AMIS Training Manual

AE102: CDE Certification Application Submission
(for CDE Certification Applicants)

September 2015
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1 Introduction

AE101: Getting Started – Navigating AMIS (for External Users) is a pre-requisite for the training manual you are currently viewing, AE102: CDE Certification Application Submission (for CDE Certification Applicants).

An entity seeking to be certified as a Community Development Entity (CDE) will have the ability to submit a CDE Certification Application, to the CDFI Fund, in AMIS. To submit an application online, that entity must have an AMIS account. Please refer to the AE101: Getting Started – Navigating AMIS (for CDFI Fund External Users) training manual on how to set up an account.

NOTE: An organization that is currently certified as a CDFI by the CDFI Fund must complete a Type A CDE Certification Application in order to also be considered as a certified CDE. See section 2.1 of this training manual for instructions on submitting the Type A CDE Certification Application.

The objective of this training manual is to provide CDE Certification applicants with instructions on how to complete a CDE Certification Application. Applicants will learn how to select a CDE Certification Application type and complete and submit their application in AMIS.

2 Create/Select a CDE Certification Application

Once applicants have successfully created an AMIS account, they will have the ability to create, complete, and submit a CDE Certification Application in AMIS. There are three types of CDE Certification Applications – Type A, Type B, and Type C. The steps below show how to select a CDE Certification Application type that suits your organization.

To select a CDE Certification Application:

1. Log in to AMIS.
2. Click the Organizations tab to be forwarded to the Organizations Home page.
   a. The organization is listed under the Recent Organizations section; alternatively,
   b. If the organization is not listed, click the Go! button next to the View drop-down menu to be forwarded to the Organizations list view.
3. From the Organizations Home Page, click the **Organization Name** link to access the organization’s Detail page.

4. From the Organization Detail page, scroll down to the Program Profiles related list.
NOTE: When a user creates an organization, AMIS automatically creates a Program Profile, with partial data, for each CDFI Fund program. Users are required to complete the rest of the Program Profile or keep it updated regularly. Clicking the Edit button will update the Program Profile. Please refer to the AE101: Getting Started – Navigating AMIS (for CDFI Fund External Users) training manual to learn how to update a Program Profile.

5. Click the Program Profile Name for the CDE-CERT Program Profile to be forwarded to the Program Profile Detail page.
6. On the Program Profile Detail page, navigate to the Certification Applications related list and click the **New Certification Application** button.

![Figure 5. Certification Applications Related List](image)

7. You will be forwarded to a page where you can select your application type.

![Figure 6. Select Certification Application Record Type Page](image)

**NOTE:** Organizations must ensure that the appropriate CDE Certification Application Type is selected. There are three types of CDE Certification Application:

1. **Type A** – An Applicant CDE that is applying for initial CDE Certification only on behalf of itself.
2. **Type B** – An Applicant CDE that is applying for initial CDE Certification on behalf of itself and one or more subsidiary entities.
   - **Type B Express** – An Applicant CDE that is applying for initial CDE Certification on behalf of itself and one or more subsidiary entities and the subsidiary entities have the same primary mission, service area, and accountability as the Applicant CDE and there are no unapproved material changes to the Applicant CDE’s primary mission, service area, and accountability. Selecting this option will
3. **Type C** – An Applicant CDE, which is already certified that is applying for CDE Certification on behalf of one or more subsidiary entities.
   - **Type C Express** – An Applicant CDE, which is already certified that is applying for CDE Certification on behalf of one or more subsidiary entities and the subsidiary entities have the same primary mission, service area, and accountability as the Applicant CDE and there are no unapproved material changes to the Applicant CDE’s primary mission, service area, and accountability. Selecting this option will allow you to copy the board and service area information from the Applicant CDE into each subsidiary entity.

8. Complete the on-line CDE Certification Application and submit the application as demonstrated in Sections 2.1, 2.2, 2.3, 2.4, and 2.5.

9. The CDFI Fund will notify you via email regarding your CDE Certification Application status.
2.1 CDE Certification Application – Type A

Applicants that select the Type A CDE Certification Application are required to complete the following sections:

- CDE Certification Details
- Board Information and Board Members
- Certification Application Service Areas

To complete the application:

1. Make sure that you are on the Select Certification Application Record Type page. If not, refer to Section 2 or follow the steps below:
   a. From the Organization Detail page, navigate to the Program Profiles related list.
   b. Click the Program Profile Name for the CDE-CERT Program Profile to be forwarded to the CDE-CERT Program Profile Detail page.
   c. Click the New Certification Application button.

2. Select CDE-CERT Type A as the Record Type from the drop-down menu and then click the Continue button.

3. You will be forwarded to the Certification Application Edit page. AMIS auto-populates the Basic Information section of this page with data from the Program Profile.
4. Complete/update the information on the page.
5. Click the **Save** button to be forwarded to the Certification Application Detail page. Do not click the **Save & New** button.

**NOTE:** Once the application has been saved, it can still be edited by selecting the **Edit** button on the Certification Application Detail page.
2.1.1 Add/Update Board Information and Board Members
To add board information:
1. On the Certification Application Detail page, scroll down to the Boards related list.
2. Click the **New Board** button to add boards and their corresponding board members.

3. You will be forwarded to the Select Board Record Type page.
4. Select a Board Record Type and click the **Continue** button. You will be forwarded to the Board Edit page.

![Figure 11. Select Board Record Type Page](image)

5. Complete the information on the page and then click the **Save** button. You will be forwarded to the Board Detail page.

![Figure 12. Board Edit Page](image)

6. From the Board Detail page, click the **New Board Members** button under the Board Members related list. You will be forwarded to the Select Board Members Record Type page.

![Figure 13. Board Detail Page](image)
7. Select the type of board member and click the **Continue** button to be forwarded to the Board Members Edit page.

8. Complete the information on the page and then click the **Save** button. You will be forwarded to the Board Members Detail page.
   a. Click the **Save & New** button to save the record and create another board member. Use this option when you want to create several board members quickly.
   b. Click the **Cancel** button to exit the Board Members Edit page and cancel creating a new board member.
9. Click the **Clone** button to copy a contact and create another board member with similar information.
10. Click the **link** next to the Board field to return to the Board Detail page.

2.1.2 Add/Update a Certification Application Service Area

To add a service area:
1. On the Certification Application Detail page, scroll down to the Certification Application Service Areas related list.
2. Click the **New Certification Application Service Areas** button.
3. You will be forwarded to the Certification Application Service Areas Edit page.

![Figure 19. Certification Application Service Areas Edit Page](image)

4. Click the **Lookup** icon next to the Service County/Area field to invoke the Lookup dialog window. Search and select a county by clicking its County Name.
5. Click the **Save** button to be returned to the Certification Application Service Areas Detail page.

![Figure 20. Certification Application Service Areas Detail Page](image)

6. Click the **link** next to the Certification Application field to return to the Certification Application Detail page.

### 2.1.3 Add/Update an Attachment

To add an attachment:
1. On the Certification Application Detail page, scroll down to the Notes & Attachments related list.
2. Click the **Attach File** button in the Notes & Attachments related list.

![Figure 21. Notes & Attachments Related List](image)

3. You will be forwarded to the Attach File screen.
4. Click the **Browse** button and browse to select a file.
5. Click the **Attach** file button.
6. Click the **Done** button.
7. The attached file will be displayed under Notes & Attachments.

### 2.1.4 Submit Application

To submit the application to the CDFI Fund:

1. Make sure that the Signature section on the Certification Application Detail page is completed. This section allows you to attest to the accuracy and completeness of the information you provided in the application.

   **Figure 23. Certification Application Detail Page – Signature Section**

2. Click the **Edit** button on the Certification Application Detail page and check the Signature box in the Signature section. Click the **Save** button.
3. Click the **Submit** button on the Certification Application Detail page.
4. A confirmation dialog window will be displayed. Click the OK button to confirm that you have provided your attestation electronically in the Signature section.

5. Click the Submit button to submit the application.

6. The CDFI Fund will notify you via email regarding your CDE Certification Application status.
2.2 CDE Certification Application – Type B

Applicants that select the Type B CDE Certification Application are required to complete the following sections:

- CDE Certification Details
- Board Information and Board Members
- Certification Application Service Areas
- Subsidiary Information

To complete the application:

1. Make sure that you are on the Select Certification Application Record Type page. If not, refer to Section 2 or follow the steps below:
   a. From the Organization Detail page, navigate to the Program Profiles related list.
   b. Click the Program Profile Name for the CDE-CERT Program Profile to be forwarded to the CDE-CERT Program Profile Detail page.
   c. Click the New Certification Application button.

2. Select the CDE-CERT Type B as the Record Type from the drop-down menu and then click the Continue button.

3. You will be forwarded to the Certification Application Edit page. AMIS auto-populates the Basic Information section of this page with data from the Program Profile.
4. Complete/update the information on the page.
5. Click the Save button to be forwarded to the Certification Application Detail page. Do not click the Save & New button.

**NOTE:** Once the Certification Application has been saved, it can still be edited by selecting the Edit button on the Certification Application Detail page.
2.2.1 Add/Update Board Information and Board Members

To add board information:

1. On the Certification Application Detail page, scroll down to the Boards related list.
2. Click the New Board button to add boards and their corresponding board members.
3. You will be forwarded to the Select Board Record Type page.

![Select Board Record Type](image)

**Figure 30. Select Board Type**

4. Select a Board Record Type and click the **Continue** button. You will be forwarded to the Board Edit page.

![Board Edit Page](image)

**Figure 31. Board Edit Page**

5. Complete the information on the page and then click the **Save** button. You will be forwarded to the Board Detail page.

![Board Detail Page](image)

**Figure 32. Board Detail Page**
6. From the Board Detail page, click the **New Board Members** button under the Board Members related list. You will be forwarded to the Select Board Members Record Type page.

![Figure 33. Select Board Members Record Type Page](image)

7. Select the type of board member and click the **Continue** button to be forwarded to the Board Members Edit page.

![Figure 34. Board Members Edit Page](image)

8. Complete the information on the page and then click the **Save** button. You will be forwarded to the Board Members Detail page.
   a. Click the **Save & New** button to save the record and create another board member. Use this option when you want to create several board members quickly.
b. Click the **Cancel** button to exit the Board Members Edit page and cancel creating a new board member.

![Board Members Detail Page](image)

**Figure 35. Board Members Detail Page**

9. Click the **Clone** button to copy a board member and create another board member with similar information.

10. Click the **link** next to the Board field to return to the Board Detail page.

![Board Detail Page](image)

**Figure 36. Board Detail Page**

11. You can add as many board members as appropriate by clicking the **New Board Members** button. Alternatively, you can select **Save & New** to add new board members until all the members have been added.

12. Click the **link** next to the Certification Application field to return to the Certification Application Detail page.

### 2.2.2 Add/Update a Certification Application Service Area

To add a service area:

1. On the Certification Application Detail page, scroll down to the Certification Application Service Areas related list.

2. Click the **New Certification Application Service Areas** button.
3. You will be forwarded to the Certification Application Service Areas Edit page.

4. Click the **Lookup** icon next to the Service County/Area field to invoke the Lookup dialog window. Search and select a county or state by clicking the appropriate geography.

5. Click the **Save** button to be returned to the Certification Application Service Areas Detail page.

6. You will need to use the Lookup for each proposed service area.

7. Click the **link** next to the Certification Application field to return to the Certification Application Detail page.

### 2.2.3 Add/Update a Subsidiary

To add a subsidiary:

1. On the Certification Application Detail page, scroll down to the Subsidiary CDE related list.
2. Click the **Subsidiary CDE** button.
3. You will be forwarded to the Subsidiary CDE Edit page.

![Figure 41. Subsidiary CDE Edit Page](image1)

4. Complete/update the information on the page.
5. Click the **Save** button to be forwarded to the Subsidiary CDE Detail page.

![Figure 42. Subsidiary CDE Detail Page](image2)

- Click this link to return to the Certification Application Detail page.
- Click a **New...** button to add a subsidiary board, service area, or attachment.
6. Click the **New Subsidiary Board** button in the Subsidiary Boards related list to add a subsidiary board as indicated above.

7. Click the **New Subsidiary Service Area** button in the Subsidiary Service Areas related list to add a subsidiary service area as indicated above.

8. Click the **Attach File** button in the Notes & Attachments related list to add an attachment.

9. Click the **link** next to the Certification Application field to return to the Certification Application Detail page.

### 2.2.4 Add/Update an Attachment

To add an attachment:

1. On the Certification Application Detail page, scroll down to the Notes & Attachments related list.
2. Click the **Attach File** button in the Notes & Attachments related list.

   ![Figure 43. Notes & Attachments Related List](image)

3. You will be forwarded to the Attach File screen.

   ![Figure 44. Attach File Screen](image)

4. Click the **Browse** button and browse to select a file.
5. Click the **Attach file** button.
6. Click the **Done** button.
7. The attached file will be displayed under Notes & Attachments.

### 2.2.5 Submit Application

To submit the application to the CDFI Fund:

1. Make sure that the Signature section on the Certification Application Detail page is completed. This section allows you to attest to the accuracy and completeness of the information you provided in the application.
2. Click the **Edit** button on the Certification Application Detail page and check the Signature box in the Signature section. Click the **Save** button.

3. Click the **Submit** button on the Certification Application Detail page.

4. A confirmation dialog window will be displayed. Click the **OK** button to confirm that you have provided your attestation electronically in the Signature section.

5. Click the **Submit** button to submit the application to the CDFI Fund.
6. The CDFI Fund will notify you via email regarding your CDE Certification Application status.
2.3 **CDE Certification Application – Type B Express**

Applicants that select the Type B Express CDE Certification Application are required to complete the following sections:

- CDE Certification Details
- Board Information and Board Members
- Certification Application Service Areas
- Subsidiary Information

**NOTE:** This option should only be used by an Applicant CDE that is applying for initial CDE Certification on behalf of itself and one or more subsidiary entities; and the subsidiary entities have the same primary mission, service area, and accountability as the Applicant CDE and there are no unapproved material changes to the Applicant CDE’s primary mission, service area, and accountability.

The Accountability & Service Area section must be completed for the Applicant CDE and the Basic Information section for each subsidiary must be entered before selecting the Express B Option, in order for the Express Option to populate the data properly.

To complete the application:

1. Make sure that you are on the Select Certification Application Record Type page. If not, refer to Section 2 or follow the steps below:
   a. From the Organization Detail page, navigate to the Program Profiles related list.
   b. Click the **Program Profile Name** for the CDE-CERT Program Profile to be forwarded to the CDE-CERT Program Profile Detail page.
   c. Click the **New Certification Application** button.

2. Select the **CDE-Cert Type B Express** as the Record Type from the drop-down menu and then click the **Continue** button.
3. You will be forwarded to the Certification Application Edit page. AMIS auto-populates the Basic Information section with data from the Program Profile.

Figure 49. Select Certification Application Record Type Page – Type B Express

4. Complete/update the information on the page.

5. Click the Save button to be forwarded to the Certification Application Detail page. Do not click the Save & New button.
2.3.1 Add/Update Board Information and Board Members

To add board information:

1. On the Certification Application Detail page, scroll down to the Boards related list.
2. Click the New Board button to add boards and their corresponding board members.

Click the For Express B Option to copy the board and service areas from the Applicant CDE to the subsidiary entities.

Click the Edit button to update the application.

Click a New... button to add subsidiaries, boards, service areas, or attachments.

Figure 50. CDE Certification Application Detail Page – Type B Express

Figure 51. Boards Related List – Type B Express
3. You will be forwarded to the Select Board Record Type page.

![Select Board Record Type Page](image)

3. Select Board Record Type page

4. Select a Board Record Type and click the **Continue** button. You will be forwarded to the Board Edit page.

![Board Edit Page](image)

4. Board Edit page

5. Complete the information on the page and then click the **Save** button. You will be forwarded to the Board Detail page.

![Board Detail Page](image)

5. Board Detail page

Click this link to return to the Certification Application Detail page.

Click the New Board Members button to add board members.
6. From the Board Detail page, click the **New Board Members** button under the Board Members related list. You will be forwarded to the Select Board Members Record Type page.

![Select Board Members Record Type Page](image)

**Figure 55. Select Board Members Record Type Page**

7. Select the type of board member and click the **Continue** button to be forwarded to the Board Members Edit page.

![Board Members Edit Page](image)

**Figure 56. Board Members Edit Page**

This section will change based on the type of board member selected.

8. Complete the information on the page and then click the **Save** button. You will be forwarded to the Board Members Detail page.
   a. Click the **Save & New** button to save the record and create another board member. Use this option when you want to create several board members quickly.
   b. Click the **Cancel** button to exit the Board Members Edit page and cancel creating a new board member.
9. Click the **Clone** button to copy a board member and create another board member with similar information.

10. Click the **link** next to the Board field to return to the Board Detail page.

11. You can add as many board members as appropriate by clicking the **New Board Members** button.

12. Click the **link** next to the Certification Application field to return to the Certification Application Detail page.

### 2.3.2 Add/Update a Certification Application Service Area

To add a service area:

1. On the Certification Application Detail page, scroll down to the Certification Application Service Areas related list.

2. Click the **New Certification Application Service Areas** button.
3. You will be forwarded to the Certification Application Service Areas Edit page.

4. Click the **Lookup** icon next to the Service/County Area field to invoke the Lookup dialog window. Search and select a county or state by clicking the appropriate geography.

5. Click the **Save** button to be returned to the Certification Application Service Areas Detail page.

6. You will need to use the Lookup for each proposed service area.

7. Click the **link** next to the Certification Application field to return to the Certification Application Detail page.

### 2.3.3 Add/Update a Subsidiary

To add a subsidiary:
1. On the Certification Application Detail page, scroll down to the Subsidiary CDE related list.
2. Click the **Subsidiary CDE** button.

3. You will be forwarded to the Subsidiary CDE Edit page.
4. Complete the information on the page.
5. Click the **Save** button to be forwarded to the Subsidiary CDE Detail page.

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**Figure 63. Subsidiary CDE Edit Page**

**Figure 64. Subsidiary CDE Detail Page**

Click this link to return to the Certification Application Detail page.

This information will be copied from the Applicant CDE.
6. You do not need to add subsidiary board information and service areas if they are similar to the Applicant CDE. The system will allow you to automatically copy this information into each subsidiary.

7. Click the link next to the Certification Application field to return to the Certification Application Detail page.

2.3.4 Copy the Applicant CDE’s Information into Each Subsidiary Entity

To copy the Applicant CDE’s board information and service areas into each subsidiary entity:

1. Locate the For Express B Option button on the Certification Application Detail page.

![Figure 65. Copy the Applicant CDE’s Information into Each Subsidiary]

2. Click the For Express B Option button to copy the Applicant CDE’s board information and service areas into each subsidiary.

3. A confirmation dialog window is displayed.
4. Click the **OK** button on the confirmation dialog window.

5. On the Certification Detail page, scroll down to the Subsidiary CDE related list.

6. Click the **link** next to the Subsidiary CDE field to be forwarded to the Subsidiary CDE Detail page.

**Figure 66. Copy the Applicant CDE’s Information into Each Subsidiary – Confirmation**

**Figure 67. Subsidiary CDE Related List**

**Figure 68. Subsidiary CDE Detail Page**
7. Verify that the subsidiary boards and subsidiary service areas displayed were copied from the Applicant CDE’s board information and service areas.

8. Click the link next to the Certification Application field to return to the Certification Application Detail page.

2.3.5 Add/Update an Attachment

To add an attachment:
1. On the Certification Application Detail page, scroll down to the Notes & Attachments related list.
2. Click the Attach File button in the Notes & Attachments related list.

![Figure 69. Notes & Attachments Related List](image)

3. You will be forwarded to the Attach File screen.

![Figure 70. Attach File Screen](image)

4. Click the Browse button and browse to select a file.
5. Click the Attach file button.
6. Click the Done button.
7. The attached file will be displayed under Notes & Attachments.

2.3.6 Submit Application

To submit the application to the CDFI Fund:
1. Make sure that the Signature section on the Certification Application Detail page is completed. This section allows you to attest to the accuracy and completeness of the information you provided in the application.
2. Click the **Edit** button on the Certification Application Detail page and check the Signature box in the Signature section.

3. Click the **Submit** button on the Certification Application Detail page.
4. A confirmation dialog window will be displayed. Click the OK button to confirm that you have provided your attestation electronically in the Signature section.

5. Click the Submit button to submit the application.

6. The CDFI Fund will notify you via email regarding your CDE Certification Application status.
2.4 CDE Certification Application – Type C

Applicants that select the Type C CDE Certification Application are required to complete the following sections:

- CDE Certification Details
- Subsidiary Information

To complete the application:

1. Make sure that you are on the Select Certification Application Record Type page. If not, refer to Section 2 or follow the steps below:
   a. From the Organization Detail page, navigate to the Program Profiles related list.
   b. Click the Program Profile Name for the CDE-CERT Program Profile to be forwarded to the CDE-CERT Program Profile Detail page.
   c. Click the New Certification Application button.

2. Select CDE-CERT Type C as the Record Type from the drop-down menu and then click the Continue button.

3. You will be forwarded to the Certification Application Edit page. AMIS auto-populates the Basic Information section of this page with data from the Program Profile.
4. Complete/update the information on the page.
5. Click the Save button to be forwarded to the Certification Application Detail page.
2.4.1 Add/Update a Subsidiary

To add a subsidiary:
1. On the Certification Application Detail page, scroll down to the Subsidiary CDE related list.
2. Click the Subsidiary CDE button.

3. You will be forwarded to the Subsidiary CDE Edit page.
4. Complete/update the information on the page.
5. Click the **Save** button to be forwarded to the Subsidiary CDE Detail page.
6. Click the **New Subsidiary Board** button in the Subsidiary Boards related list to add a subsidiary board as indicated above.
7. Click the **New Subsidiary Service Area** button in the Subsidiary Service Areas related list to add a subsidiary service area as indicated above.
8. Click the **Attach File** button in the Notes & Attachments related list to add an attachment.
9. Click the link next to the Certification Application field to return to the Certification Application Detail page.

### 2.4.2 Add/Update a Subsidiary Board

To add a board:

1. On the Certification Application Detail page, scroll down to the Boards related list.
2. Click the **New Subsidiary Board** button to add boards and their corresponding board members.

![Figure 80. Subsidiary Boards Related List](image)

3. You will be forwarded to the Select Subsidiary Board Record Type page.

![Figure 81. Select Subsidiary Board Type](image)

4. Select a board type and click the **Continue** button. You will be forwarded to the Subsidiary Board Edit page.
5. Complete the information on the page and then click the **Save** button. You will be forwarded to the Subsidiary Board Detail page.

6. From the Board Detail page, click the **New Subsidiary Board Members** button under the Board Members related list. You will be forwarded to the Select Board Members Record Type page.
7. Select the type of board member and click the **Continue** button to be forwarded to the Subsidiary Board Members Edit page.

8. Complete the information on the page and then click the **Save** button. You will be forwarded to the Subsidiary Board Members Detail page.
   a. Click the **Save & New** button to save the record and create another board member. Use this option when you want to create several board members quickly.
   b. Click the **Cancel** button to exit the Board Members Edit page and cancel creating a new board member.
9. Click the **Clone** button to copy a contact and create another subsidiary board member with similar information.

10. Click the **link** next to the Subsidiary CDE field to return to the Subsidiary Board Detail page.

11. You can add as many board members as appropriate by clicking the **New Subsidiary Board Members** button.

12. Click the **link** next to the Subsidiary CDE field to return to the Subsidiary CDE Detail page.

### 2.4.3 Add/Update a Subsidiary Service Area

To add a subsidiary service area:

1. On the Subsidiary CDE Detail page, scroll down to the Subsidiary Service Areas related list.
2. Click the **New Certification Application Service Area** button.
3. You will be forwarded to the Subsidiary Service Areas Edit page.

4. Click the **Lookup** icon next to the Service/County Area field to invoke the Lookup dialog window. Search and select a county or state by clicking the appropriate geography.

5. Complete all the information on the page.

6. Click the **Save** button to be returned to the Subsidiary Service Area Detail page.

7. You can add as many subsidiary service areas as appropriate by clicking the **New Subsidiary Service Area** button.

8. Click the **link** next to the Certification Application field to return to the Certification Application Detail page.
2.4.4 Add/Update an Attachment

To add an attachment:
1. On the Certification Application Detail page, scroll down to the Notes & Attachments related list.
2. Click the Attach File button in the Notes & Attachments related list.
3. You will be forwarded to the Attach File screen.
4. Click the Browse button and browse to select a file.
5. Click the Attach file button.
6. Click the Done button.
7. The attached file will be displayed under Notes & Attachments.

2.4.5 Submit Application

To submit the application to the CDFI Fund:
1. Make sure that the Signature section on the Certification Application Detail page is completed. This section allows you to attest to the accuracy and completeness of the information you provided in the application.

2. Click the **Edit** button on the Certification Application Detail page and check the Signature box in the Signature section. Click the **Save** button.

3. Click the **Submit** button on the Certification Application Detail page.

4. A confirmation dialog window will be displayed. Click the **OK** button to confirm that you have provided your attestation electronically in the Signature section.

5. Click the **Submit** button to submit the application.
6. The CDFI Fund will notify you via email regarding your CDE Certification Application status.
2.5 CDE Certification Application – Type C Express

Applicants that select the Type C Express CDE Certification Application are required to complete the following sections:

- CDE Certification Details
- Subsidiary Information

This option should only be used by an Applicant CDE that is already certified and is applying for CDE certification on behalf of one or more subsidiary entities; and the subsidiary entities have the same primary mission, service area, and accountability as the Applicant CDE and there are no unapproved material changes to the Applicant CDE’s primary mission, service area, and accountability.

The Accountability & Service Area section must be completed for the Applicant CDE and the Basic Information section for each subsidiary must be entered before selecting the Express B Option, in order for the Express Option to populate the data properly.

To complete the application:

1. Make sure that you are on the Select Certification Application Record Type page. If not, refer to Section 2 or follow the steps below:
   a. From the Organization Detail page, navigate to the Program Profiles related list.
   b. Click the Program Profile Name for the CDE-CERT Program Profile to be forwarded to the CDE-CERT Program Profile Detail page.
   c. Click the New Certification Application button.

2. Select the CDE-CERT Type C Express as the Record Type from the drop-down menu and then click the Continue button.
3. You will be forwarded to the Certification Application Edit page. AMIS auto-populates the Basic Information section of this page with data from the Program Profile.

![Certification Application Edit Page](image)

**Figure 98. CDE Certification Application Edit Page – Type C Express**

4. Complete/update the information on the page.
5. Click the **Save** button to be forwarded to the Certification Application Detail page.
2.5.1 Add/Update a Subsidiary

To add a subsidiary:

1. On the Certification Application Detail page, scroll down to the Subsidiary CDE related list.
2. Click the Subsidiary CDE button.
3. You will be forwarded to the Subsidiary CDE Edit page.
4. Complete the information on the page.
5. Click the **Save** button to be forwarded to the Subsidiary CDE Detail page.

Click this link to return to the Certification Application Detail page.

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**Figure 101. Subsidiary CDE Edit Page**

**Figure 102. Subsidiary CDE Detail Page**
6. You do not need to add subsidiary board information and service areas if they are similar to the Applicant CDE. The system will allow you to automatically copy this information into each subsidiary.

7. Click the link next to the Certification Application field to return to the Certification Application Detail page. You can add as many subsidiaries as needed by following the steps above.

2.5.2 Copy the Applicant’s Certified CDE Information into Each Subsidiary Entity

To copy the applicant’s certified CDE board information and service areas into each subsidiary entity:

1. Locate the For Express C Option button on the Certification Application Application Detail page.

![Figure 103. Copy the Applicant’s Certified CDE Information into Each Subsidiary](image)

2. Click the For Express C Option button to copy the Applicant’s certified CDE board information and service areas into each subsidiary.

3. A confirmation dialog window is displayed.

![Figure 104. Copy the Applicant’s Certified CDE Information into Each Subsidiary – Confirmation](image)
4. Click the **OK** button on the confirmation dialog window.

5. On the Certification Detail page, scroll down to the Subsidiary CDE related list.

![Figure 105. Subsidiary CDE Related List](image)

6. Click the **link** next to the Subsidiary CDE field to be forwarded to the Subsidiary CDE Detail page.

![Figure 106. Subsidiary CDE Detail Page](image)
7. Verify that the subsidiary boards and subsidiary service areas displayed were copied from the Applicant CDE’s board information and service areas.
8. Click the link next to the Certification Application field to return to the Certification Application Detail page.

2.5.3 Add/Update an Attachment
To add an attachment:
1. On the Certification Application Detail page, scroll down to the Notes & Attachments related list.
2. Click the Attach File button in the Notes & Attachments related list.

![Notes & Attachments Related List](image1)

Figure 107. Notes & Attachments Related List
3. You will be forwarded to the Attach File screen.

![Attach File Screen](image2)

Figure 108. Attach File Screen
4. Click the Browse button and browse to select a file.
5. Click the Attach file button.
6. Click the Done button.
7. The attached file will be displayed under Notes & Attachments.

2.5.4 Submit Application
To submit the application to the CDFI Fund:
1. Make sure that the Signature section on the Certification Application Detail page is completed. This section allows you to attest to the accuracy and completeness of the information you provided in the application.
2. Click the **Edit** button on the Certification Application Detail page and check the Signature box in the Signature section. Click the **Save** button.

3. Click the **Submit** button on the Certification Application Detail page.

4. A confirmation dialog window will be displayed. Click the **OK** button to confirm that you have provided your attestation electronically in the Signature section.

5. Click the **Submit** button to submit the application.
Figure 111. Certification Application Detail Page – Confirmation

6. The CDFI Fund will notify you via email regarding your CDE Certification Application status.