 34
Figure 43: CIMS5 Layout 36
Figure 44: CIMS5 layers for CDFI-Cert 37
Figure 45: CIMS5 Legend for CDFI-Cert 37
Figure 46: CIMS5 Search Bar 38
Figure 47: Census Tract Details 39
Figure 48: Exporting a map 40
Figure 49: Exported file on new browser tab 41
Figure 50: Help Icon 42
Figure 51: Icon Hover Text 43
Figure 52: CIMS Mapping Tool 45
Figure 53: Maps Tab 46
Figure 54: New Selection Map Creation, Map Name 46
Figure 55: New Selection Map Creation, Select Layers for Validation 47
Figure 56: New Selection Map Creation, Select Tracts 47
Figure 57: New Selection Map Creation, Select By County 48
Figure 58: Multiple County Selection 48
Figure 59: New Selection Map Creation, Select By Drawing 49
Figure 60: New Selection Map Creation, Review Results 50
Figure 61: Failed validation 51
Figure 62: Passed validation 51
Figure 63: Validation Results 52
Figure 64: Revalidation button 52

1 Introduction

The Community Development Financial Institutions (CDFI) Fund's Awards Management Information System (AMIS) is an enterprise-wide awards management system that allows the CDFI Fund to manage the certifications and awards life-cycle processes without reliance on manual or paper-based methods. AMIS provides higher accuracy, transparency, and scalability to the CDFI Fund's mission-critical processes across all CDFI Fund programs – CDFI, NACA, BEA, BGP, NMTC, CMF, SDLP, ERP, RRP, and CDE and CDFI Certifications. AMIS runs on the Salesforce cloud-based application platform. As an external user (i.e., CDFI Fund applicant or recipient user), AMIS provides:

- Standardized and common data elements to enable applicants and award/allocation recipients to use their information across programs
- A consistent flow of information from applicants and award/allocation recipients to CDFI Fund staff, and vice versa
- A portal where applicants and award/allocation recipients can: complete and submit applications online; submit requests for funding, amendments, and payments requests online; and submit compliance reports online
- Interfaces with external systems, including Grants.gov and the CDFI Information Mapping System (CIMS).

1.1 Purpose

The purpose of this training manual is:

- To provide detailed instructions and procedures for the CDFI Fund's external users so that they may be able to navigate and use AMIS efficiently
- To present training scenarios to aid trainees in learning how to use AMIS.

1.2 Scope

This training manual is an introduction to the overall features and navigation of AMIS. Training on specific AMIS processes (e.g., applying for program funding) is covered in other training manuals.

2 Accessing AMIS

2.1 Logging into AMIS – First Visit (for Users without an AMIS Account)

If your organization is not registered in AMIS, you create a new organization in AMIS by going to the AMIS Login Page and selecting the "Join our Community" link. This will display the New User Registration page.

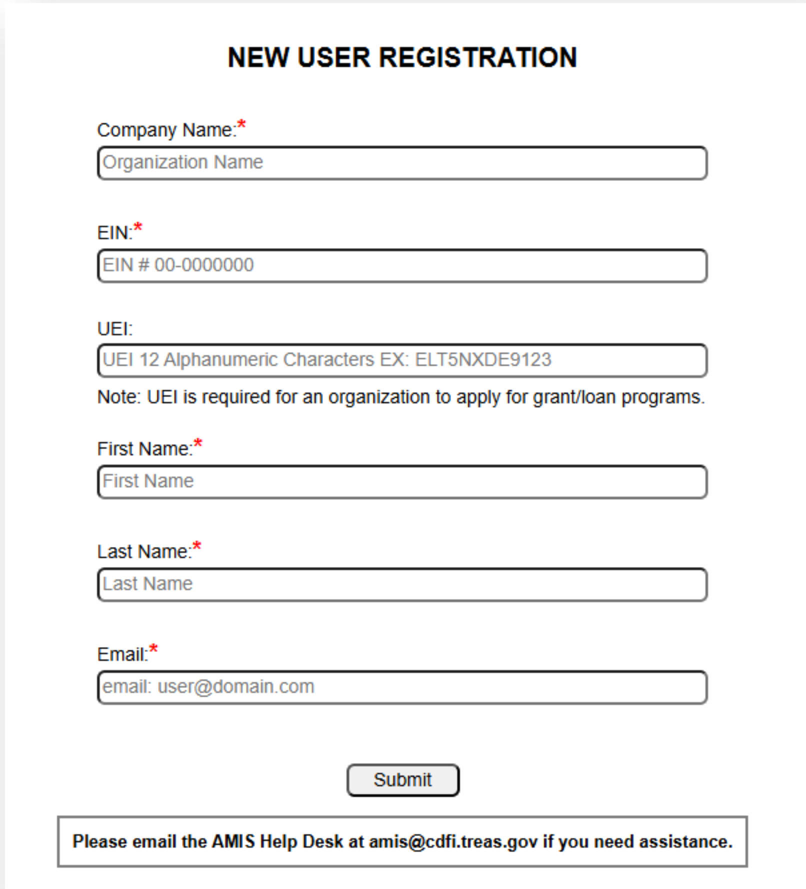


Figure 1: AMIS New User Registration Page

Enter your organization name, the Entity Identification Number (EIN) for your organization (never enter a Social Security Number in this field), your first and last name, and your email address. AMIS will create your organization in the system, and you will be added as an Admin User for that organization with your AMIS username being your email address.

Once you submit your registration request, you will receive an email with a link to update your password. To set your password, click the link provided in the email.

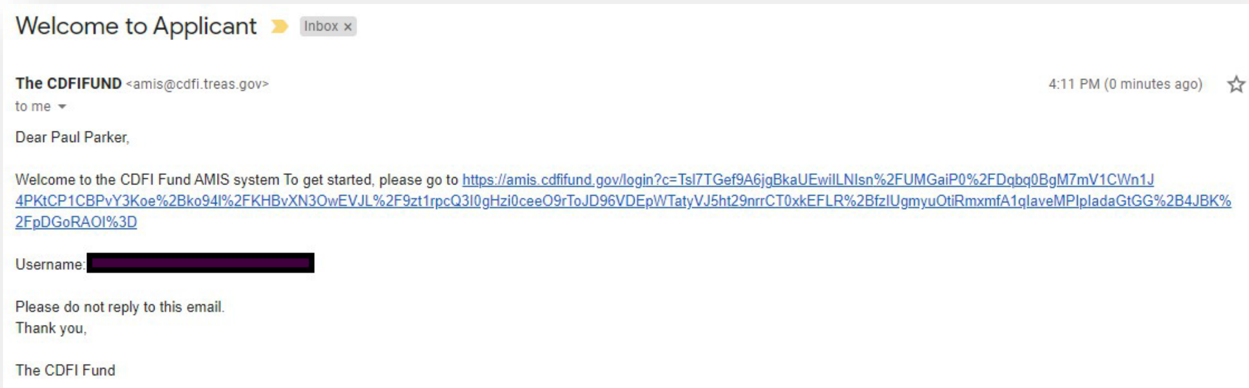


Figure 2: AMIS User Registration Email

After clicking on the link, you will be directed to a browser page and will be prompted to enter a new password. Enter your new password, verify, and click Change Password to log in to AMIS.

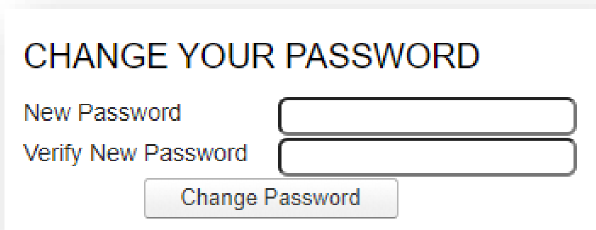


Figure 3: AMIS User Password Change Screen

	NOTE: Passwords expire and must be reset every 60 days. Passwords must also adhere to the CDFI Fund's password requirements: a. Be at least eight characters. b. Contain at least one lower case letter, one upper case letter, one number, and one special character.

Once logged in, you will be directed to the AMIS Home page.

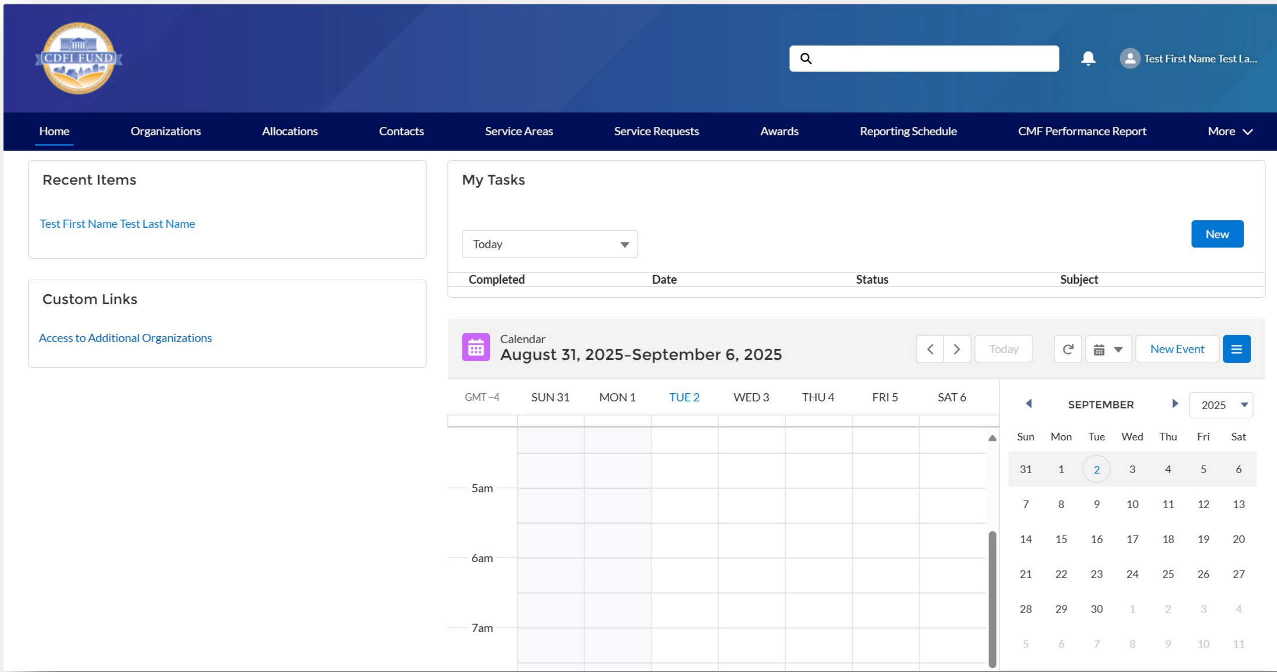


Figure 4: AMIS Home Page

	TIP: After you have established a username and password, you can bookmark the Login page for future logins.

The first person to register with an organization becomes an administrator for the organization in AMIS and is automatically assigned the Admin User Profile by AMIS. Additional users who register under an organization are automatically assigned a Viewer Profile, which has limited privileges. They can request becoming an Admin User by contacting an administrator for their organization. AMIS will automatically send an email notification to the administrators for the organization informing them that a new user has registered under their organization.

The administrators for an organization's AMIS account are responsible for setting up users in their organization and validating and assigning appropriate privileges to users registered under their organization. See Section 6.3 Add/Update Contacts for instructions on managing users within an AMIS organization.

2.2 Logging into AMIS – Subsequent Visits

Now that you have set your password and have logged into the system, you're ready to start doing your work within AMIS. For future work within AMIS, you'll access AMIS directly using your web browser.

1. Navigate to: amis.cdfifund.gov. The AMIS Landing page displays.
2. Click the LOGIN link. The AMIS Login page displays.

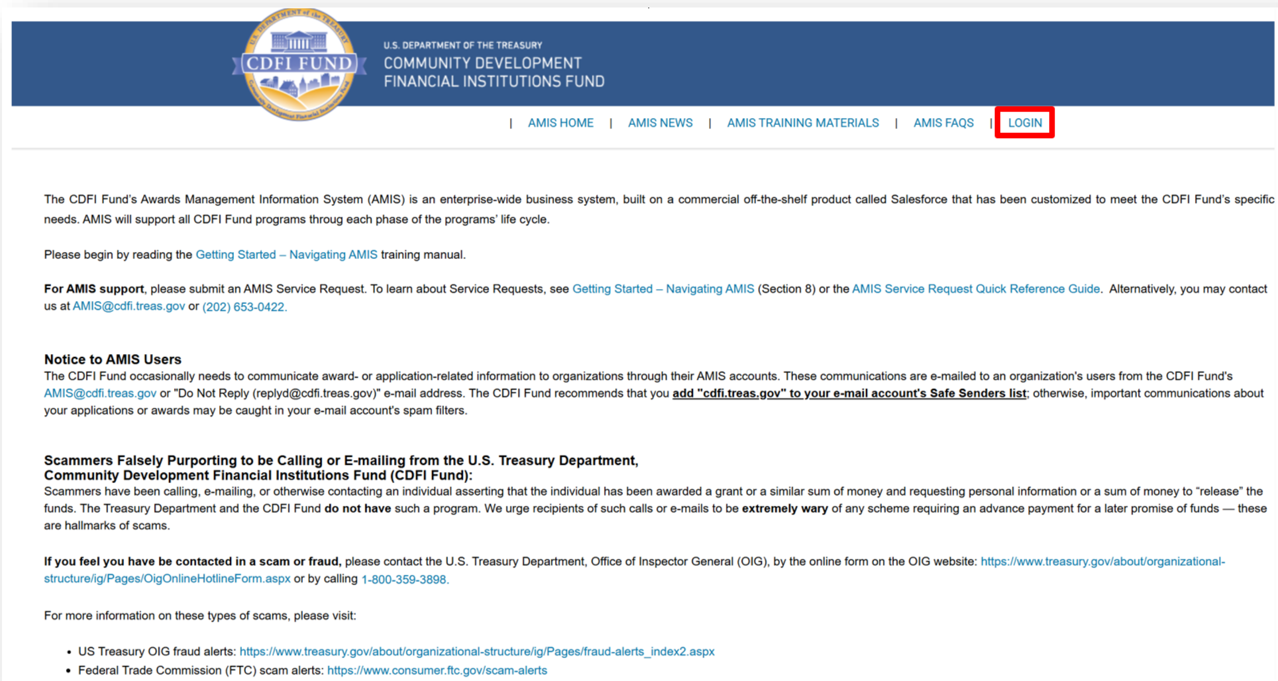


Figure 5: AMIS Landing Page

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

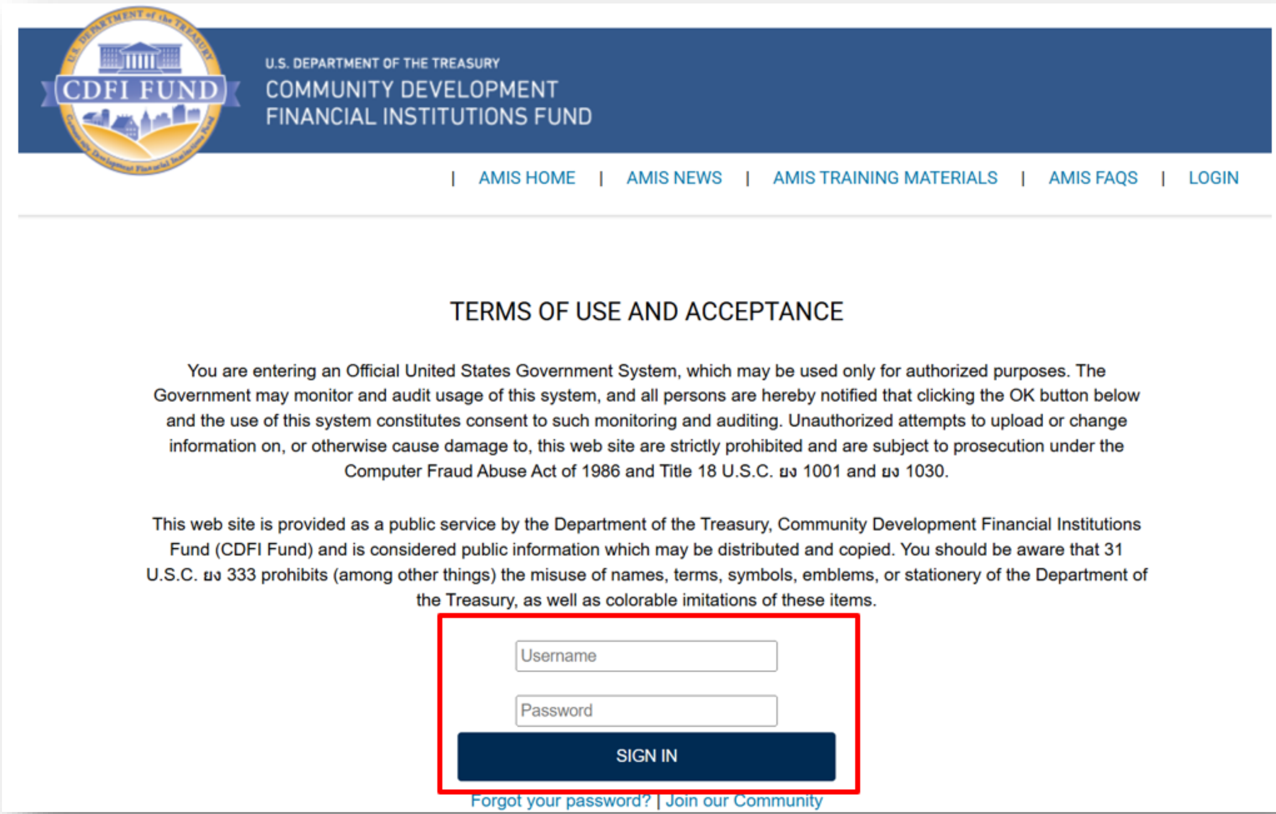


Figure 6: AMIS Login Page

4. You will be directed to your AMIS Home Page.

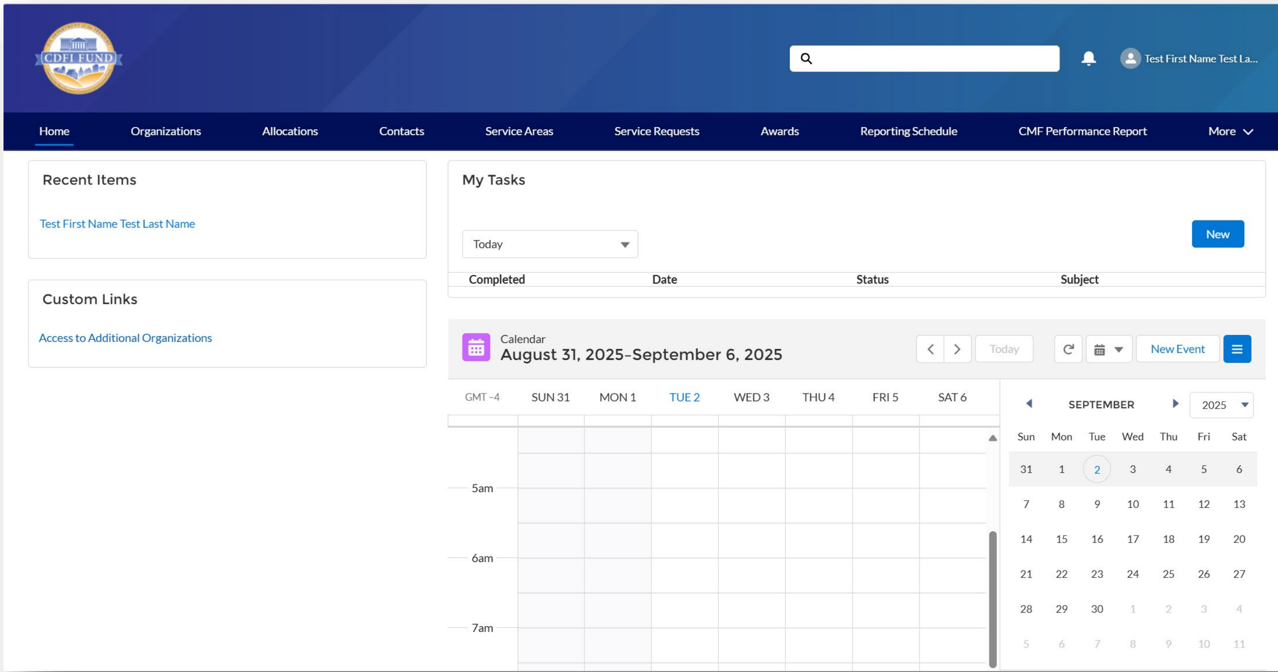


Figure 7: AMIS Home Page

2.3 Permissions and Security

Each user will be assigned a User Profile in order to access AMIS. A User Profile determines the permission and privileges that a user will have. A user will be able to view, create, edit, and/or delete records for their organization based upon their User Profile. There are two profiles:

- Admin User – This profile allows a user for an organization to view, create, edit, and delete records in their organization. In addition, the Admin User can assign the User Profile to other users registered under their organization. (Please refer to Section 6.4 Assign a Profile to a Contact for instructions on how to assign a profile to a contact.)
- Viewer – This is the default profile automatically assigned by AMIS to all subsequent users who register under an existing organization. This profile has limited privileges and allows the user to view a limited set of organizational information. Such information includes organization type, address, and contacts.

2.4 Session Timeout

AMIS logs out a user after two hours of inactivity. As such, it is very important to save your work frequently so that it is not lost. If you are logged out, access the Login page (see Section 2.2 above) to log in again to your AMIS account.

2.5 Resetting Your Password

To reset your password, click the Forgot your password? link on the AMIS Login page, and follow the on-screen instructions to reset your password. AMIS will prompt you for your username, then will send you an email with a temporary password. If your account becomes disabled, contact an administrator for your organization's AMIS account.

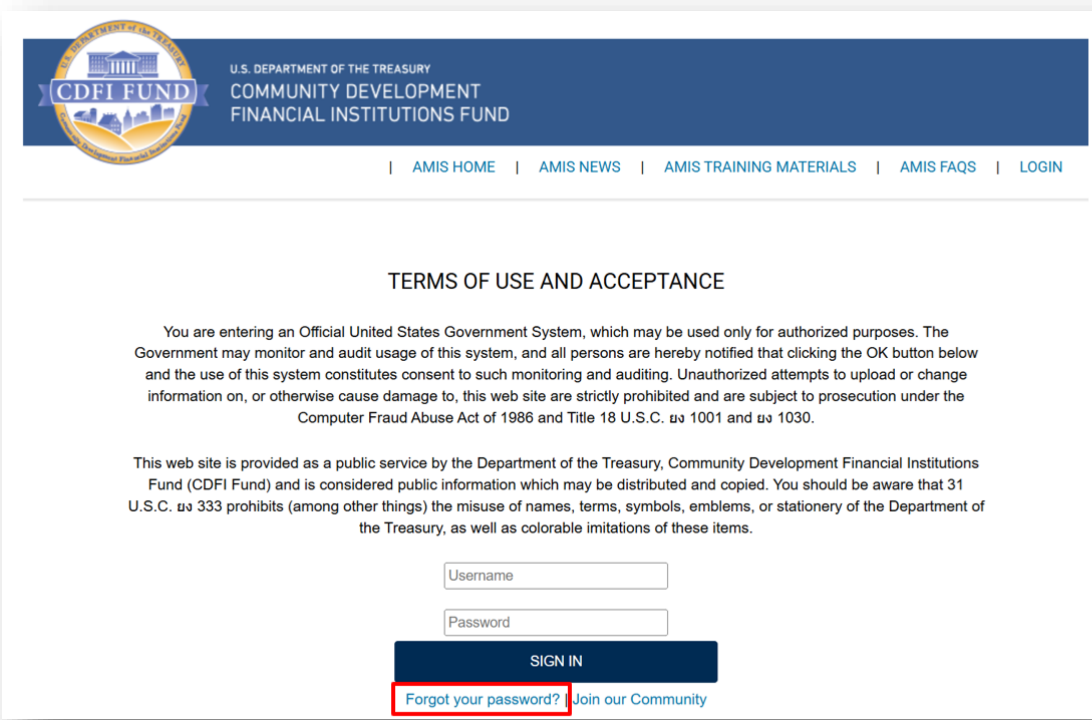


Figure 8: AMIS Login Page – Forgot Password Link

3 User Profile

Using your Contact record, you can edit your personal information. To navigate to your Contact record, click Contact in the menu bar, then select your name. In this section, you will learn how to edit your Contact record.

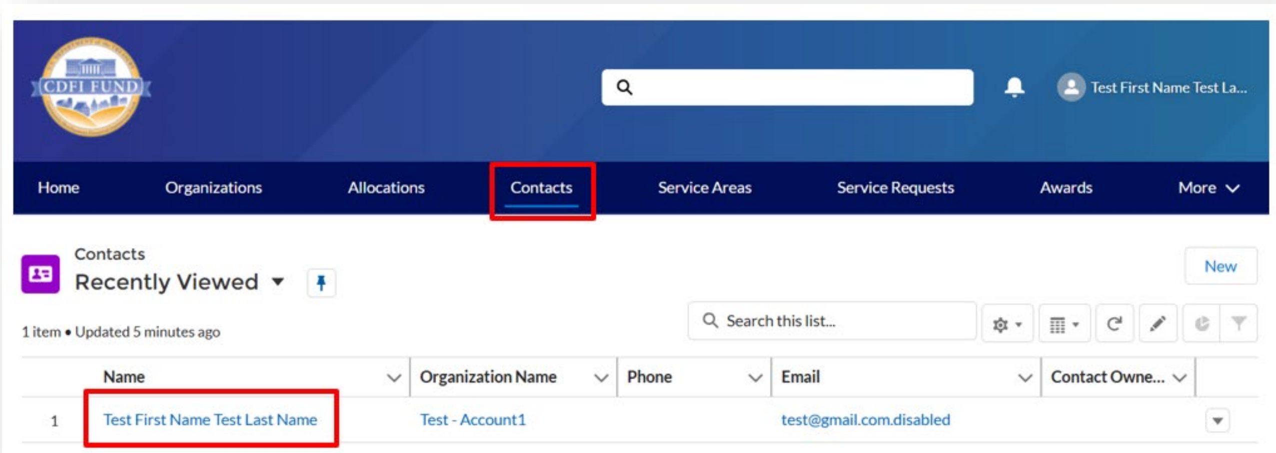


Figure 9: AMIS Contact/User Profile

3.1 Editing Your Contact Record

Once you are on your Contact record, click on the Edit button (or the pencil next to the field) to modify your contact record. Then Save the record.

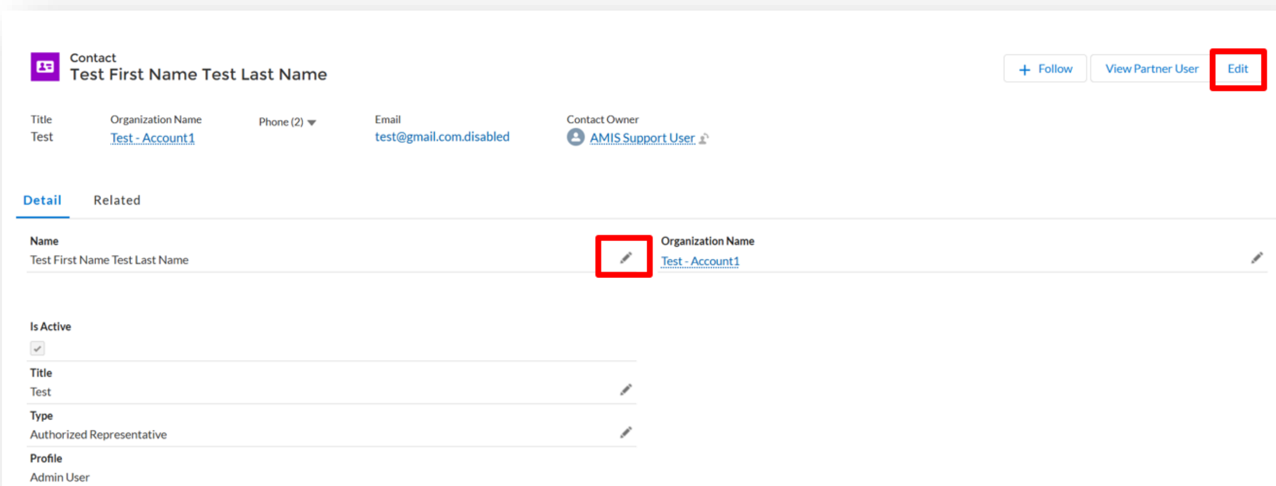


Figure 10: AMIS Contact/User Profile - Edit Button

You can edit the following fields:

- Name (First and Last)
- Title
- Email address
- Phone number (Main, Mobile, and Fax)
- Mailing address

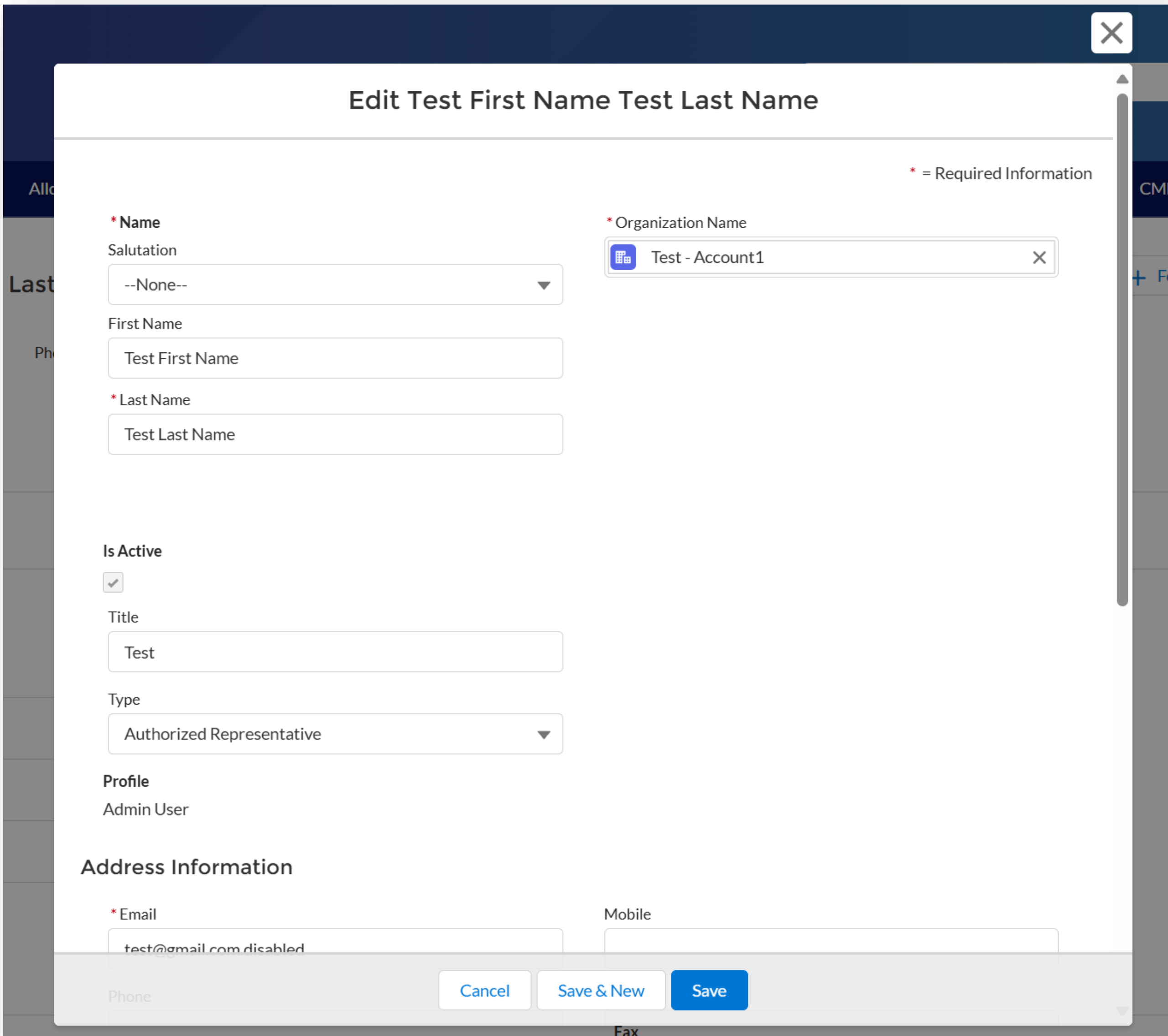


Figure 11: AMIS Contact/User Profile - Edit Screen

3.2 Log Out of AMIS

To log out of AMIS, click your name in the top right corner, and select Logout.

Figure 12: AMIS Logout Screen

4 Overview of the Home Page

The AMIS Home page gives you instant access to your information in AMIS. It consolidates all your work and activities in one section. After you log in to AMIS, the AMIS Home page is displayed, if it is your default home page. Click on the Home tab to ensure you are on your Home page.

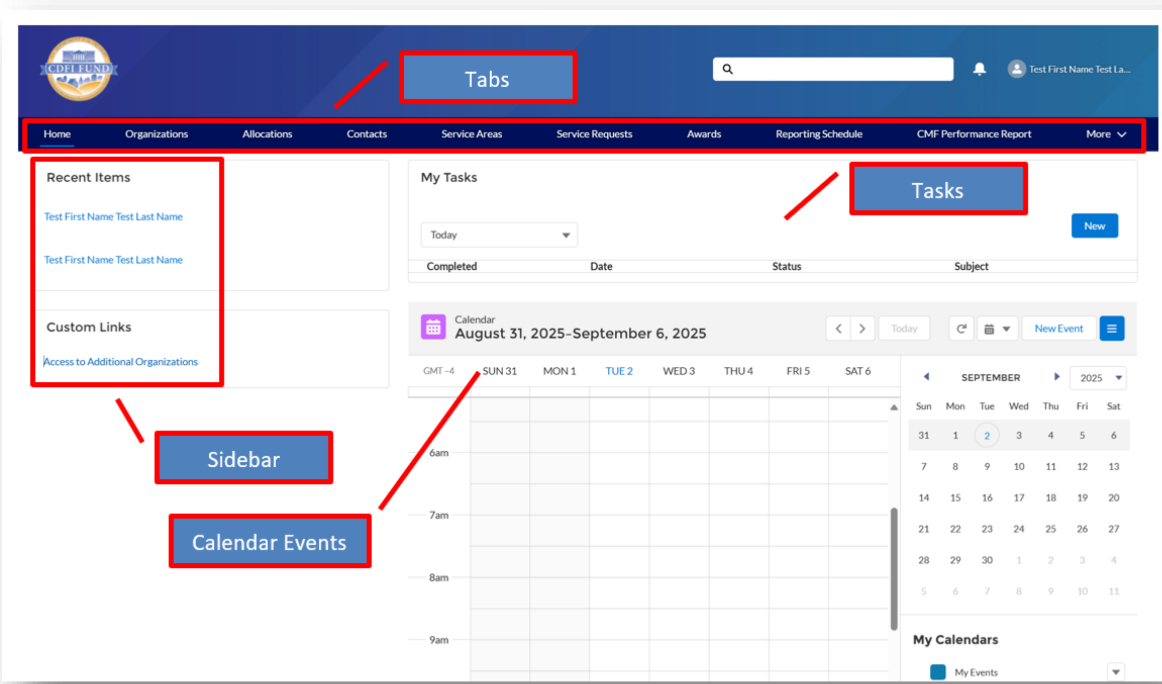


Figure 13: AMIS Home Page

The sidebar appears on the left on most AMIS pages with multiple components that improve usability.

These components provide convenient access to:
- Open your recently viewed items
- Open custom links, if any.

5 Tabs, Objects, and Records

Information in AMIS is organized into objects and records. Each object is a category of records and contains different information. Each record details a specific piece of information. In the example shown below, a FY15 NACA Award is a record; award records “reside” within the Awards object.

Figure 14: Records and Objects

Figure 15: Award Record and Object

A tab allows you to access data related to a specific object. Tabs are displayed across the top of all pages in AMIS; they are the primary means of accessing records. For example, the Organizations tab allows you to view organization-related records and the Awards tab allows you to view award records.

Click the Organizations tab to view data on your organization.

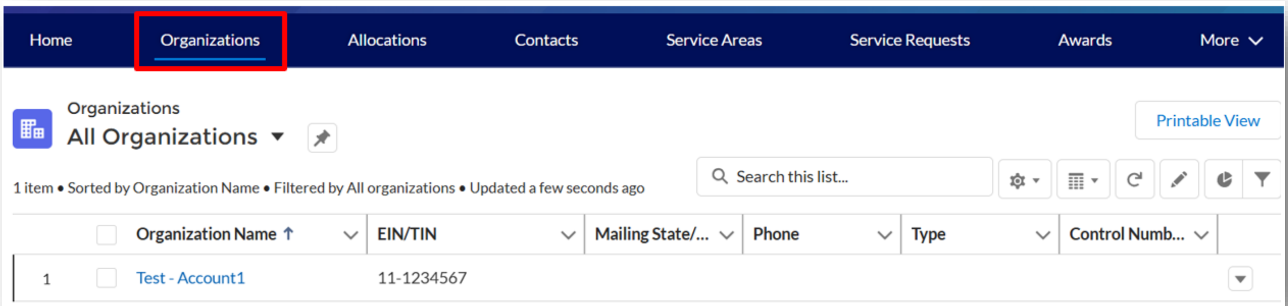


Figure 16: Organizations Home Page

From within each tab, you can:

- Access existing lists of a record
- Create or edit a record
- View details of a record
- Do in-line editing of a record
- Delete a record (with the necessary permission)
- Use shortcuts to access related lists of a record quickly
- View related lists of a record.

5.1 Access Existing Lists of a Record

A list of your Recently Viewed records is displayed when you click a tab. This is the default Salesforce behavior. You can change the filter and instead view All Organizations or New This Week records. In most instances, you will have one record for your organization under the Organizations tab.

However, under other tabs such as Service Requests or Awards, you will see multiple records if you have created multiple service requests or have received more than one award.

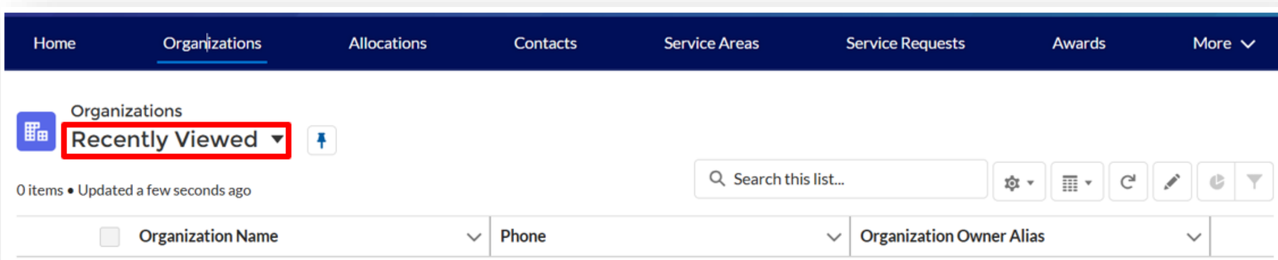


Figure 17: Default - Recently Viewed Filter

You can also access customized list views with specific customized columns by selecting the dropdown icon next to the list view name. Select All Organizations list view the page will automatically update with that view.

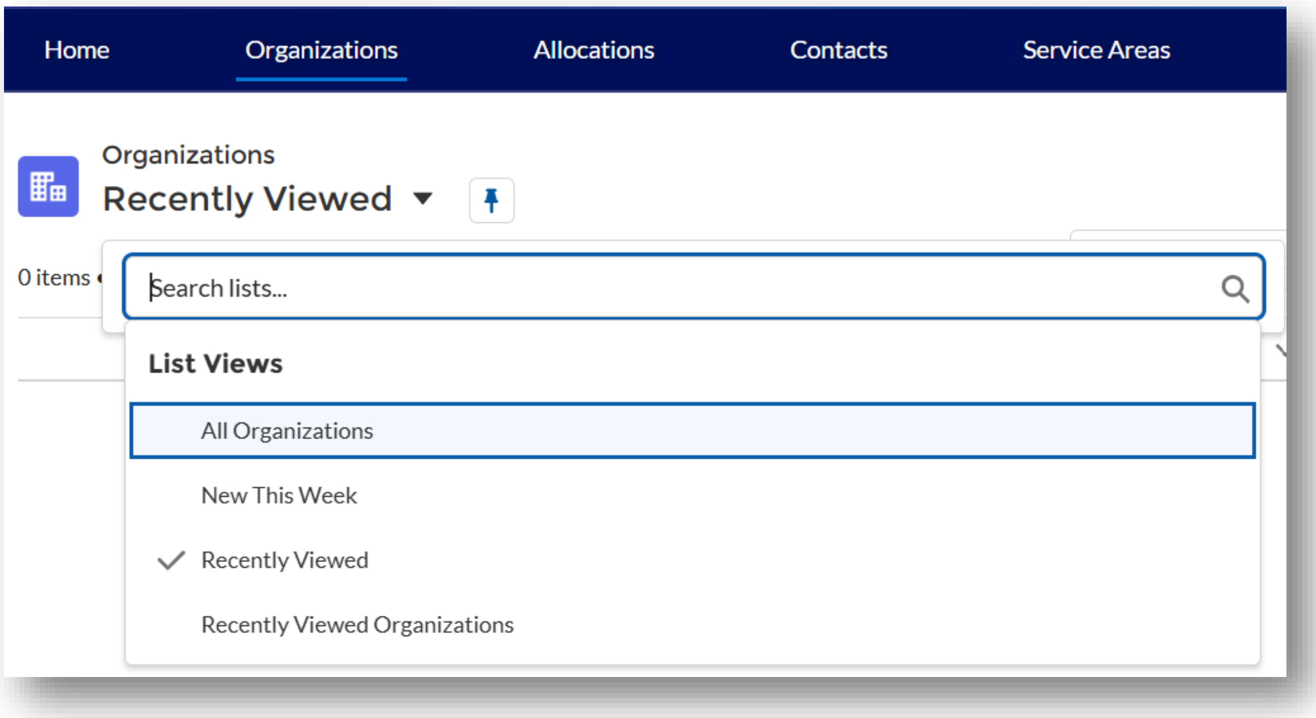


Figure 18: All Organizations View

The list view allows you to edit a record, delete a record (with the appropriate permission), and access the Detail page. Clicking on the Edit link under the dropdown icon column brings up the Organization Edit page popup. Clicking on the Organization Name brings up the Organization Detail page. As noted above, in most instances, you will see one record in the All Organizations list view because the majority of external users are registered under one organization only.

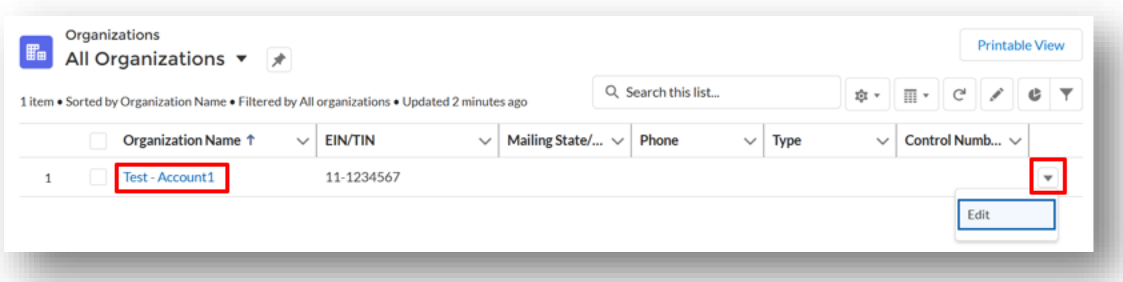


Figure 19: Organizations List View

5.2 Create/Edit a Record

Creating records is the standard procedure to be used to enter data into AMIS. Users can only create new records or edit existing records if they have the necessary permission granted to them by an administrator for their organization's AMIS account.

To create a new record, you typically click the New button for the record you want to create. However, for organizations, AMIS automatically creates an Organization Profile once your organization is registered. The Organization Profile created automatically by AMIS contains partial information; an authorized user from the organization must complete all the required information. (Please see Section 6 for more information on Organization Profiles.) In this section, you will learn how to edit a record by editing the organization record.

To edit your organization record:

1. Click the Edit link displayed next to your organization.
   Note: If you do not see an Edit link, you may not have the permission to create and edit records. Please contact an administrator for your organization's AMIS account, if you require these capabilities.

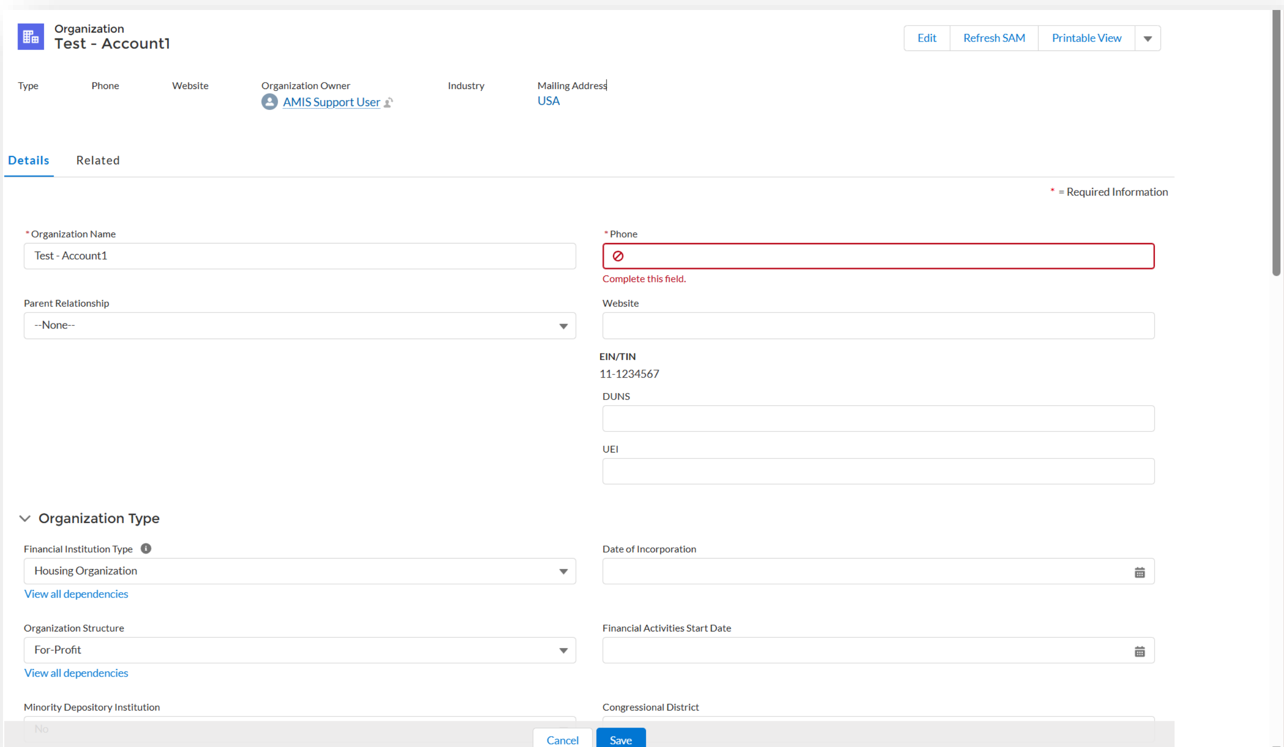


Figure 20: Organization Edit Page

2. Enter all the required information on the page – a required field has a red asterisk and is mandatory to save information on a page. For example, Organization Name is a required field.

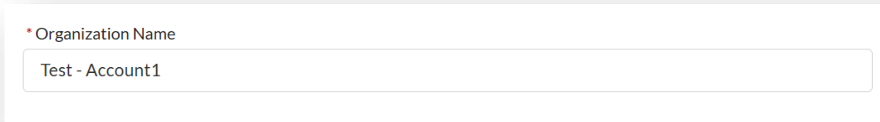


Figure 21: Organization Edit Page – Required Information

3. Notice the Field-Level Help link displayed as an Information icon to the right of the Financial Institution Type field. These links provide instructions about a particular field on the page.

   Move the mouse over the Information icon (Field-Level Help link) to see the instructions.

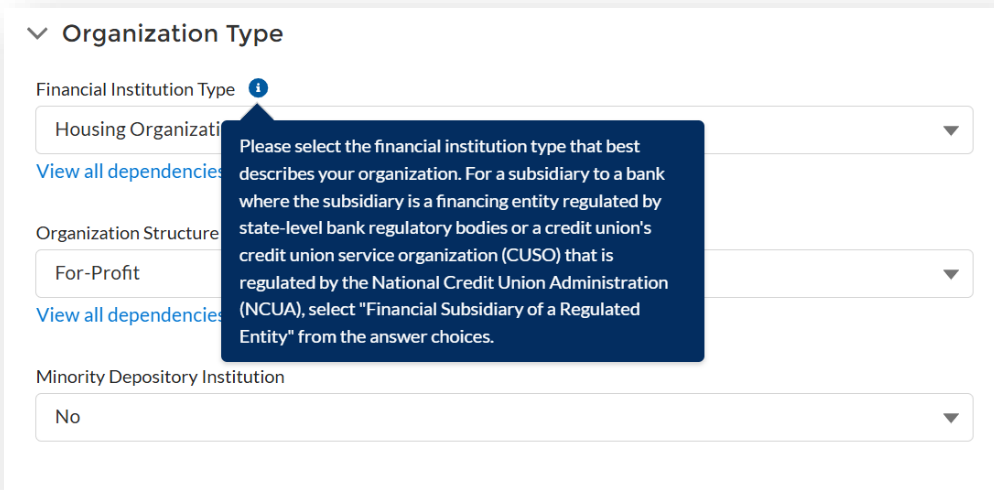


Figure 22: AMIS Field-Level Help Link (Information Icon)

4. Notice the multi-select drop-down menus; the multi-select menus allow you to choose multiple values for a field.
5. Complete all other fields on the page.
6. Save the record by clicking the Save button:
   a. The Save button is located at the bottom of the page.

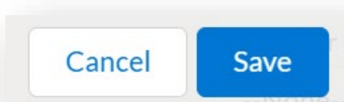


Figure 23: Save Button

   b. Clicking the Save button on any Edit page saves the record and forwards you to the Detail page.

c. Clicking the Save & New button on any Edit page saves the record and re-displays another blank form to create a new record. Use this button when you want to create several records quickly.
d. Clicking the Cancel button allows you to cancel the action.

5.3 View Details of a Record

The Detail page allows you to view the details of a record. To access the Detail page:

1. Click the Organizations tab to ensure you are on the Organizations Home page.
2. Click the Organization Name to be forwarded to the Detail page.

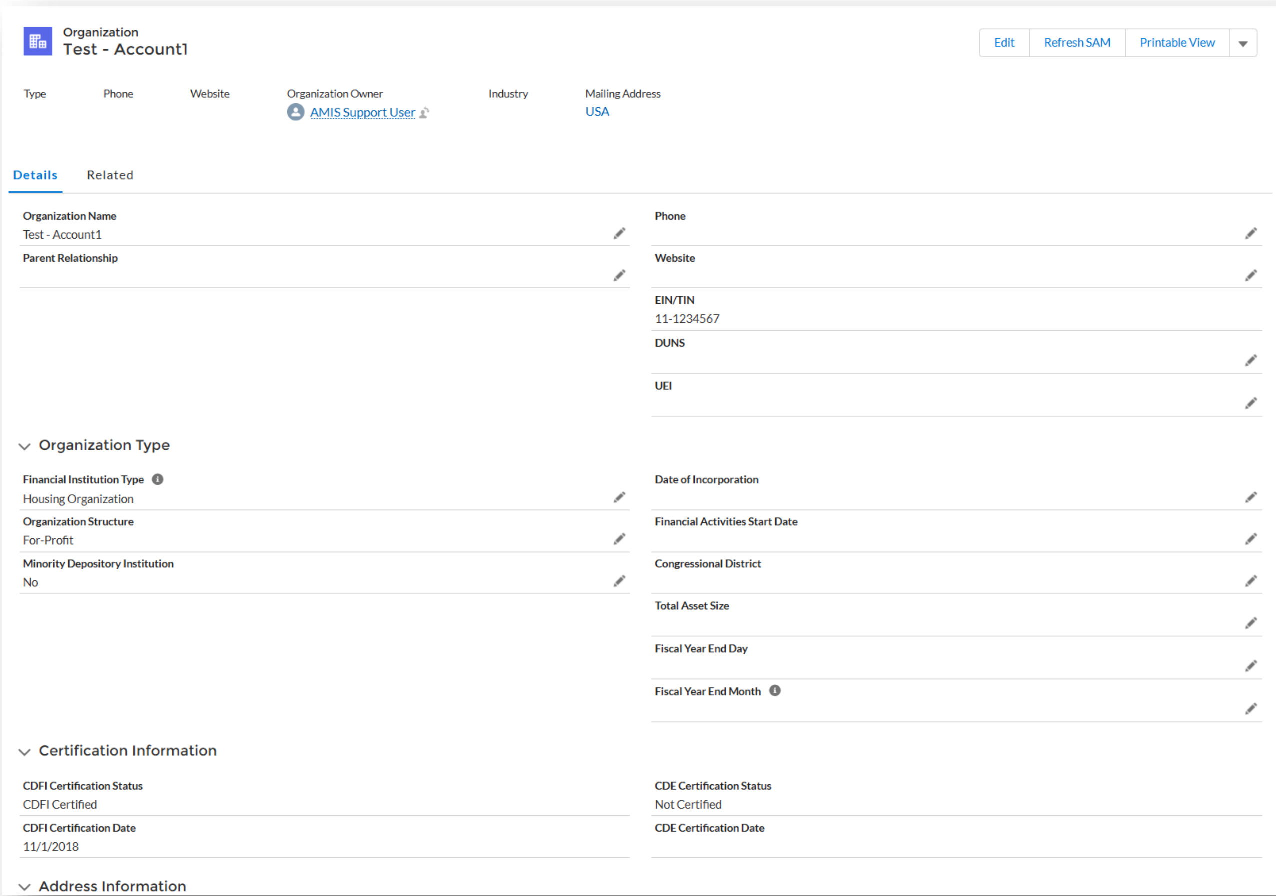


Figure 24: Organization Detail Page

5.4 In-Line Editing of a Record

AMIS supports field-level in-line editing from the Detail page. To edit a field using in-line editing:

1. To the right of a field's value, from the Detail page, use the visible pencil icon. The Pencil icon allows you to do in-line editing.

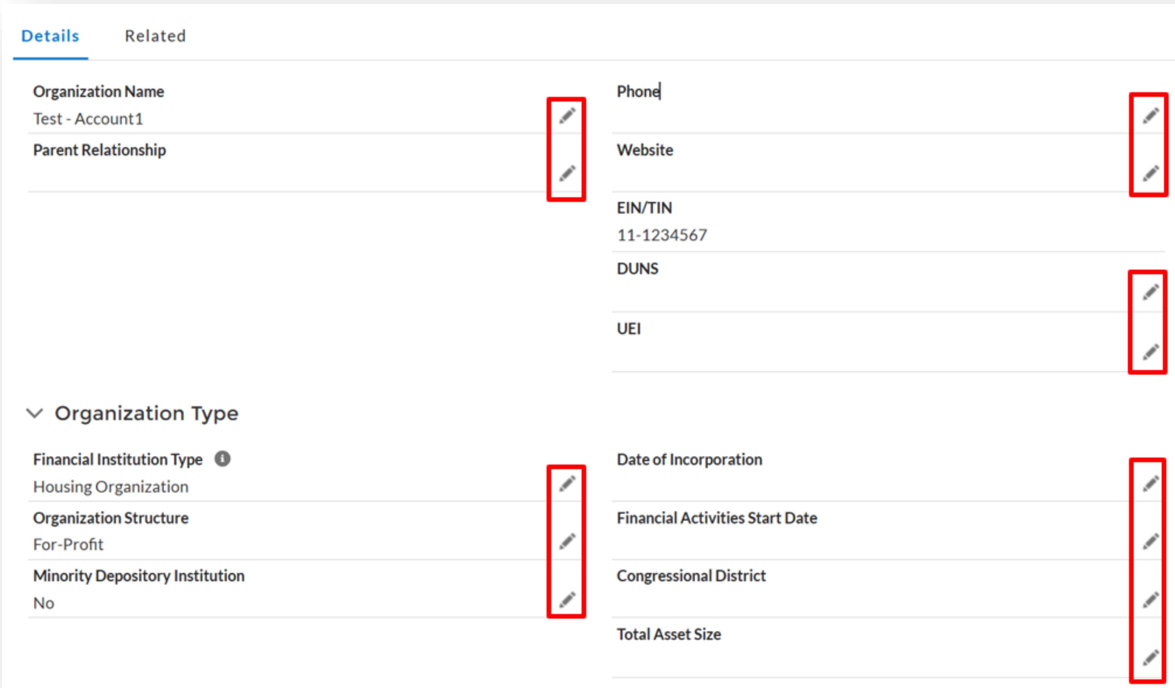


Figure 25: In-Line Editing

2. Click the Pencil icon. The field will become editable.
3. Edit the field.
4. Click the Save button to save your changes.

	NOTE: You will not be able to edit fields that are non-editable. There will not be a pencil icon next to a non- editable field.

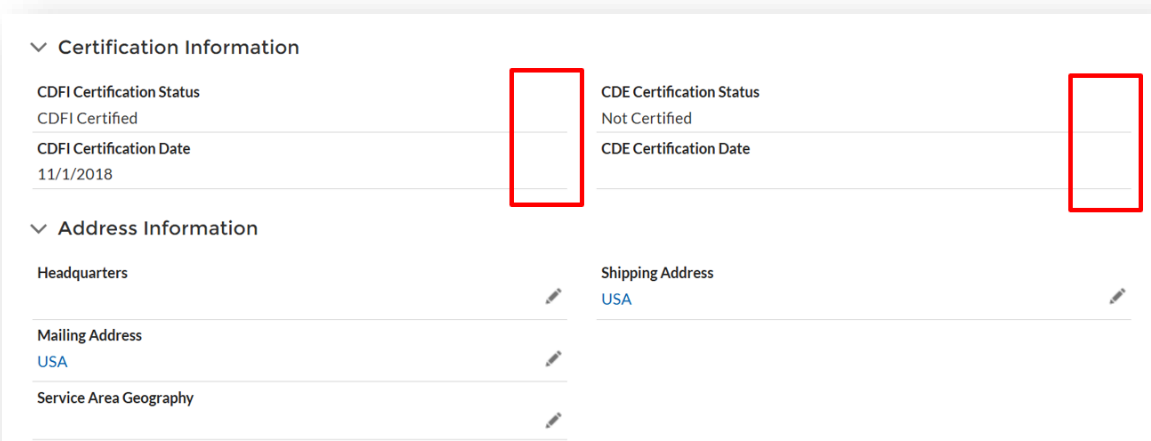


Figure 26: Non-Editable Field

5.5 View Related Lists of a Record

Related lists are records from other objects (e.g., Contacts, Program Profiles, etc.) that are related to the object (organization) you are viewing. Related lists are also referred to as “Child Records” and the main object is referred to as the “Parent Record”. Related lists are displayed via the Related tab at the top of the Detail page.

1. To access the organization’s related lists, click the Related tab and then navigate/scroll down the page.

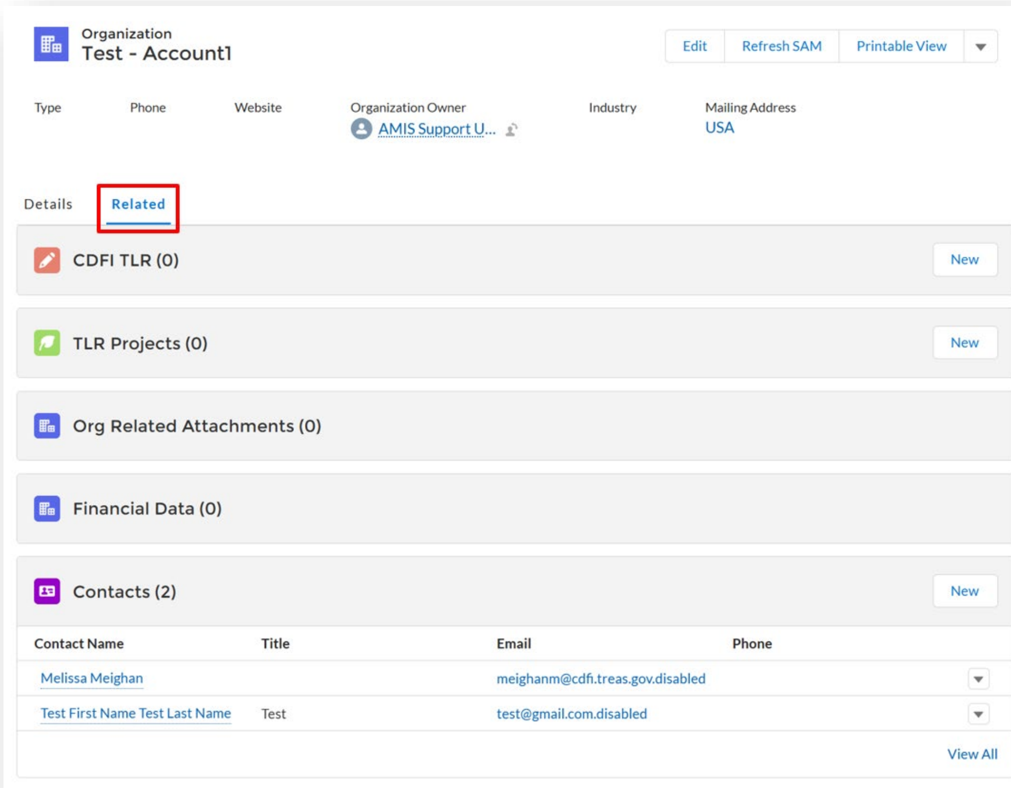


Figure 27: Organization Related Lists (Child Records)

2. From each related list, you can:
    a. Add a new Child Record by clicking the respective New button under a related list. For example, clicking the New Contact button allows you to add a contact to the Contacts related list.
    b. Update a Child Record by clicking the Edit link, within the dropdown, next to a record.
3. From each related list, you can also add a record to a related list. For example, you can add a new attachment to an organization.
    a. Locate the Notes & Attachments related list.

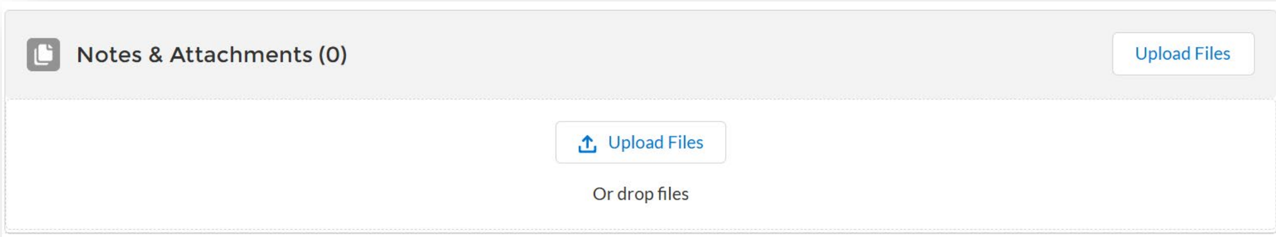


Figure 28: Notes & Attachments Related List

b. Click the Upload File button in the Notes & Attachments related list to browse your computer and select a file.
c. The file will begin to upload and once complete you will receive the below green check confirmation.

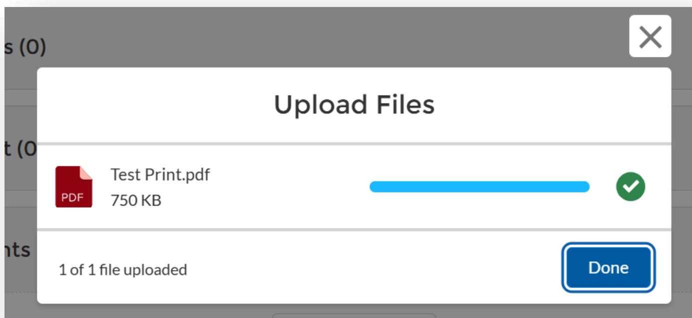


Figure 29: Upload File Confirmation

d. Click the Done button.

The attached file will be displayed under Notes & Attachments.

6 Update Organization and Program Profiles

AMIS automatically creates your Organization Profile once your organization is registered. The Organization Profile created automatically by AMIS contains partial information; an authorized user from the organization must complete all the necessary information.

The first person to register the organization becomes the initial administrator for the organization's AMIS account and is responsible for assigning permissions to other users to create or update records in their organization.

Make sure you are on the Organizations Home page by clicking the Organizations tab. Click on the Organization Name link to open the Organization Detail page.

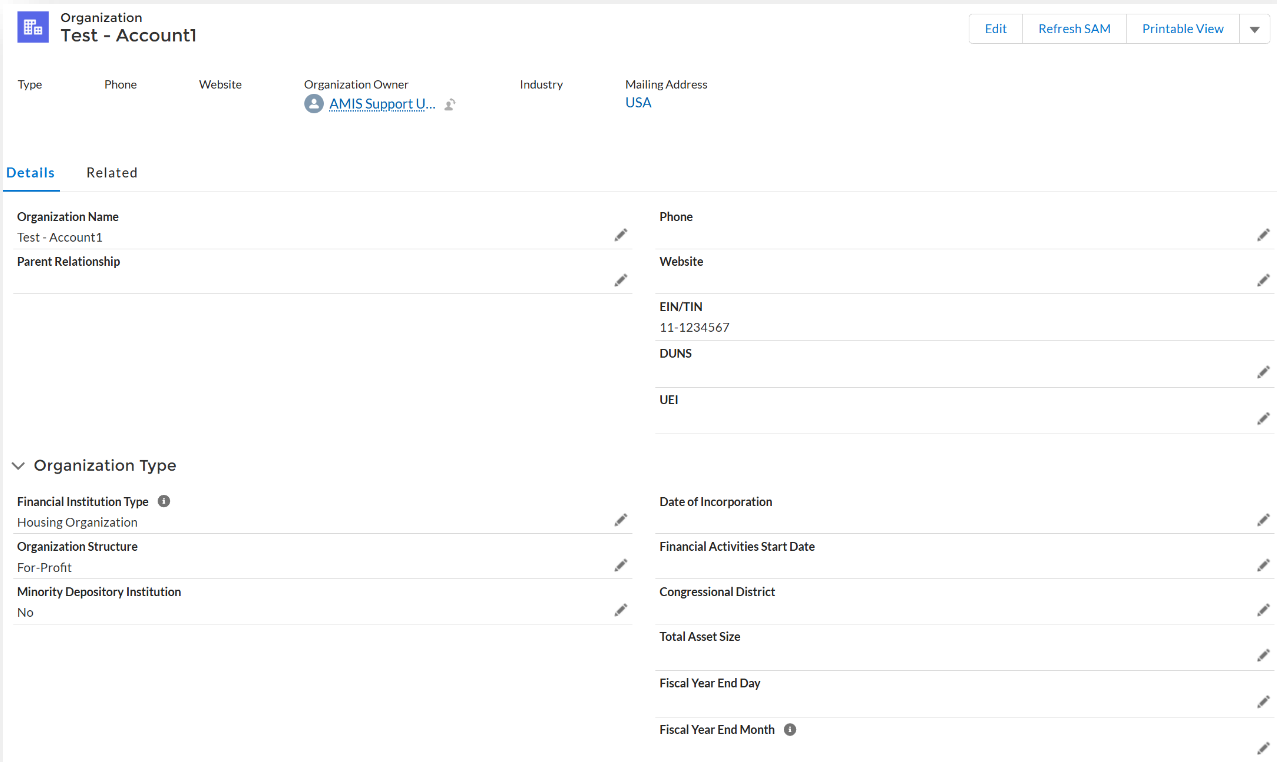


Figure 30: Organization Detail Page

In this section, you will learn how to:

- Update your Organization Profile
- Understand Grants.gov integration
- Add/update contacts
- Assign a profile to a contact
- Add/update Program Profiles
- Add/update affiliates.

6.1 Update Your Organization Profile

To edit the organization detail information:

1. Click the Edit button.
   Note: If you do not see an Edit button, you may not have the permission to create and edit records. Please contact an administrator for your organization's AMIS account, if you require these capabilities.

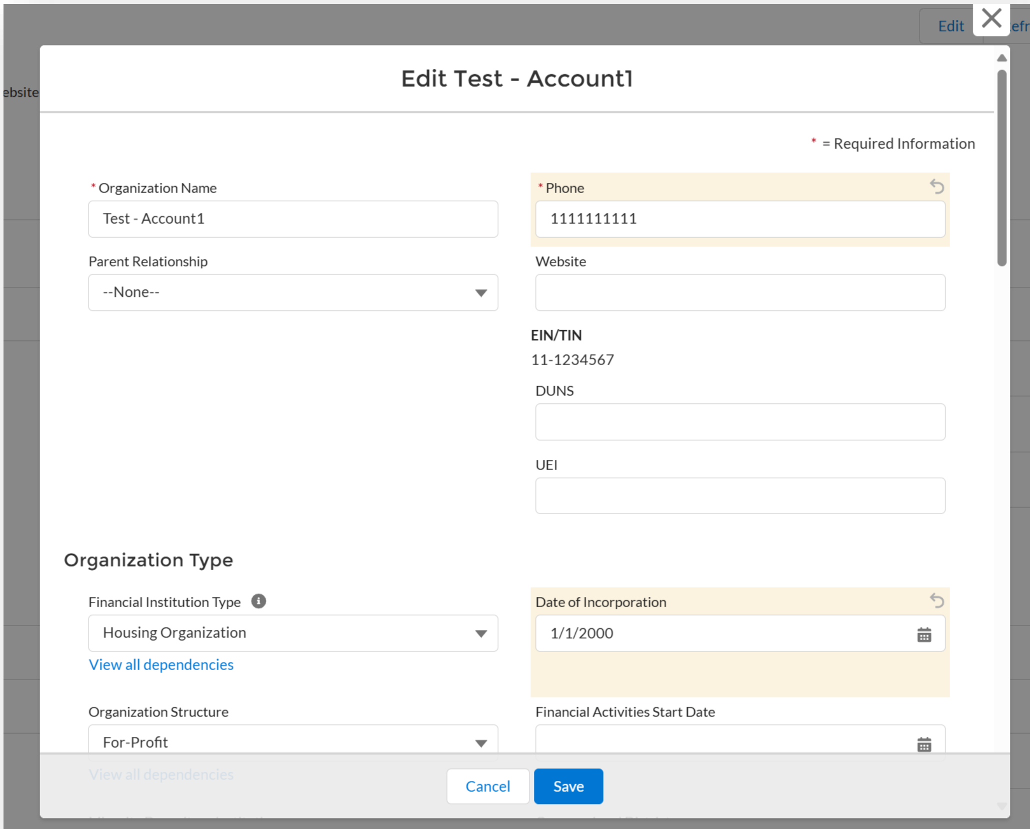


Figure 31: Organization Edit Page

2. Enter all the information on the page such as Financial Institution Type, Organization Structure, and Address Information, etc.
3. Click the Save button to save your work and return to the Organization Detail page.

6.2 Grants.gov

Some CDFI Fund programs (e.g., CMF Program) require applicants to submit their SF-424 program application via Grants.gov. When an organization applies for CDFI Program funding, AMIS interfaces with Grants.gov, downloads the SF-424 application, and associates it to the applicant organization.

	NOTE: Please ensure you enter the accurate EIN and DUNS number for your organization in AMIS.

	NOTE: All contractors or entities doing business with the U.S. Federal Government are required to register in SAM.gov, the System for Award Management (SAM) website.

6.3 Add/Update Contacts

The Contacts related list allows you to add contacts/users to your organization. The contacts/users that you add will participate in AMIS by completing the organization's award information such as applications, payment requests, and compliance reports.

From the Organization Detail, Related, page, navigate to the Contacts related list.

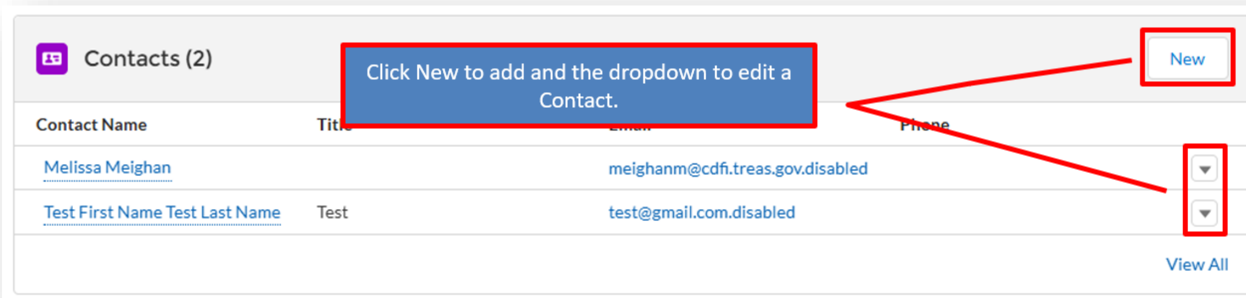


Figure 32: Contacts Related List

1. To add a contact, click the New Contact button.

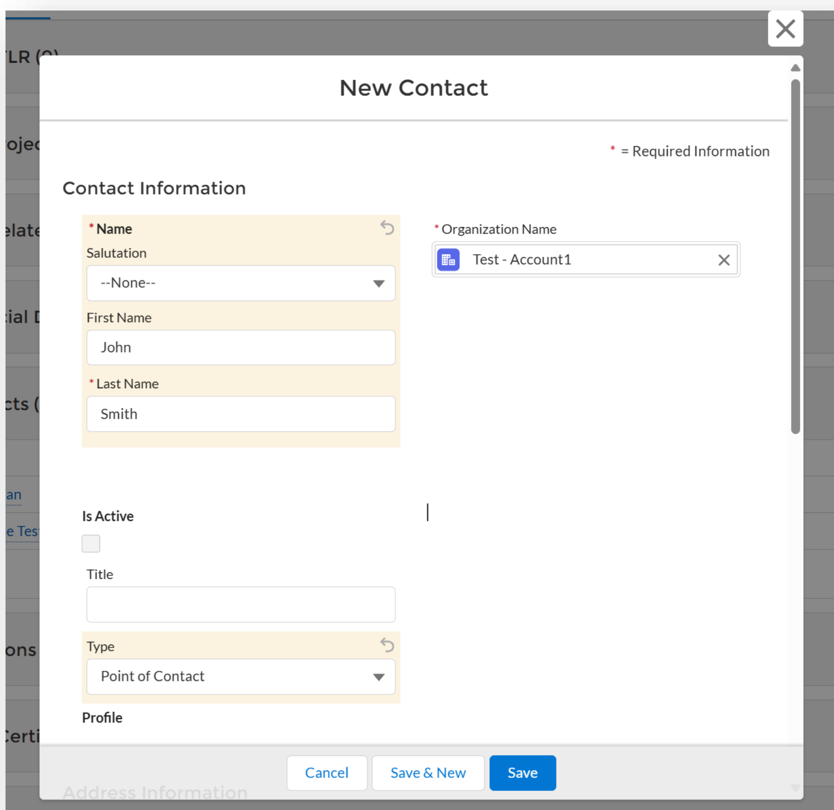


Figure 33: Contact Edit Page

2. Complete all the information on the Contact Edit page.
3. Click the Save button once you are done. You will be forwarded to the Contact Detail page.

6.4 Assign a Profile to a Contact

In order for a contact to be able to log in to AMIS as a user and complete tasks, they need to be assigned a profile (permissions) that enables them to create and edit records.

To assign a profile to a contact:

1. Access the Contacts related list on the Organization Detail page.

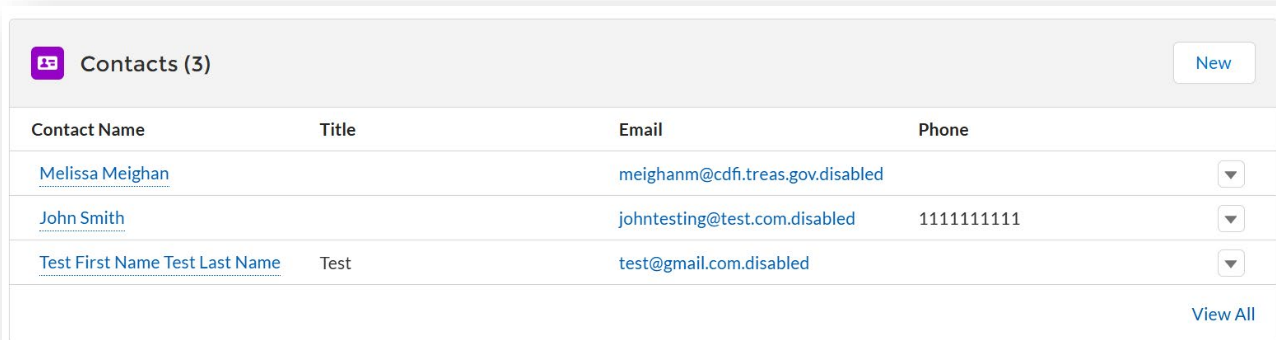


Figure 34: Contacts Related List

2. Click the Contact Name link for a contact you wish to assign a profile e.g., click the name of the contact you created above.

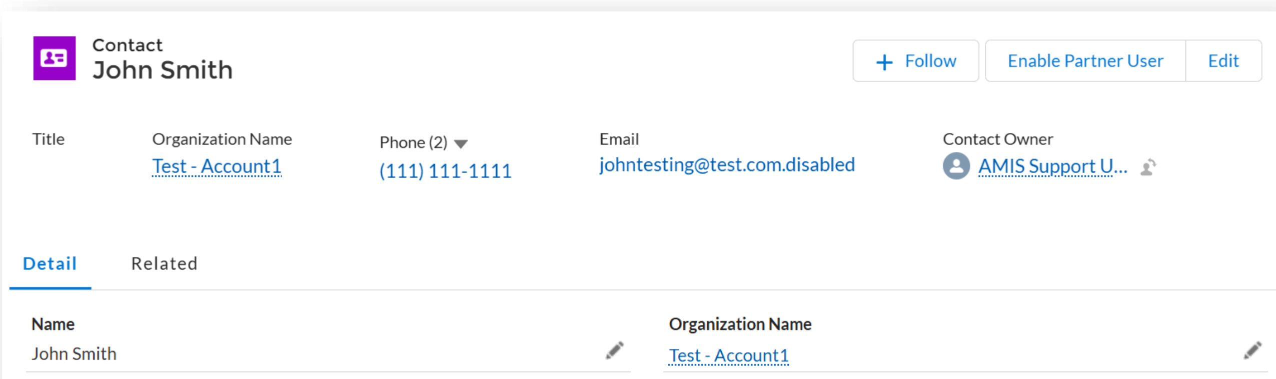


Figure 35: Contact Detail Page

3. From the Contact Detail page, click the Enable Partner User button to be forwarded to the Manager External User page.

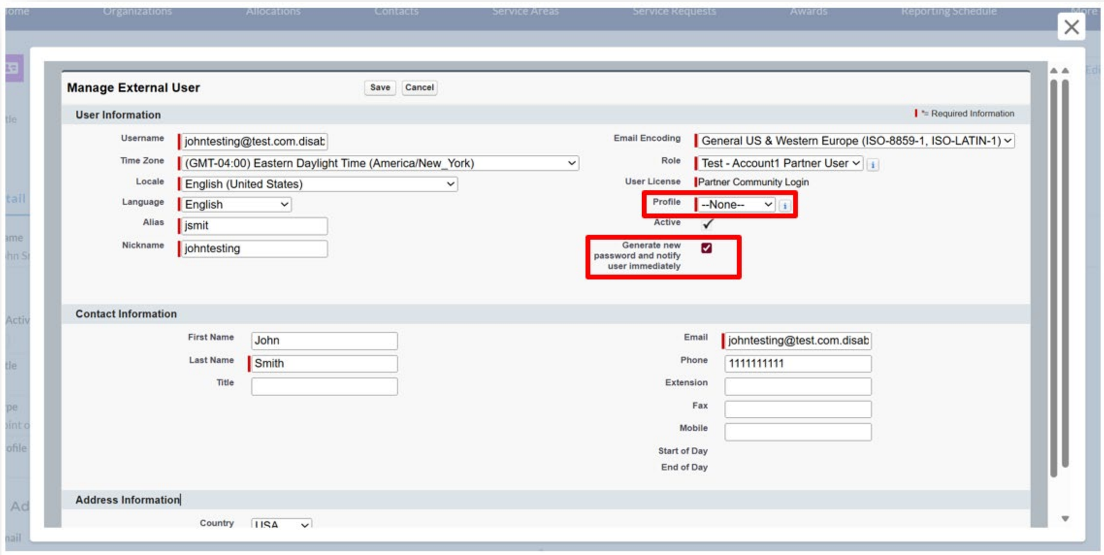


Figure 36: Manage External User Page

4. Complete all the required information on the page.
    a. Enter a Username and Nickname for the contact.
    b. Select User under the Profile field.
    c. Ensure the "Generate new password and notify user immediately" checkbox is selected.
    d. Enter an email address for the contact.
5. Click the Save button to save your changes.
6. AMIS will send an email to the contact inviting them to log in to AMIS and create their password.

6.5 Add/Update Program Profiles

The Program Profiles related list allows you to add or update your organizational data that is specific to a CDFI Fund program from a single area. This section is required in order for you to complete an application. AMIS automatically creates a Program Profile, with partial data, for each of the CDFI Fund's programs when the organization is created. Organizations applying for certification or funding programs are required to complete the rest of the Program Profile information and specify information such as the Applicant Category and Fiscal Year. Scroll down the Organization Detail, Related, page to access the Program Profiles related list.

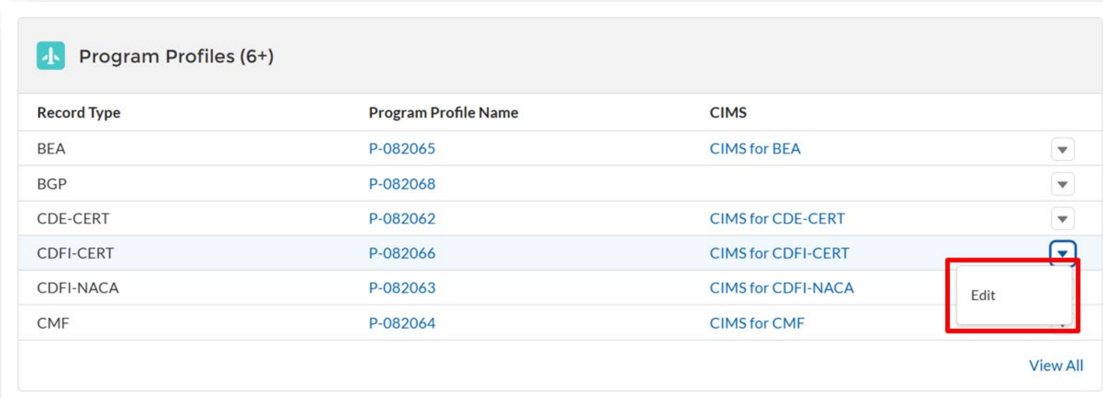


Figure 37: Program Profiles Related List

To edit a Program Profile:

1. From the Organization Detail, Related, page, click the Edit link next to a Program Profile record (e.g., click the Edit link next to the CDE-CERT Record Type). You will be forwarded to the Program Profile Edit page.

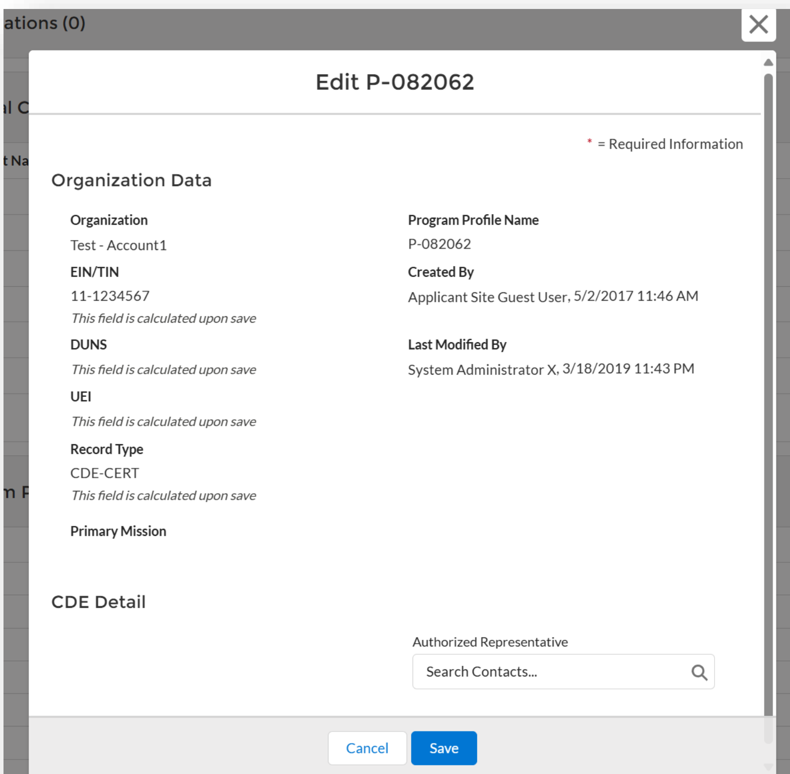


Figure 38: Program Profile Edit Page

2. Complete all the information on the page.
3. Click the Save button. You will be forwarded to the Organization Detail page.
4. You are now ready to complete your CDE Certification Application. Scroll down to the Program Profile related list. From the Program Profile related list, click the Program Profile Name link next to the CDE-CERT Record Type to be forwarded to the CDE Certification Program Profile Detail page.

    a. Observe the Certification Applications, within the Related tab.
    b. To complete a CDE Certification Application, click the Apply for CDE Certification button. Please refer to the *AE102: CDE Certification Application Submission (for CDE Certification Applicants)* training manual to learn how to complete your application.

6.6 Add/Update Affiliates

The CDFI Fund requires regulated institutions to report their affiliates or subsidiary institutions. The Affiliates related list allows you to add or update your affiliates.

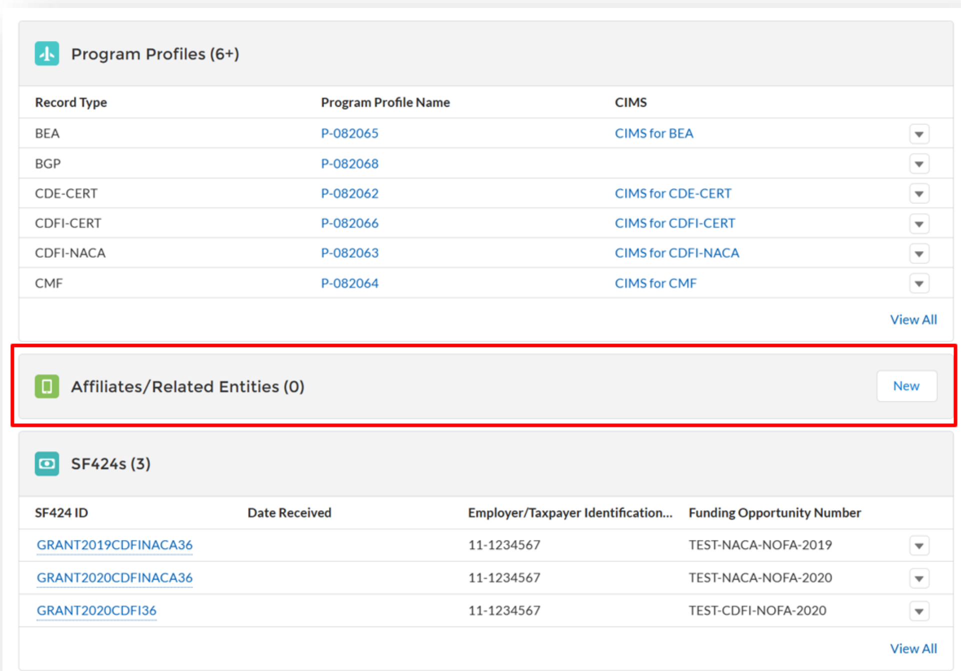


Figure 39: Affiliates Related List

To add an affiliate:

1. From the Affiliates related list, on the Organization Detail, Related, page, click the New Affiliates button to be forwarded to the Affiliates Edit page.

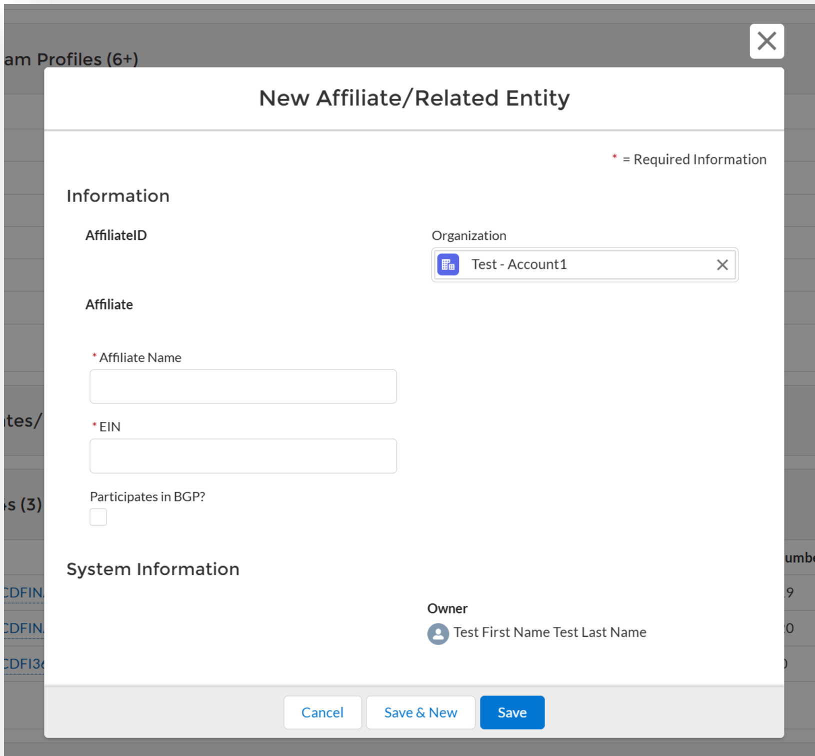


Figure 40: Affiliates Edit Page

2. Complete all the information on the page and click the Save button.

7 CIMS5

The CDFI Information Mapping System, version 5 (CIMS5) provides mapping and geocoding capabilities to support the CDFI and CDE Certification Application process for organizations and to assess the program eligibility of investments and lending, financial, and development services activities in specific geographic areas for CDFI Fund programs.

All users will have access to the CDFI Fund's eligibility data for all programs by census tract, including both data based upon the most recent 5-year American Community Survey (ACS), as well as previous eligibility criteria based on prior census years. Users will also be able to access the location of CDFI headquarters and the boundaries of contemporary Congressional Districts. Those holding AMIS accounts will have access to saved maps, in addition to all census data that the CDFI Fund makes available to the public.

This document provides step-by-step instructions for common functions in CIMS5, including:

- How to Access CIMS5;
- Basic CIMS5 Functionality;
- Help within CIMS5;
- Target Markets in CIMS5;
- How to Perform Bulk Address Geocoding.

In addition, the CDFI Fund has recorded a video tutorial on "[How to Use CIMS5 to Create, Analyze, and Validate a Target Market]." **[FORTHCOMING]** This tutorial also describes some basic CIMS5 functionality.

7.1 How to Access CIMS5

CIMS5 has two interfaces: Public Viewer and Authenticated User.

7.1.1 Public Viewer

The public interface is available to everyone and can be used without having to log into AMIS. To use the Public Viewer, go to the CIMS page on the CDFI Fund public website. Alternatively:

1. Go to the CDFI Fund Public Website
2. Select the TOOLS & RESOURCES link in the menu bar
3. Select the CIMS Mapping Tool link.

Select the PUBLIC button, and the CIMS Mapping Tool welcome page is displayed.

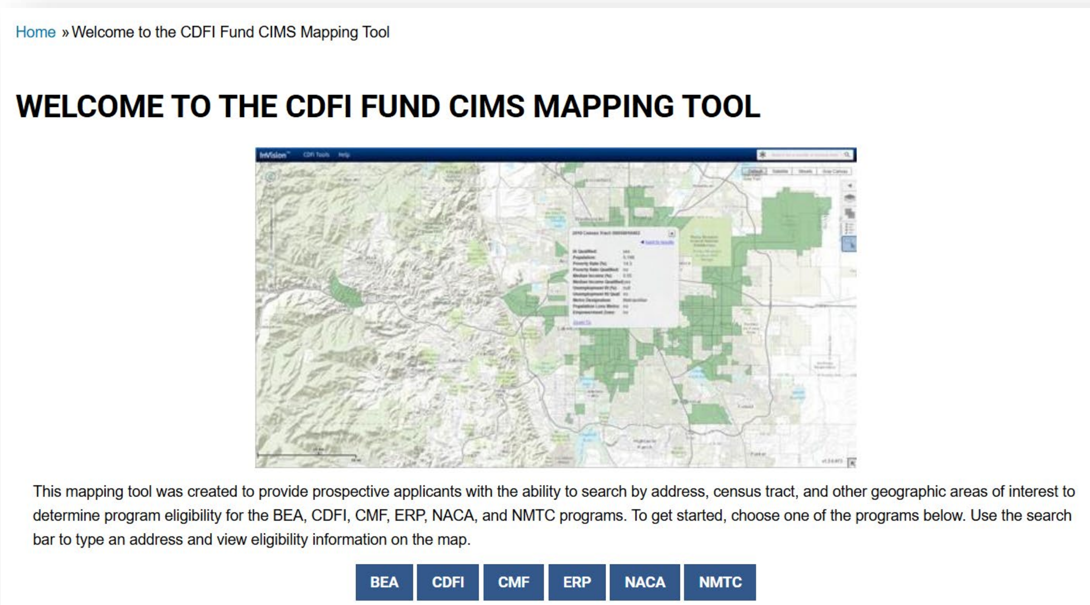


Figure 41: Landing Page for CIMS Public Viewers

Select the CDFI Fund Program button of choice to launch CIMS5 for that program.

7.1.2 Authenticated User

The authenticated user interface allows for more functionality, such as saving maps. The authenticated user interface can only be accessed through your AMIS account.

1. Login to AMIS and select the relevant organization.
2. Scroll down to the Program Profiles section and select the CIMS Mapping Tool link for the CDFI

Fund Program of choice to launch CIMS.

	Record Type ↑	Program Profile Name	CIMS Mapping Tool	CIMS
1	BEA	P-036662		CIMS for BEA
2	BGP	P-036665		
3	CDE-CERT	P-036659		CIMS for CDE-CERT
4	CDFI-CERT	P-036663		CIMS for CDFI-CERT
5	CDFI-NACA	P-036660		CIMS for CDFI-NACA
6	CMF	P-036661		CIMS for CMF
7	ERP	P-181120		CIMS for ERP
8	NMTC	P-036664		CIMS for NMTC
9	SDL	P-128765		

Figure 42: Program Profiles Section

NOTE: Some AMIS users (including CDFI Fund users) have access to maps for more than one AMIS Organization. If you launched CIMS5 for one Organization, then want to use CIMS5 for a different Organization, please close and restart your browser before launching CIMS5 for that second Organization.

7.2 Basic CIMS5 Functionality

This section provides an overview of how to navigate and use CIMS5.

7.2.1 CIMS5 Controls

Upon choosing the CDFI Fund program, CIMS5 is launched in a new tab on your browser. CIMS5 has the following layout.

- On the left pane, there is a Program dropdown selector.
  - There are two tabs for: Details and Maps
    - ➢ The Details Tab provides you with information about the feature that you selected on the map.
    - ➢ If applicable for the selected Program, the Maps Tab is where you create your Target Market and validate that Target Market. (*Authenticated Users only*)
      - The Maps Tab will display created/saved maps. (*Authenticated Users only*)
- Within the map, the first icon is Search. Users have the option to search by Address, Census Tract, Congressional District, County, and State.
- Underneath the Search icon are seven additional icons:
  - Zoom In/Zoom Out
  - Measure Tool
  - Layers (which allows you to turn map layers on and off)
  - Home (which will reset the map view to the default setting)
  - Use your Current Location

- Base Map
  - Types of Basemaps include:
    - Imagery
    - Imagery Hybrid
    - Streets
    - Topographic
    - Navigation
    - Streets (Night)
    - Terrain with Labels
    - Light Gray Canvas
    - Dark Gray Canvas
    - Outdoor
    - Oceans
    - National Geographic Style Map
    - Open Street Map
    - Topographic (Vector)
    - Outline Map
    - NAIP Imagery Hybrid
    - USGS National Map
    - USA Topo Maps
    - Charted Territory Map
    - Community Map
    - Navigation (Dark)
    - Newspaper Map
    - Human Geography Map
    - Human Geography Dark Map
    - Modern Antique Map
    - Mid-Century Map
    - Nova Map
    - Colored Pencil Map
    - Firefly Imagery Hybrid
    - Blueprint
    - Environment Map
    - Enhanced Contrast Map
    - Enhanced Contrast Dark Map
    - Navigation (Places)
    - Navigation (Dark-Places)
- Export

- The Map Legend, located within the map, lets you see how the features on the map are displayed by color and symbol.

- Within the Maps tab, on the left pane, is the button to make a New Map *(Authenticated Users only for applicable Programs)*.

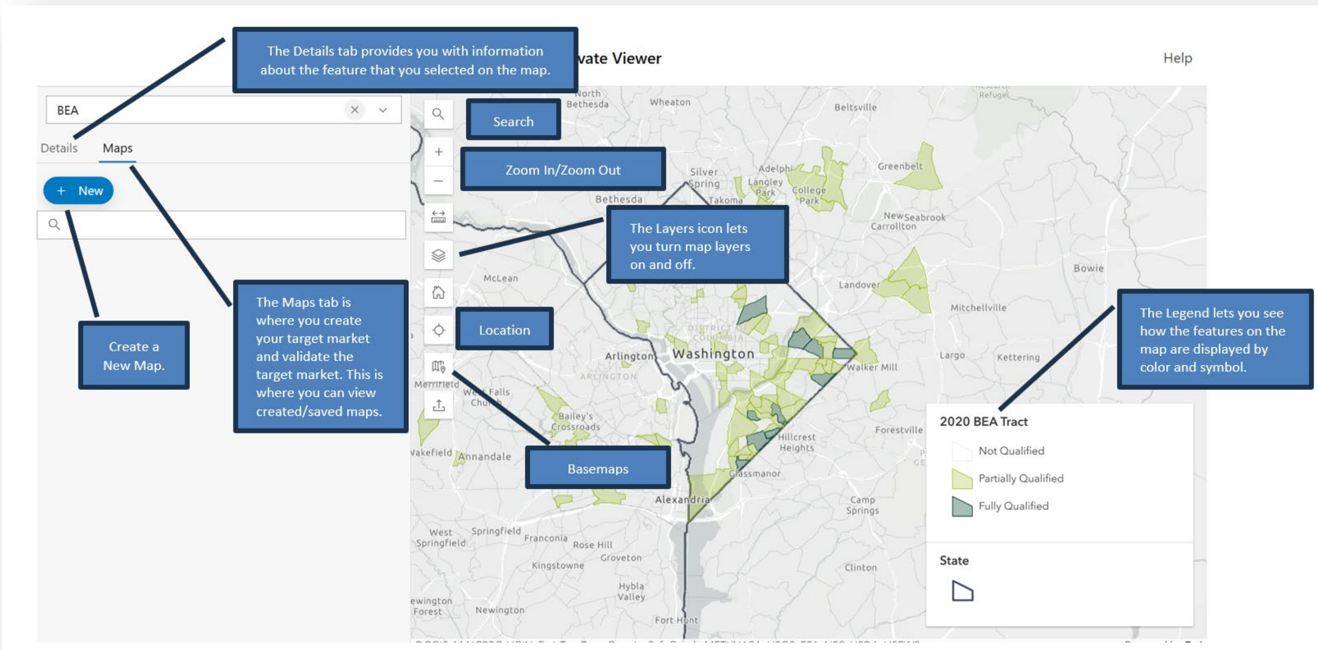


Figure 43: CIMS5 Layout

7.2.2 Control Layer Visibility within a Selection

Layers are the mechanism used to display geographic datasets in the CIMS5 mapping application. Select the Layers icon to show the list of available CIMS5 layers and toggle the visibility (on or off) of any of the available layers. Users should be aware that in CIMS5 numerous layers of geography (county, census tract, etc.) can be displayed on the screen at the same time. Also, the list of layers will change depending on the CDFI Fund program selected.

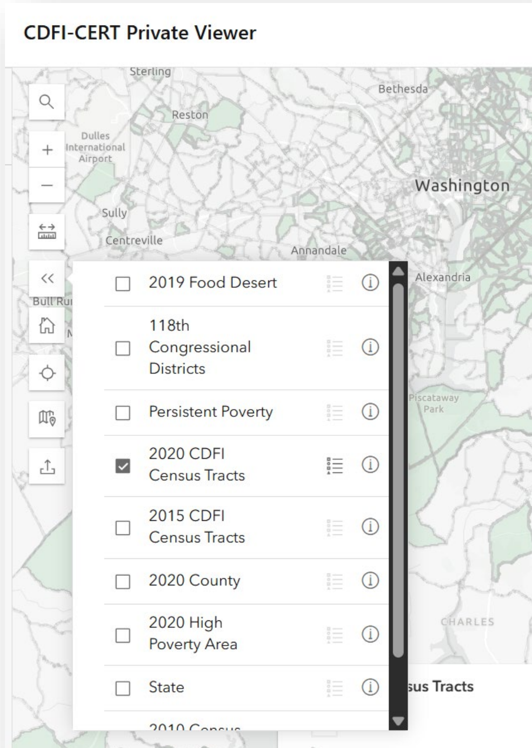


Figure 44: CIMS5 layers for CDFI-Cert

7.2.3 View a Legend for the Visible Layers on a Selection

View the Legend which displays the color/symbol for the currently visible map layers.

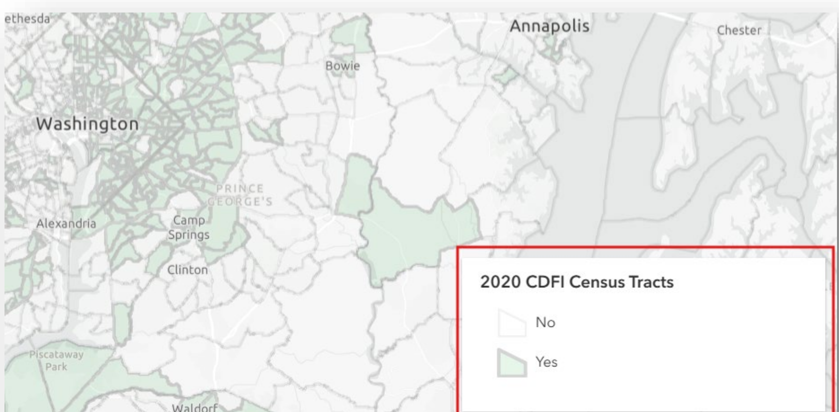


Figure 45: CIMS5 Legend for CDFI-Cert

7.2.4 Search for a Location

Click on the Search icon at the top of the map.

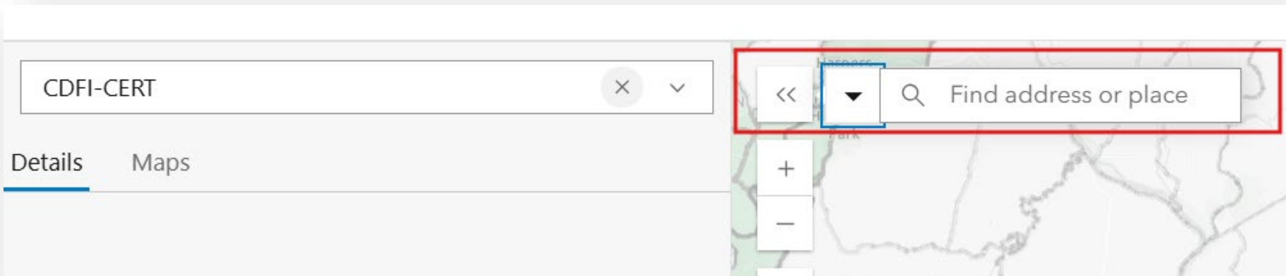


Figure 46: CIMS5 Search Bar

Then, type in the search box the address, longitude/latitude, or FIPS that you need to find. If the feature exists, the map will zoom to it, and you will get its information in the Details tab.

Example search terms that should return results for each available entity type:

- Latitude/Longitude: 36.1000, -112.1000 (Grand Canyon)
- Address: 1600 Pennsylvania Ave NW, Washington, DC (Valid address)
- 2020 Census Tract: 11001010700 (Valid Census Tract ID)
- County: Knox (Valid county)
- State: Maine (Proper format for State search)

7.2.5 View Program Eligibility and Demographic Information for Individual Census Tracts

Make sure that census tracts are turned on in the map Layers icon and zoom in/out so that they become visible. Click on any census tract and the system will display in the Details tab information about that census tract.

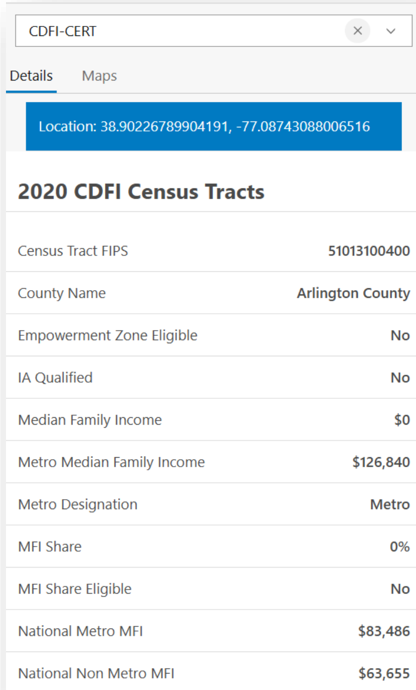


Figure 47: Census Tract Details

7.2.6 Exporting Maps

To export a map, click the Export button to open the export panel on the right side of the map. Under the Layout tab, your program name will appear in the Title field. You can add additional text next to the program name if needed. After saving your desired export settings, click Export to generate the map.

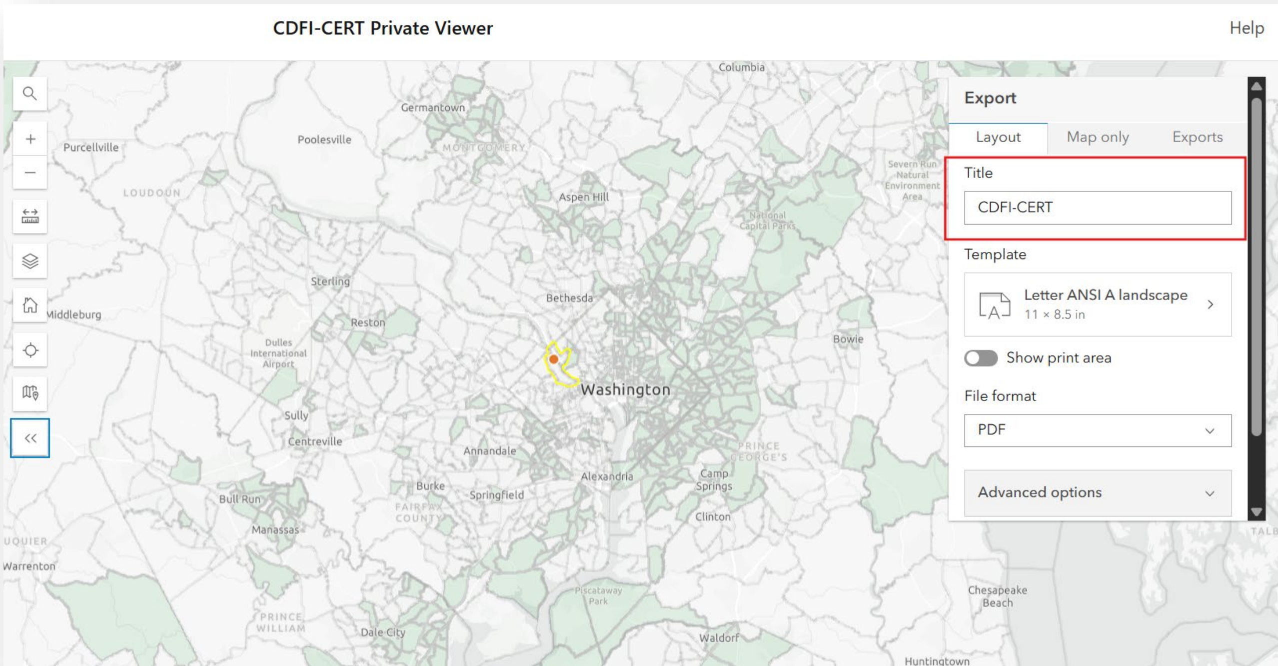


Figure 48: Exporting a map

	Troubleshooting: If you come across an error while exporting, refresh the page ONCE. Return to the Export button and you will be able to export your map.

Your exported file will be generated under the Export tab. Once complete, click on the file to open a new browser tab to view your export.

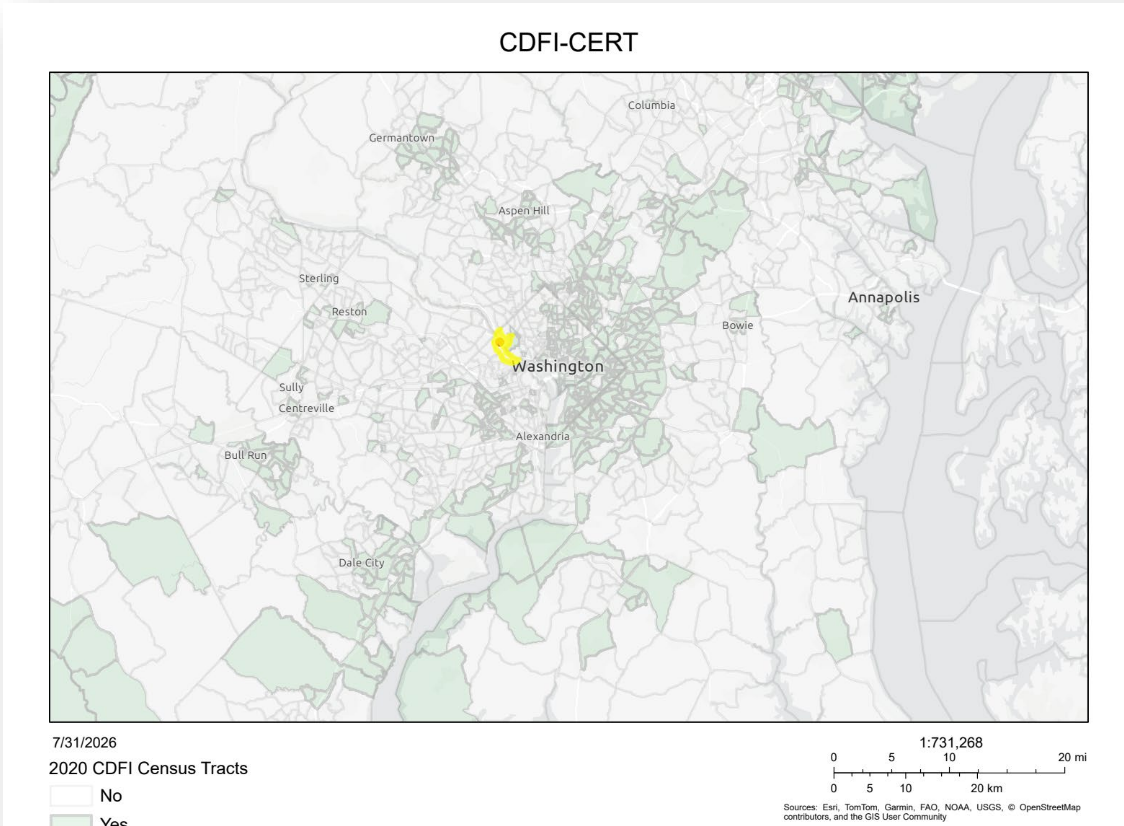


Figure 49: Exported file on new browser tab

7.3 Help within CIMS

1. CIMS5 has built-in help features. Click the help link in the top right corner of the map. This help icon will open the CIMS CDFI Fund webpage in a new tab.

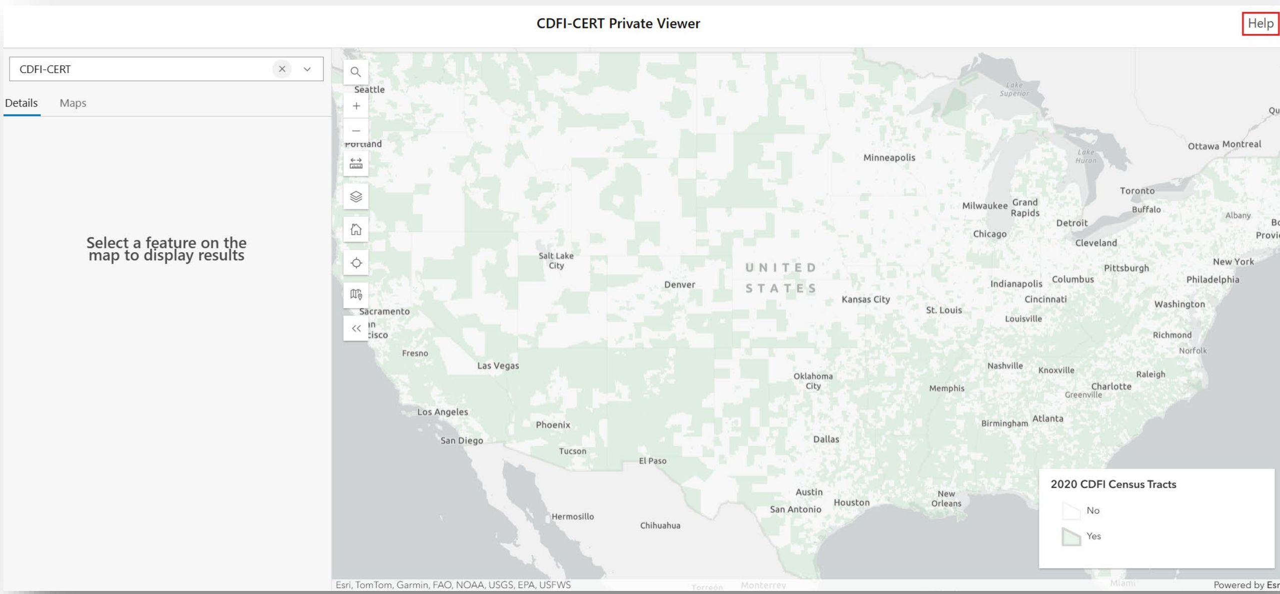


Figure 50: Help Icon

2. In addition, many of the CIMS5 controls have hover text that will display when you point the mouse's cursor over the icon.

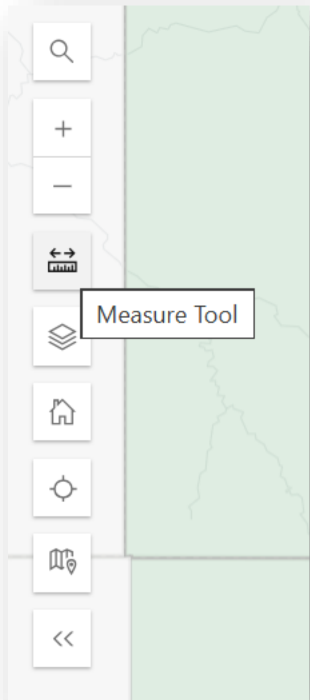


Figure 51: Icon Hover Text

7.4 Target Markets in CIMS5

Organizations can apply to establish their Target Markets based on either Investment Areas (IA), Low-Income Targeted Populations (LITP) or Other Targeted Populations (OTP). Users should be cognizant of the criteria that the CDFI Fund uses for CDFI Certification, as well as NMTC and BEA eligibility.

7.4.1 Contiguity for CDFI Certification and BEA program

Both CDFI Certification and BEA program require calculating whether census tracts are contiguous. In the case of the CDFI Certification, Applicants must create and submit Target Market maps for each customized Investment Area Target Market (see CDFI Certification Application Supplemental Guidance and Tips for additional information). Each distinct customized Investment Area will need a separate map. All geographic units of a customized Investment Area must be contiguous.

In the case of the BEA program, some census tracts are "partially" qualified and may become qualified when they are contiguous with a fully qualified tract.

7.4.2 CDFI Investment Areas, NMTC Eligible Areas, BEA Eligible Areas

The CDFI Certification, NMTC, and BEA programs each require, in some instances, organization to create a map in CIMS to reflect a particular service area geography.

Investment Area

An Investment Area meets at least one of the following economic distress criteria and has significant unmet needs for Financial Products and Services; or it is wholly located within an Empowerment Zone or Enterprise Community (as designated under section 1391 of the Internal Revenue Code of 1986 [26 U.S.C.1391]).

Economic Distress Criteria:

- Poverty rate greater than 20%;
- Median family income (MFI) at 80% or below specific MFI benchmarks[1]; or
- Unemployment rate 1.5 times the national average. For a Non-Metropolitan area – has an MFI at or below 80% of the greater either the statewide or national non-metropolitan MFI; or
- Is wholly located within an Empowerment Zone or Enterprise Community.

NMTC Eligible Area

For the purpose of the New Markets Tax Credit (NMTC) Program, an eligible NMTC area is a census tract that:

- Has a poverty rate of at least 20%; OR
- If located in a Metropolitan Area – has a median family income (MFI) at or below 80% of the greater of either the Metropolitan Area MFI or statewide MFI; OR
- If not located in a Metropolitan Area – has an MFI at or below 80% of the statewide MFI.

If applicable, please also refer to the following additional statutory requirements:

- ➢ For census tracts located in a possession of the United States (e.g. Puero Rice), instead of a state, possession-wide MFI is used (instead of statewide income) in assessing the eligibility of census tracts. (IRC §45D(e)(1)(B))
- ➢ For areas that do not have census tracts, the equivalent count divisions are used to define poverty rates and median family incomes. (IRC §45D(e)(3))

BEA Eligible Area

For the purposes of the Bank Enterprise Award (BEA), a Distressed Community must meet the following minimum area and eligibility requirements:

(1) Minimum Area Requirements.

i. An area located within the boundaries of a General Local Government;

ii. The boundaries of the area must be contiguous; and

iii. The area must:

[1] For a Metropolitan area: a qualified Investment Area geographic unit has a median family income (MFI) at or below 80% of the greater of either the metropolitan or national metropolitan MFI. For a Non-Metropolitan area: a qualified Investment Area geographic unit has an MFI at or below 80% of the greater either the statewide or national non-metropolitan MFI.

A. Have a population of not less than 4,000 if any portion of the area is located within a Metropolitan Area with a population of 50,000 or greater; or
B. Have a population of not less than 1,000 if no portion of the area is located within a Metropolitan Area with a population of 50,000 or greater; or
C. be located entirely within an Indian Reservation.

(2) Eligibility Requirements:

i. An area where at least 30 percent of the eligible residents have incomes that are less than the national poverty level;

ii. An area where the unemployment rate at least 1.5 times the national average, as determined by the U.S. Bureau of Labor Statistics; and

iii. Such additional requirements as may be specified by the CDFI Fund in the applicable NOFA.

Validations for these criteria are included in the functionality of CIMS5.

7.4.3 How to Create and Manage Target Market Maps

Users can use CIMS5 to create new maps for Target Markets, edit existing Target Market maps, or delete maps that are no longer needed.

1. Login into AMIS. Navigate to the Program Profile for your Organization and click the link for the CIMS Mapping Tool. CIMS5 will open embedded within the AMIS screen.

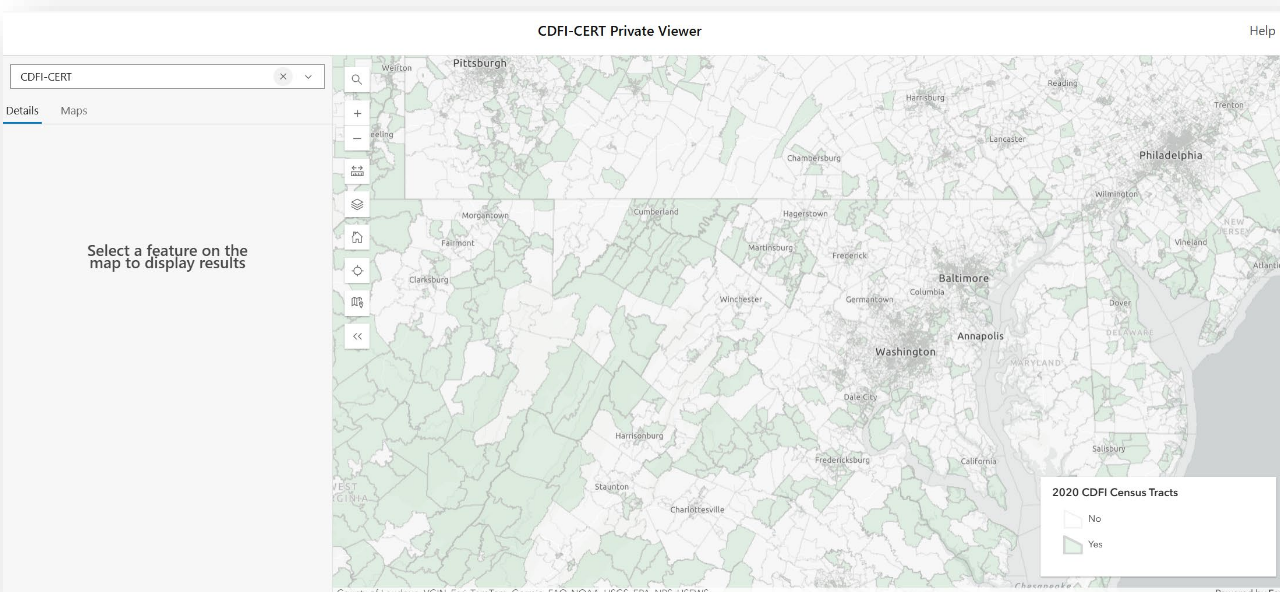


Figure 52: CIMS Mapping Tool

2. Zoom in on an area of interest then click the Maps tab.

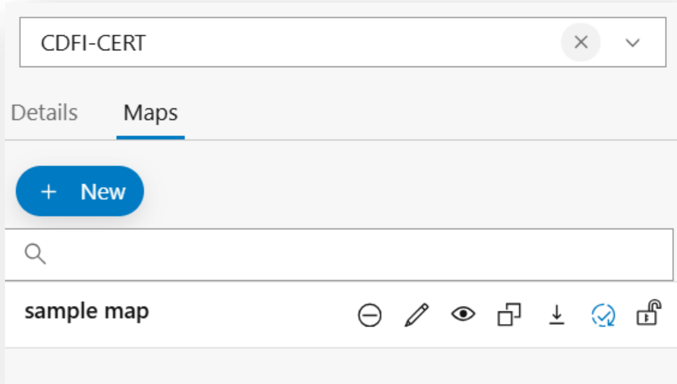


Figure 53: Maps Tab

3. Click New button and name your Map.

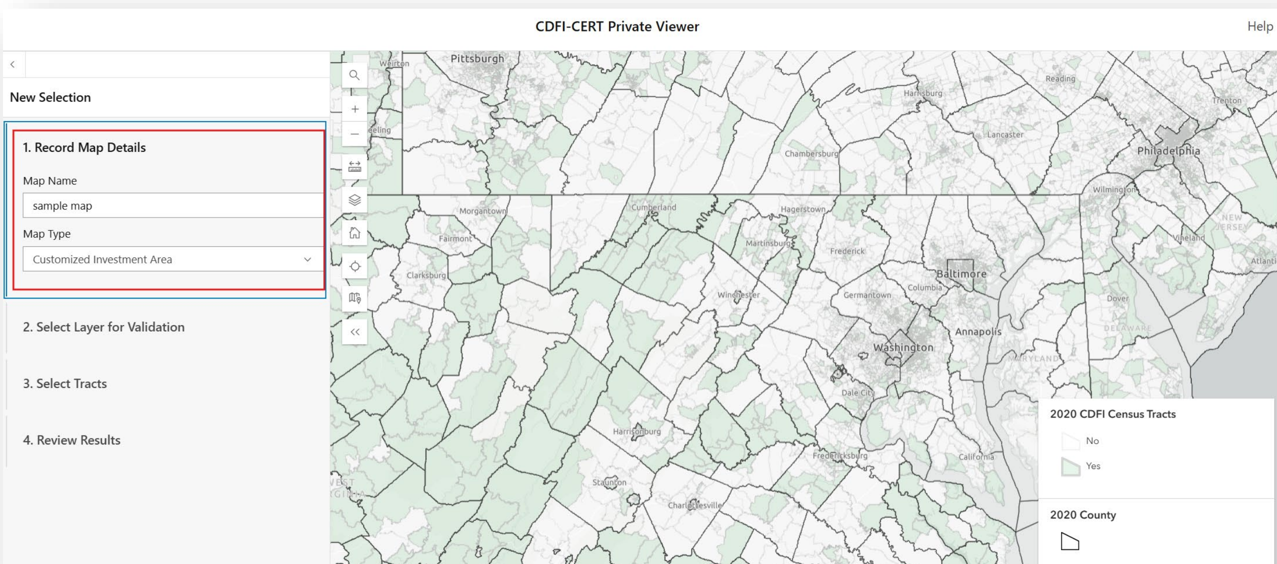


Figure 54: New Selection Map Creation, Map Name

4. Click the second step, select the layers for validation.

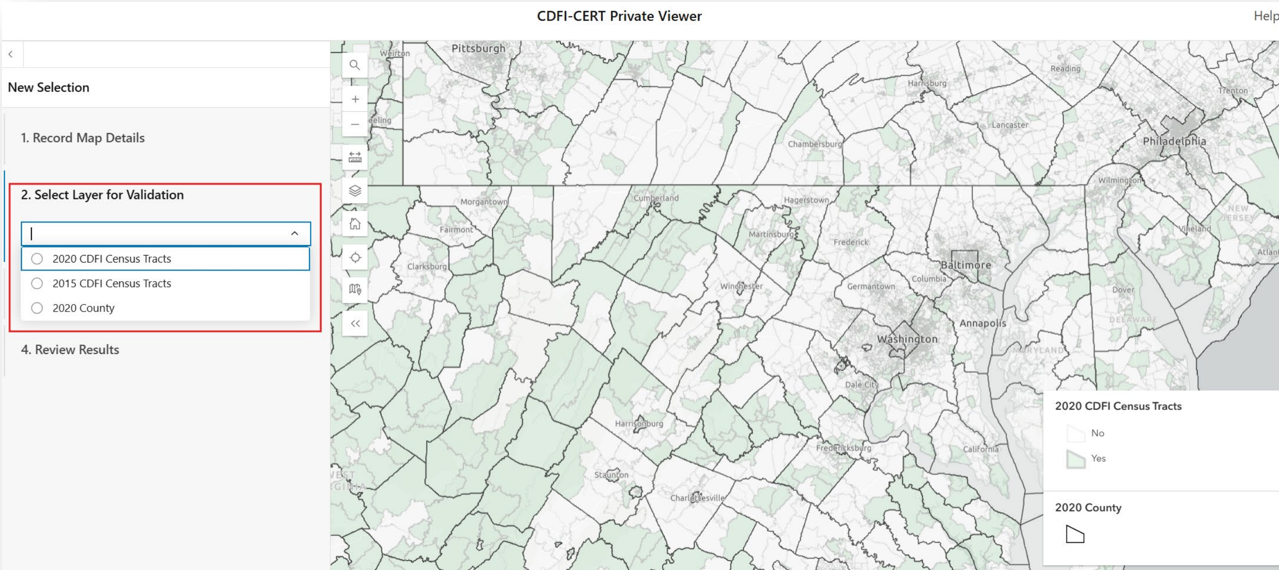


Figure 55: New Selection Map Creation, Select Layers for Validation

5. Click the third step Select Tracts. There are two options to view Census Tracts.

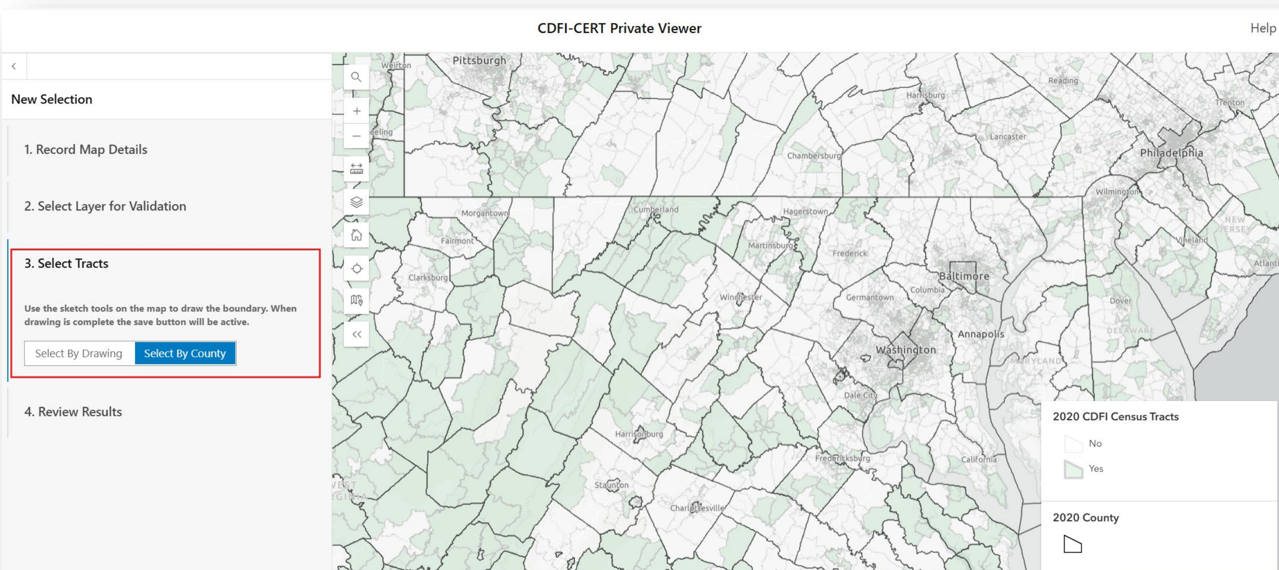


Figure 56: New Selection Map Creation, Select Tracts

Click on the Select By County option. This will turn on the County layer which will show all the Counties on the map. Click on a county and the selected county will be highlighted in yellow. To select multiple counties, click on the counties and it will highlight all counties selected. To unselect a county, click on the highlighted county once.

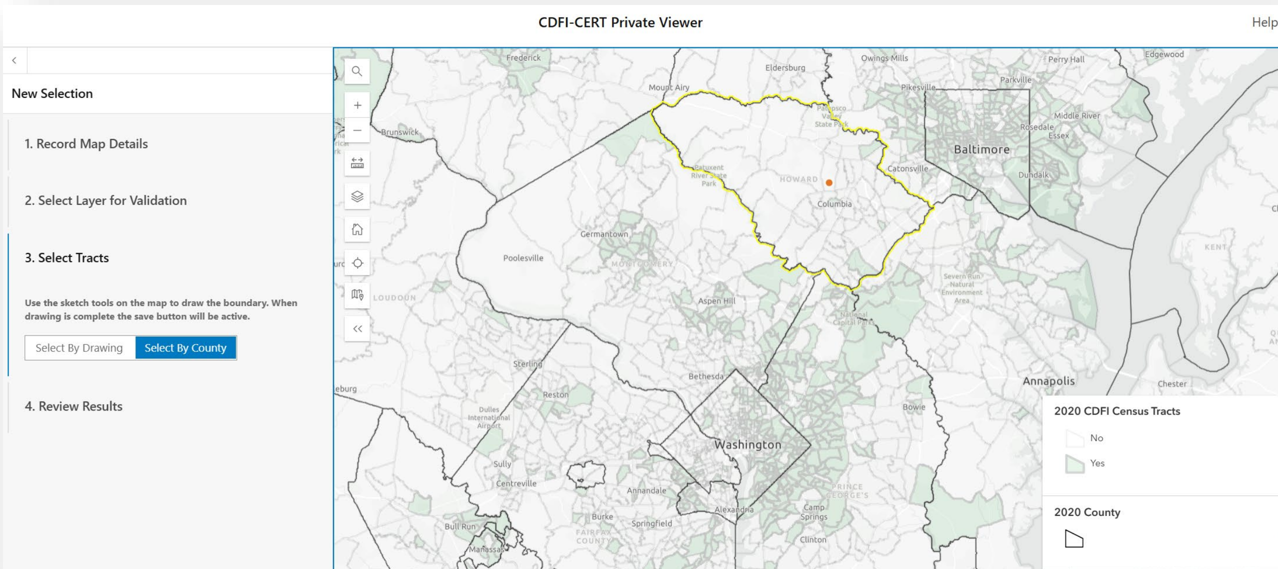


Figure 57: New Selection Map Creation, Select By County

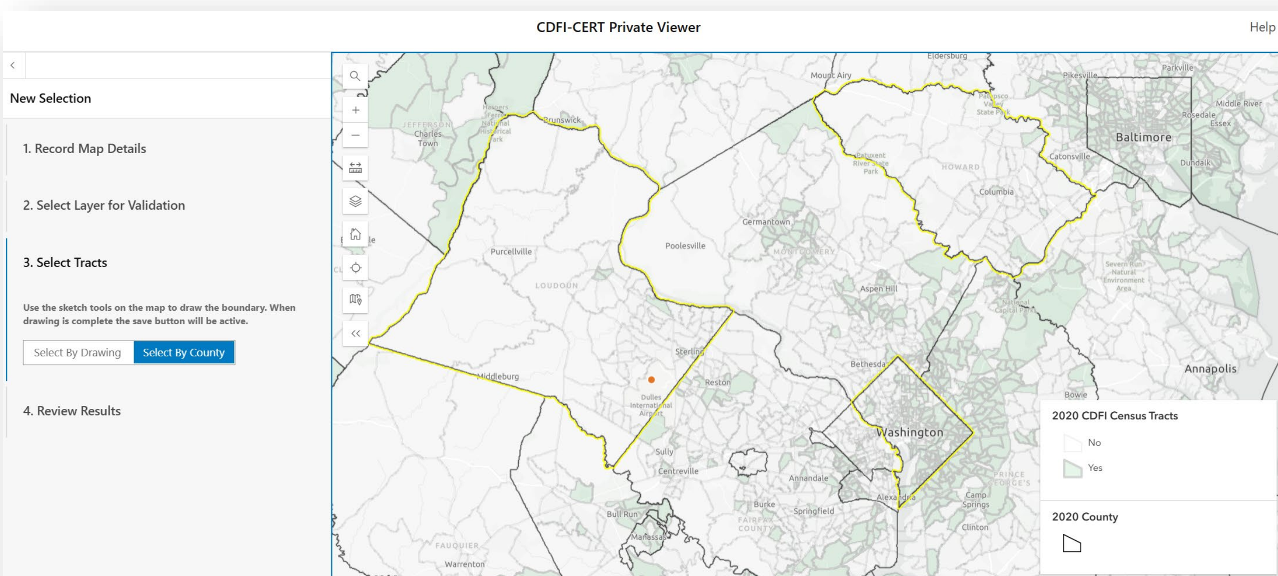


Figure 58: Multiple County Selection

Click on the second option, Select By Drawing. This option will open a drawing tool bar (top right). Select the Draw a Polygon tool and draw a figure on the map. The drawn boundary will be highlighted in purple.

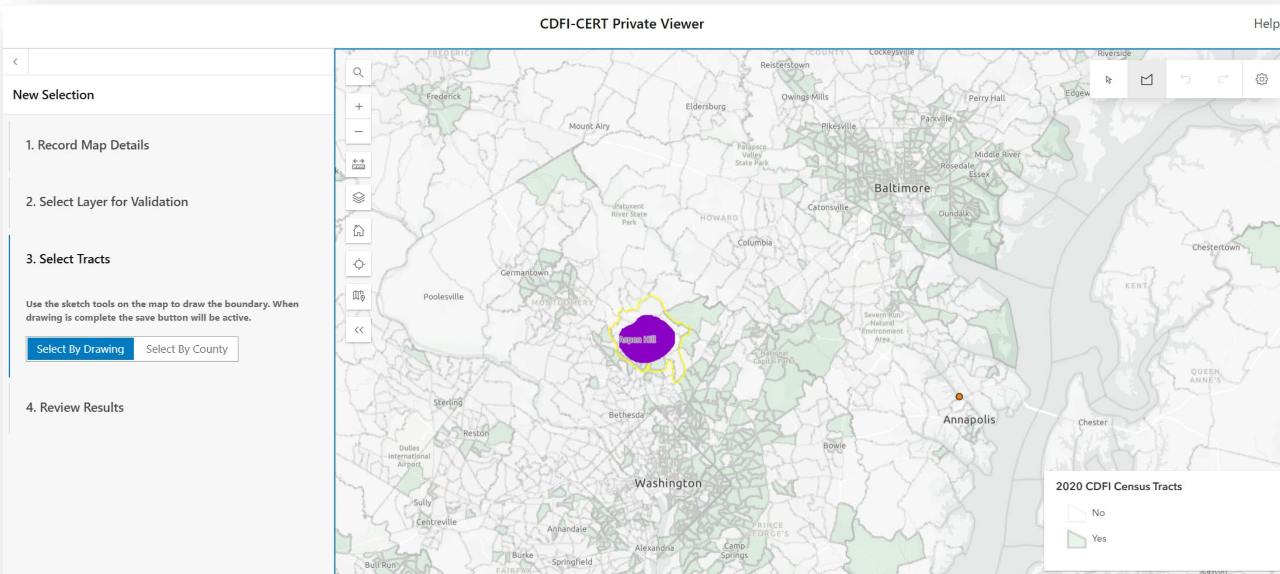


Figure 59: New Selection Map Creation, Select By Drawing

6. Once complete with your drawn shape or selected county, click the fourth step, Review Results. Within this step you can review all the census tracts obtained from the drawn boundary or selected County by clicking on the drop-down list. When you're finished, click Save.

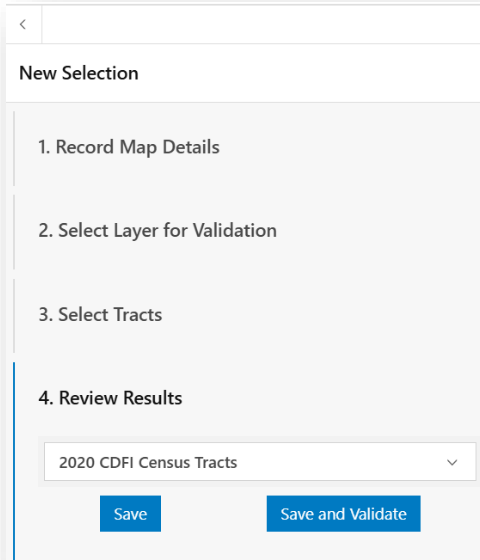


Figure 60: New Selection Map Creation, Review Results

7. Click the pencil to the right of your saved map and choose the Save and Validate button, within step four, to perform the validation on the selected map.

8. Once the analysis is complete, view results in the Results tab. You have the option to Print the analysis or save it as a PDF document.

7.4.4 Validating Maps and Generating PDF Report

1. To validate a map, create a map by following steps 3 to 6 from the previous section. On the 4th section, Review Results, click on Save and Validate. Depending on how many counties were selected/drawn, it could take a moment. Once validation is complete, you will be navigated back to the Maps tab.

Note: If validation passed, there will be a green check mark located on the map name. If validation failed, there will be a flag icon located on the map name.

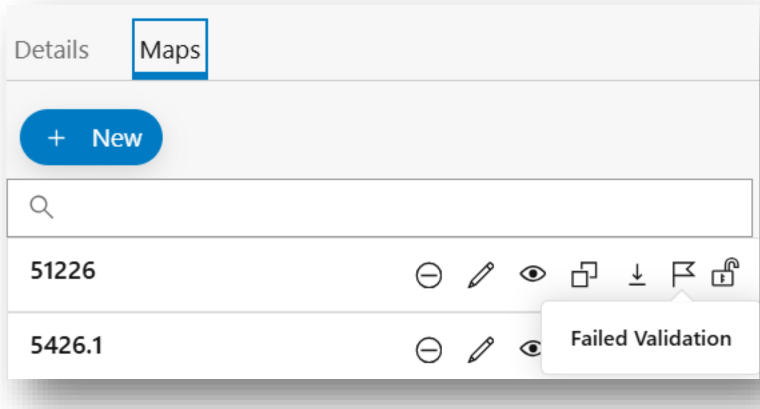


Figure 61: Failed validation

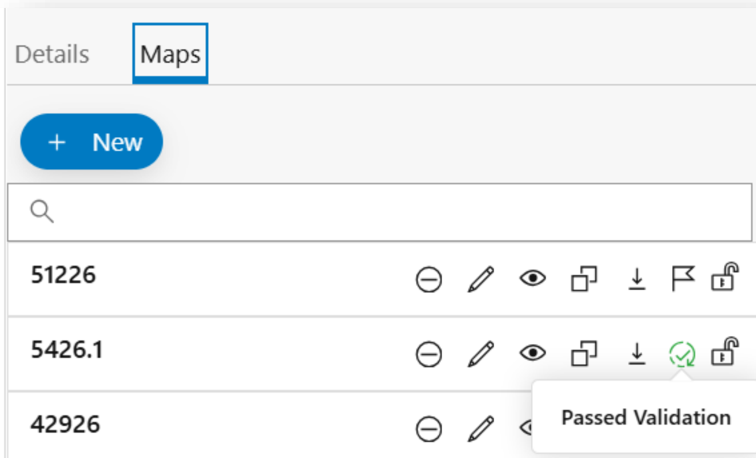


Figure 62: Passed validation

2. Once validation is complete, a PDF will be downloaded. Navigate to your Download folder to open the Validation PDF for your map.

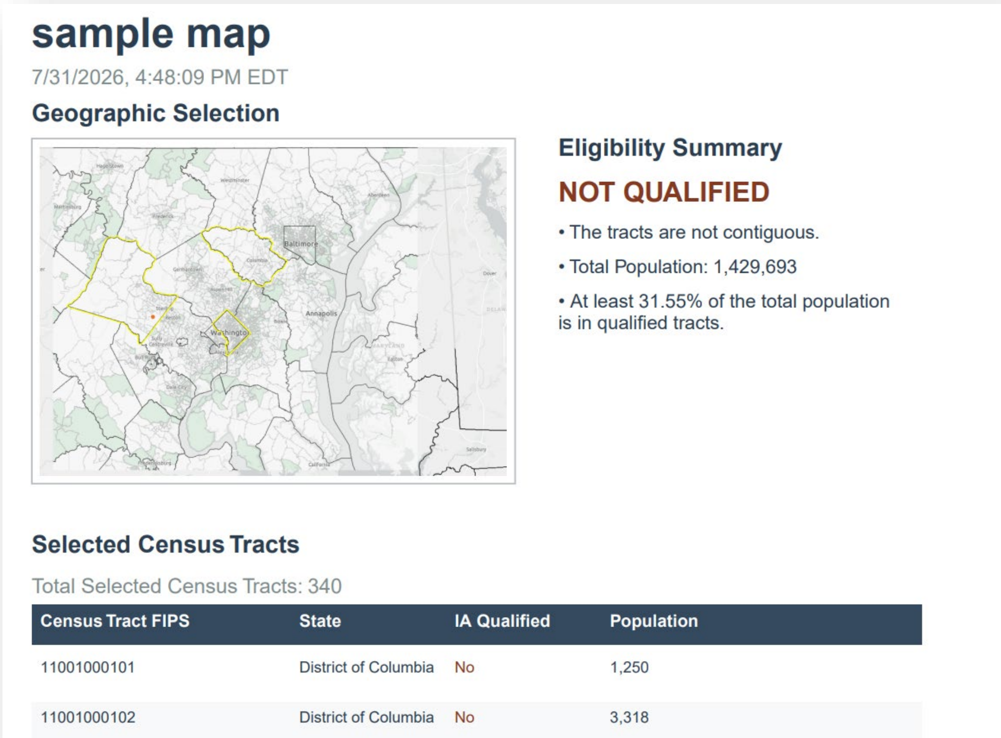


Figure 63: Validation Results

3. To revalidate your map, click the blue Validate button. This will initiate the validation process again. Once validation is complete, you will be able to download the validation PDF.

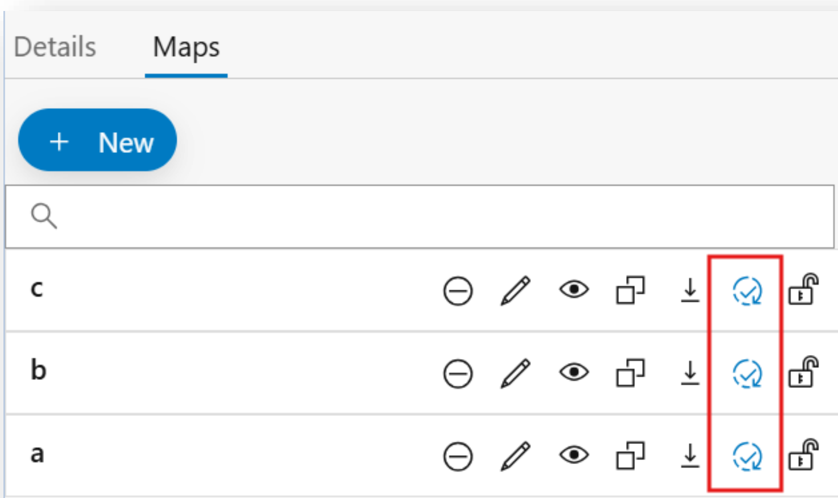


Figure 64: Revalidation button

7.5 Bulk Address Geocoding

1. In AMIS, open the dropdown on the right-hand side of the page. Select TLR Download/Upload/Certify option.

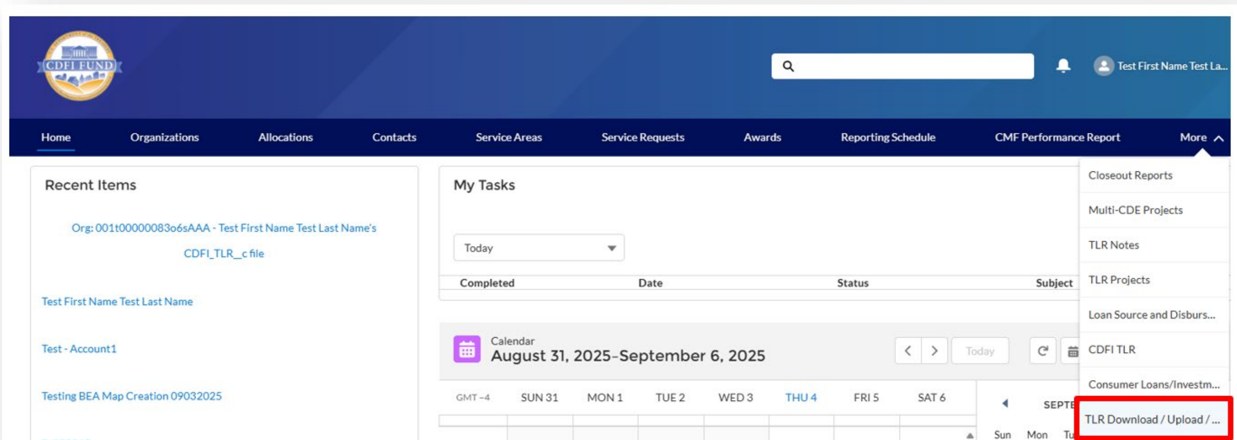


Figure 59: AMIS Homepage - More dropdown - TLR Download, Upload, or Certify option

2. On the TLR Download/Upload/Certify page, your organization will be defaulted in the Organization Name field. If you are a contact for another Organization, you can change the Organization by using the "Change Organization" button.

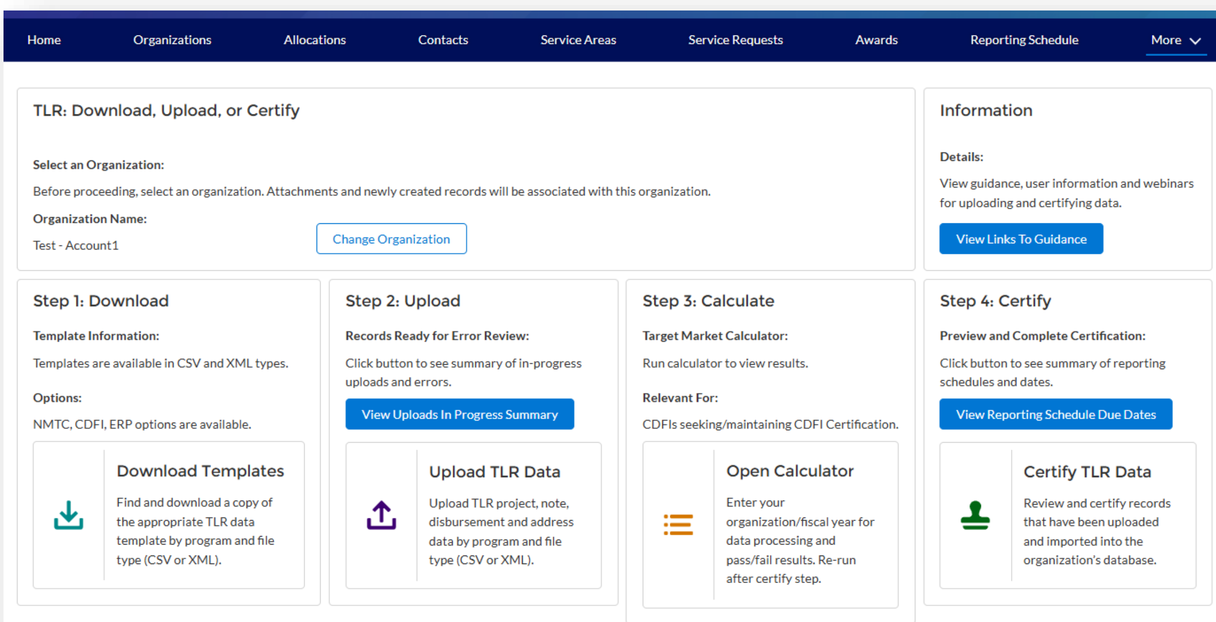


Figure 60: TLR Download, Upload, or Certify page

3. Step 1: Download will provide the templates that are available to download a copy to be used to upload. Click the Download Templates icon.

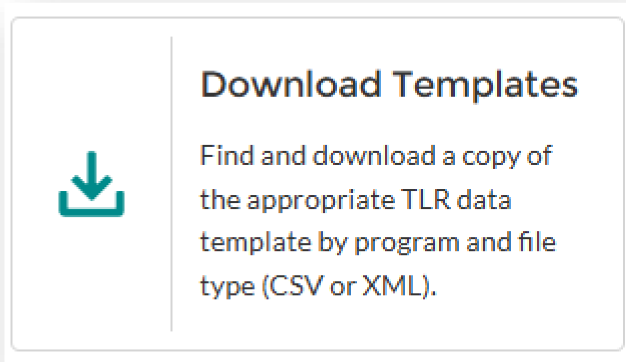


Figure 61: TLR Download, Upload, or Certify page - Step: 1 Download button

4. Click the Geocoding Address CSV Template link under the CDFI tab, CDFI CSV Templates heading.

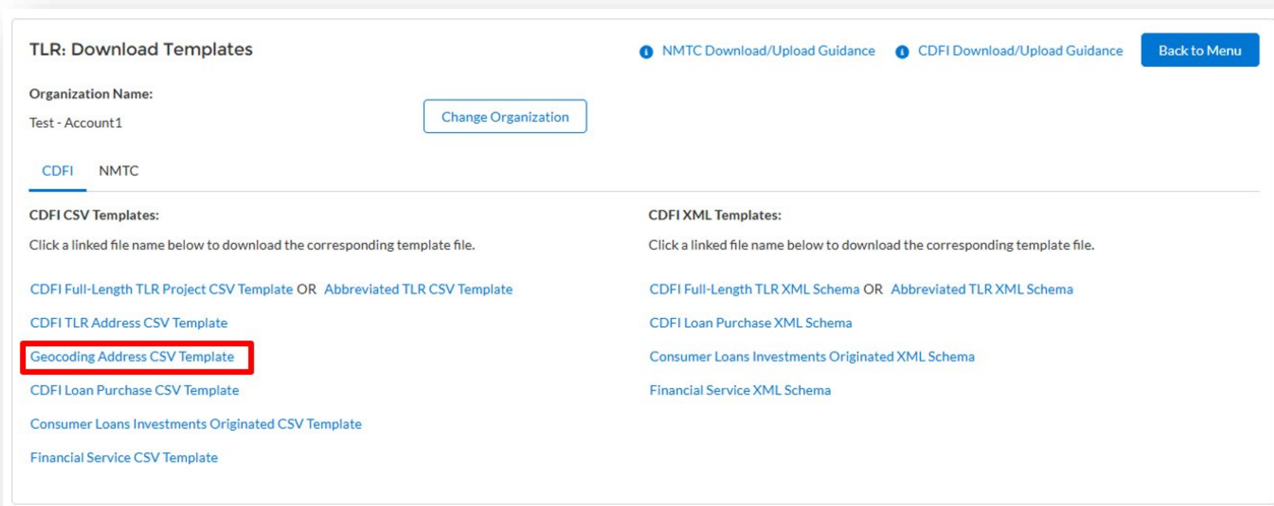


Figure 62: Geocoding Address CSV Template link

5. Open the Excel bulk address import file, this is the file that will need to update with the address entries for each import. The file includes the following text fields:

- Field Label
- Census Vintage Year
- Street Address 1
- City
- State
- Zip Code
- Generic Field 1

- Generic Field 2
- Generic Field 3
- Generic Field 4
- Generic Field 5

6. The five generic fields may contain any data the user wants included in the geocoding output results for that address entry.

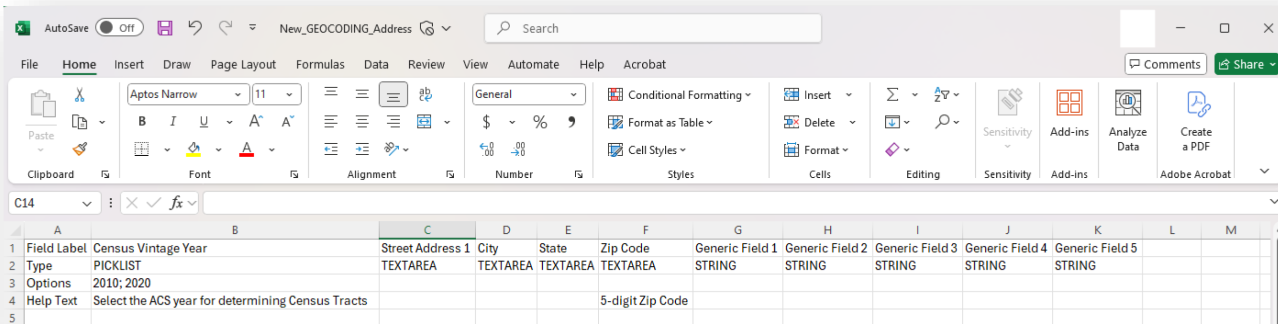


Figure 63: Sample CSV File

7. Start to enter the addresses to be geocoded on line five in column B of the template. Make sure you do not enter any information into Column A. Do not change any information in rows 1 – 4. Begin entering your records in row 5.

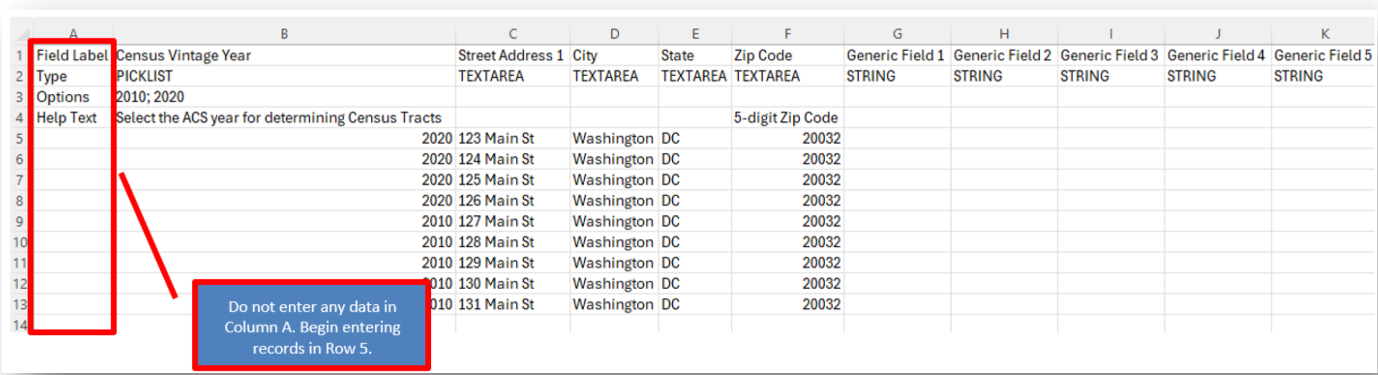


Figure 64: Sample Completed CSV File

8. Once all the entries have been made, save the Excel file and return to the Organization TLR Download/Upload/Certify page. Click Step 2: Upload button.

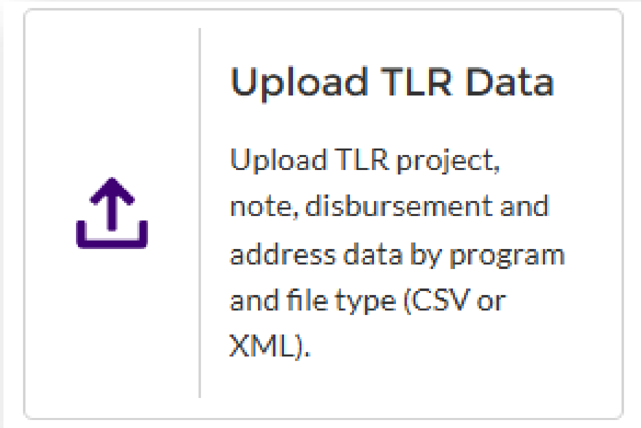


Figure 65: TLR Download, Upload, or Certify page - Step: 2 Upload TLR Data button

9. Click the Upload Geocoding Address CSV link under the CDFI tab, CDFI CSV Upload heading. Geocoding Address CSV Template link

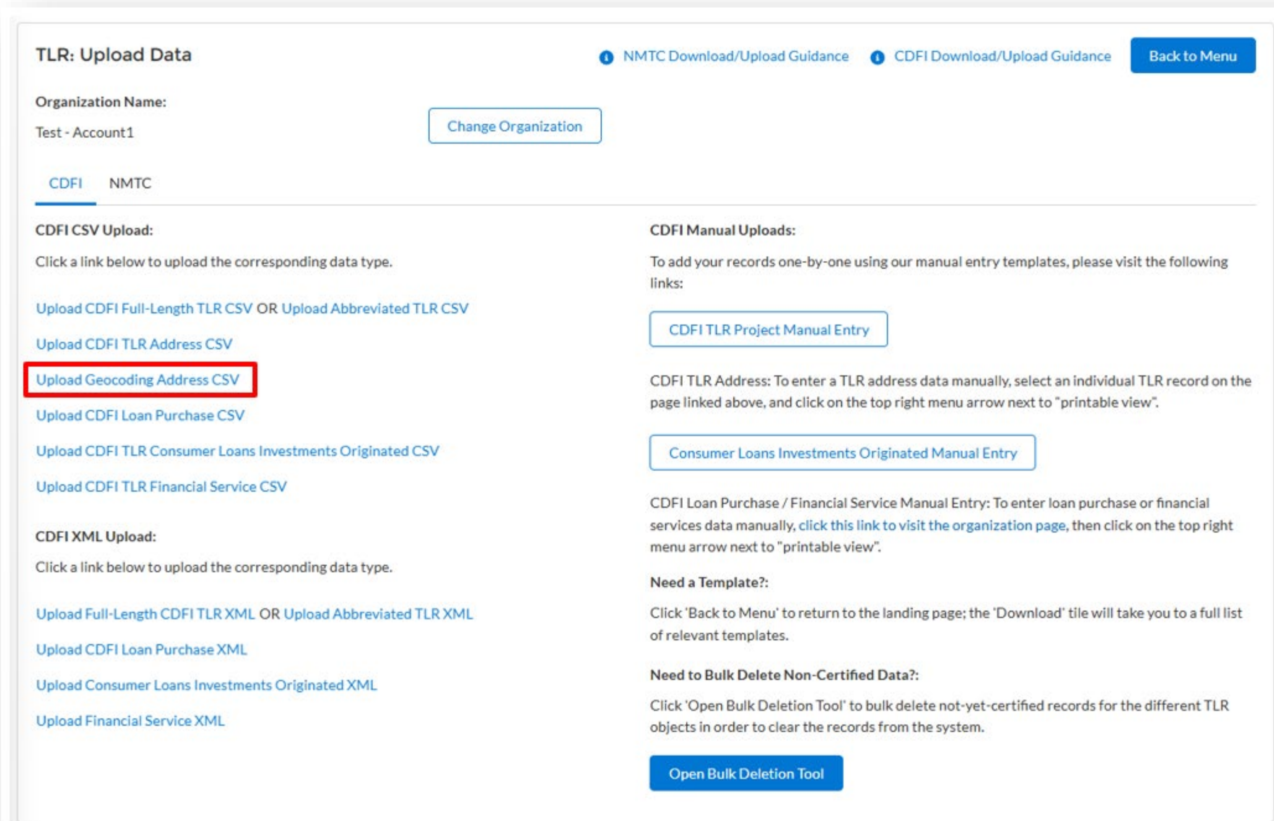


Figure 66: Upload Geocoding Address CSV link

10. The Add Files for Processing upload page will display. Click the “Upload Files” button or drop files into the upload area.

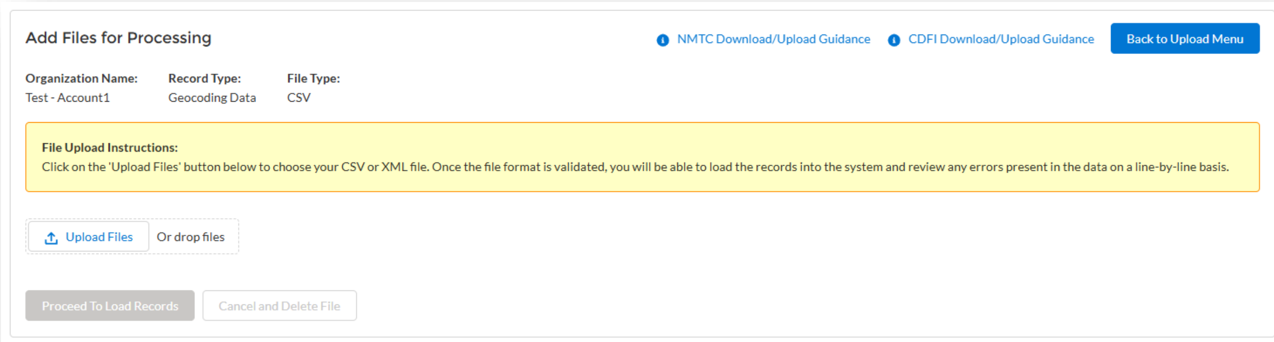


Figure 67: Add Files for Processing upload page

11. After you upload the file, the page will provide a validated green message. (If there were errors you would receive a red message informing you the file was not validated.) Then click the Proceed To Load Records button.

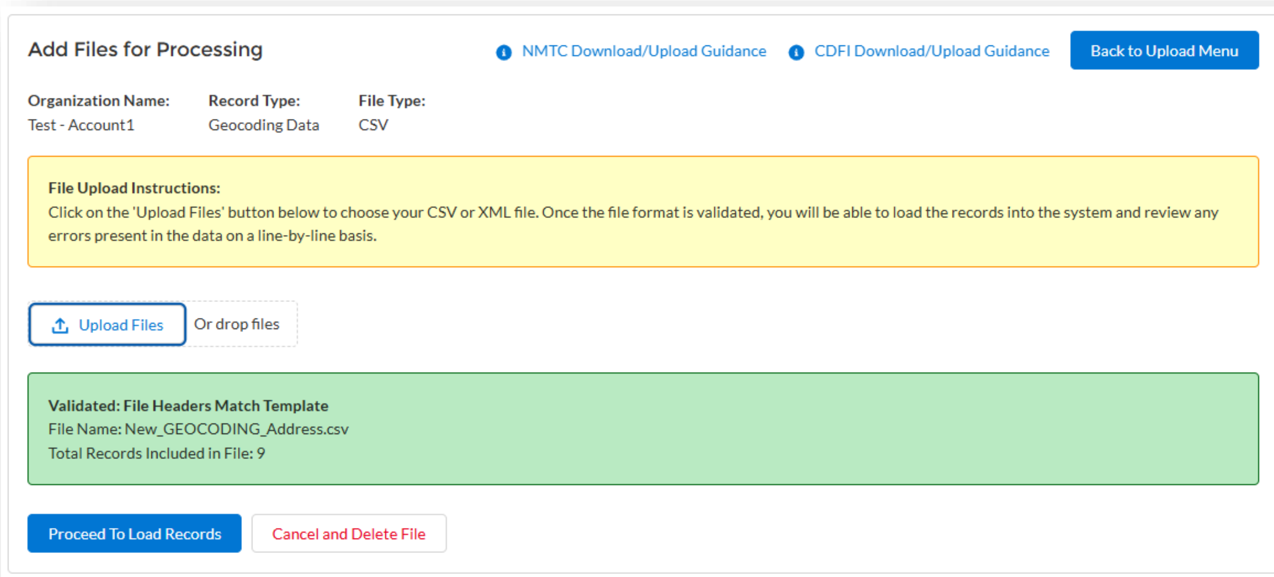


Figure 68: Green Validated Message -- Proceed to Load Records

12. Once all records are loaded, you will receive the following message, click Continue.

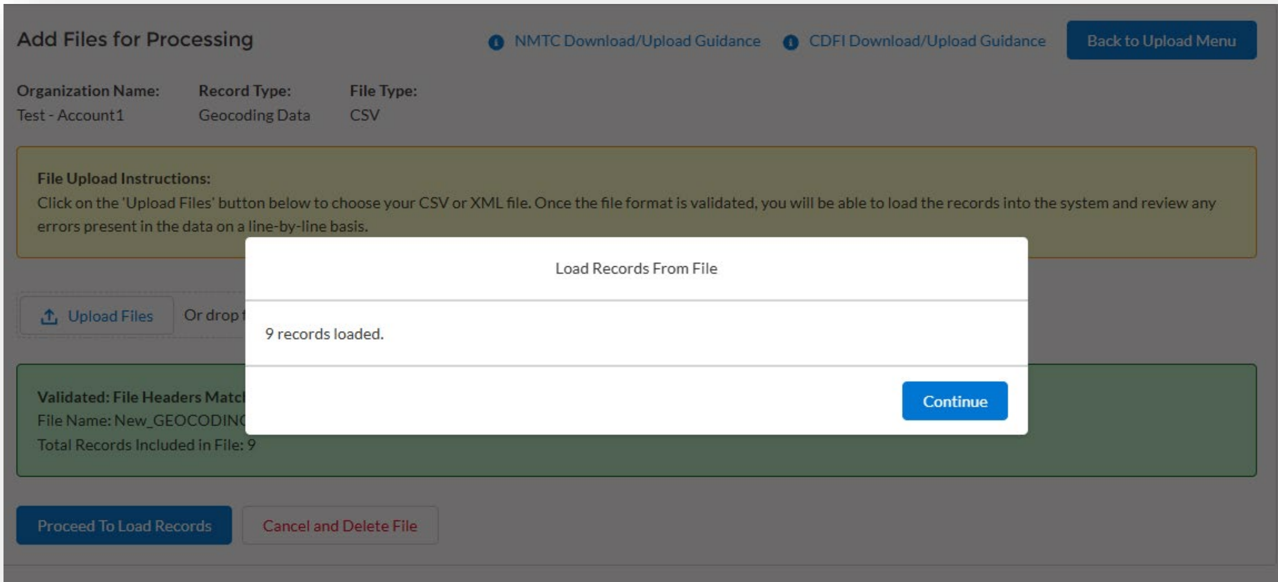


Figure 69: Records Loaded Message

13. Click the Check for Errors button, for the system to validate the address entries and notify you if there are any errors in your data.

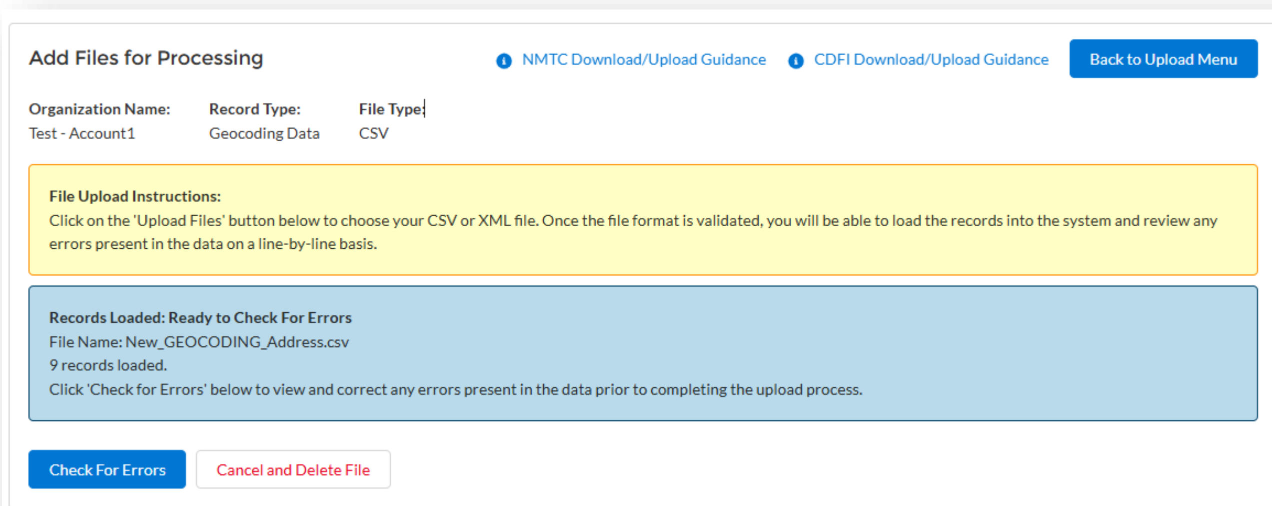


Figure 70: File Validation

14. The system will check for errors and then display the notice of no errors and confirming the total number of records to create.

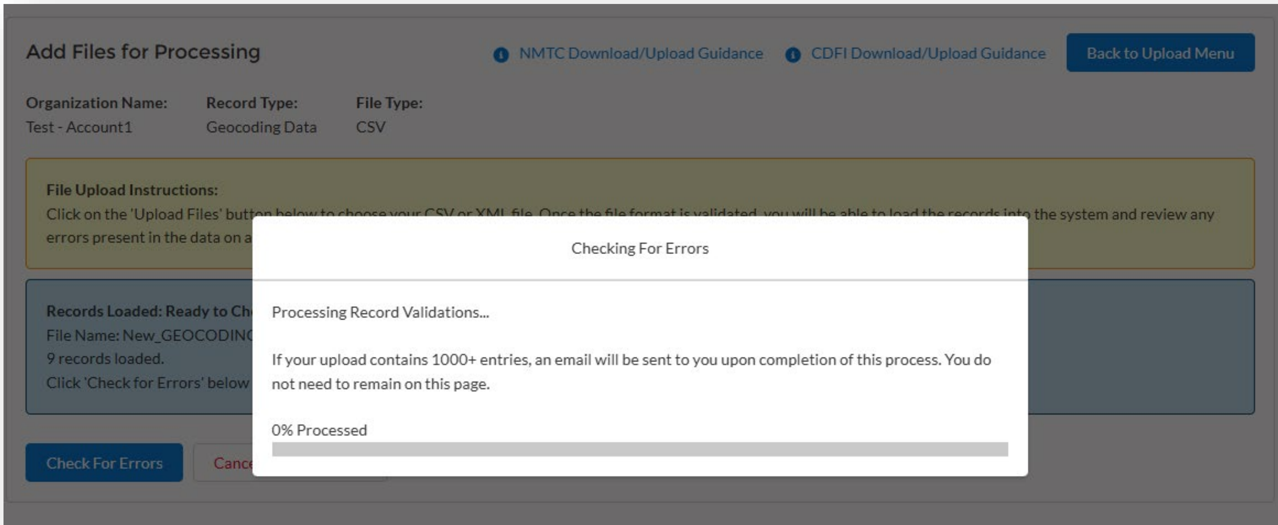


Figure 71: Checking for Errors Message

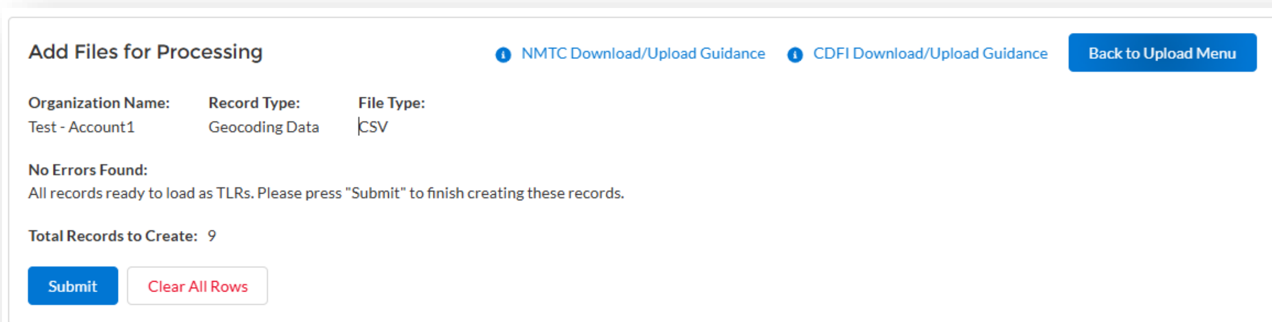


Figure 72: Confirmation on the Number of Records to Create

15. Click the Submit button to begin the process.

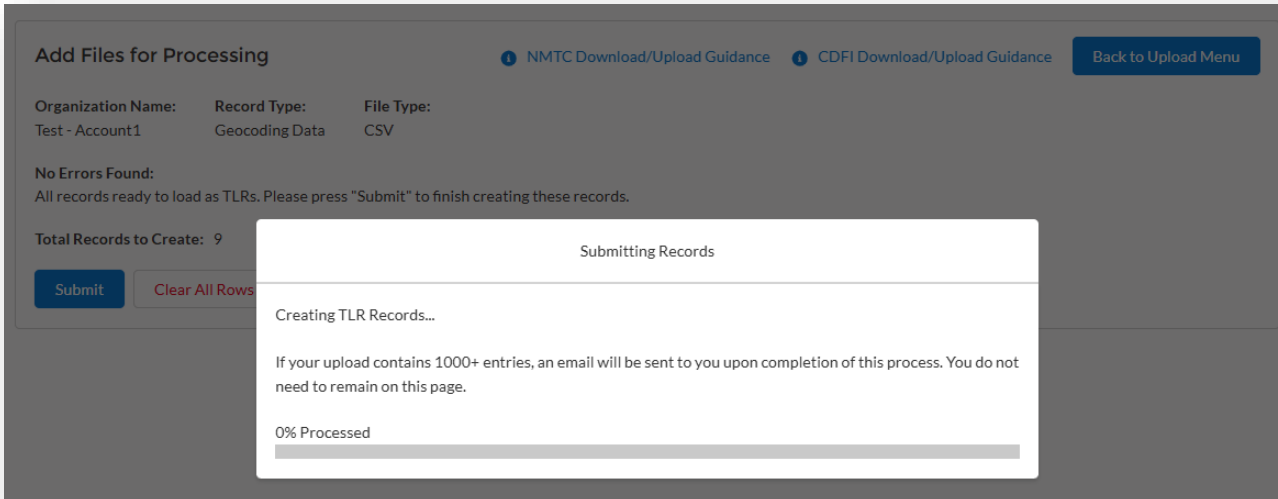


Figure 73: Submitting Records Message

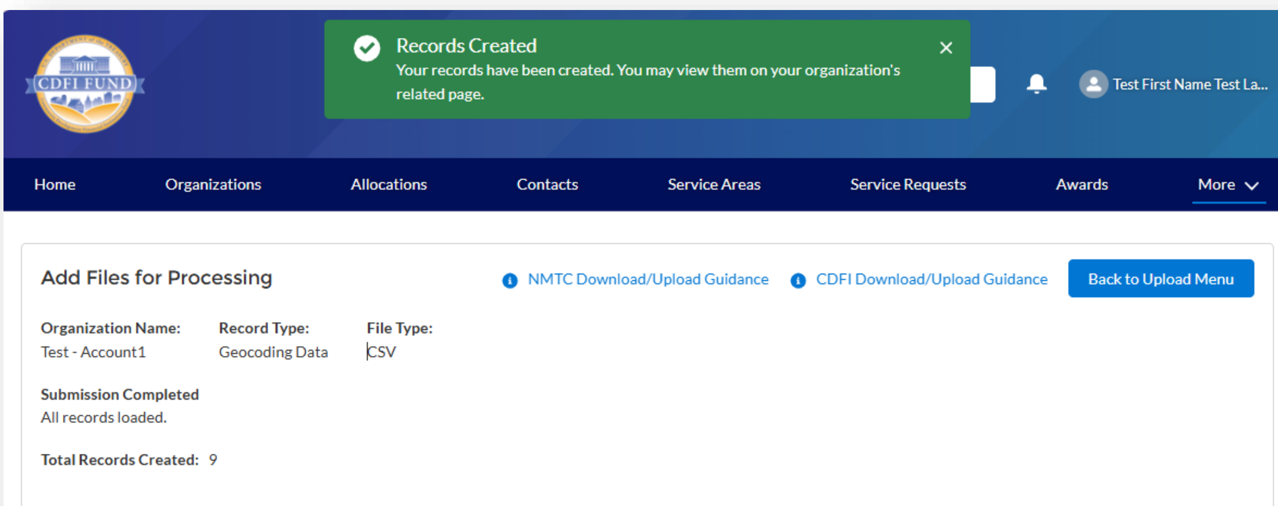
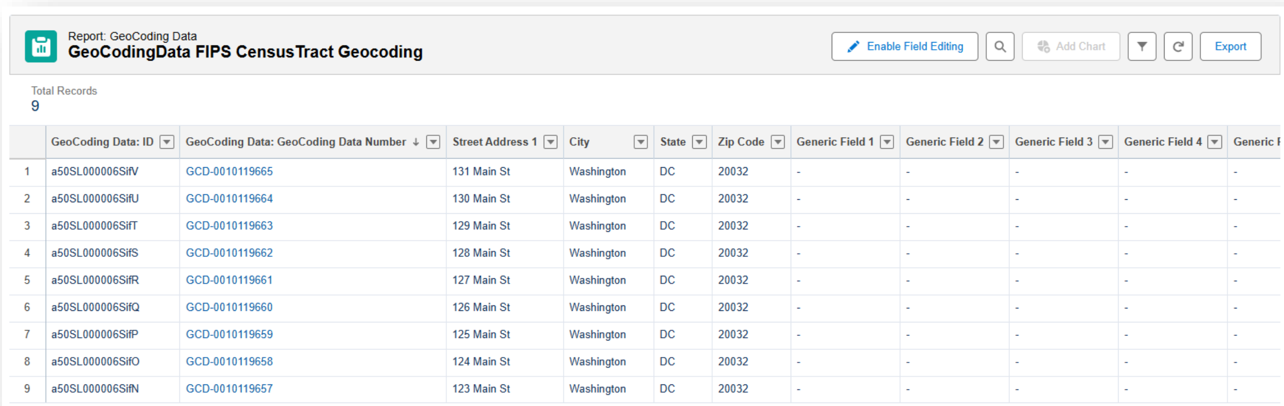


Figure 74: Geocoding Records Created Successfully Message

16. Navigate to your Organization page and scroll to the bottom of the page to the Custom Links. Click the GeoCodingData FIPS Export Report link.

Figure 75: GeoCodingData FIPS Export Report

17. View a Geocoding Data record, click the GeoCoding Data Number link to view your results. An entry will exist for each entry successfully geocoded.



	GeoCoding Data: ID	GeoCoding Data: GeoCoding Data Number ↓	Street Address 1	City	State	Zip Code	Generic Field 1	Generic Field 2	Generic Field 3	Generic Field 4	Generic F
1	a50SL000006SifV	GCD-0010119665	131 Main St	Washington	DC	20032	-	-	-	-	-
2	a50SL000006SifU	GCD-0010119664	130 Main St	Washington	DC	20032	-	-	-	-	-
3	a50SL000006SifT	GCD-0010119663	129 Main St	Washington	DC	20032	-	-	-	-	-
4	a50SL000006SifS	GCD-0010119662	128 Main St	Washington	DC	20032	-	-	-	-	-
5	a50SL000006SifR	GCD-0010119661	127 Main St	Washington	DC	20032	-	-	-	-	-
6	a50SL000006SifQ	GCD-0010119660	126 Main St	Washington	DC	20032	-	-	-	-	-
7	a50SL000006SifP	GCD-0010119659	125 Main St	Washington	DC	20032	-	-	-	-	-
8	a50SL000006SifO	GCD-0010119658	124 Main St	Washington	DC	20032	-	-	-	-	-
9	a50SL000006SifN	GCD-0010119657	123 Main St	Washington	DC	20032	-	-	-	-	-

Figure 76: View GeoCoding Data Records

NOTE: Geocoded records will be removed after one week.

18. The detailed results for that address entry will display.

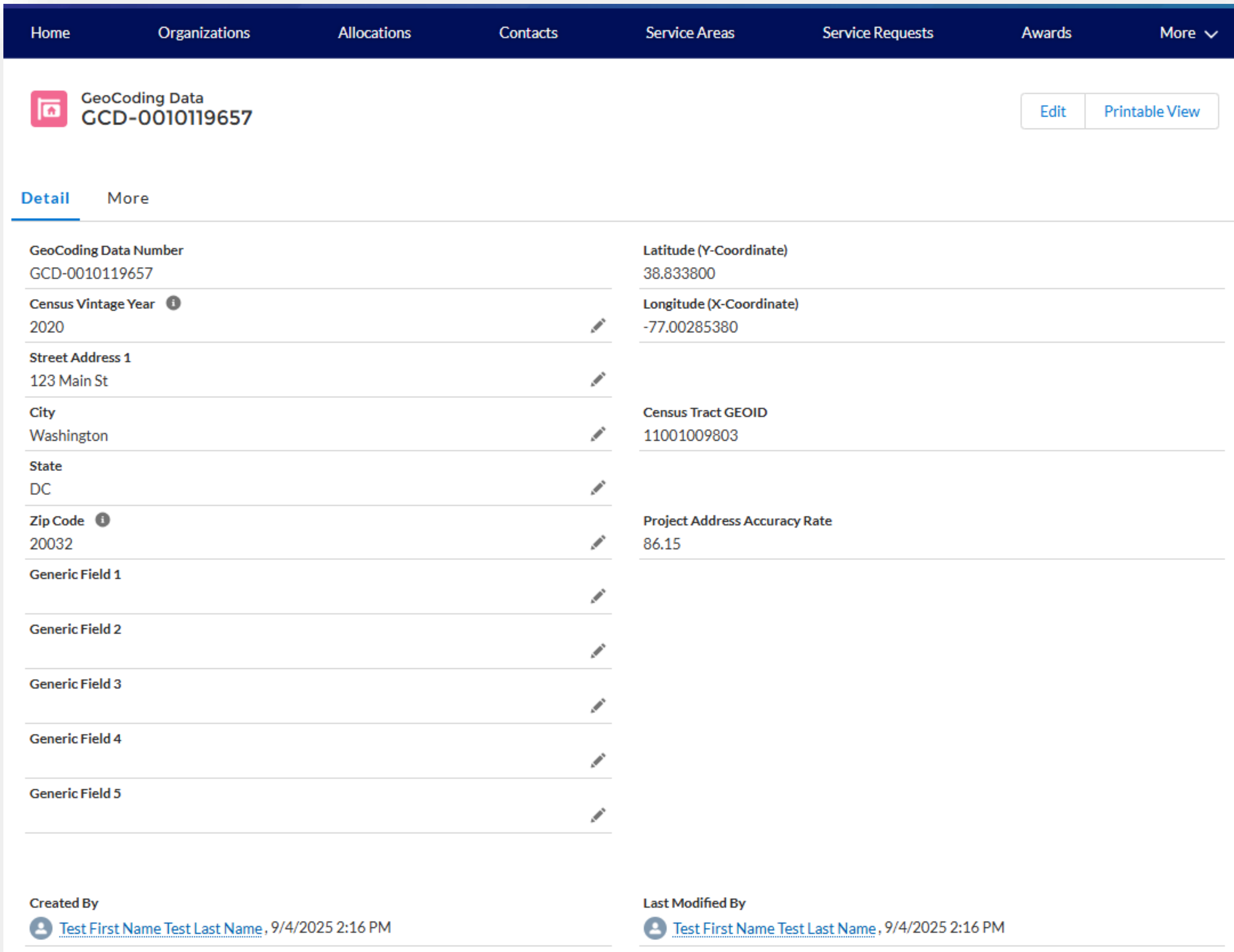


Figure 77: GeoCoding Detail Page

19. To export your results, Select the Export button from the GeoCodingData FIPS Export Report page. User access to object data will be via report only. Click Export.

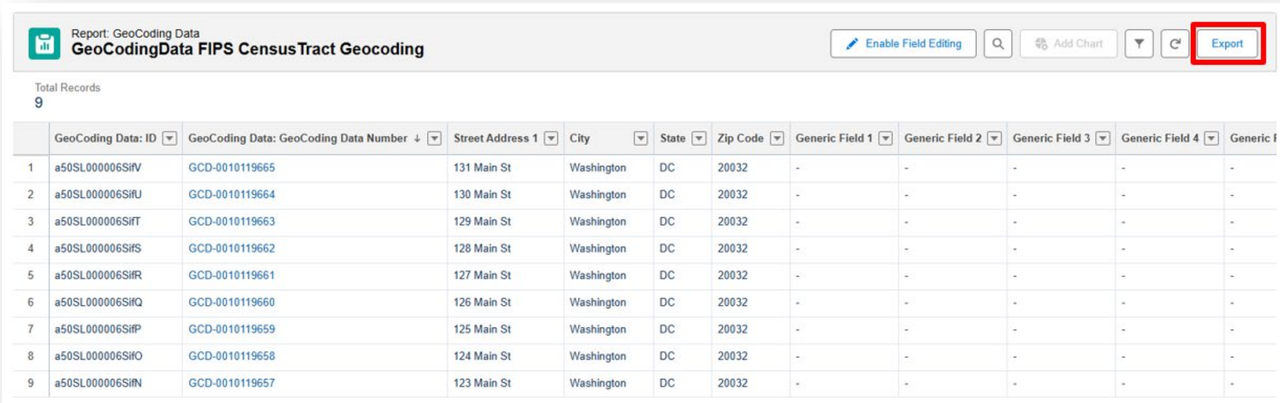


Figure 78: GeoCodingData FIPS Export Report - Export Button

20. Choose the export view, formatted or details only. Click the Export button.

- Formatted Report - Export the report, including the report header, groupings, and filter settings. The available format is .xlsx
- Details Only - Export only the detail rows. Use this to do further calculations or for uploading to other systems. The available formats are .xls, .xlsx, and .csv

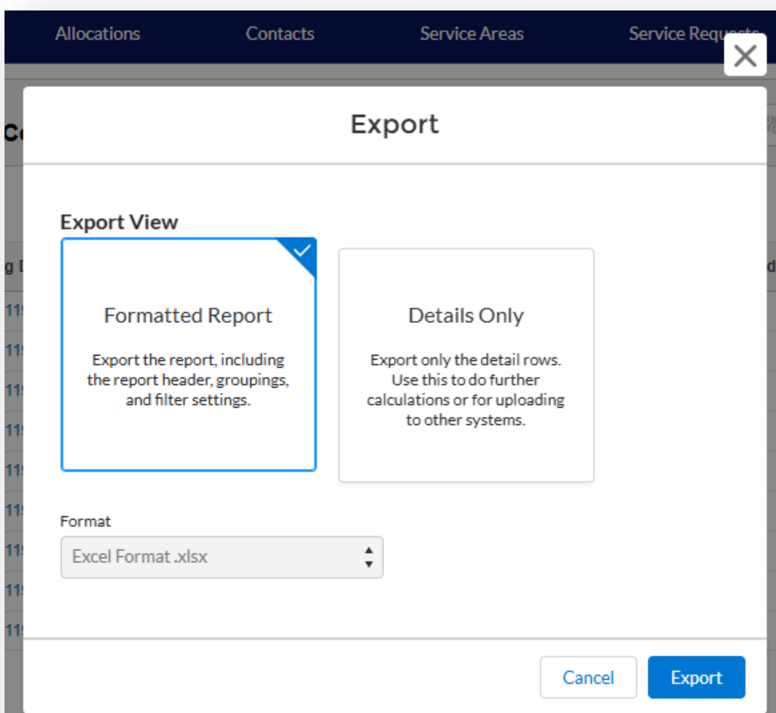
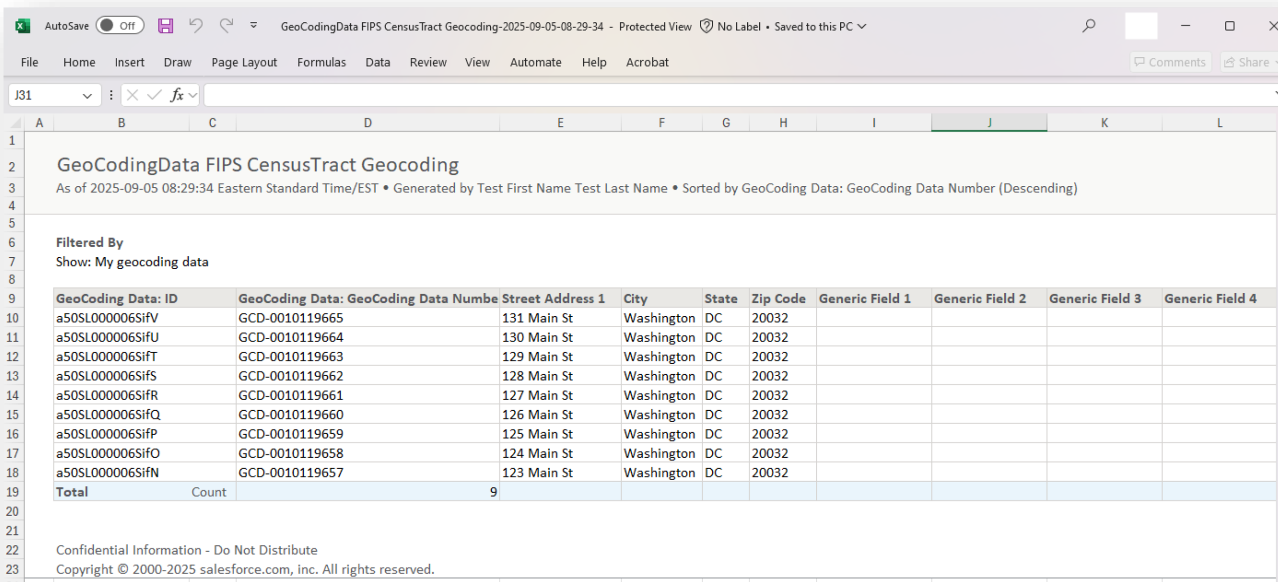


Figure 79: Export popup with Button

21. The geocoding output will be exported to Excel. The output will include the following fields:

- GeoCoding Data: ID
- GeoCoding Data: GeoCoding Data Number
- Street Address 1
- City
- State
- Zip Code
- Generic Field 1
- Generic Field 2
- Generic Field 3
- Generic Field 4
- Generic Field 5
- Latitude (Y-Coordinate)
- Longitude (X-Coordinate)
- Census Tract GEOID
- Project Address Accuracy Rate



GeoCodingData FIPS CensusTract Geocoding

As of 2025-09-05 08:29:34 Eastern Standard Time/EST • Generated by Test First Name Test Last Name • Sorted by GeoCoding Data: GeoCoding Data Number (Descending)

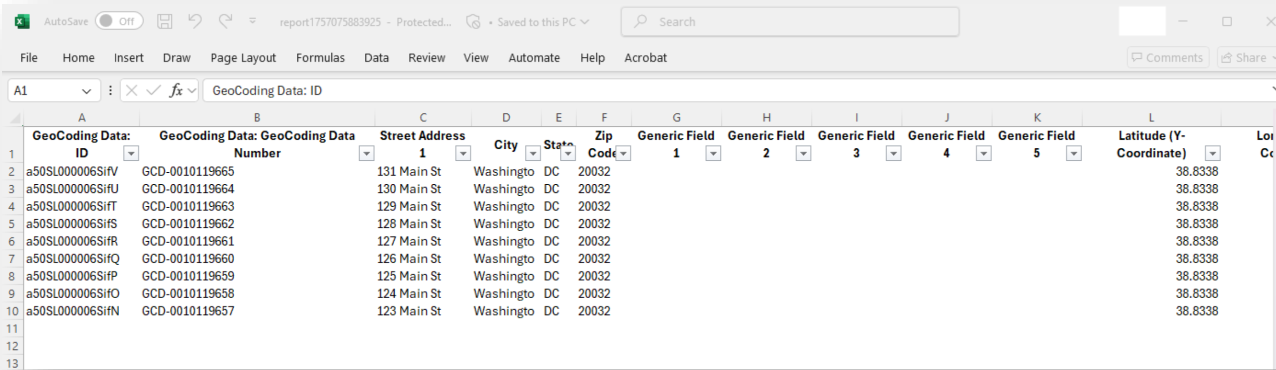
Filtered By

Show: My geocoding data

GeoCoding Data: ID	GeoCoding Data: GeoCoding Data Numbe	Street Address 1	City	State	Zip Code	Generic Field 1	Generic Field 2	Generic Field 3	Generic Field 4
a50SL000006SifV	GCD-0010119665	131 Main St	Washington	DC	20032				
a50SL000006SifU	GCD-0010119664	130 Main St	Washington	DC	20032				
a50SL000006SifT	GCD-0010119663	129 Main St	Washington	DC	20032				
a50SL000006SifS	GCD-0010119662	128 Main St	Washington	DC	20032				
a50SL000006SifR	GCD-0010119661	127 Main St	Washington	DC	20032				
a50SL000006SifQ	GCD-0010119660	126 Main St	Washington	DC	20032				
a50SL000006SifP	GCD-0010119659	125 Main St	Washington	DC	20032				
a50SL000006SifO	GCD-0010119658	124 Main St	Washington	DC	20032				
a50SL000006SifN	GCD-0010119657	123 Main St	Washington	DC	20032				
Total Count	9								

Confidential Information - Do Not Distribute

Figure 80: Sample Formatted Report Exported File



GeoCoding Data: ID	GeoCoding Data: GeoCoding Data Number	Street Address 1	City	State	Zip Code	Generic Field 1	Generic Field 2	Generic Field 3	Generic Field 4	Generic Field 5	Latitude (Y-Coordinate)
a50SL000006SifV	GCD-0010119665	131 Main St	Washingto	DC	20032						38.8338
a50SL000006SifU	GCD-0010119664	130 Main St	Washingto	DC	20032						38.8338
a50SL000006SifT	GCD-0010119663	129 Main St	Washingto	DC	20032						38.8338
a50SL000006SifS	GCD-0010119662	128 Main St	Washingto	DC	20032						38.8338
a50SL000006SifR	GCD-0010119661	127 Main St	Washingto	DC	20032						38.8338
a50SL000006SifQ	GCD-0010119660	126 Main St	Washingto	DC	20032						38.8338
a50SL000006SifP	GCD-0010119659	125 Main St	Washingto	DC	20032						38.8338
a50SL000006SifO	GCD-0010119658	124 Main St	Washingto	DC	20032						38.8338
a50SL000006SifN	GCD-0010119657	123 Main St	Washingto	DC	20032						38.8338

Figure 81: Sample Details Only Exported File

8 Global Search

Global Search allows users to search all AMIS data elements/fields. It uses search options, search terms, and wildcards and operators to refine your search. Just like any search engine, Global Search keeps track of your search terms and how often you use them and arranges the search results accordingly. Search results for the objects you use most frequently appear at the top of the list.

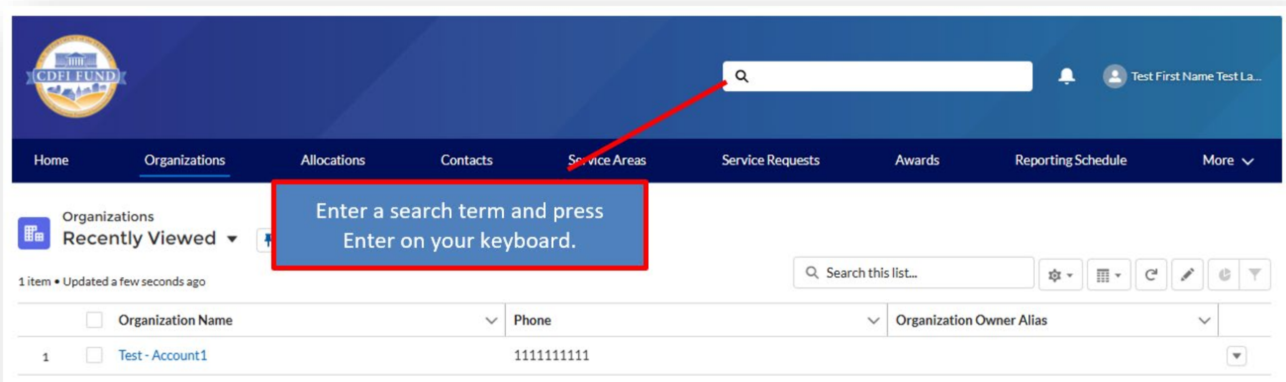


Figure 82: AMIS Global Search Screen

Wildcards and Boolean operators allow you to refine or search for partially matching terms.

8.1 Wildcards

AMIS allows you to search using the asterisk symbol (*) and question mark symbol (?) as wildcards.

1. Use the asterisk symbol (*) to match zero or more characters in the middle or end of your search term. For example, comp* finds items like "Explanation of Noncompliance" and "Compliance Report"; 11* finds items with record IDs that have ones. Please note that the search engine searches only for records within your organization.
    a. Enter 11* and click the Search button.

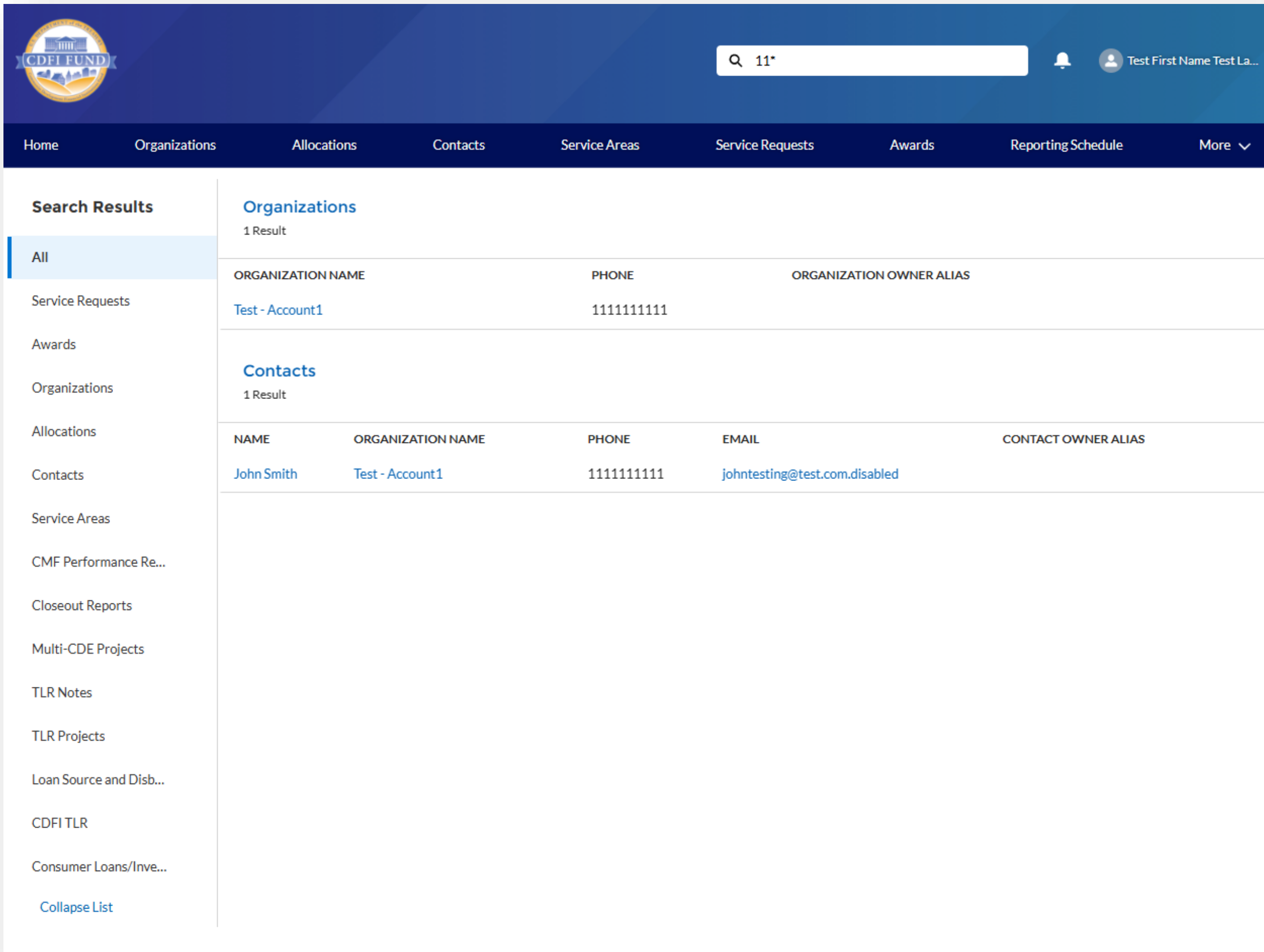


*Figure 83: Search Results for Search by * Symbol*

b. Search using any other search term or text character of your choice followed by *.

8.2 Boolean Operators

You can also use Boolean operators, such as AND, OR, AND NOT, ( ) (parentheses), and " " (quotation marks) to refine search results.

Operator	Description
AND	Finds items that match all of the search terms. For example, "acme AND california" finds items with the word "acme" and the word "california", but not items with only the word "acme". Using AND is optional in most cases, because searching for "acme california" is the same as searching for "acme AND california". If a search doesn't return any results that match all of the terms, the search capability looks for matches by using the OR operator.
OR	Finds items with at least one of the search terms. For example, "acme OR california" finds items with either "acme" or "california" or both.

Operator	Description
AND NOT	Finds items that do not contain the search term. For example, “acme AND NOT california” finds items that have the word “acme” but not the word “california”.
() (parentheses)	Groups search terms together. Grouped search terms are evaluated before other search terms in a character string. For example, “acme AND (california OR meeting)” finds items that contain “acme and california” and items that contain “acme and meeting”.
“ “ (quotation marks)	Finds an exact phrase. For example, a search for "monday meeting" finds items that contain “monday meeting”, but not items that contain “monday afternoon meeting” or “monday's meeting”. The asterisk (*) and question mark (?) function as wildcards when included in a search phrase that is enclosed in quotation marks or when an exact phrase is selected in the search scope.

9 Service Requests

Service Requests (SRs) are the preferred method for CDFI Fund applicants and recipients to submit inquiries and help requests to the CDFI Fund. Unlike email messages or telephone calls, SRs reside in AMIS; and therefore, can be tracked and monitored. Where appropriate, the CDFI Fund will transcribe email messages and telephone calls into SRs to enable their tracking and management.

Within this section, External User refers to a person from a CDFI Fund applicant or recipient organization who has an AMIS login account. CDFI Fund User refers to a CDFI Fund employee or contractor who is completing an SR.

9.1 Service Request Lifecycle

Before exploring the details behind an SR, it is helpful to understand SRs at a higher level. An SR goes through a simple five-step lifecycle from being created to being closed. During this lifecycle, AMIS sends specific email notifications to the External User who created the SR. These lifecycle steps and notifications are introduced below.

	TIP: Add the domain “cdfi.treas.gov” to your Safe Senders List to prevent these notifications from ending up in your Junk or Spam folder.

1. Creating. An External User logs into AMIS and submits a new SR. AMIS creates a unique Service Request Number for the SR and sends an email notification to the External User confirming receipt.
2. Assignment. When the SR is submitted, AMIS assigns it to a CDFI Fund business unit based on information in the SR. SRs then can be assigned to an individual within that business unit or assigned to another business unit if the request requires multiple groups to complete it. Although no email notifications are sent, the External User can simply look at the Service Request Owner field to see the current assignment.
3. Information Exchange. If more information is needed, a CDFI Fund user requests the information by adding a comment to the SR. AMIS sends an email notification instructing the External User to log

into AMIS to view and respond to the question(s). The External User responds by adding another comment or attaching a document to the SR.

4. Validation. Once the SR has been completed, the CDFI Fund User describes the resolution in the SR. AMIS sends an email notification instructing the External User to log into AMIS within 14 days to agree or disagree. The External User responds within the SR with a Yes or No. If No, the External User adds a comment explaining the No response. If No, AMIS also sends an email notification to the External User noting that the SR has been updated and that a member of the CDFI Fund team will be in contact shortly.
5. Closing. AMIS closes the SR if the validation response is Yes. Alternatively, if 14 days pass with no response from the External User, AMIS closes the SR and sends an email notification explaining that the request was closed since no response was received, and that a new SR must be created if the issue persists.

NOTE: These notifications are sent from a mailbox that is not monitored. Please do not respond to these notifications, but follow the instructions below to add comments or attach files.

9.2 Service Requests Actions

Within the SR lifecycle, there are only three actions needed from the External User: Create an SR; Respond to a Request for Information; Validate an SR (i.e., respond Yes or No).

9.2.1 Create a Service Request

The CDFI Fund has simplified the process for creating an SR.

1. Go to the AMIS Service Requests tab and select the Create New Service Request button.

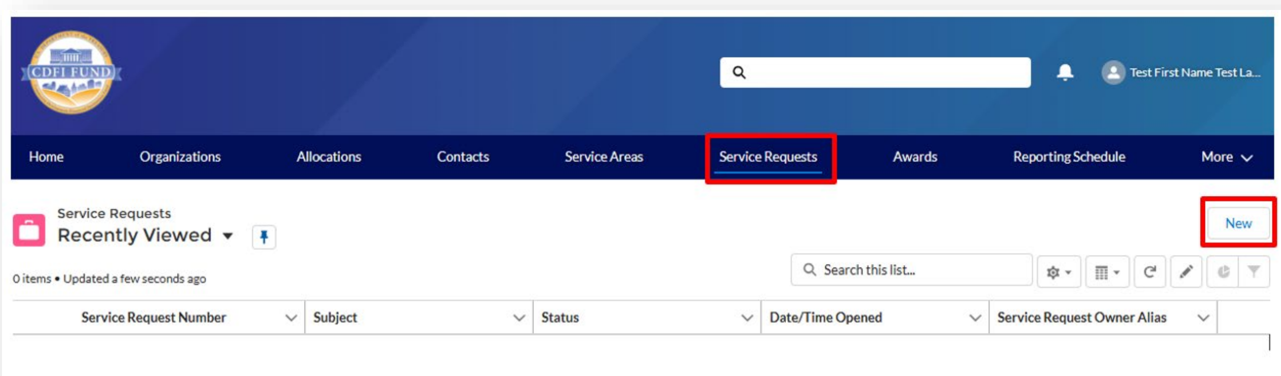


Figure 84: Service Requests Home Page

2. Alternatively, you can create an SR by going to the Service Requests section on your Organization Detail, Related tab, page and clicking the New Service Request button from there. All SRs submitted by your organization are displayed in this section.

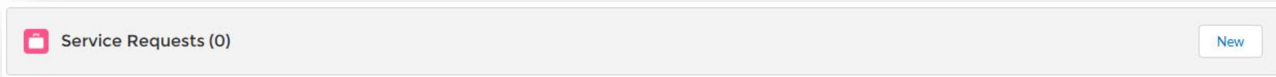
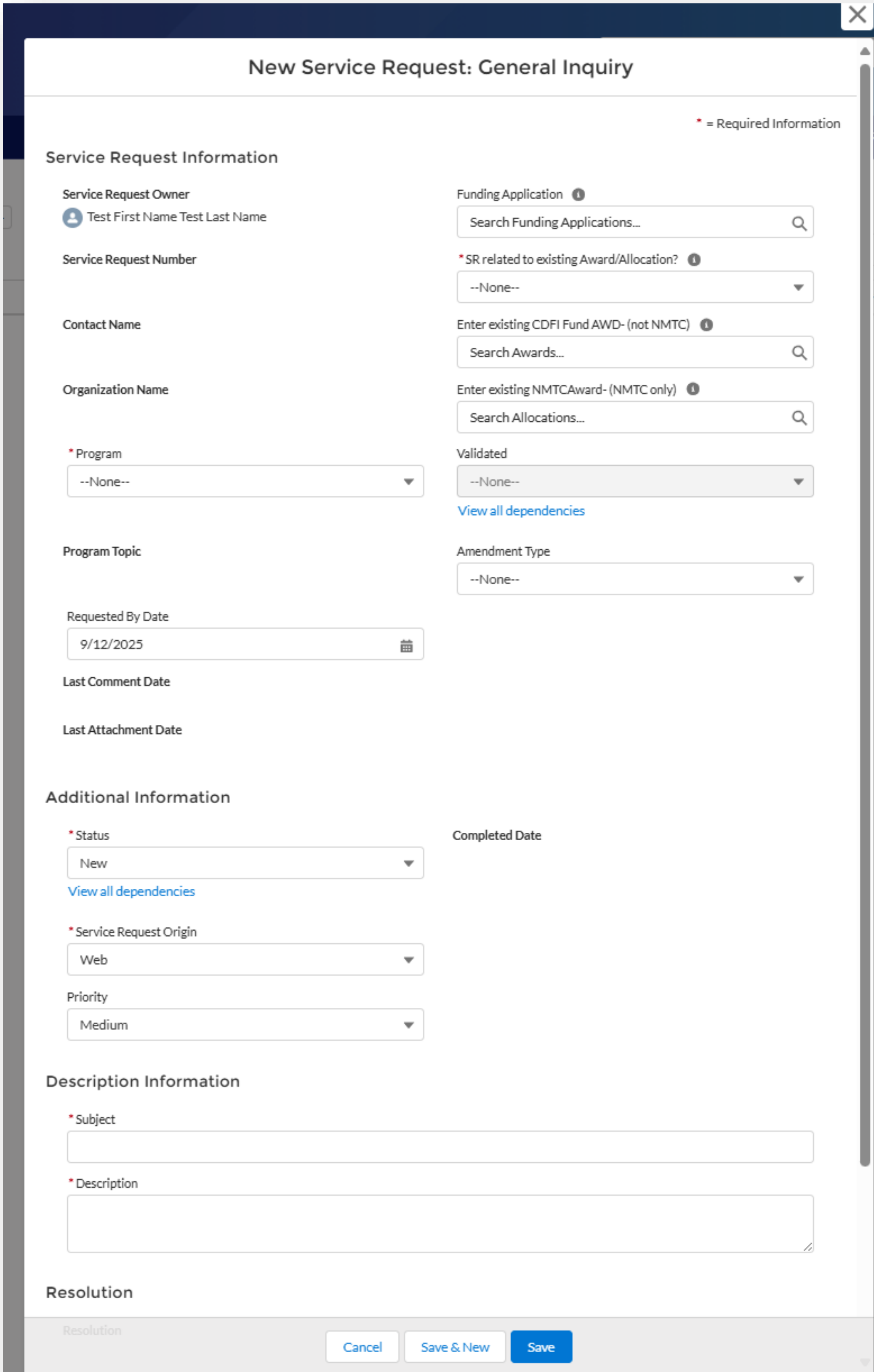


Figure 85: Service Requests Section on the Organization Detail Page

3. The Service Request Edit page is displayed.



New Service Request: General Inquiry

* = Required Information

Service Request Information

Service Request Owner
Test First Name Test Last Name

Funding Application
Search Funding Applications...

Service Request Number

* SR related to existing Award/Allocation?
--None--

Contact Name

Enter existing CDFI Fund AWD- (not NMTC)
Search Awards...

Organization Name

Enter existing NMTCAward- (NMTC only)
Search Allocations...

* Program
--None--

Validated
--None--
View all dependencies

Program Topic

Amendment Type
--None--

Requested By Date
9/12/2025

Last Comment Date

Last Attachment Date

Additional Information

* Status
New
View all dependencies

Completed Date

* Service Request Origin
Web

Priority
Medium

Description Information

* Subject

* Description

Resolution

Resolution

Cancel | Save & New | Save

Figure 86: Service Request Edit Page

4. Provide the following information.
    - SR related to existing Award/Allocation? Select Yes/No
    - Program – select BEA Program, BG Program, Capital Magnet Fund, CDFI/NACA Program, CDFI Equity Recovery Program (CDFI ERP), CDFI Rapid Response Program (CDFI RRP), Certification, Compliance & Reporting, NMTC Program, Small Dollar Loan Program, Technical Issues, or Other from the dropdown list as relevant to your question or issue.
    - Requested By Date – select the date you want the SR completed. Although this is a requested date, it indicates the urgency behind the SR. It defaults to one week in the future. You can type in a date or select a date with the calendar tool.
    - Funding Application – if the SR relates to a specific funding application, you can select the funding application by clicking the Search icon next to the Funding Application field, and choosing the application from the list that is displayed.
    - Award – similar to Funding Application, if the SR relates to a specific award, you can select the award by clicking the Search icon next to the Award field, and choosing the award from the list that is displayed.
    - Status – leave as New.
    - Priority – set to High, Medium, or Low.
    - Service Request Origin – leave as Web.
    - Subject – provide a brief title for the SR.
    - Description – provide a complete description of your question or issue. If you are submitting the Service Request on behalf on another organization or person, provide that information in the Description.

5. Click the appropriate submission button at the top (or bottom) of the page.
    - Click the Save button to submit the SR to the CDFI Fund. The Service Request Detail page will be displayed.
    - Click the Save & New button to submit the SR and to have AMIS display a blank Service Request allowing you to create another SR.
    - Click the Cancel button to return to the Service Request Home page without submitting the SR.

9.2.2 Respond to an Information Request

If more information about an SR is needed, a CDFI Fund user requests the information by adding a comment to the SR. AMIS sends an email notification instructing the External User to log into AMIS to view and respond to the question(s). The External User responds by adding another comment or attaching a document to the SR.

9.2.2.1 Add a Comment to a Service Request

1. To add a comment, select the SR from your list of SRs on the Service Request Home page.

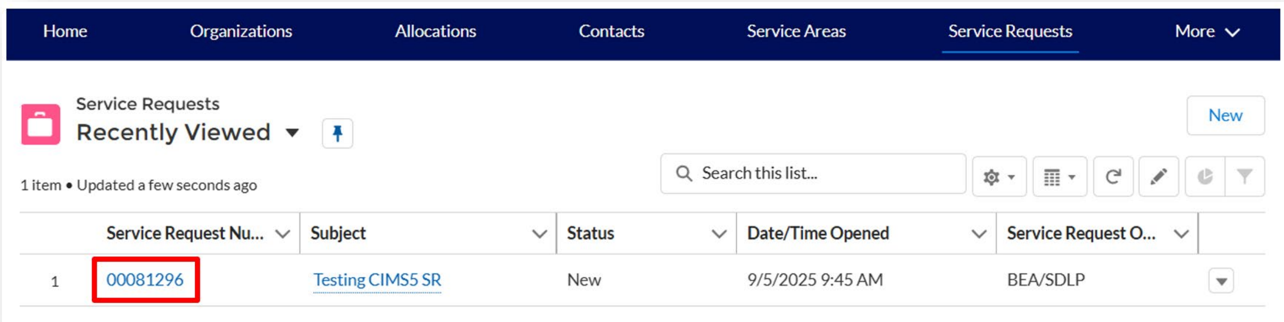


Figure 87: Service Requests Home Page

2. The Service Request Detail page will be displayed. Within the Related tab, in the Service Request Comments Public section, select the New button.

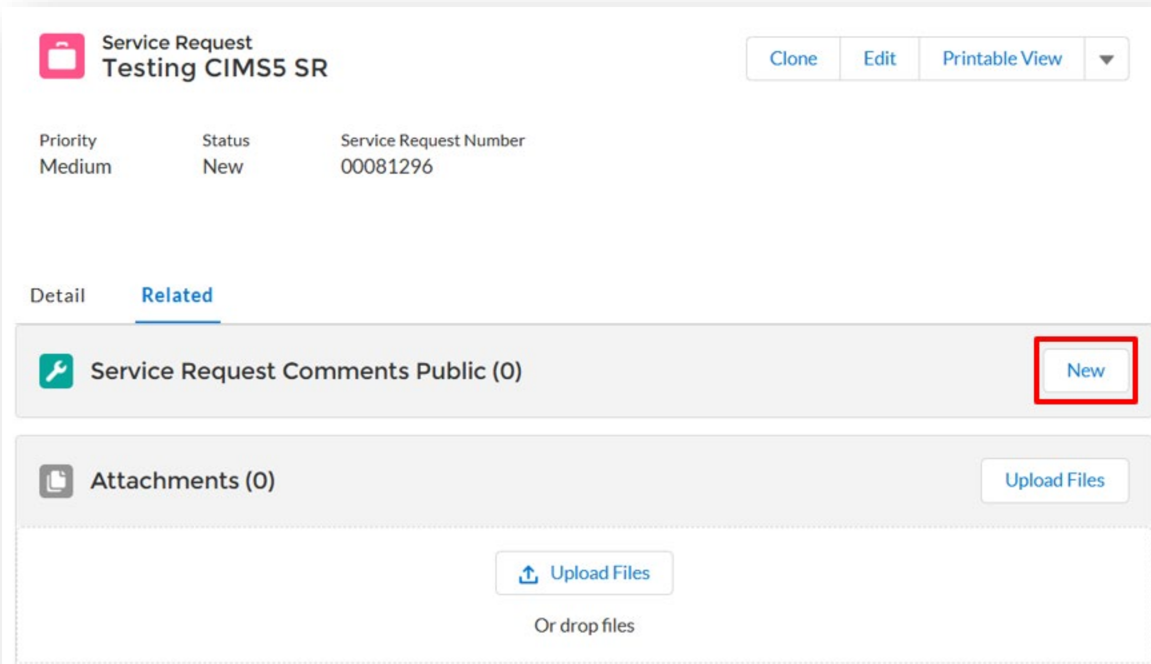


Figure 88: Service Request Comments Public Section – New Button

3. The Service Request Comment Public Edit page is displayed. Enter your comment in the Body field and click the Save button.

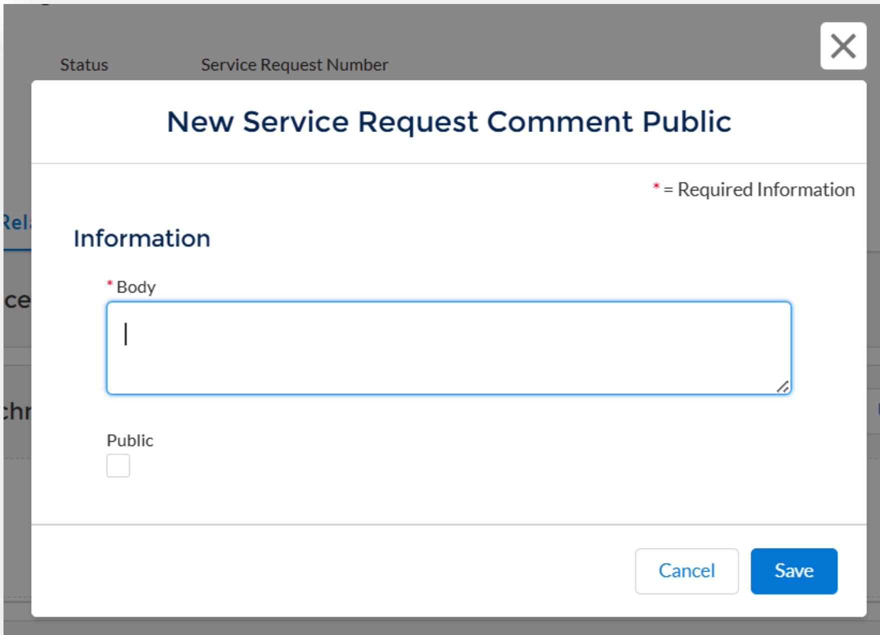


Figure 89: Service Request Comment Public Edit Page

9.2.2.2 Add an Attachment to a Service Request

1. To attach a file, select the Upload Files button, or drag/drop the attachment in the Attachments section on the Service Request Detail page.

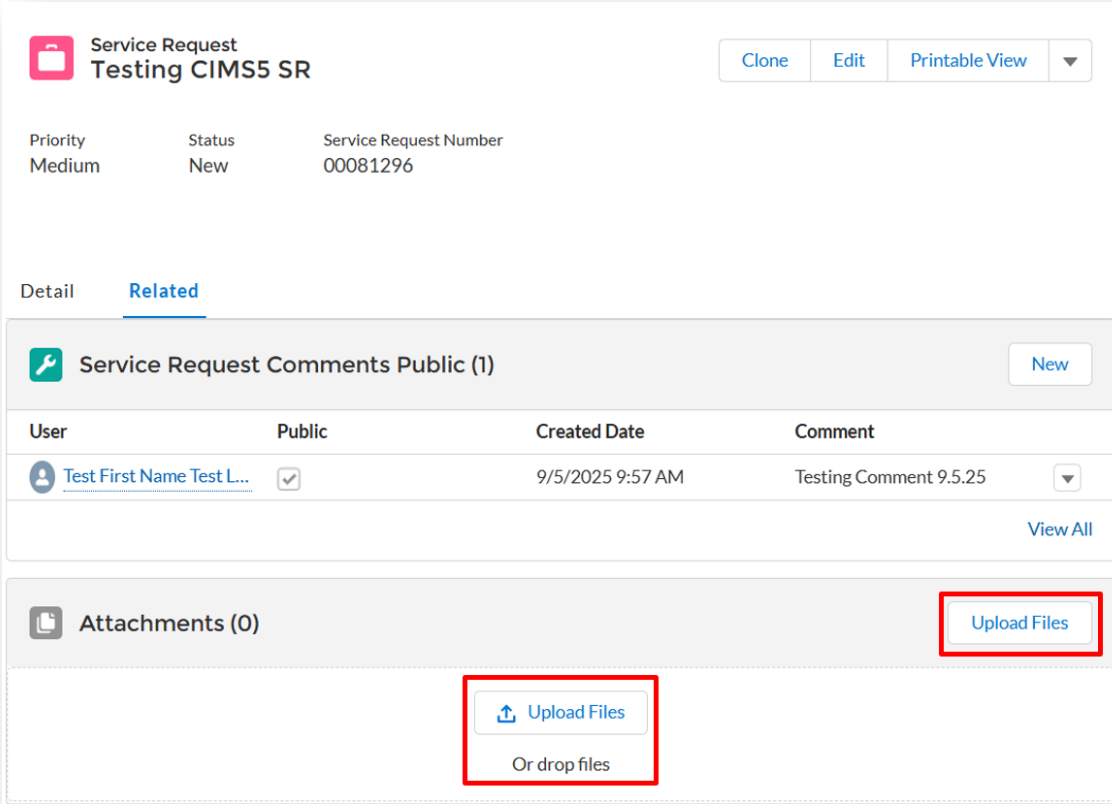


Figure 90: Service Request - Attachments Section

2. Follow the onscreen instructions by (1) clicking the Browse button to select your file, then (2) clicking the Attach File button. These two steps can be repeated to attach more than one file. Once all files have been attached, click the Done button.

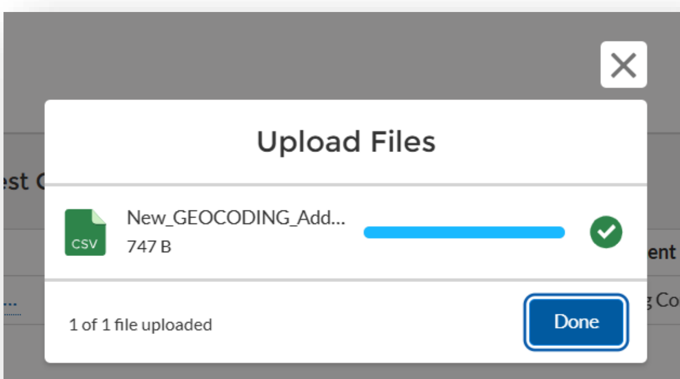


Figure 91: Successfully Uploaded File - Service Request

	TIP: Ensure that your files have uploaded completely before clicking Done.

3. All attachments show the file name, size, date last modified, and who created it. For each attachment, you can:
   - Edit – allows you to rename the file or add a description.
   - View – displays the contents of the file.
   - Delete – removes the file from the list of attachments.

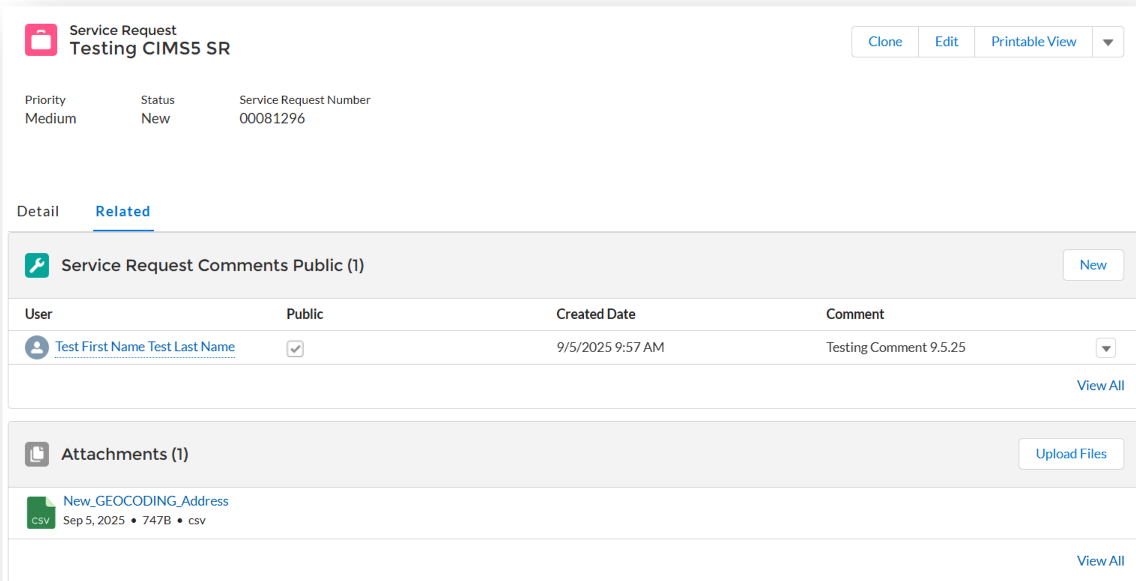


Figure 92: List of Attachments to a Service Request

To view these additional functions, click the View All link on the Attachments section. On the Attachments Home Page click the files drop down menu to view the additional functions.

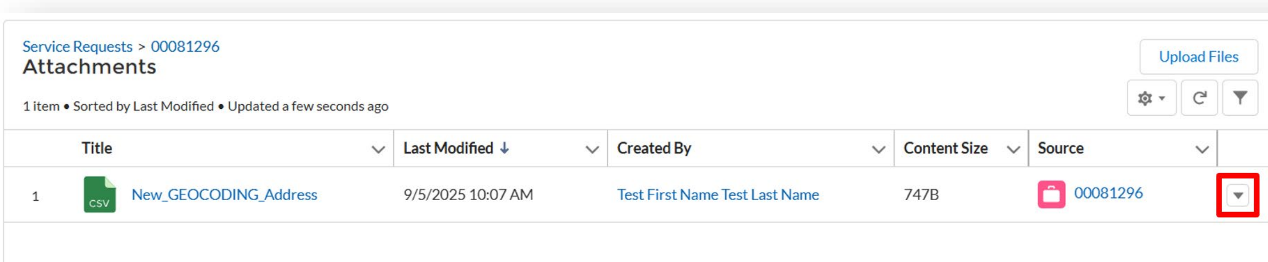


Figure 93: Service Requests - Attachments Home Page

9.2.3 Validate a Service Request

Once an SR has been completed, a CDFI Fund User describes the resolution in the SR. AMIS sends an email notification instructing the External User to log into AMIS within 14 days to agree or disagree. The External User responds within the SR with a Yes or No.

1. To validate an SR, select the SR from your list of SRs on the Service Request Home page.

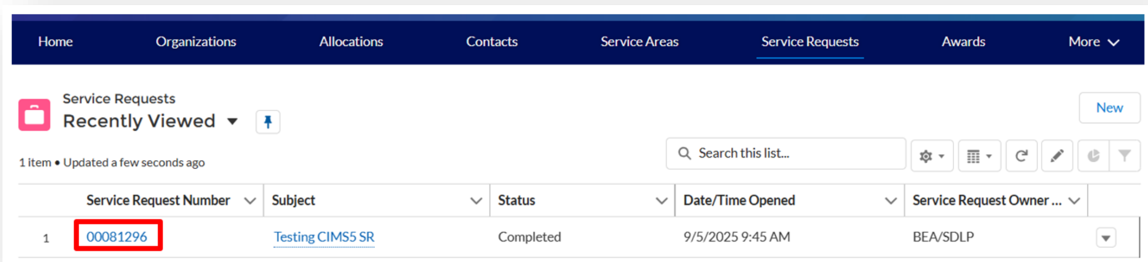


Figure 94: Service Requests Home Page

2. The Service Request Detail page is displayed. Select the Edit button.

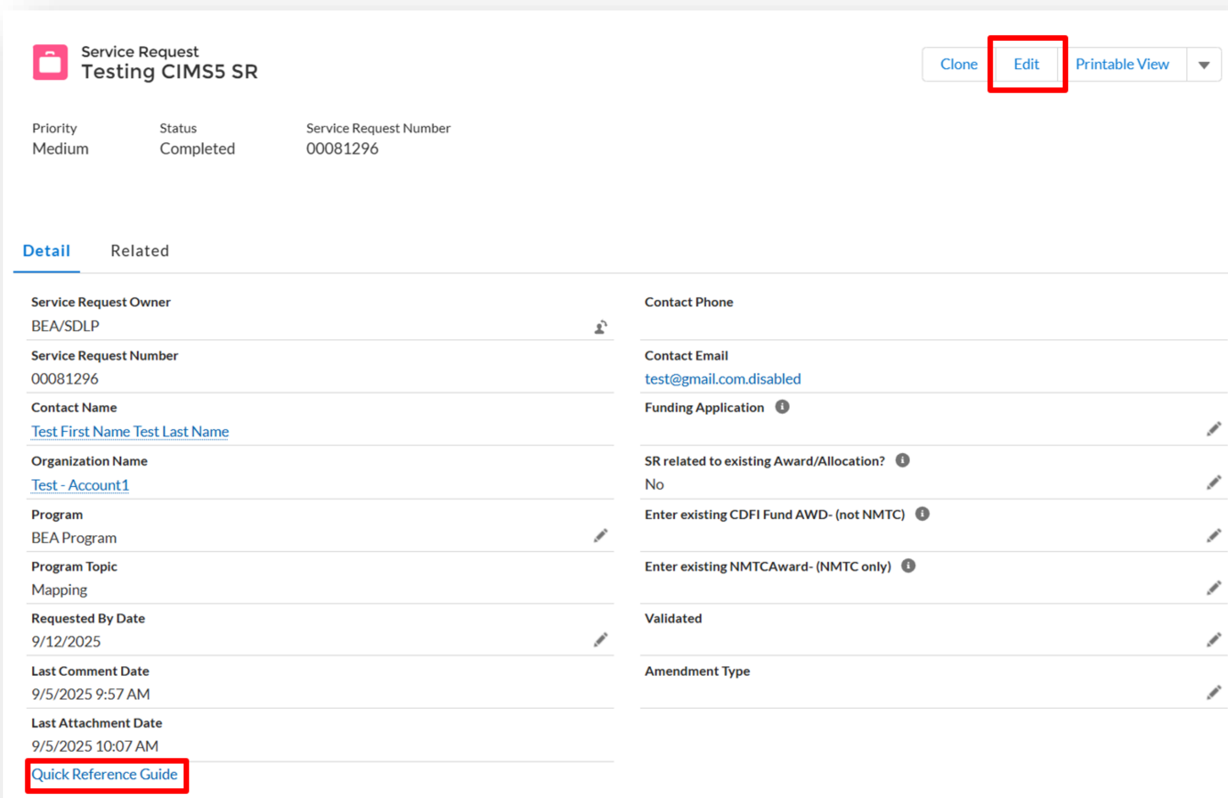


Figure 95: Service Request Detail Page

NOTE: A Quick Reference Guide is available as a link in the Service Request Detail section of every Service Request.

3. The Service Request Edit page is displayed. One this page, you can review the resolution prior to validating. If you agree that the SR has been completed, select Yes, then click the Save button. Upon saving, AMIS will close the SR. If you do not agree that the SR has been completed, select No, then click the Save button. Please add a comment and/or an attachment to explain what has not been completed.

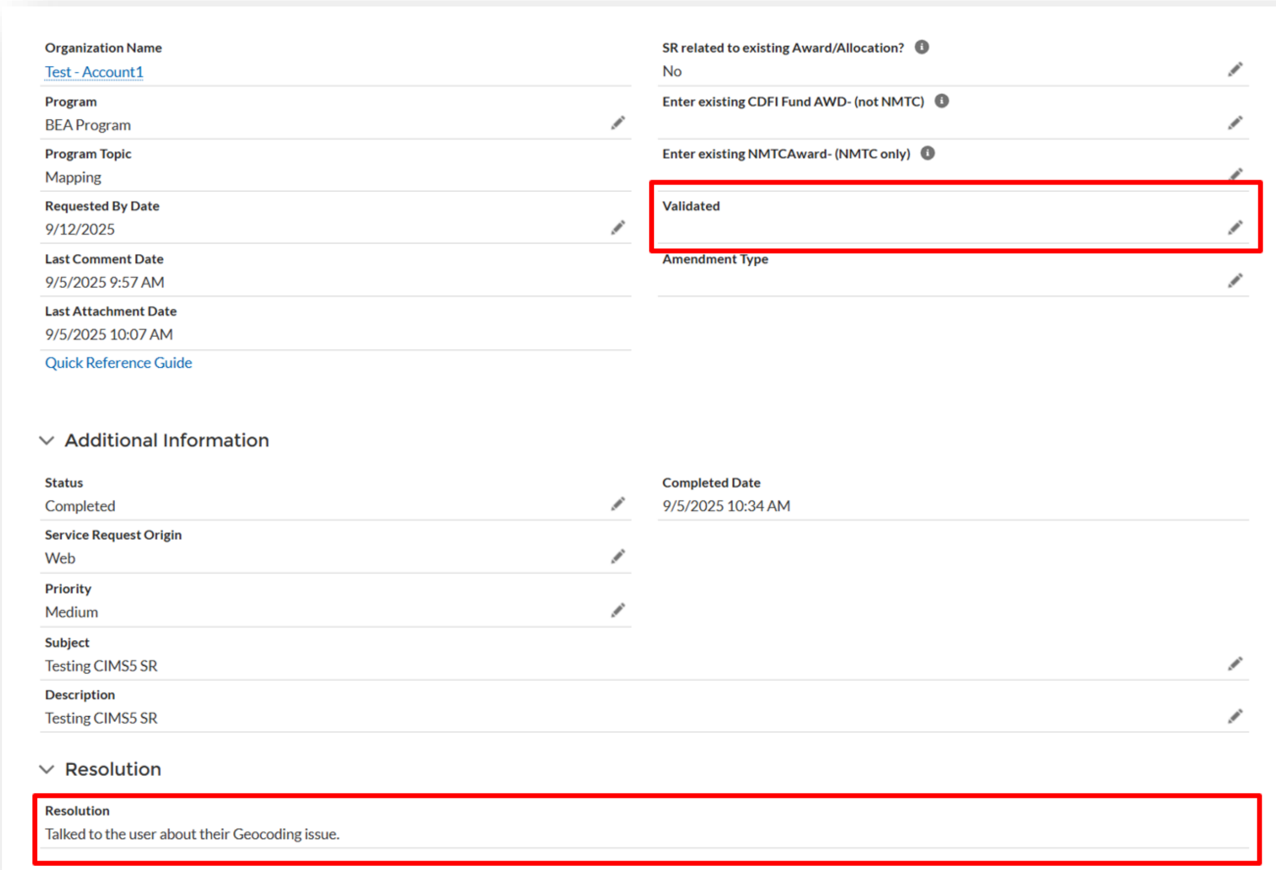


Figure 96: Service Request Edit Page

10 External Contacts

AMIS has the capability for a user needing access to another organization to request for that access. Once access is requested, the administrator for the organization's AMIS account will review the request and take the appropriate action to grant or reject the access.

10.1 Request Access to an Additional Organization

NOTE: You need to be registered as a user in AMIS before you can request access to an additional organization.

To request access to an additional organization:

1. Click the Home tab and then click the Access to Additional Organizations link, on the left sidebar menu, under Custom Links.

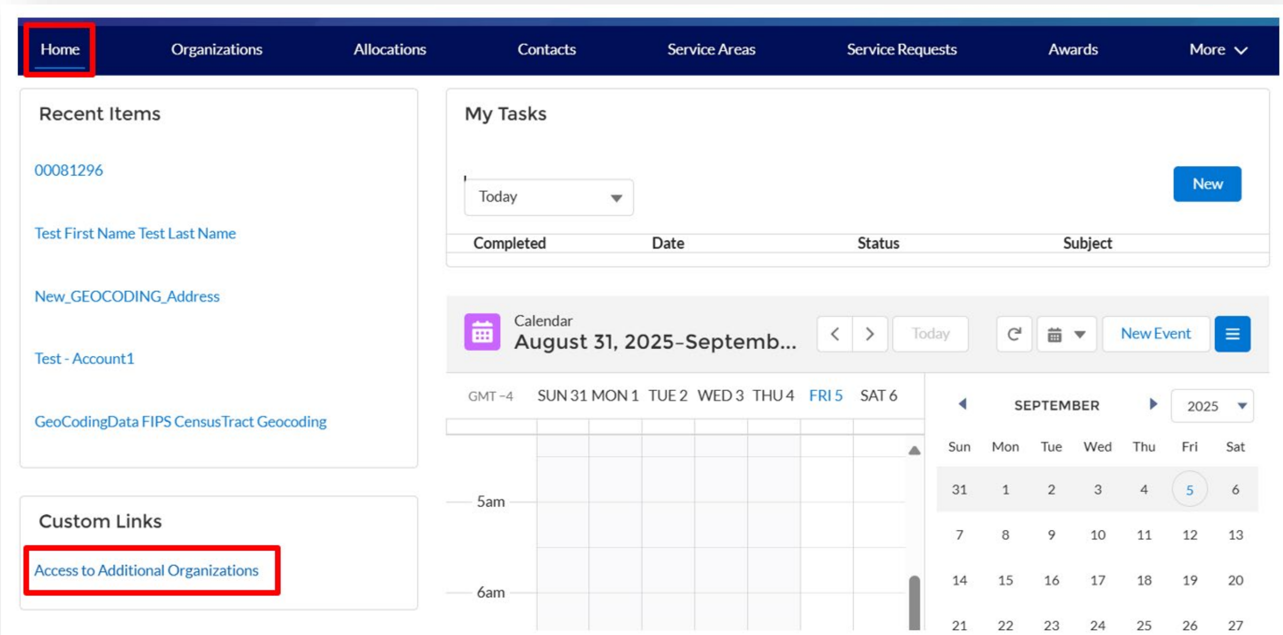


Figure 97: Home Page – Link to Request Access to Additional Organizations

2. You will be forwarded to the Organizations tab, to a page where you can search for the organization for which you need access. Enter the EIN/TIN# for the organization you wish to request access and then click the Search button.

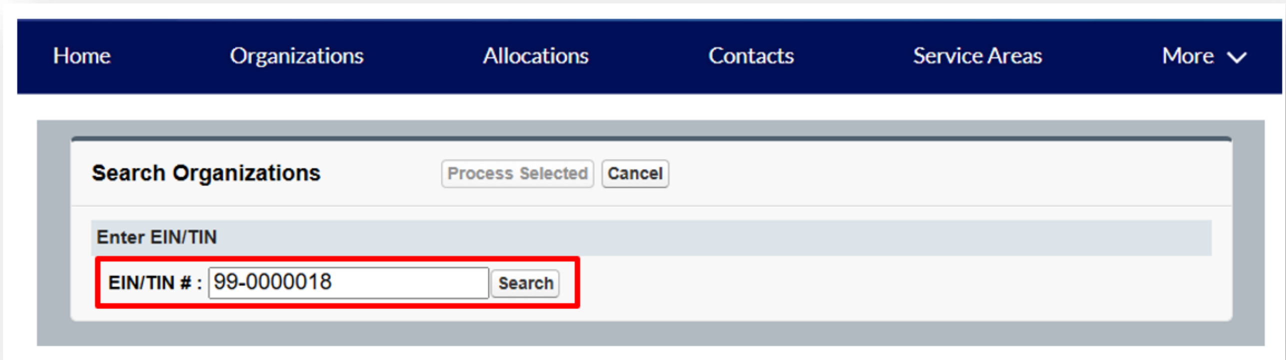


Figure 98: Request Access to Additional Organizations – Search for Organization

	NOTE: Please ensure you enter the accurate EIN, including any dashes, of the organization in which you are requesting access.

3. Under the Organization Results section, locate and select the checkbox next to the name of the organization you wish to access. Click the Process Selected button.

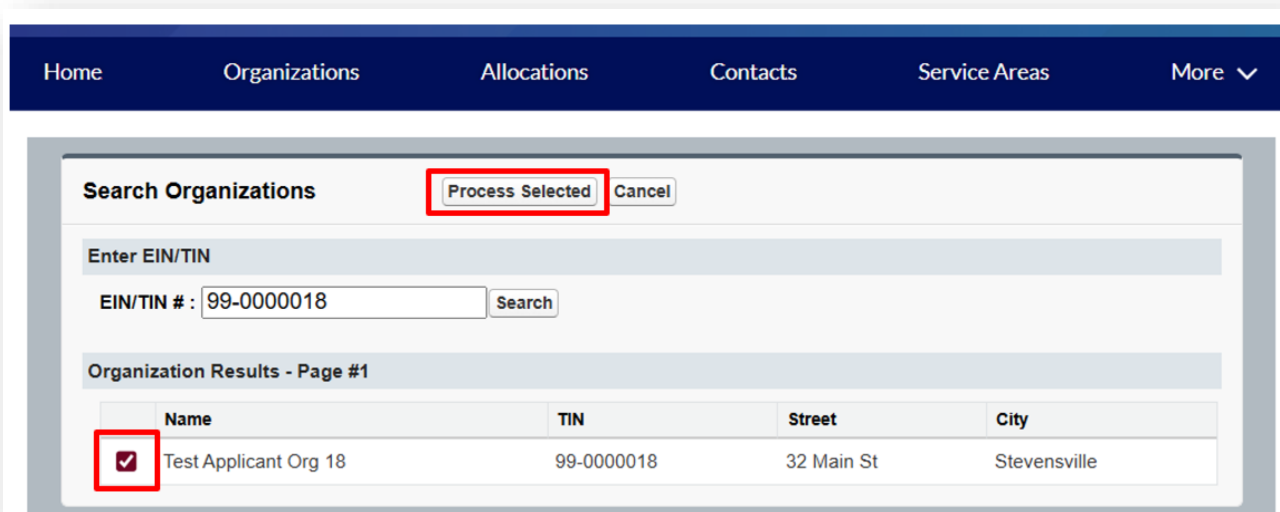


Figure 99: Request Access to Additional Organizations – Select Organization

4. A results message will be displayed to confirm your access request. The Admin Users of the organization will receive an email about your access request. You will also receive an email to inform you if your request was granted or rejected.

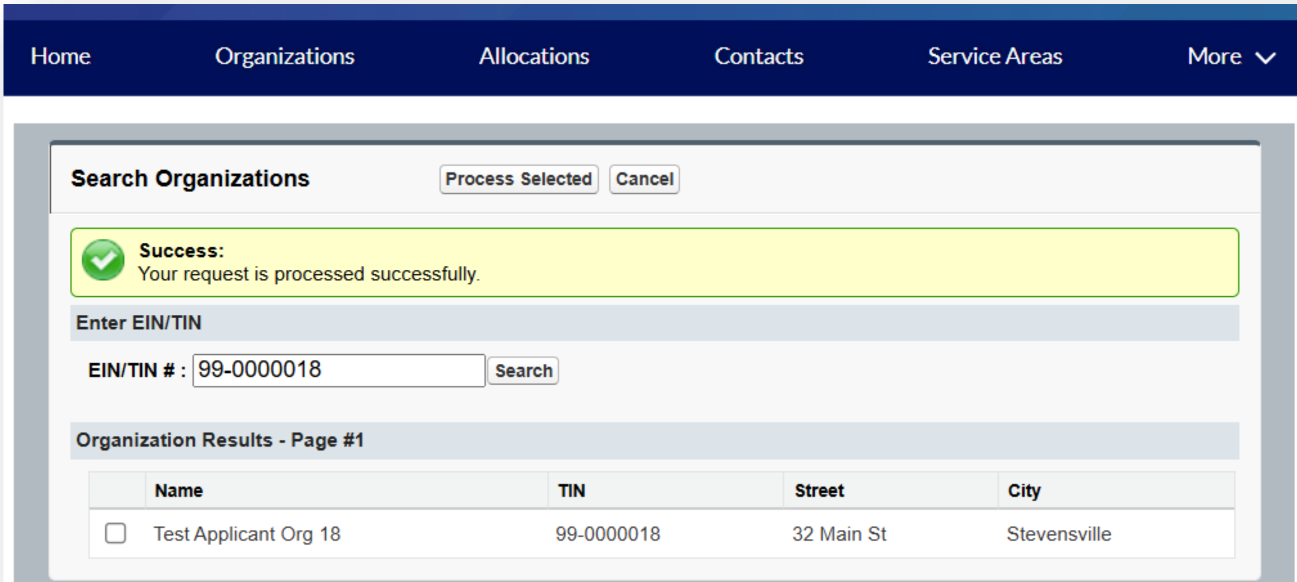


Figure 100: Request Access to Additional Organizations Results

10.2 Access Additional Organizations as an External Contact

Once you receive an email confirming that you have been granted access to an additional organization as per your access request, you can access that organization as follows:

1. From the Organizations tab, select "All Organizations" next to the View drop-down menu.

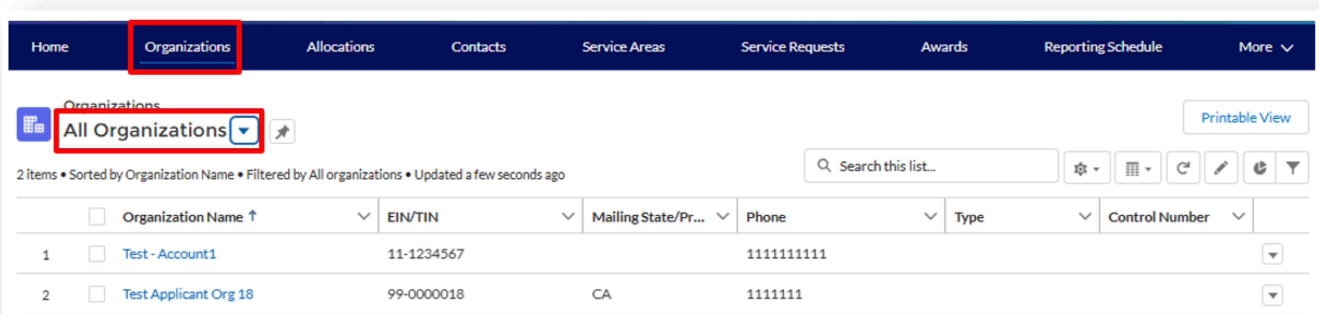


Figure 101: Organization Home

2. From the organization's list, locate the new organization and click on its Organization Name link to be forwarded to the Organization Detail page.

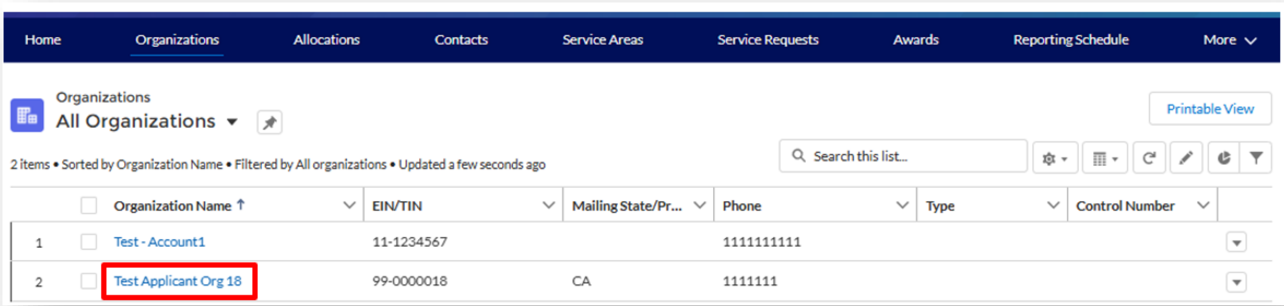


Figure 102: Organization's List Page

3. You will be forwarded to the Organization Detail page. Based upon your access control, you can read or edit organization data.

10.3 Grant Organization Access to an External Contact

Admin Users will receive an email when an external contact requests access to their organization. To grant organization access to an external contact:

1. From the Organizations tab, locate your organization and click on the Organization Name link to open the Organization Detail page. If you cannot see your organization, select "All Organizations" next to the View drop-down menu.

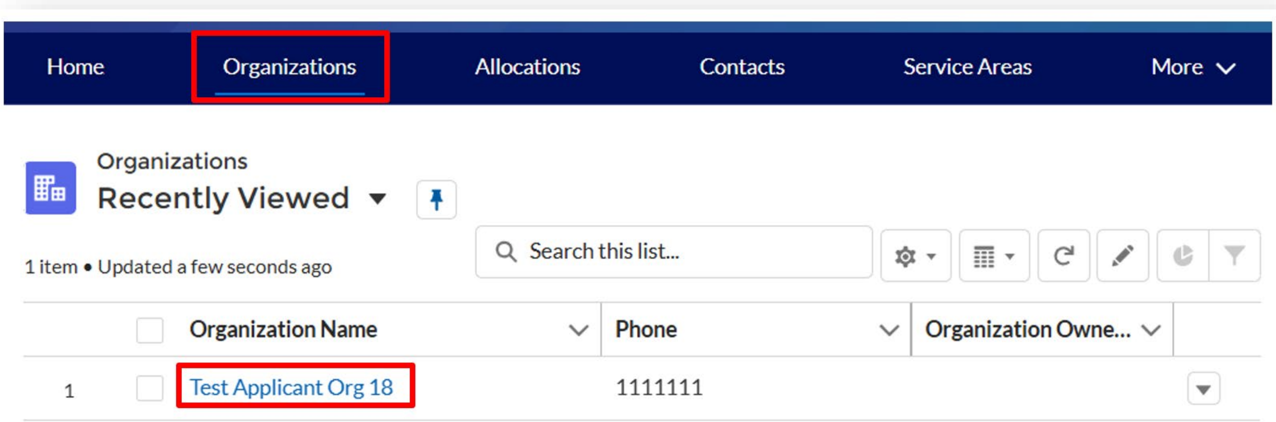


Figure 103: Organizations Home Page

2. From the Organization Detail, Related tab, page, access the External Contacts related list.

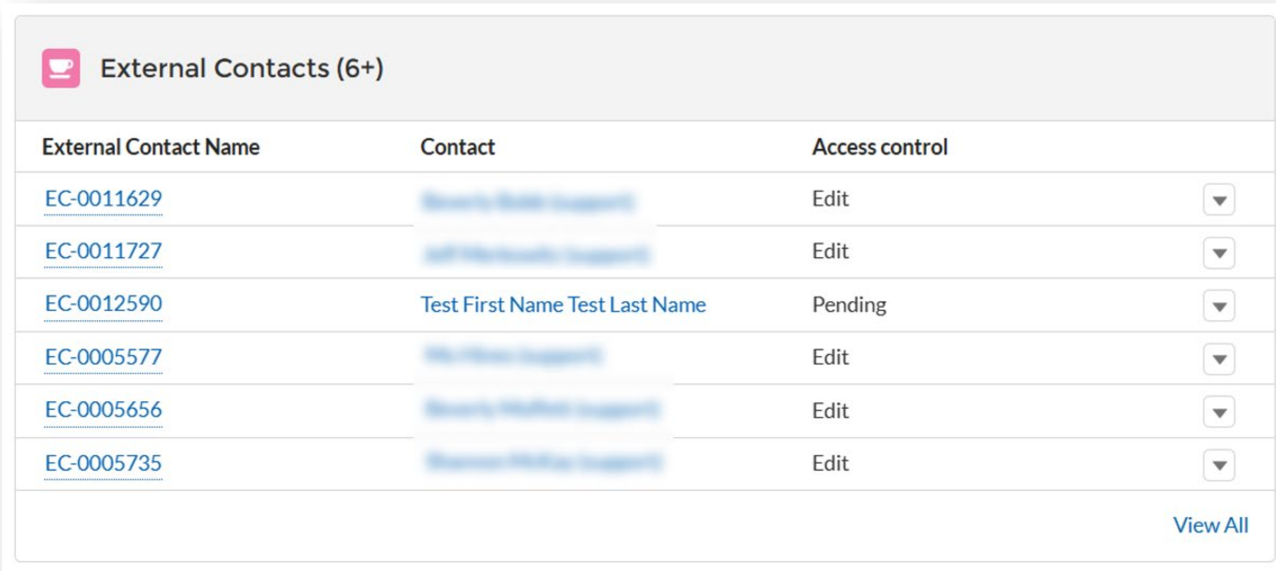


Figure 104: Organizations Detail, Related List – External Contacts

3. The External Contacts related list displays external contacts for your organization. Access Control for each contact is also displayed. To grant or revoke access, locate an external contact whose Access Control is "Pending" and click their Edit link.

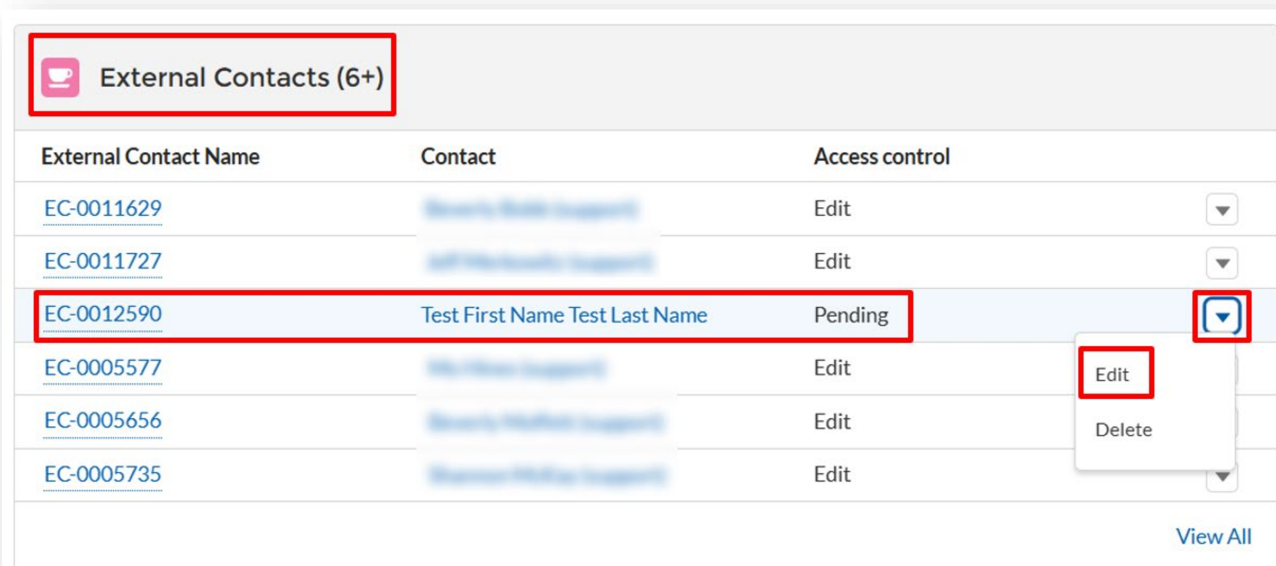


Figure 105: External Contacts Related List

4. From the External Contact Edit page, select an option next to the Access Control drop-down menu and then click the Save button.

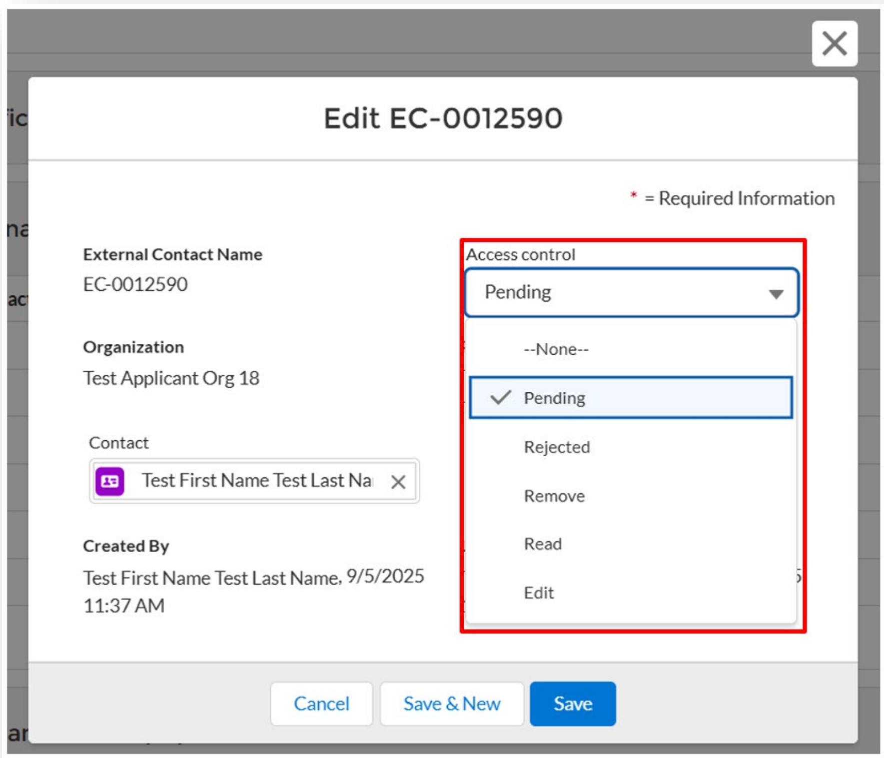


Figure 106: External Contacts Edit Page

Access Control Definitions:

a. Pending – This is the default Access Control assigned by AMIS when an external user requests access. The external contact access request in this state has not been reviewed by the Admin User.
b. Rejected – This option should be used to reject an organization access request. The rejected user will not be able to access the organization.
c. Remove – This option should be used to revoke organization access originally granted to an external user. The user will not be able to access the organization.
d. Read – This option should be used to grant 'View' access to an external user. The user will be able to log in to your organization and read all the information.
e. Edit – This option should be used to grant 'Edit' access to an external user. The user will be able to log in to your organization and edit your organization information.

5. You will be forwarded to the External Contact Detail page.
    a. The information you edited should be saved.
    b. The external contact you granted or rejected access will receive an email regarding your decision.
6. Click the Organization link to return to the Organization Detail page.

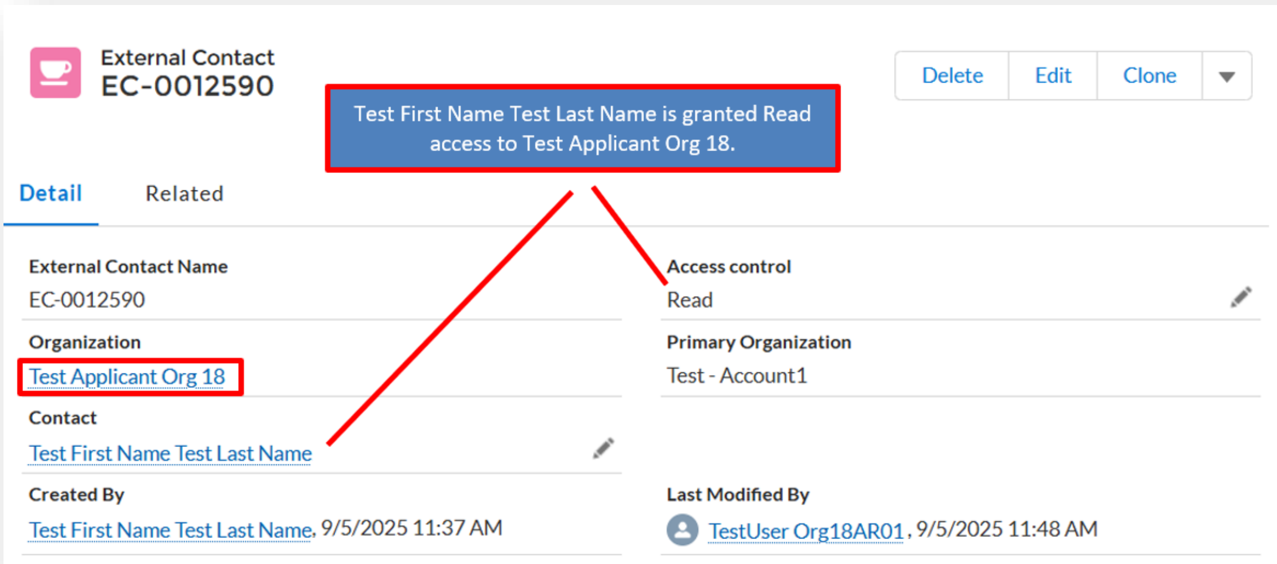


Figure 107: External Contacts Detail Page

7. Repeat steps 2-5 under this section to grant, reject, or revoke access to additional external contacts for your organization.

11 Appendices

11.1 Acronyms

Table 10-1 – Acronyms

AMIS	Awards Management Information System
BEA Program	Bank Enterprise Awards Program
BG Program	Bond Guarantee Program
CDE	Community Development Entity
CDFI	Community Development Financial Institution
CDFI Program	Community Development Financial Institutions Program
CIMS	CDFI Fund Information Mapping System
CMF Program	Capital Magnet Fund Program
EIN	Entity Identification Number
NACA Program	Native American CDFI Assistance Program
NMTC Program	New Markets Tax Credit Program
SAM	System for Award Management
SDLP Program	Small Dollar Loan Program
SR	Service Request