MyCDFIFund Account Administrators:
Access Privileges and Reponsibilities

THIS DOCUMENT CONTAINS IMPORTANT INFORMATION. PLEASE PRINT THE DOCUMENT OUT, READ IT CAREFULLY, AND SAVE IT FOR YOUR RECORDS.

When any individual first logs into myCDFIFund using his/her e-mail address and an organization's EIN (Employer Identification Number), that individual has the status of a potential ***User*** of that organization's myCDFIFund Account. After a User registers a previously unregistered organization by filling out an Organization Profile, he or she is automatically designated as the ***Account Administrator*** for that organization's myCDFIFund account and all the information therein.[1]

SERVING AS AN ACCOUNT ADMINISTRATOR IS A CRITICAL RESPONSIBILITY. ALL POTENTIAL USERS OF THE ORGANIZATION'S myCDFIFund ACCOUNT – AND ANY INFORMATION THEREIN – WILL NEED TO CONTACT YOU FIRST.

YOU WILL NEED TO BE ACCESSIBLE BY E-MAIL AND/OR PHONE ON A REGULAR BASIS. CONSEQUENTLY, YOU WILL NEED TO KEEP ALL OF YOUR INDIVIDUAL CONTACT INFORMATION UP-TO-DATE IN myCDFIFund BY REGULARLY UPDATING THE FIELDS IN YOUR "USER PROFILE" SECTION.

IF YOU DO NOT WISH TO SERVE AS THE ACCOUNT ADMINISTRATOR:
You will need to designate a different person as the organization's myCDFIFund Account Administrator and disable your own Administrator status using the appropriate fields under the "Manage Users" tab.

IF YOU ARE SERVING AS AN ACCOUNT ADMINISTRATOR BUT ARE LEAVING THE ORGANIZATION:
You will need to designate a new Account Administrator prior to your departure, using the procedures above, in order to ensure that the organization you are representing is able to have uninterrupted access to its myCDFIFund Account and relevant information.

IF YOU ARE SERVING AS AN ACCOUNT ADMINISTRATOR BUT ARE GOING ON LEAVE FOR AN EXTENDED PERIOD OF TIME:
You will need to designate a second person as the organization's back-up myCDFIFund Account Administrator using the appropriate fields under the "Manage Users" tab (there may be more than one Account Administrator designated per organization). Having an additional Account Administrator as a back-up is always a good practice, as unplanned absences are always a possibility

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[1] Note that serving as a myCDFIFund Account Administrator only pertains to administering access to the data within an organization's myCDFIFund Account. ***It does not grant or affect the status of an individual as a Contact person or Authorized Representative for any of the CDFI Fund's Programs.*** To serve as an organizational Contact or Authorized Representative, a User or Account Administrator must either fill out the appropriate fields under the "User Profile" section, or they must indicate that they wish to serve in this capacity in their Application to a particular CDFI Fund Program.

Account Administrators have the following access and administrative privileges within the myCDFIFund Account that they are administering:

1) <u>Access to all areas of the myCDFIFund Account</u>

   Access to all areas of an organization's myCDFIFund Account means that an Account Administrator will have access to all Web pages and the potentially sensitive data contained therein. If an individual is not willing to accept this responsibility, a new Account Administrator may be designated using the procedures above.

2) <u>Update any User Profile information.</u>

   Under the "Manage Users" tab, an Account Administrator is able to update the contact information for any individual User. This is particularly important a User is serving as a Contact person or Authorized Representative for a CDFI Fund Award, Allocation or Certification Application

3) <u>Open, complete and submit applications on behalf of the Organization (or grant access to a User to do so).</u>

   If an organization is using a consultant or outside party to complete a CDFI Fund on-line Program Application, the individual may be granted User access to the "Applications" tab by the Account Administrator (see ***myCDFIFund Users: Access Privileges and Responsibilities*** for User login instructions).

4) <u>Designate, test, save and edit qualifying geographic areas for the Fund's Programs (or grant access to a User to do so).</u>

   Because several of the CDFI Fund's Programs and/or Award Components required applicants to designate geographic areas that meet certain distress criteria, the CDFI Fund has provided the ***CDFI Fund Information and Mapping System (CIMS)*** under the "Mapping" tab of each organization's myCDFIFund Account.[2]

   If an organization is using a consultant or outside party to complete a CDFI Fund on-line Program Application, the individual may be granted User access to the "Mapping" tab by the Account Administrator (see ***myCDFIFund Users: Access Privileges and Responsibilities*** for User login instructions).

   Account Administrators or Users that has been granted access to CIMS (under the "Mapping" tab) will have the ability to electronically designate, test, save and edit geographic areas to determine:

   a) Whether the organization's lending or investing activities fall within a qualifying geographic area;

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[2] Note that CIMS will be available through the myCDFIFund beginning in February 2004. Prior to the launch of CIMS, Applicants will need to designate, test and save geographic areas through the CDFI Fund Help Desk (www.cdfifundhelp.gov).

b) Which geographic areas meet the distress criteria of the Fund's Programs; and
c) What economic distress indicators does a particular area exhibit.

Saved geographic areas will then be listed on a separate page and will be available for editing or uploading into electronic CDFI Fund Program Applications.