FY 2021 Capital Magnet Fund (CMF) Application

AMIS Navigation Guide

Contents

1.0 Summary

This Application User Interface (UI) guide is intended to help Applicants complete the FY 2021 CMF Funding Application in the CDFI Fund's Award Management Information System (AMIS). It is a technical guide and is not intended to replace the FY 2021 CMF Application Instructions and other Application materials.

Application Specific Guidance (Section 2) contains additional instructions for completing three sections of the CMF Application: Setting Entity Approach, Attaching an SF-424, and Selecting Geographic Areas. Please note that in order to launch the CMF Application, you will first need to set your Entity Approach as described in this section.

UI Appearance and Navigation (Section 3) and **UI Form Features** (Section 4) provide guidance on navigating the Application's UI and explain how to use the Application's form features to complete your Application.

Finally, **Completing and Submitting the Application** (Section 5) explains how to attest and successfully submit your CMF Funding Application.

2.0 Application Specific Guidance

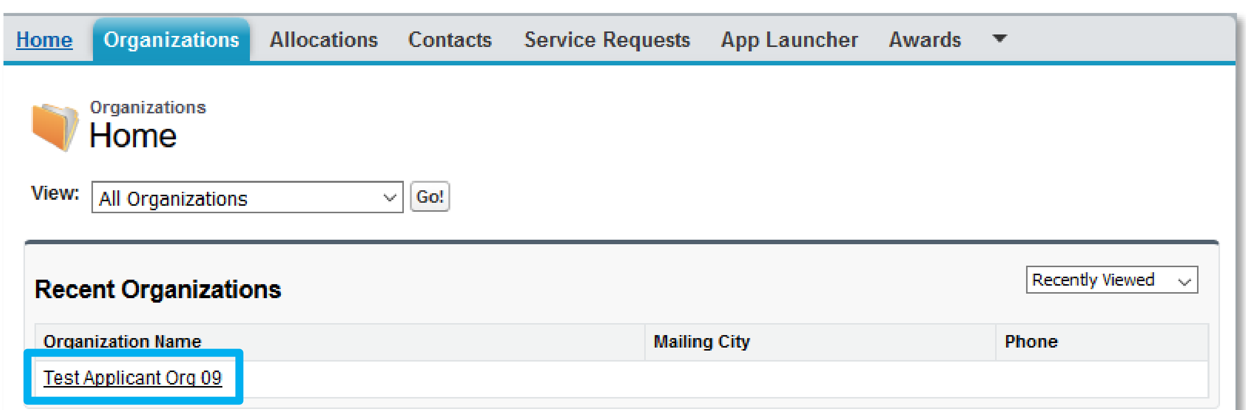
This section includes additional guidance for navigating features unique to the CMF Application process in the Template Application UI.

2.1 Setting Entity Approach on Program Profile

Before you can begin entering your Application in the UI, you will need to set your organization's Entity Approach on the CMF Program Profile.

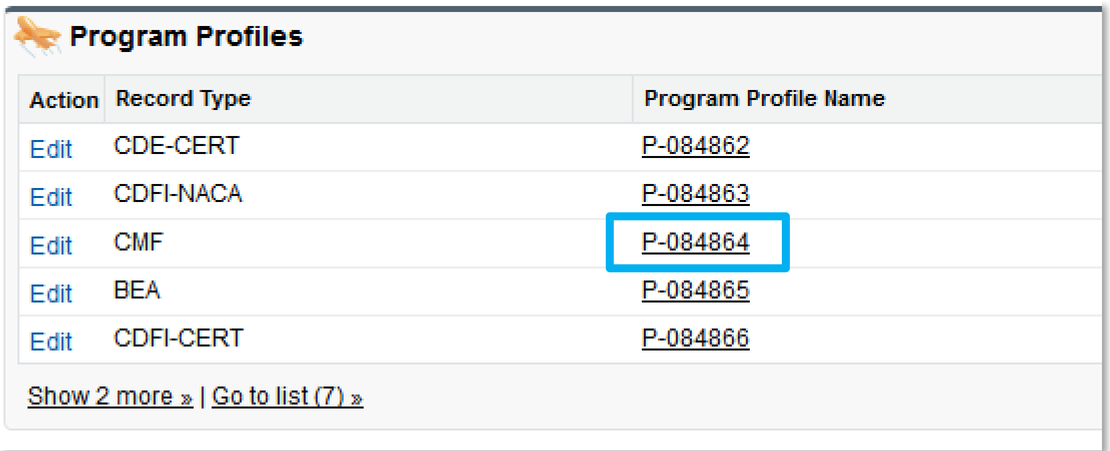
To update your Entity Approach:

1. Log in to AMIS and click on the Organizations tab. Select your Organization name.



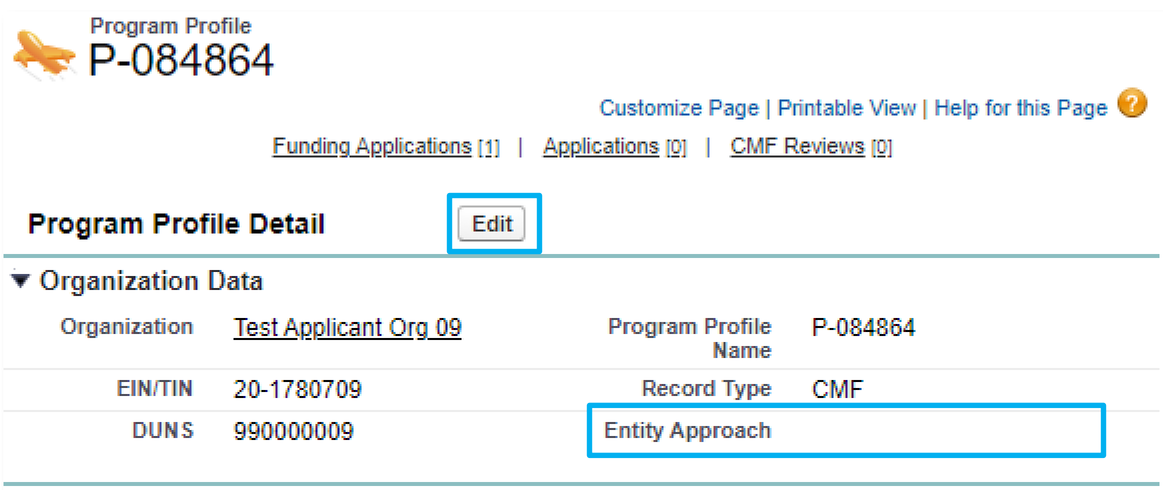
Organizations Home Page

2. From your Organization's detail page, scroll down to and select the Program Profiles related list. Click on the CMF Program Profile name.



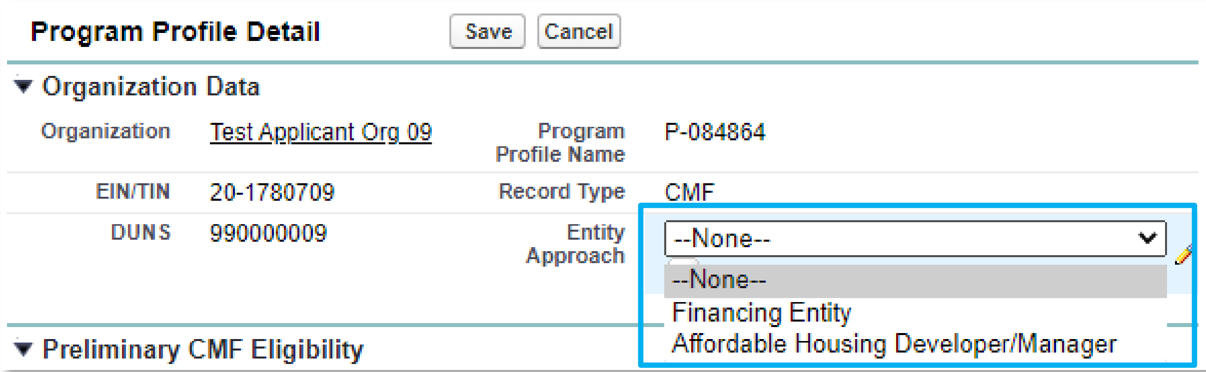
Program Profiles Related List

3. On the Program Profile detail page, locate the field "Entity Approach" under the section "Organization Data."



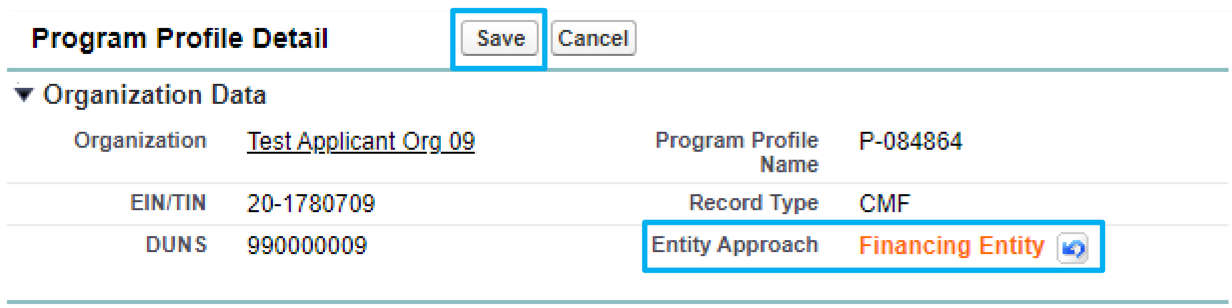
CMF Program Profile- Entity Approach Field

4. Double click on the blank space or click the **Edit** button at the top of the page to enable the Entity Approach picklist.



Entity Approach Picklist

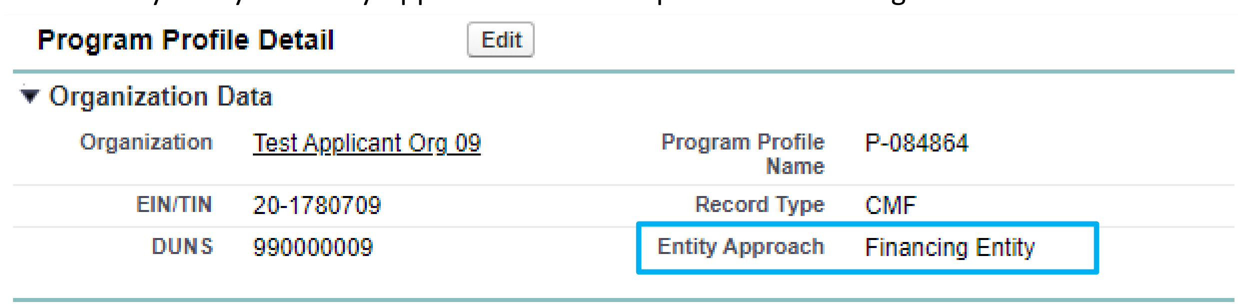
5. Indicate whether your Organization is applying as a "Financing Entity" or "Affordable Housing Developer/Manager."



Saving Entity Approach

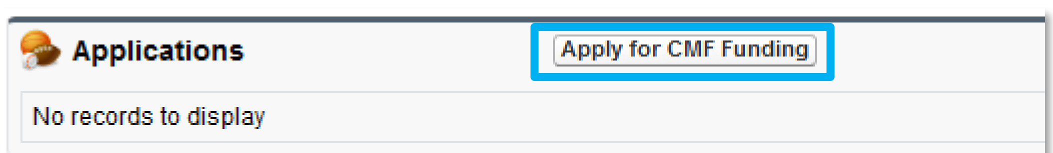
6. Click **Save.**

7. Verify that your Entity Approach has been updated on the Program Profile.



New Entity Approach Set

8. Once your Entity Approach is updated, you will be able to launch the Application from the Applications related list on the Program Profile by clicking the button **Apply for CMF**.



Applications Related List- Launch New CMF Funding Application

2.2 Attaching SF-424

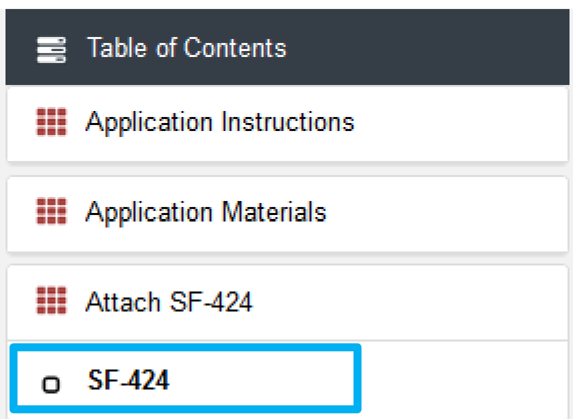
All Applicants are required to submit the initial component of their FY 2021 CMF Program Application using the Grants.gov portal, the official website for federal grant information and Applications. The only component of the CMF Application submitted via Grants.gov is the Standard Form (SF)-424 Mandatory Form. The SF-424 Mandatory Form (SF-424) is required for all Applicants.

The registration for Grants.gov and the processing time needed to review your SF-424 submission will take several days so it is recommended that Applicants begin this process before they start their Application in AMIS. For more detailed instructions on how to submit your SF-424 to Grants.gov, please see the **FY 2021 CMF Application Instructions**.

Once your SF-424 is validated by Grants.gov, a record for your SF-424 will be generated in AMIS. You will need to link your SF-424 record to your CMF Funding Application in the Application UI.

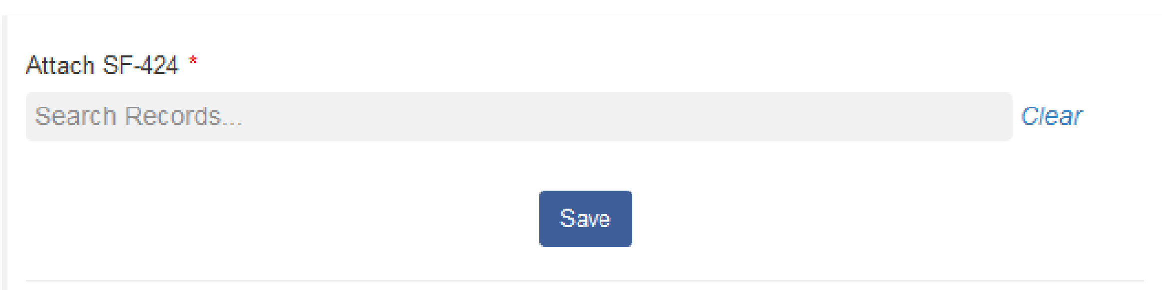
To attach your SF-424:

1. Expand the "Attach SF-424" section in the menu bar. Click on the "SF-424" subsection.



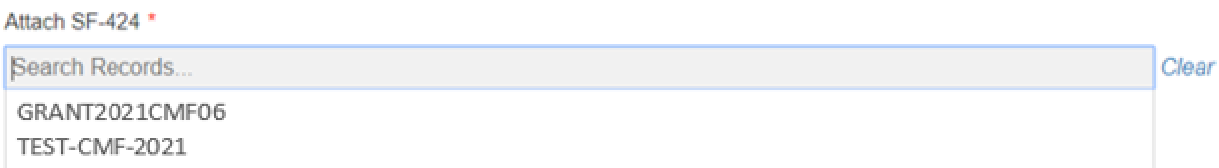
SF-424 Subsection in Menu

2. The subsection will display a single related record question. Click in the gray "Search Records" box. Begin typing "GRANT" to view the grant in the gray search box and select the record you would like to use.



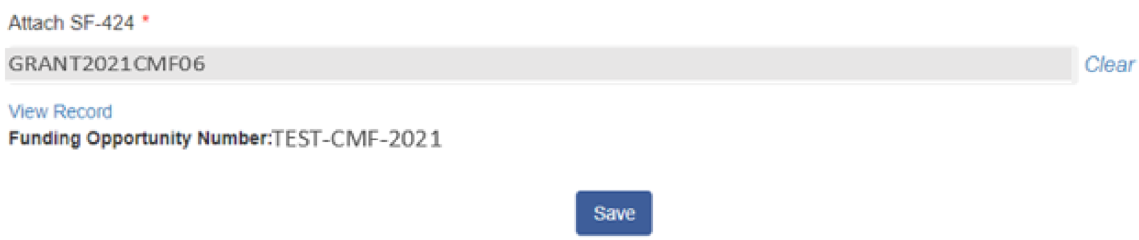
Attach SF-424 Related Record Field

3. SF-424 records associated with your organization will appear in the related record list. If you have submitted multiple SF-424s in Grants.gov, please select the correct SF-424 by referencing the SF-424 ID (the digits following “Grant”). If your SF-424 does not appear, please contact the CMF Team by submitting a Service Request.



SF-424 Record for Your Organization in Related Record List

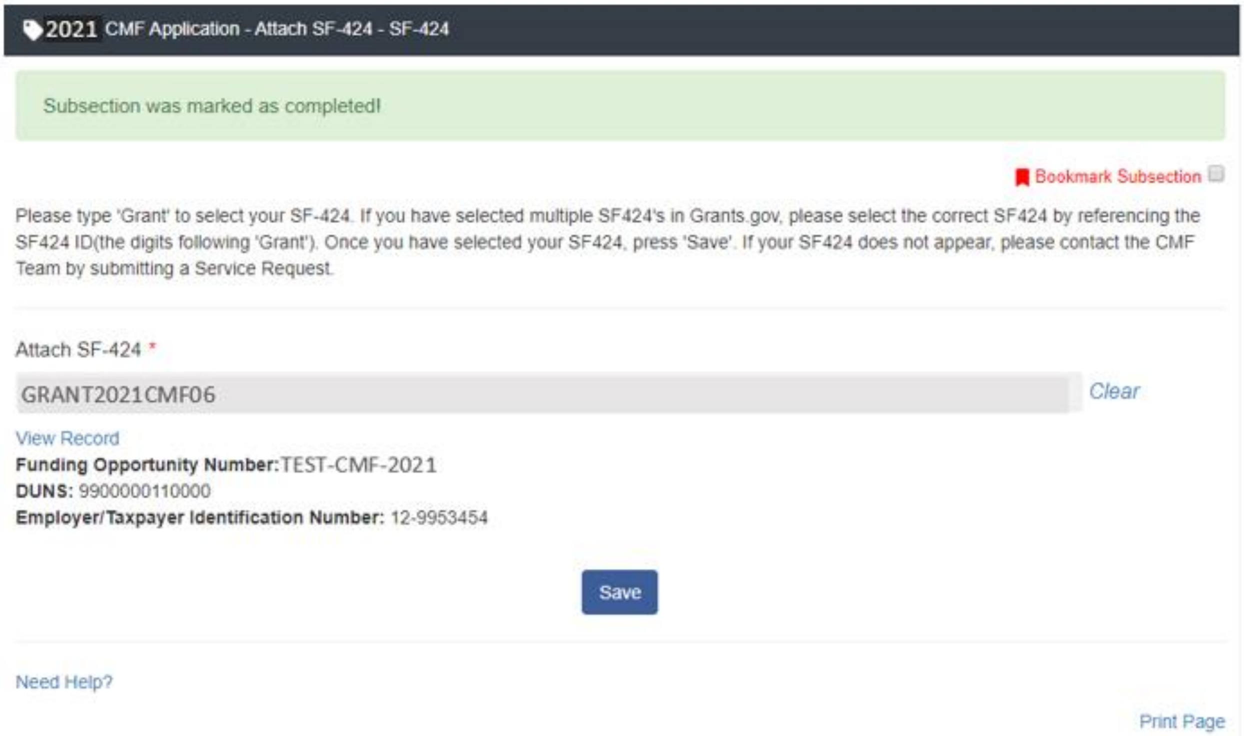
4. Verify that you have selected the correct record by confirming that the Funding Opportunity Number listed is “TEST-CMF2021” and the SF-424 ID corresponds to your SF-424’s Grants.gov Tracking Number (GRANTxxxxxxxx).



Selected SF-424 Record

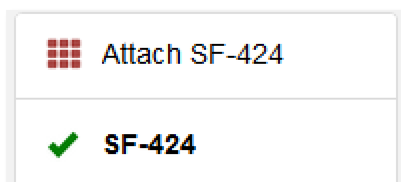
5. If you have selected the incorrect record and need to choose another, select the “Clear” button to the right of gray box and re-select the correct record.

6. Once you select an SF-424 record and click **Save**, you will see additional information listed below the related record field.



Successfully Attached SF-424 Record

7. Your SF-424 record has successfully been attached if you receive the positive validation "Subsection was marked as completed!" and a green checkmark next to the SF-424 subsection in the menu.



Subsection SF-424 Marked Complete in Menu

2.3 Validate Leverage Inputs

In the subsection "Validate Leverage Inputs", there are questions to ensure that the data entered in Question 14-17 is accurate. No data needs to be entered in this question, but you must successfully save it and get a green check mark in order to submit the Application. If you receive an error, you must update the data in Question 14-17 to resolve the issue.

Validate Leverage Inputs Subsection in Menu

Leverage Type/Source	Leverage Amount
Leverage Types	
Enterprise-Level Leverage (15c)	20,000
Reinvestment Leverage (16a + 16b + 16c)	60,000
Project-Level Leverage (17c)	60,000
Total Leverage as Entered (15c + 16a + 16b + 16c + 17c) ?	The total of 15(c) + 16(a) + 16(b) + 16(c) + 17(c) must be equal to 14(e), your Leveraged Costs. 140,000.00
Leveraged Costs (14e)	9,050,000
Private Sources	
Private Leverage as Entered (15a + 16b + 17a)	The total of 15(a) + 16(b) + 17(a) must be equal to 14(f), your Private Leveraged Costs. 60,000.00
Private Leverage from Q. 14f	9,000,000
Public Sources	
Public Leverage as Entered (15b + 16a + 16c + 17b)	The total of 15(b) + 16(c) + 17(b) must be equal to 14(g), your Public Leveraged Costs. 80,000.00
Public Leverage from Q. 14g	50,000
Leverage Type/Source	Leverage Amount

Error message when Totals don't match

Subsection was marked as completed!

Bookmark Subsection

The following table summarizes key leverage data inputs you've entered in Questions 14-17 for Leverage Type (i.e. Enterprise, Reinvestment, and Project-Level) and Leverage Sources (private vs public). Press "Save" to run the validations and to complete this sub-section.

Enterprise, Reinvestment, and Project-level Leverage amounts must add up to the Leveraged Costs you've entered in 14e (i.e. 15c + 16a + 16b + 16c + 17c = 14e).

In addition, AMIS will compare the values you've entered for private and public leverage in 14f and 14g with the amounts you've entered in Questions 15-17. If the amounts do not match, please review the values entered in Questions 14-17 and update as needed.

You will not be able to complete this sub-section or submit the Application if the amounts on this page not validated.

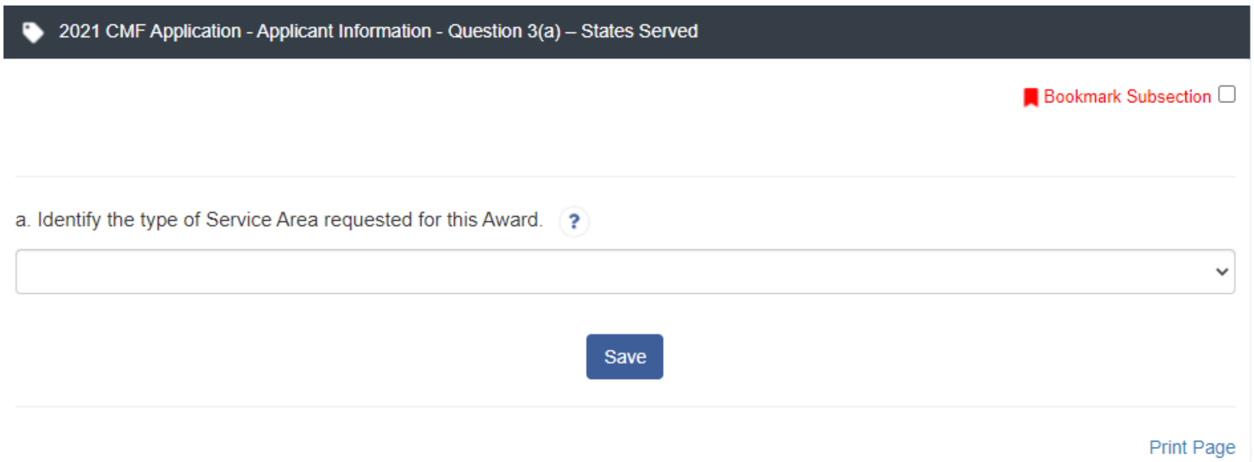
Leverage Type/Source	Leverage Amount
Leverage Types	
Enterprise-Level Leverage (15c)	7,000,000
Reinvestment Leverage (16a + 16b + 16c)	50,000
Project-Level Leverage (17c)	2,000,000
Total Leverage as Entered (15c + 16a + 16b + 16c + 17c) ?	9,050,000.00
Leveraged Costs (14e)	9,050,000
Private Sources	
Private Leverage as Entered (15a + 16b + 17a)	7,020,000.00
Private Leverage from Q. 14f	7,020,000
Public Sources	
Public Leverage as Entered (15b + 16a + 16c + 17b)	2,030,000.00
Public Leverage from Q. 14g	2,030,000
Leverage Type/Source	Leverage Amount

Successfully Saved when Totals match

2.4 Selecting Geographic Areas

In your CMF Funding Application, you will be asked to identify the Geographic Areas you plan to serve with your CMF Award.

First, you will need to indicate what type of Service Area you plan to serve with your award in "Question 3- States Served" in the "Applicant Information" section.



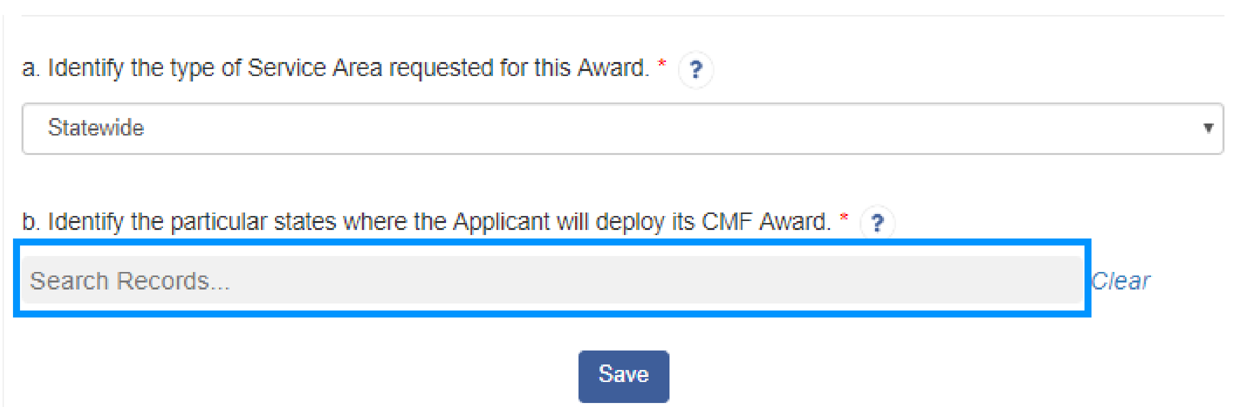
Subsection Question 3- States Served

Select your Service Area type (Statewide or Multi-State) from the picklist in Question 3a.

Statewide Service Areas

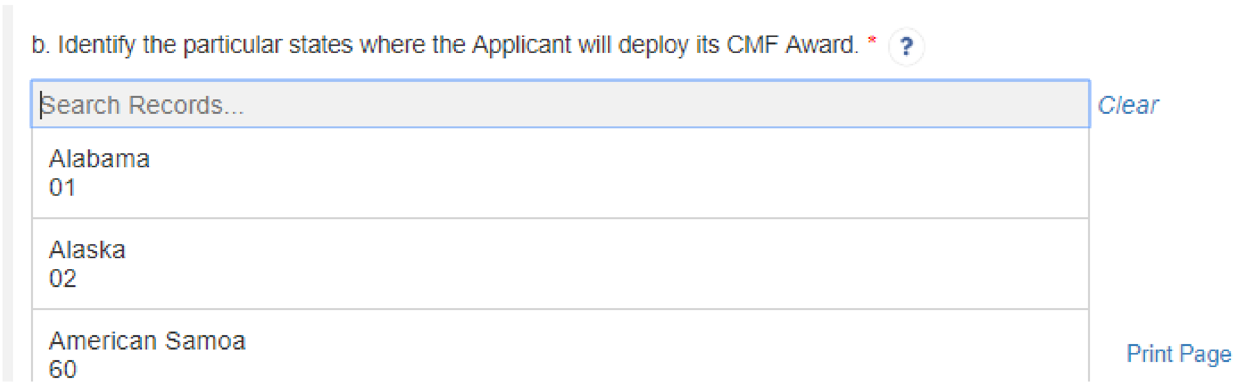
For a statewide Service Area, select <u>one</u> state.

To select a state or US Territory, on Question 3a, select "Statewide".



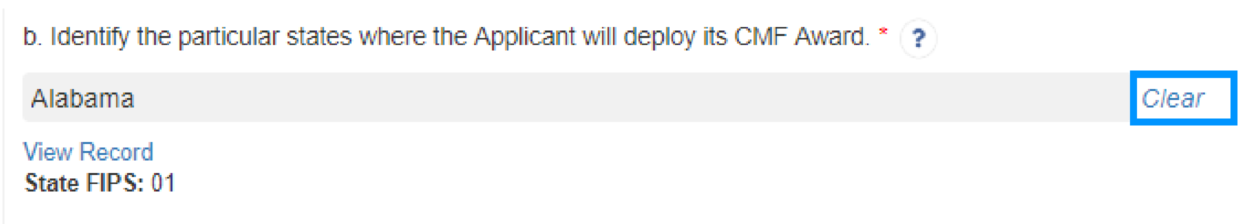
States Served - Statewide Service Area

To select the state or US Territory you plan to serve, click in the gray related record field. A list of US state or US Territory records will appear. Begin typing in the name of the state or Territory you want to select.



US State Records List

Note: You will only be able to search these records using the full state name, not postal abbreviations.



Selected State Record

The selected state and state FIPS code will be displayed.

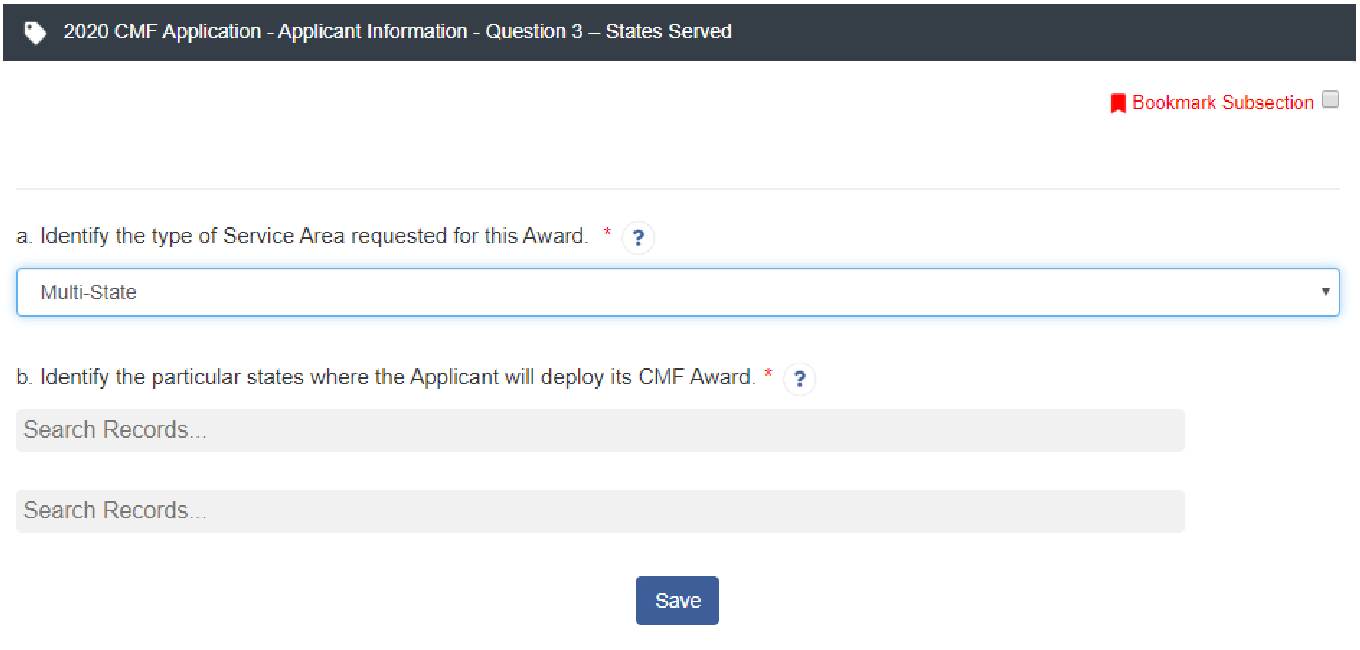
If you select the wrong state, use the **Clear** button to the right of the related record row to remove a state record and select a new one.

Once you have selected your state, click **Save.** Verify that the subsection has successfully been marked completed and has a green checkmark next to the subsection name in the menu bar.

Multi-State Service Areas

For a multi-state Service Area, you may select any combination of states and US territories. You must select <u>more than one</u> state/territory for this type of Service Area, but <u>you cannot select more than 15 states</u>.

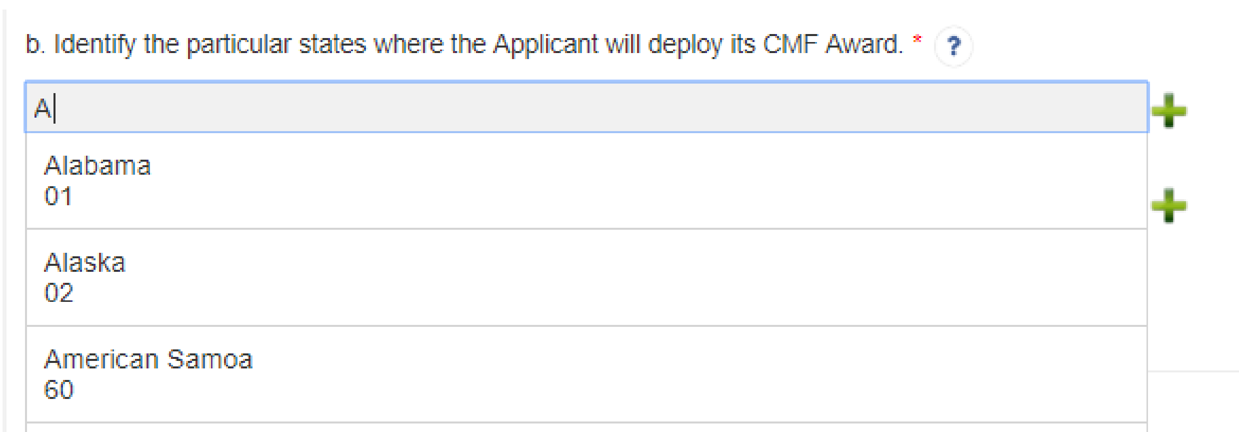
To select a state or US Territory, on Question a. select “Multi-State”



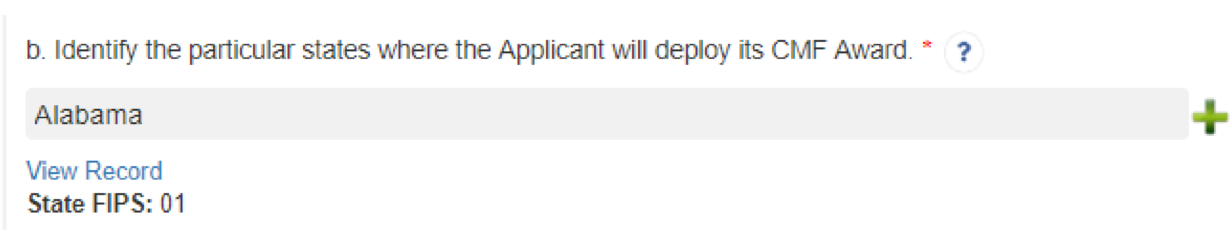
Application Geographic Areas- Multi-State Service Area

To select which US Territory and/or states you plan to serve, click in the gray related record field. A list of US Territory and state records will appear. Begin typing in the name of the Territory or state you want to select.

Note: You will only be able to search for territory or state records by the name, not the postal code abbreviation.

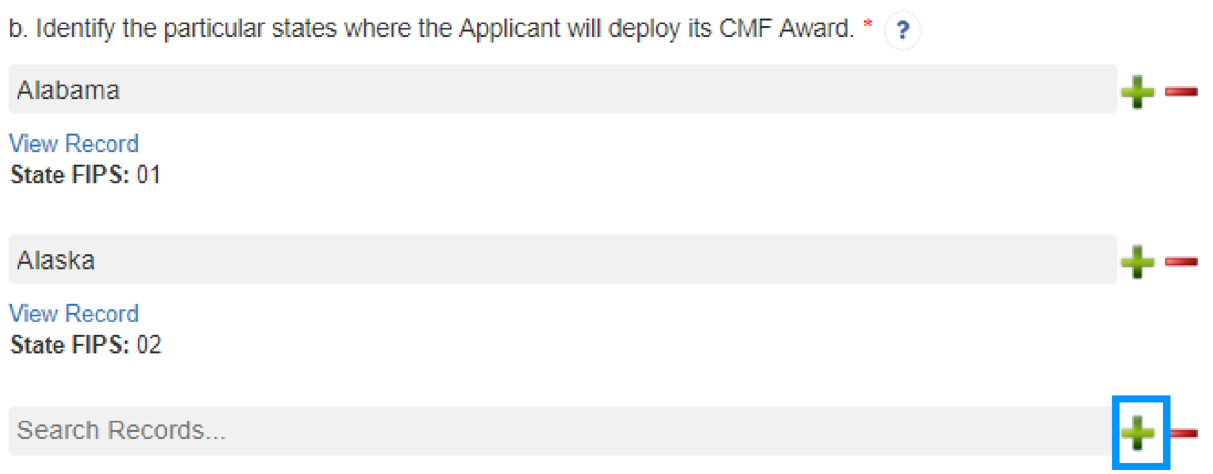


Example of Name Used in Multiple Records



State FIPS Code and State Name for Selected Record

To add another Territory/state, click the green plus sign symbol next to the related record search to create a new record row.



Use the Plus Sign to Create a New Record Row

Search for another Territory/state record. If you need to add more Territories/states, you can continue to create additional related record rows using the plus sign.

Use Minus Sign to Delete Unwanted Records

To remove a selected territory/state, click the red minus sign symbol next to the related record row you would like to delete. Make sure all related record rows you create have a territory/state selected. If you have extra record fields, delete them using the minus sign.

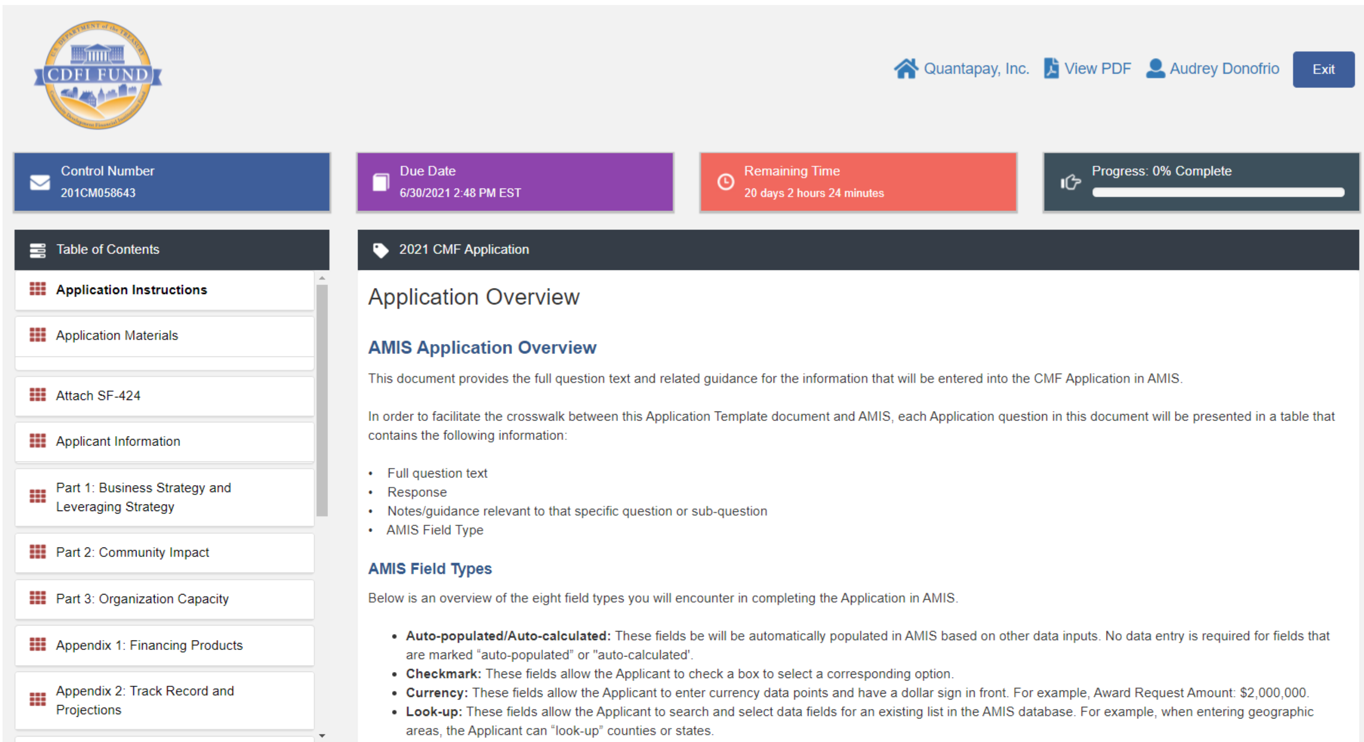
Verify that you selected your desired combination of territories and states. You must select <u>more than one</u> state/territory for this type of Service Area, but <u>you cannot select more than 15 states</u>.

Click **Save.** Verify that the subsection is successfully marked completed and has a green checkmark next to the subsection name in the menu bar.

3.0 User Interface Appearance and Navigation

3.1 Application Layout

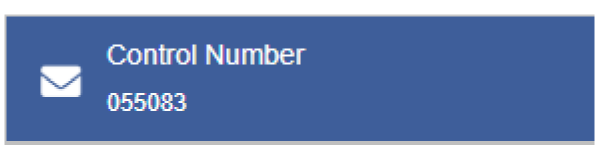
Upon logging in to the Application, you will land on the Application User Interface (UI) home page. The UI has a stationary header at the top of the page that displays important Application details.



Application UI Home Page (CMF)

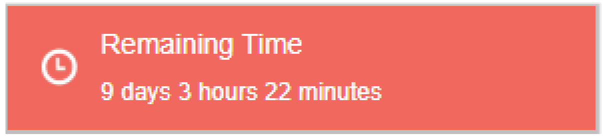
The header will include:

1. Control Number: The system-generated number assigned to your Application.

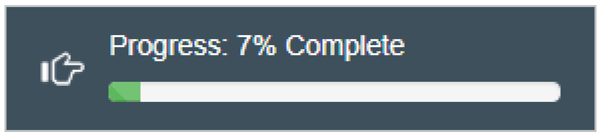


2. Due Date: The date and time when the Application must be submitted. Screenshot below is just an example; not an actual due date.

3. Remaining Time: A countdown feature that displays how much time is left to submit the Application before the due date.

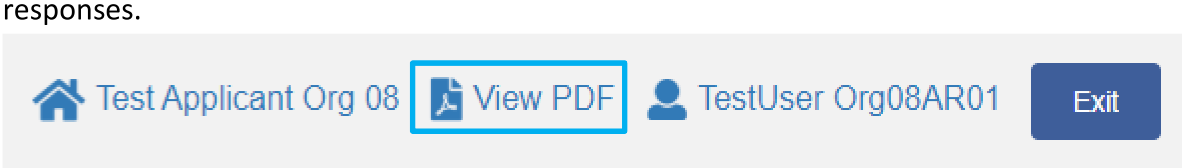


4. Progress Bar: Keeps track of your progress as you complete portions of the Application.

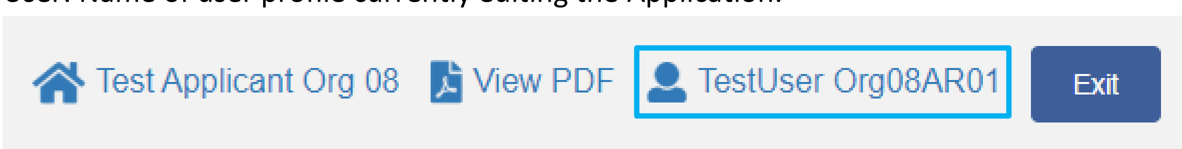


Organization: A hyperlink to your Organization's detail page. When you click this link, it will return you to your organization record in a new window.

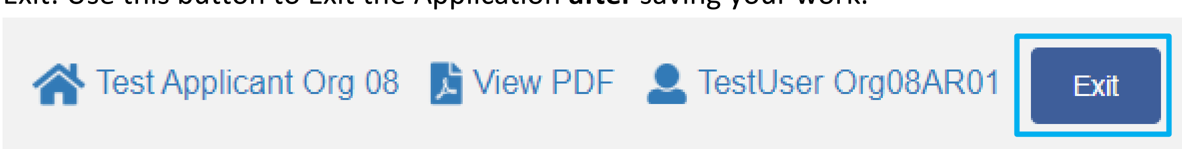
5. View PDF: An option to export and view the Application as a PDF file. The PDF prints the current state of the Application. If blank, it will show Application guidance, questions, and tables. Once responses are entered into the Application, the PDF will also include responses.



6. User: Name of user profile currently editing the Application.

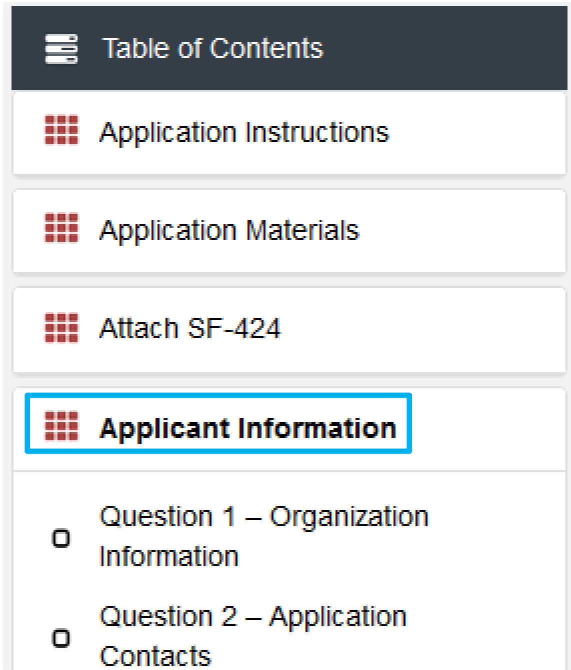


Exit: Use this button to Exit the Application **after** saving your work.



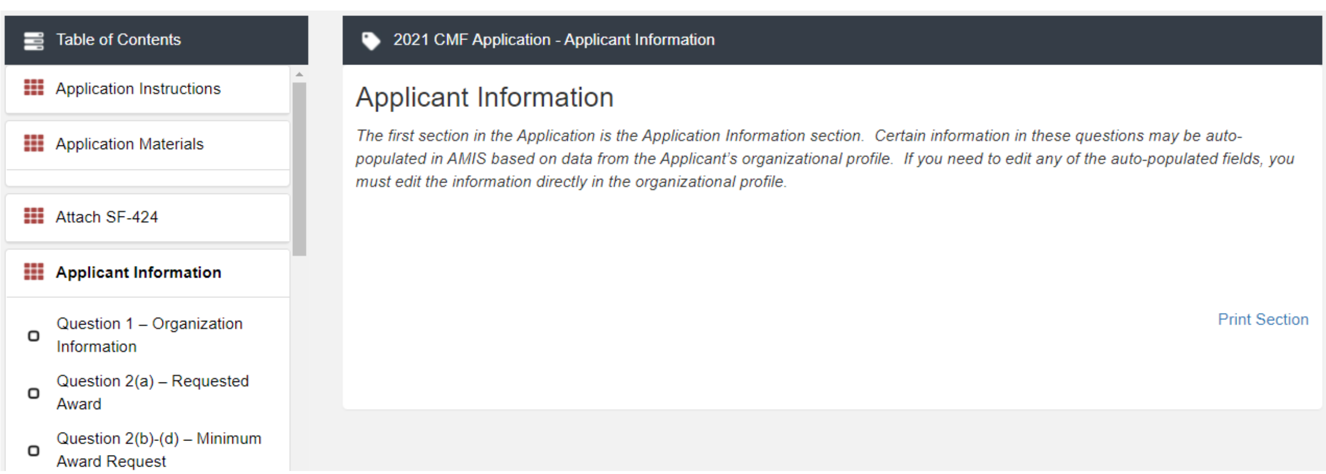
3.2 Using the Collapsible Menu

The menu on the left-hand side of the page will allow you to navigate to different sections of the Application.



Collapsible Menu- Collapsed and Expanded

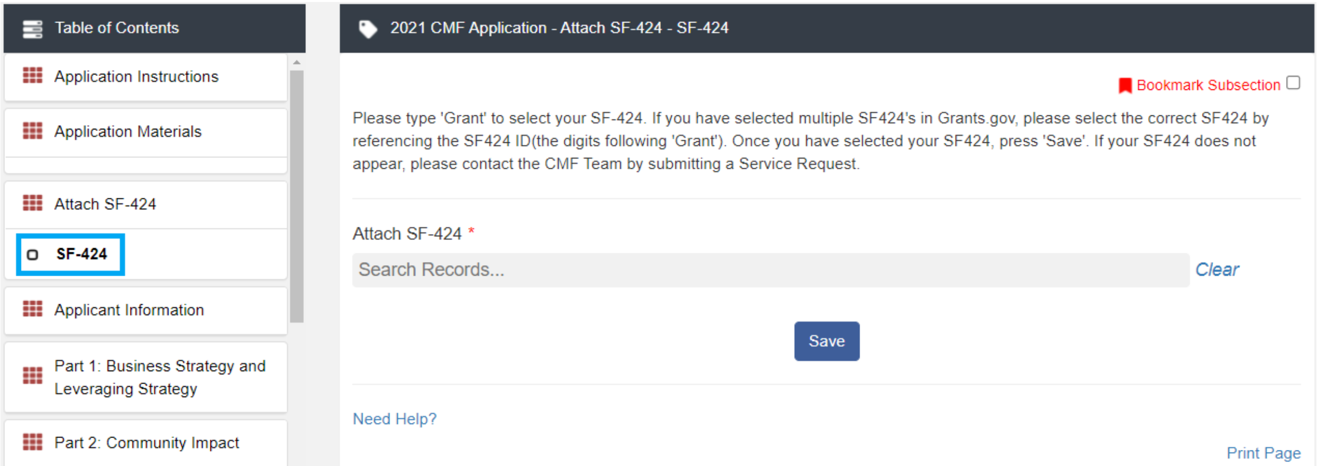
Click on the section title in the menu to expand and view subsections. This will display links to subsections below the section title in the menu bar.



Expanded Section and Section Introduction Page

Clicking on a section title will also bring up a section introduction page in the interface to the right of the menu. This page will describe the section and include any important details, tips, instructions the user may need before proceeding to the subsections.

To view a subsection, click on the hyperlink to the subsection title in the menu bar.



Subsection Page View

The page for the subsection, including Application question and response fields, will be visible in the UI display to the right of the menu. Note that the gray bar at the top of the display lists the name of the Application, section, and subsection currently displayed.

To navigate to another subsection, click on that subsection's title.

If you are finished viewing an Application section and would like to minimize its list of subsections, simply click on the section title link in the menu again.

The menu allows you to move from section to section as needed within the Application. Just be sure to always **Save** any entries you have entered for a subsection before navigating away from that page.

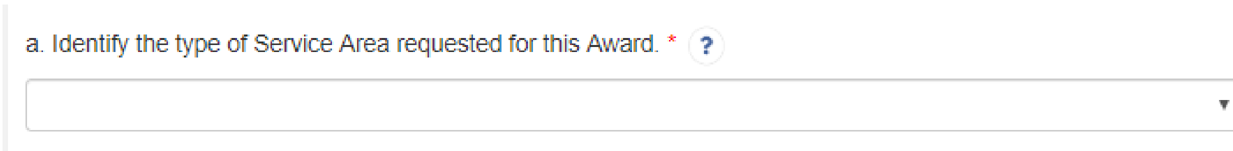
NOTE: If you do not Save before navigating away from a subsection, you will lose your work.

3.3 Saving and Completing a Section

When you click **Save** at the bottom of a subsection page, the Application will save your answers and run any validations configured for that subsection and questions. You will receive on-screen error messages and guidance based on the validation rules. After clicking **Save**, you can navigate away from the subsection and your answer will be saved.

NOTE: If you navigate away before you click save you will lose your responses/answers. REMEMBER TO ALWAYS CLICK SAVE.

To complete a subsection, fill in all necessary fields. All required questions are marked with a red asterisk *.

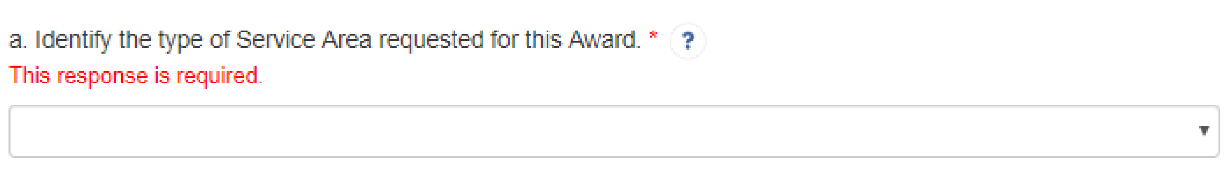


Sample Required Questions

At the bottom of the page click the **Save** button.

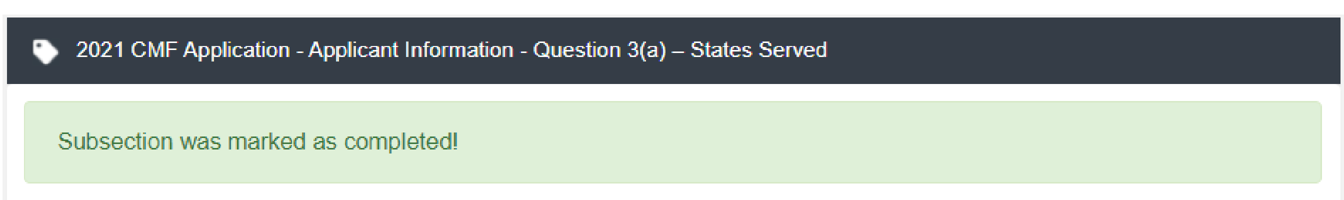
Save Button

The Application will save all responses. If any of your responses fail validation, the subsection will not be Marked Complete. Any validation errors or guidance will be displayed. For example, a field left empty will display “this response is required.”



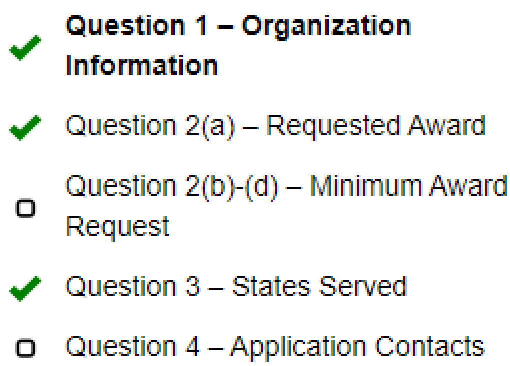
Validation Error Message

Correct any errors and try to save again. When the subsection page is successfully Marked Complete, this message will appear at the top of the display, just below the gray bar with the name of the section and subsection you are viewing.



Subsection Saved and Completed Message

In the menu bar, a green checkmark will appear next to the saved and completed subsection.



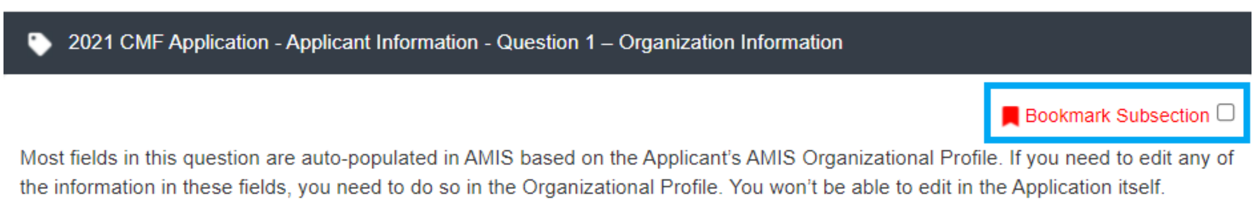
Completed Subsection Checkmark

3.4 Time Management

You may save data, log out, and return to your Application at a later date. The electronic Application will automatically log you off after 2 hours of inactivity (i.e., no movement between screens). **If this happens, you will lose any data that you have entered and did not save.**

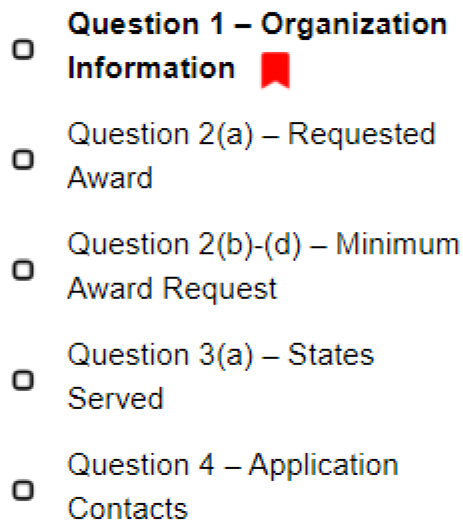
3.5 Bookmarks

If you need to flag a subsection to return to later, use the bookmark feature. When you click on any subsection, you will see the **Bookmark Subsection** checkbox visible in the upper-right of the display.



Bookmark Subsection Checkbox

Click the checkbox to bookmark the subsection. A bookmark symbol will appear next to that subsection in the Application menu.



Bookmarked Subsection

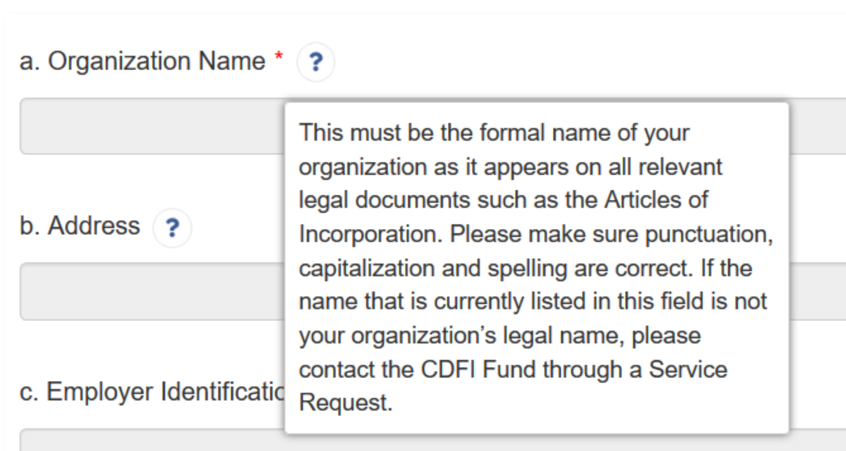
To remove a bookmark, uncheck the checkbox.

3.6 Help Text

Some questions will have Help Text that will provide additional guidance. A question that has Help Text available will have a small circle with a question mark in it following the question text.

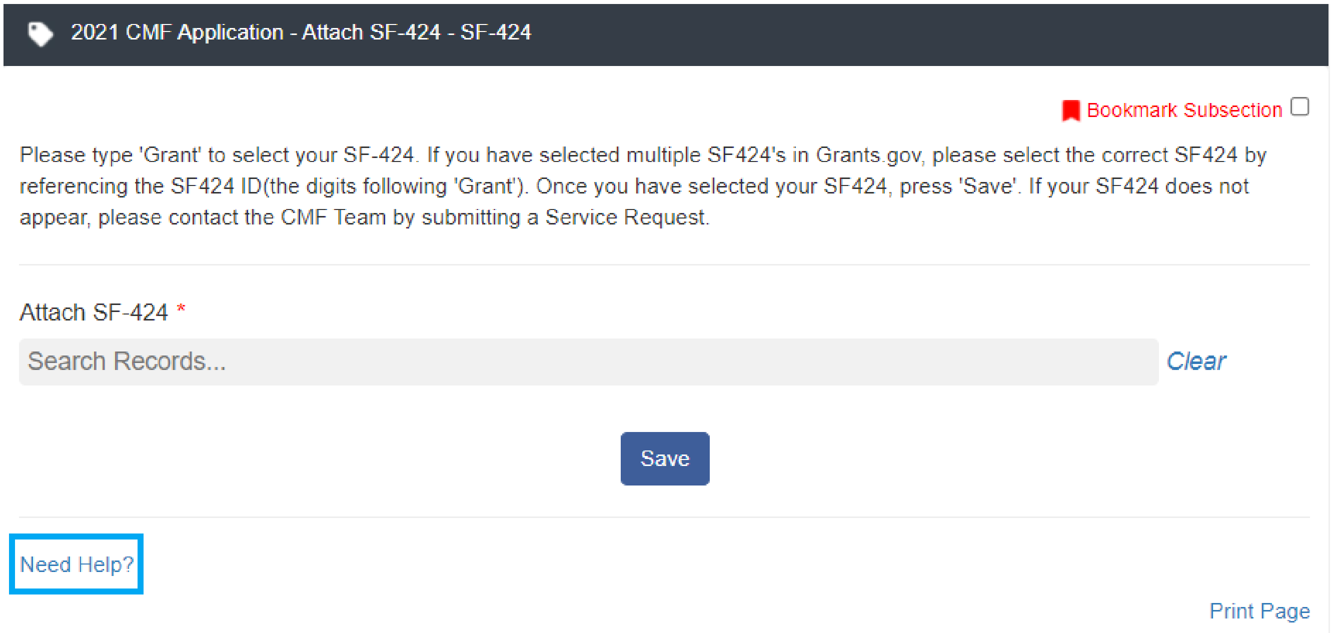
Question with Help Text

Hover your cursor over the Help Text button to view guidance.



Help Text Displayed

If Help Text is not provided for that question or if you need additional guidance, the “Need Help?” link at the bottom left of every subsection page will take you to the CDFI Fund’s CMF Application materials website.



Linked Application Guidance from Subsection Page

4.0 User Interface Form Features

4.1 Validation Rules, Error Messages, and Guidance

There are validation rules associated with required fields and other information in the Application. When you **save** a subsection, all validations will be executed. If errors are detected, you will see error messages displayed by the field that needs to be adjusted. Please follow all error message guidance accordingly.

These errors may range from entering an invalid value to omitting a required field. For example, in the Proposed Uses table below (Question 8c), all the fields are required.

	Financial Data 1	Financial Data 2	Financial Data 3
Fiscal Year * ?	*	*	*
Financial Data Type * ?	*	*	*
Financial Data Consolidation * ?	*	*	*
Single Audit Required? * ?	*	*	*

Table with Required Fields

If you click "Save" before you enter a response to each question, you will receive a validation error for any omitted required field.

	Financial Data 1	Financial Data 2	Financial Data 3
Fiscal Year * ?	* This response is required.	* This response is required.	* This response is required.
Financial Data Type * ?	* This response is required.	* This response is required.	* This response is required.
Financial Data Consolidation * ?	* This response is required.	* This response is required.	* This response is required.
Single Audit Required? * ?	* This response is required.	* This response is required.	* This response is required.

Response Required Validation Error Message

Required fields are easy to identify, but other fields that have validations are not always so obviously marked. Make sure to read subsection guidance and use help text to understand question response requirements and avoid validation errors.

Example 1: In 'Part 1: Business Strategy and Leveraging Strategy', the question 'Validate Leverage Inputs' (after Question 17) contains three fields with validations that you can identify through reading guidance provided in this subsection. In the subsection guidance at the top of the page, the instructions explain that the 'Enterprise, Reinvestment, and Project-level Leverage amounts must add up to the Leveraged Costs you've entered in 14e (i.e. 15c + 16a + 16b + 16c + 17c = 14e)'.

The following table summarizes key leverage data inputs you've entered in Questions 14-17 for Leverage Type (i.e. Enterprise, Reinvestment, and Project-Level) and Leverage Sources (private vs public). Press "Save" to run the validations and to complete this sub-section.

Enterprise, Reinvestment, and Project-level Leverage amounts must add up to the Leveraged Costs you've entered in 14e (i.e. 15c + 16a + 16b + 16c + 17c = 14e).

In addition, AMIS will compare the values you've entered for private and public leverage in 14f and 14g with the amounts you've entered in Questions 15-17. If the amounts do not match, please review the values entered in Questions 14-17 and update as needed.

You will not be able to complete this sub-section or submit the Application if the amounts on this page not validated.

Leverage Type/Source	Leverage Amount
Leverage Types	
Enterprise-Level Leverage (15c)	
Reinvestment Leverage (16a + 16b + 16c)	
Project-Level Leverage (17c)	
Total Leverage as Entered (15c + 16a + 16b + 16c + 17c) ?	The total of 15(c) + 16(a) + 16(b) + 16(c) + 17(c) must be equal to 14(e), your Leveraged Costs. 0.00

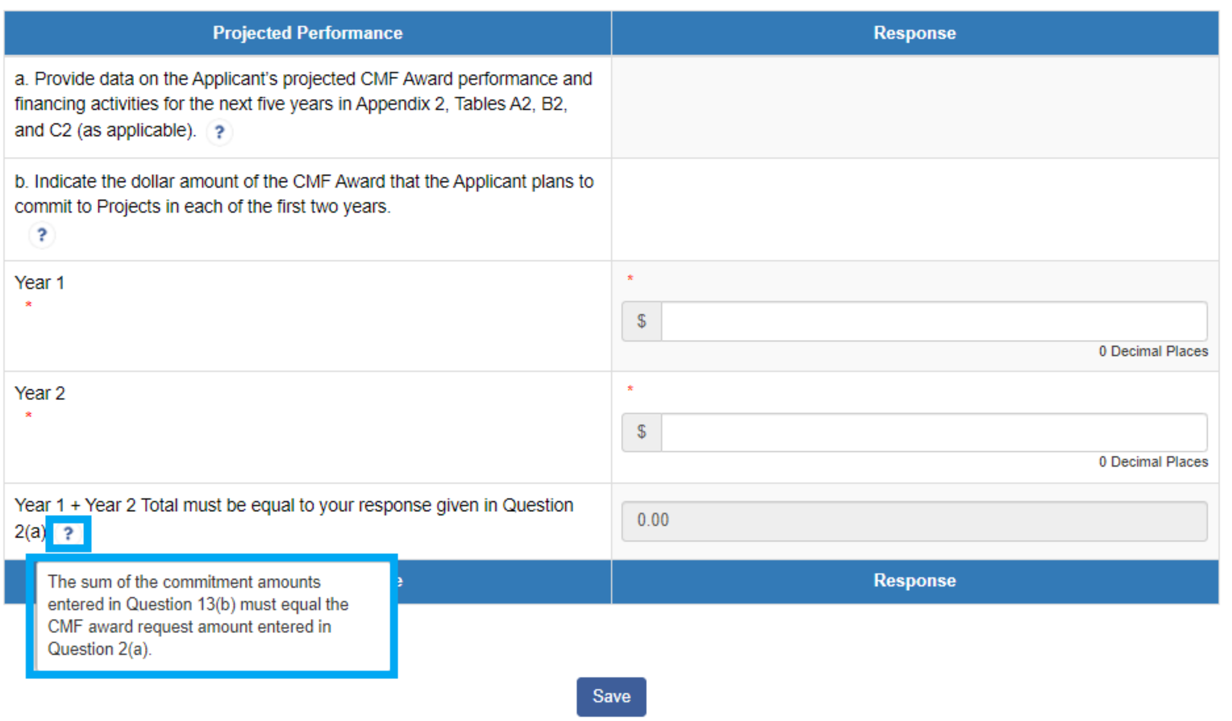
Subsection Guidance

If the amounts you entered in this table do not add up to the amount in question 14(e), the Total field will display a validation error when you press Save.

Total Leverage as Entered (15c + 16a + 16b + 16c + 17c) ?	The total of 15(c) + 16(a) + 16(b) + 16(c) + 17(c) must be equal to 14(e), your Leveraged Costs. 0.00

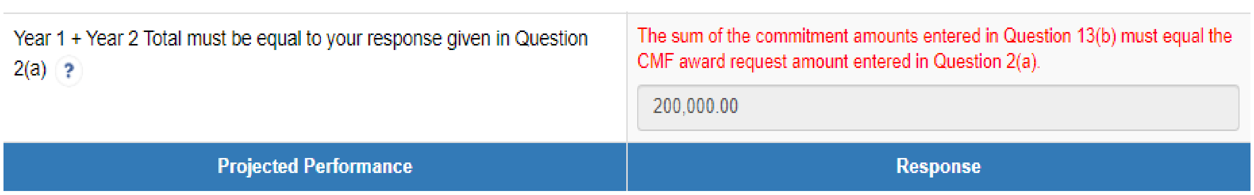
Total Field Validation Error

Example 2: If you read help text explanations, you will see that for Question 13(a)-(b) the last row of the table must equal the response given in Question 2(a).



Help Text for Question 13(a)-(b)

If you enter a number not equal to the number in Question 2(a), you will receive the following error message.



Validation Error Message

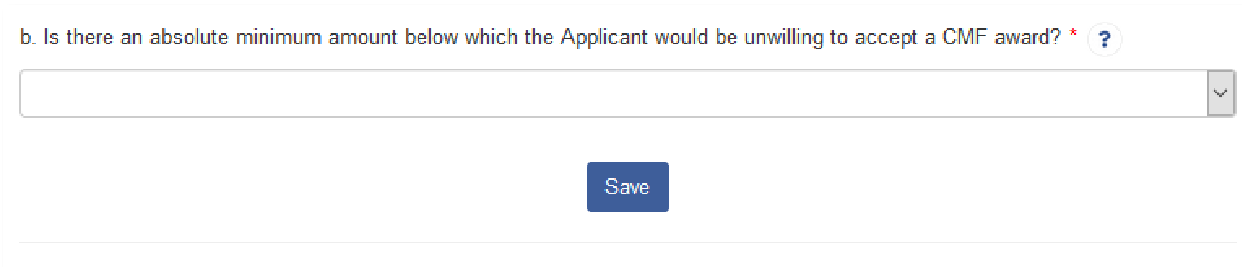
Even if you are unaware that a question has specific instructions like those in the examples above, validations are designed to catch any mistakes or discrepancies. The guidance provided in these error messages will give you a clear idea of how to correct the validation error.

4.2 Dependent Questions and Subsections

Responses to some questions will trigger the applicability of other dependent questions or subsections. Be careful when changing responses to questions, the answers you input in earlier subsections may affect dependent subsections you will have to complete later in the Application.

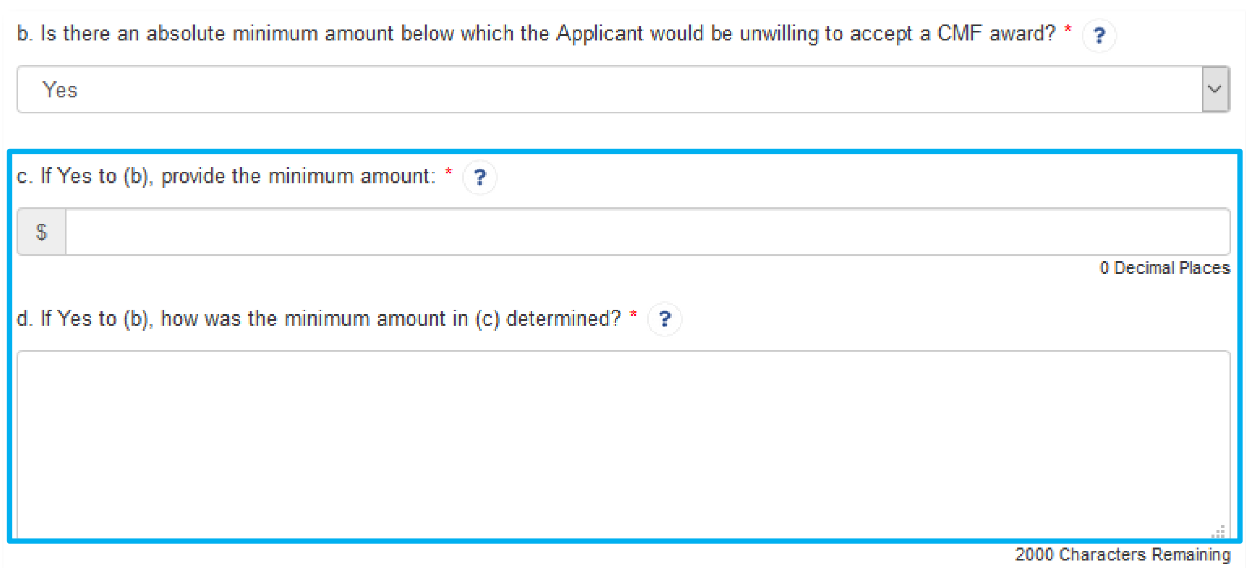
Dependent Questions

A **Dependent Question** is triggered when your response to another question requires additional responses or explanation. Dependent questions will appear on the subsection page you are currently viewing.



Sample Question that Can Trigger a Dependent Question

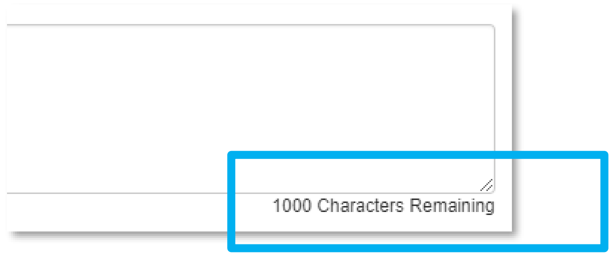
For example, if you select "Yes" from the picklist in response to Question 2b, two dependent questions (2c and 2d) appear below 2b.



Enabled Dependent Questions

Many dependent questions require a <u>narrative response</u>. Please note that each narrative response field has an identified maximum character length. These character maximums include spaces, punctuation, line breaks, and special characters. Please note that word processing programs typically do **not** count line breaks as characters, but the template Application in AMIS <u>will include line breaks in your total character count</u>**.**

The text box will not allow you to exceed the maximum character limit. If you are copying a response from another source, please make sure you are within the character limit or the ***text box may truncate your response.***



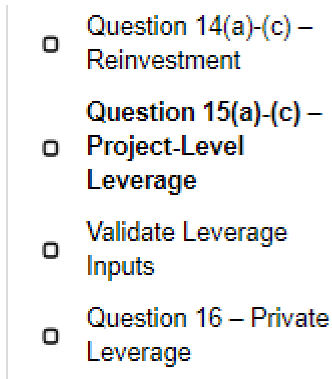
Character Maximums for Text Responses

> **TIP**: Type your narrative answers into a separate word processing program (e.g., Microsoft Word). Then copy and paste the answers into the appropriate sections of the electronic Application. This will prevent the loss of information if you encounter problems saving your Application or connection problems. It will also cut down on the time you spend directly filling out the Application online. When copying and pasting the narrative responses from a word processing program into the narrative text box, any special indentations or spacing will not carry over. Formatting, such as bold, italicized, or underlined text, will not display in the narrative.

Dependent Subsections

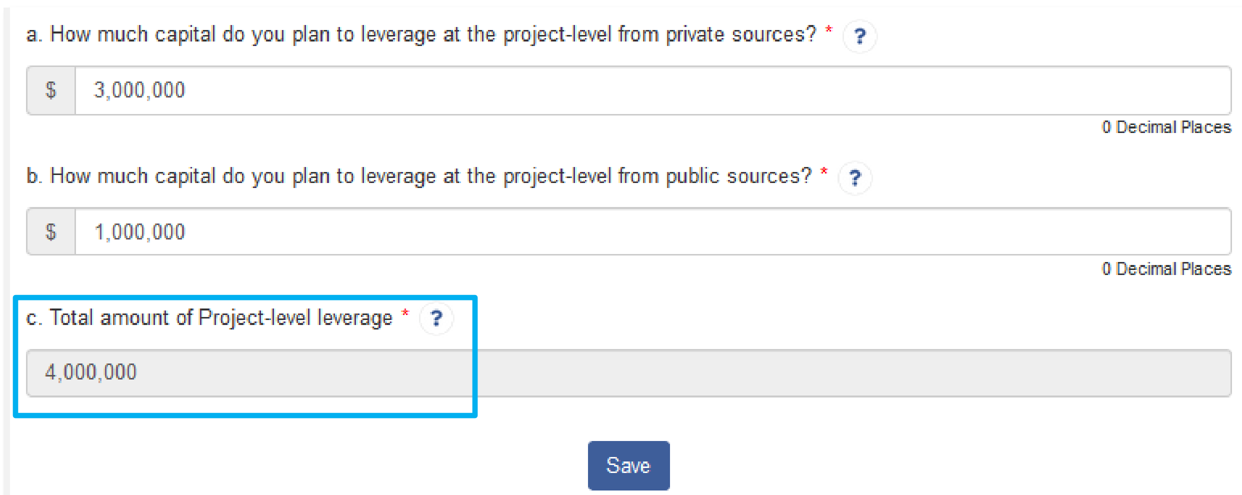
A **Dependent Subsection** is a subsection that is enabled for you to complete based on your response to one or more questions in a different subsection. This feature is designed to make it easier for you to navigate the Application by hiding/disabling sections that do not apply to your Application.

For example, your responses to the subsection "Question 15(a)-(c) Project-Level Leverage" will enable a dependent subsection, Question 15(d)-(e), if you indicate that you plan to leverage capital at the project-level.



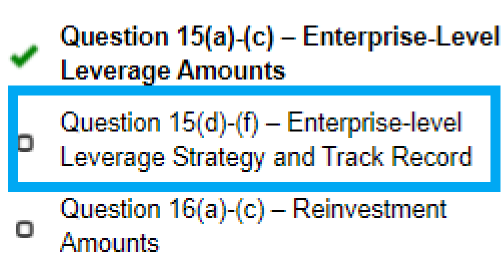
List of Subsections- Question 15(d)-(f) is By Default Disabled/Not Visible

If 15(c) – the total of 15(a)+(b) – is greater than zero, the Question 15(d)-(e) subsection will be enabled after you click **Save**.



Subsection Question 15(a)-(c)

When the subsection "Question 15(a)-(c)" is saved and marked complete, the response to 15(c) that is greater than zero enables the dependent subsection "Question 15(d)-(f)". It is now visible in the menu.



Enabled Dependent Subsection Visible in Menu

If your response to Question 15(c) was equal to zero, the subsection "Question 15(d)-(f)" will remain disabled.

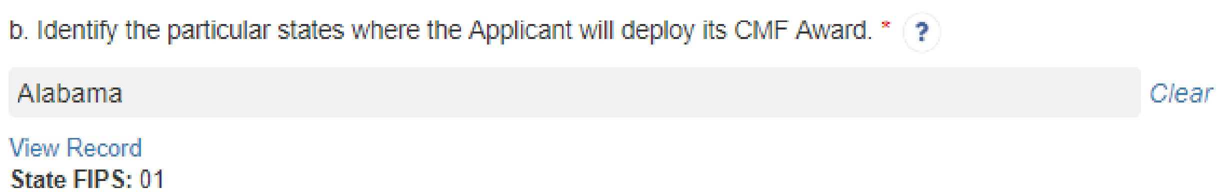
NOTE: It is important to complete the Application questions in sequence because questions like these in earlier sections may enable dependent subsections you will need to complete for your Application.

4.3 Selecting Related Records

The Application uses records associated with your organization in AMIS to help you populate information in certain fields, such as information about contacts you would like to associate with the Application. You will also connect your SF-424 and input information about Geographic Areas using related records (for specific guidance for these sections, see Section 4).

To select related records:

1. Related record fields display a list of possible related records for your organization available for this question when you click on the field. Select the name of the contact, state, or other record type.



A Selected State Related Record

2. You can view the selected record's detail page by clicking the **View Record** link. This will direct you to the record detail page, where you can see more detailed information about the selected record (this is more useful for records specific to your organization, like your organization contacts or SF-424s).

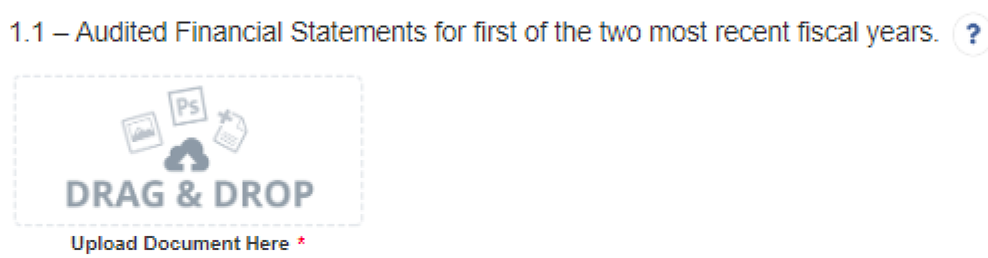
3. Some related record fields will have a +/- sign next to them allow you to add multiple related records. Click on the green plus sign to add another related record selection field.

Additional Related Record Field Row

4. If you need to delete a related record, click on the red minus sign next to the record you wish to delete.

4.4 Adding Attachments

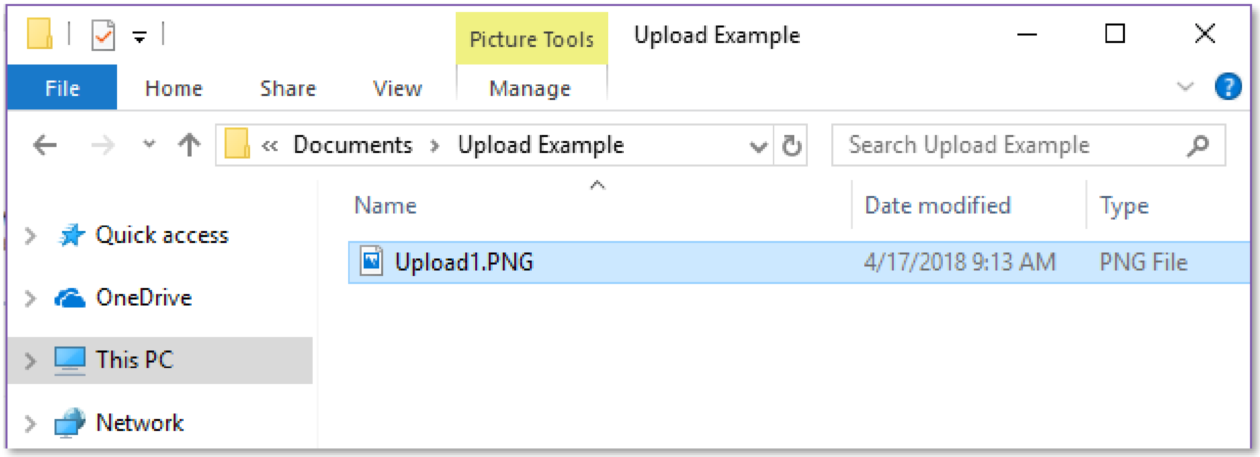
Attachments can be uploaded using the Drag & Drop. You will see the Drag & Drop box below any question that requires an attachment.



Drag & Drop Upload Box

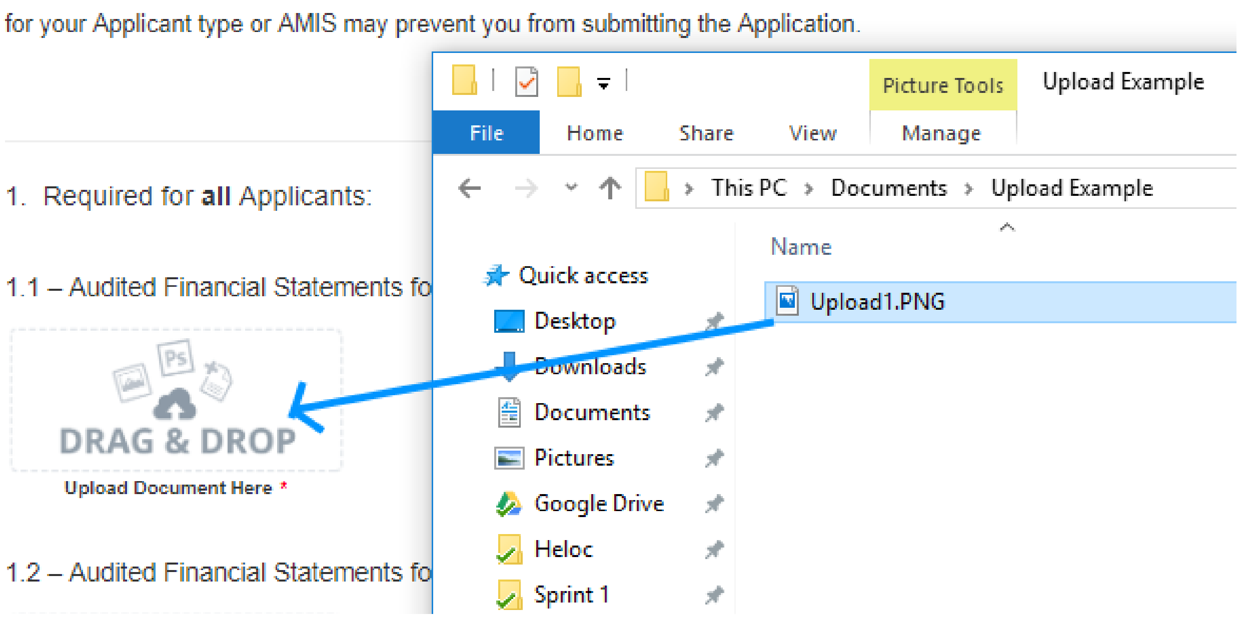
To upload using the Drag & Drop:

1. Locate the file you wish to upload on your computer. Open the folder the where the file is saved in File Explorer.



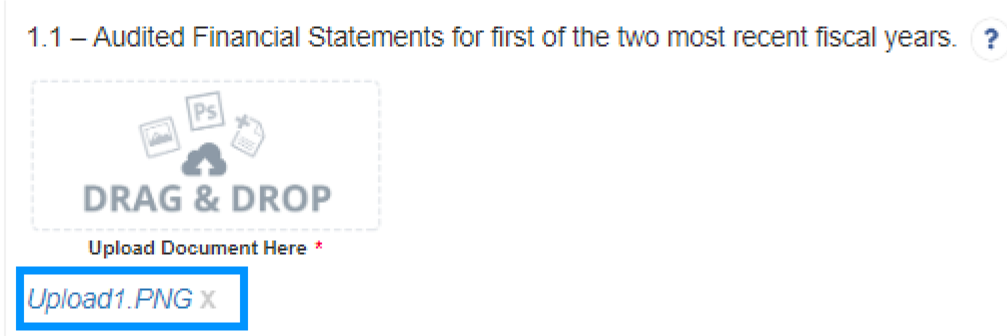
Attachment to Upload in File Explorer

2. Return to the Application page. Using your cursor, drag the file you want to upload from File Explorer to the Drag & Drop upload box on the Application.



Upload File Using Drag & Drop

3. Once your file is successfully uploaded, the file name will be displayed below the Drag & Drop box.



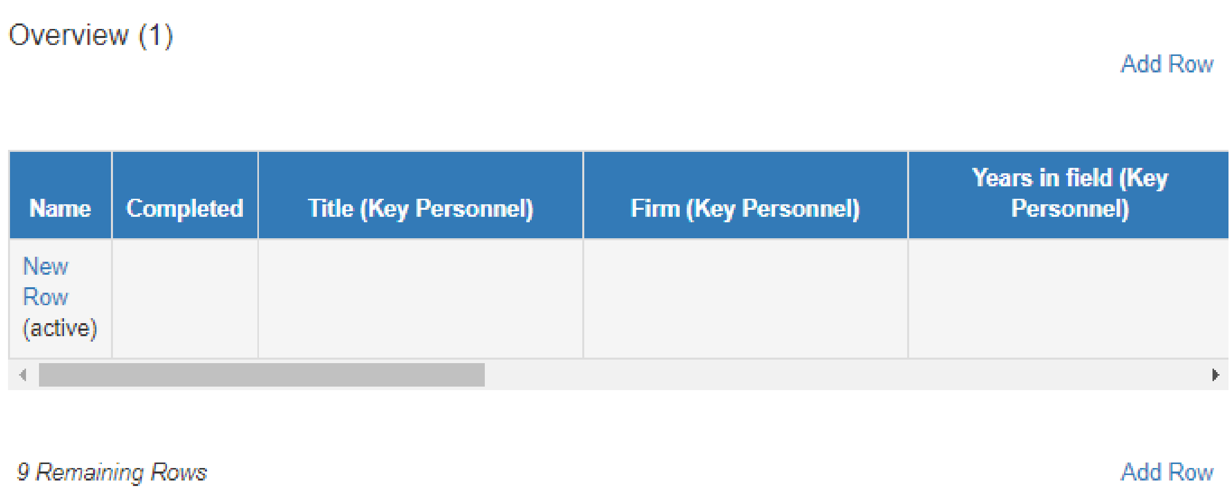
Successful File Upload

4. Upload any additional files using the same process.
5. If you need to remove an uploaded file, click the gray "x" next to the file name.

4.5 Dynamic Record Tables

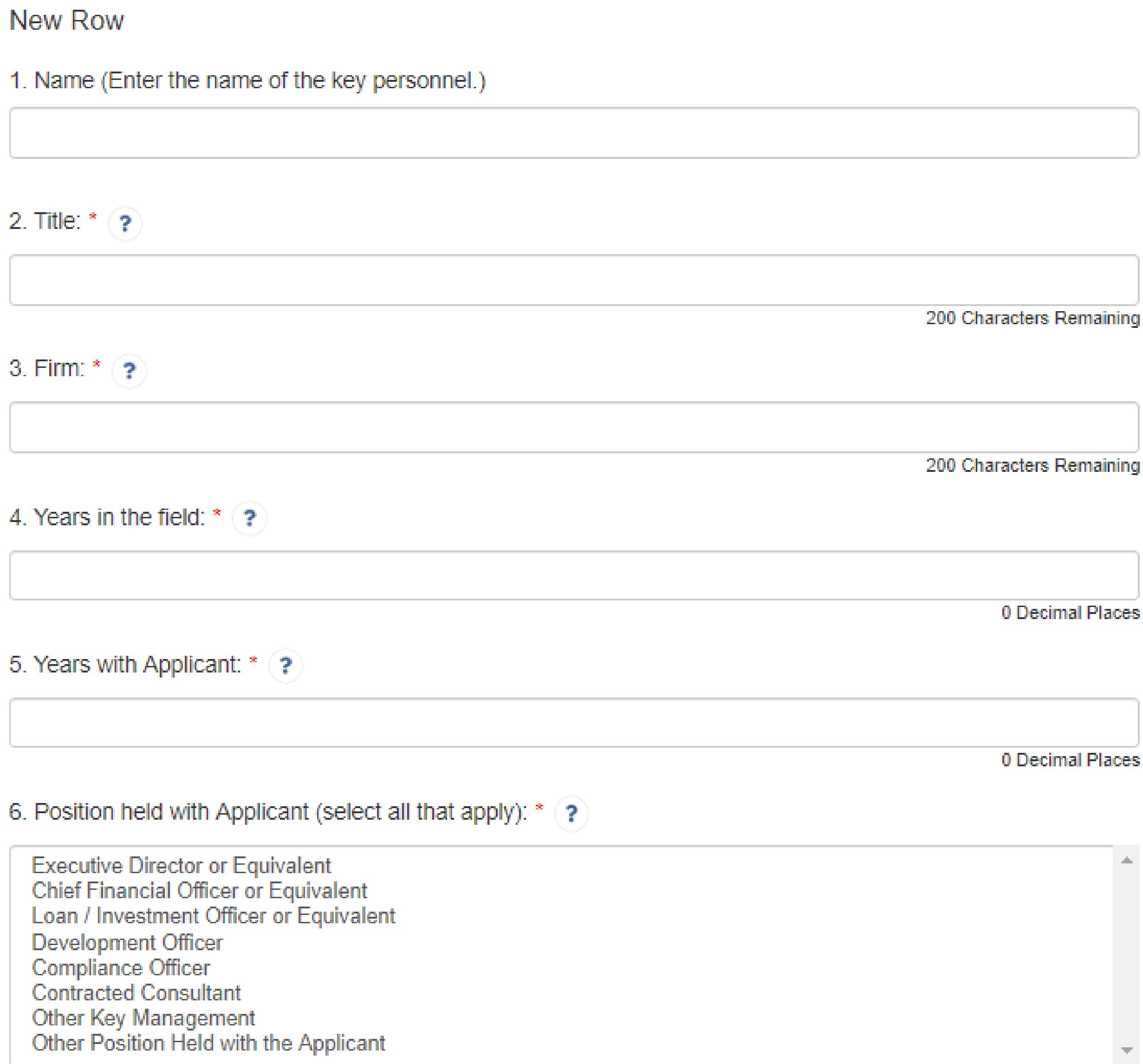
The Applicant will be required to enter a list of records, like Pipeline Projects or Key Personnel as part of the Application. These records are a series of questions that are repeated to the applicant and are collected dynamically through the Application. An applicant may need to add 2 records or 10 records depending on the Application question.

You will recognize dynamic record tables by the page setup. When you open a new subsection with one of these tables, an empty overview table will be displayed below the table instructions at the top of the page. As you add records to the table, they will appear in this table overview section.



Empty Overview Table

Below the table overview is the field entry form. Data is entered into this form and saved to create a single record row in the table. Additional rows are created by populating the fields with new data and saving the form again.


New Row

1. Name (Enter the name of the key personnel.)

2. Title: * ?

200 Characters Remaining

3. Firm: * ?

200 Characters Remaining

4. Years in the field: * ?

0 Decimal Places

5. Years with Applicant: * ?

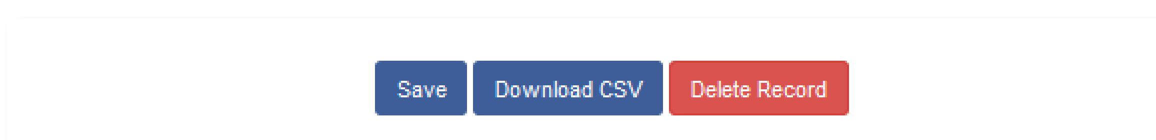
0 Decimal Places

6. Position held with Applicant (select all that apply): * ?

Executive Director or Equivalent
Chief Financial Officer or Equivalent
Loan / Investment Officer or Equivalent
Development Officer
Compliance Officer
Contracted Consultant
Other Key Management
Other Position Held with the Applicant

New Row Entry Fields

At the bottom of the page there are buttons to **Save**, **Download CSV**, and **Delete Record**.

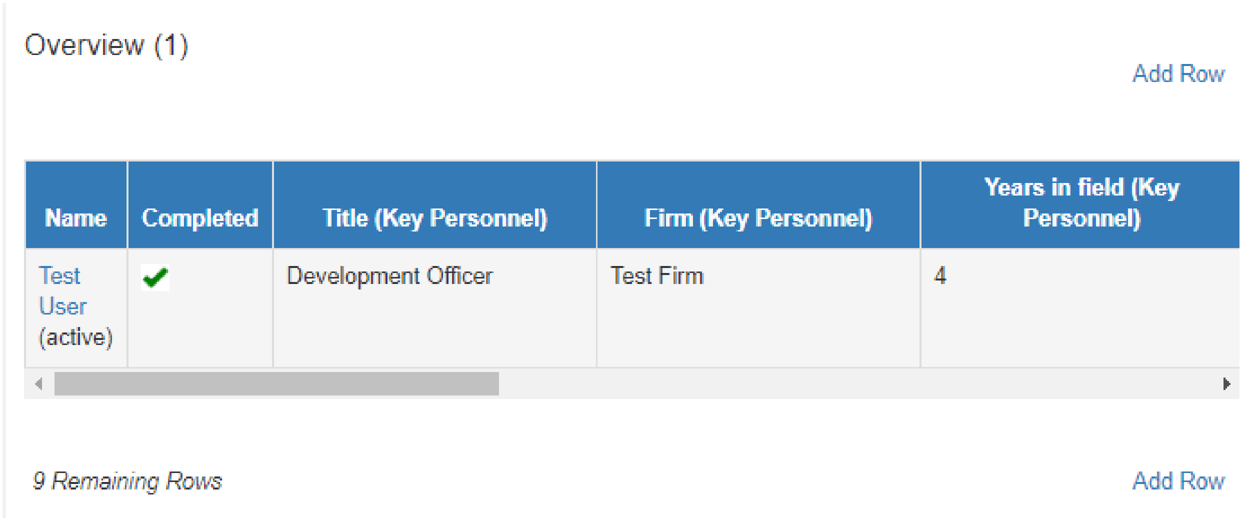


Dynamic Table Buttons

To add or edit dynamic table records:

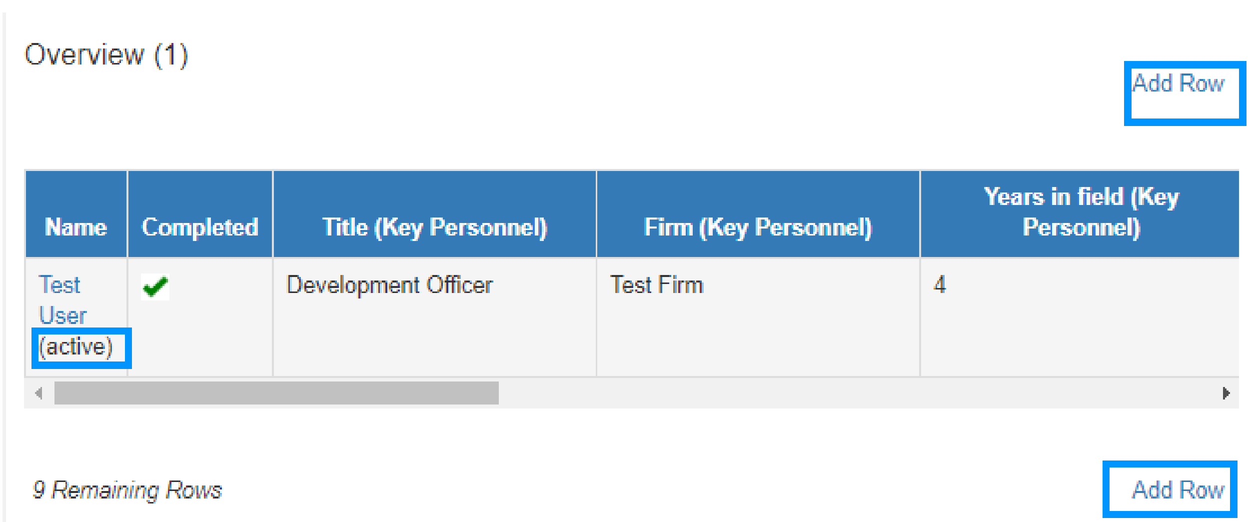
1. Answer all questions on the field entry form for your first record.

2. When you have entered all data for a new record, click the **Save** button. This will create a new row in the table overview.



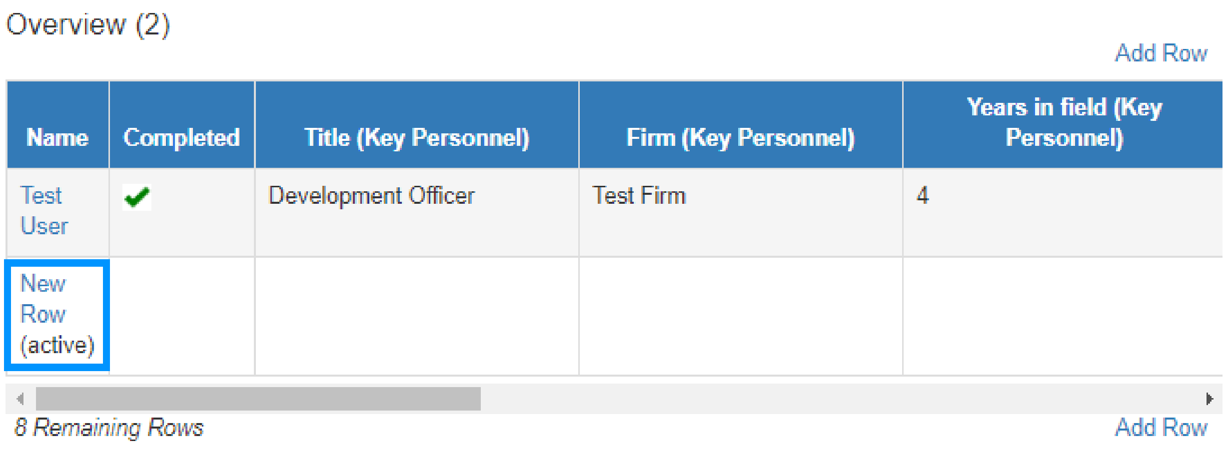
New Record Row in Table Overview

3. The record you just created will still be active, with its field data still visible on the screen. To create a new record, click **Add Row** to the right of the table overview.



Active Record Indicator and Add Row Links

4. This will create a new active record row in the overview table. Fill in the empty fields in the “New Row” section below just as you did for the first record. Click **Save** to populate the table overview with your second record’s question response data.


Overview (2)

Add Row

Name	Completed	Title (Key Personnel)	Firm (Key Personnel)	Years in field (Key Personnel)
Test User	✔	Development Officer	Test Firm	4
New Row (active)				

8 Remaining Rows

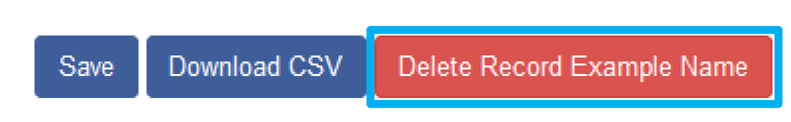
Add Row

New Active Record Row

5. Repeat this process to add additional records as needed.
6. To edit any record, click on the hyperlink of the record name in the overview table. This will pull up the record's field form/make it the active record. Update any information as needed and **Save**.

To delete dynamic table records:

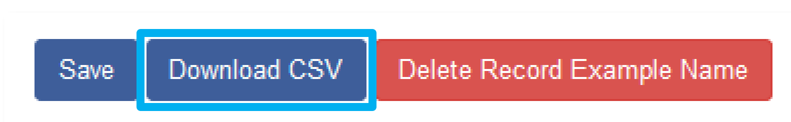
1. If you need to delete a record, make sure that record is active in the overview table and select the **Delete Record _____** button at the bottom of the page.



Delete Record

To Download CSV:

1. The Application will allow you to download a Comma Separated File (CSV File) for the records you enter into the dynamic table that you can open in Excel. After all desired records are entered and saved, click the **Download CSV** button at the bottom of the page.



Download CSV Button

2. Download CSV using your browser's download feature. When you open the document in Excel it will display all the data you have entered for each record.

	A	B	C	D	E
1	Name	Title (Key Personnel)	Firm (Key Personnel)	Years in field (Key Personnel)	Years (Key Personnel)
2	Example User	Investment Officer	Test Org	22	2
3	Test User	Development Officer	Test Firm	4	2

Sample CSV of Dynamic Record Table

4.6 Direct-Entry Tables

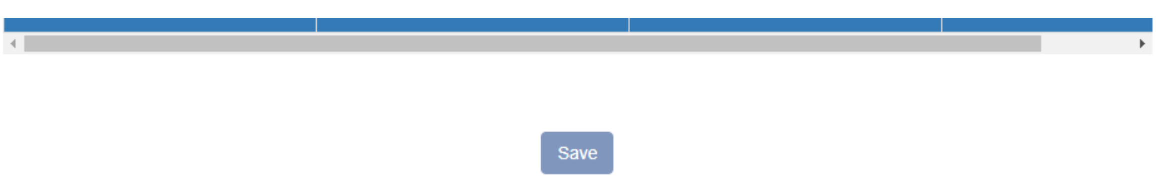
The Application will require the applicant to enter table data. These direct-entry tables are configured to collect specific data and are easy to navigate. Unlike dynamic record tables, direct-entry tables allow you to input your data directly into the table.

	Financial Data 1	Financial Data 2	Financial Data 3
Fiscal Year * ?	2016	2017	2018
Financial Data Type * ?	Audited	Audited	Unaudited
Financial Data Consolidation * ?	Consolidated	Consolidated	Consolidated
Assets			
Cash Restricted for Operations ($) * ?	$ 0 Decimal Places	$ 0 Decimal Places	$ 0 Decimal Places
Unrestricted Cash and Cash Equivalents ($) * ?	$ 0 Decimal Places	$ 0 Decimal Places	$ 0 Decimal Places
Other Real Estate Owned (OREO) ($) * ?	$ 0 Decimal Places	$ 0 Decimal Places	$ 0 Decimal Places
Current Assets ($) * ?	$ 0 Decimal Places	$ 0 Decimal Places	$ 0 Decimal Places

Sample Direct-Entry Table

In the sample table above, you can see that a direct-entry table simply allows you to enter multiple responses (in columns) to multiple questions (in rows) at the same time.

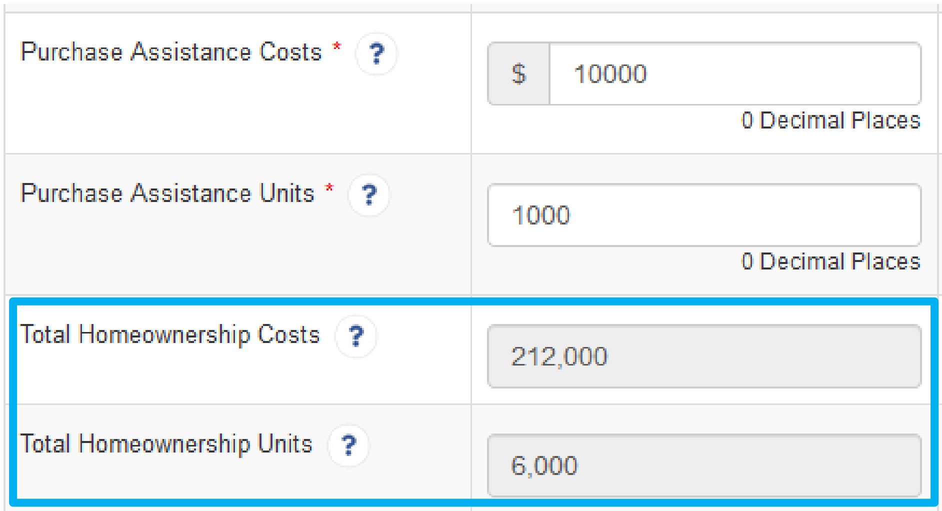
If the number of columns exceeds the standard screen format, the slide bar at the bottom of the table will allow you to access the columns to the right.



Slide Bar Feature

If using the Tab key during data entry, please note Tab moves the cursor to the field in the column to the right.

Some tables have formula fields that auto-calculate a sum based on the formula configured and the table data entered. These fields will begin to populate as you enter your data into the table.



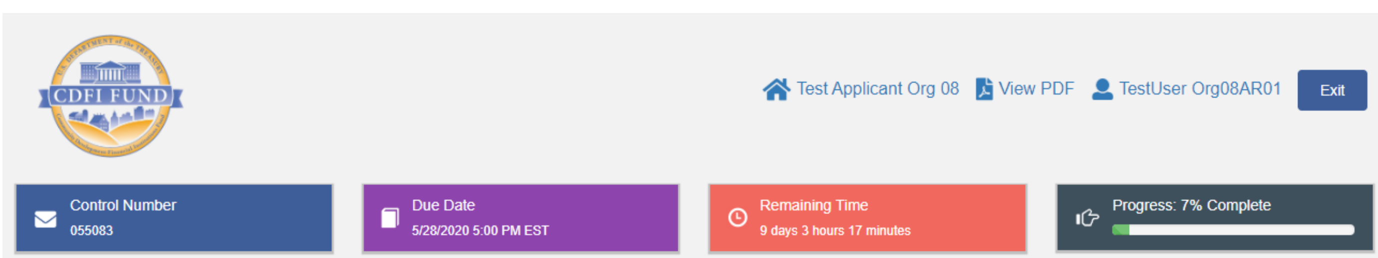
Formula Field Calculated Totals

4.7 Export to PDF

The Application can generate an Adobe PDF version of your Application for your organization's records. You can use this feature to view your current progress on the Application at any point in the Application process.

To generate a PDF version of the Application:

1. Navigate to the stationary menu bar at the top of the Application.

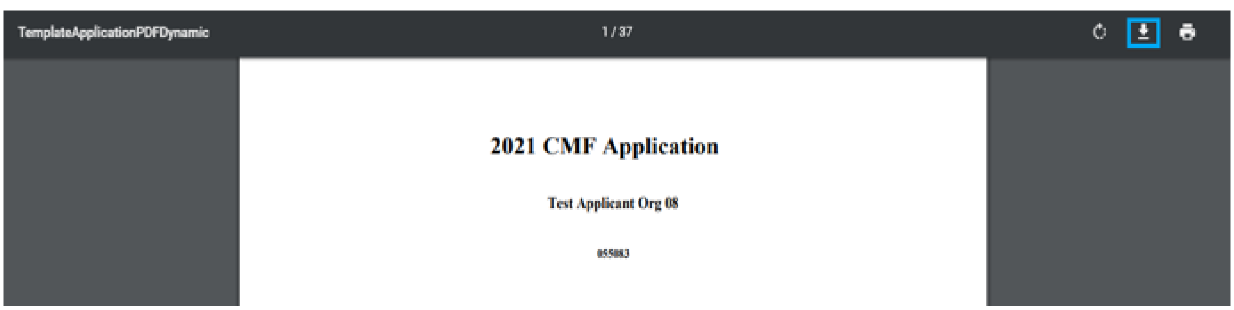


UI Menu Bar

2. Select **View PDF**.

View PDF

3. This will open a PDF of the Application and your responses in a new window. Your browser's PDF viewer will have a button (usually an arrow as highlighted in the example below) that will allow you to download and save the PDF.



Application PDF Open in a New Browser Window (in Chrome)

5.0 Completing and Submitting the Application

5.1 Printing your Application

To print your Application, click the **View PDF** link in the navigation menu at the top of the User Interface.

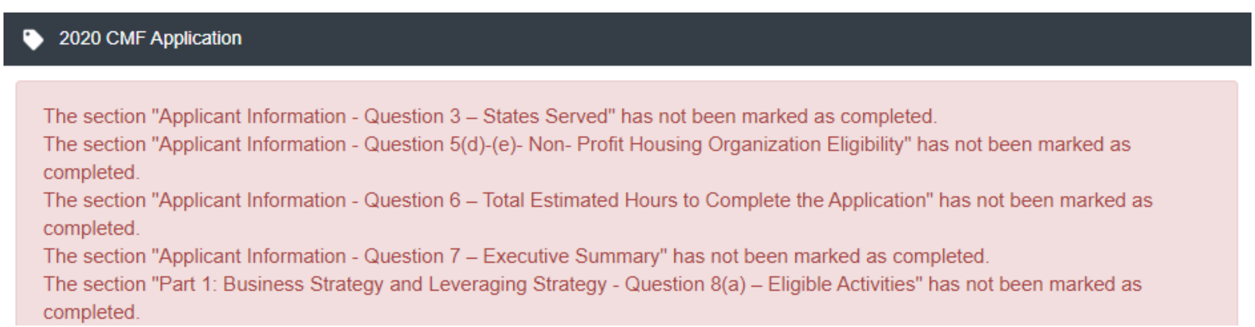
View PDF Button

This will generate a PDF of your Application you can download using your browser's download function that you will be able to save to your computer and print. For more information on how to generate a PDF in this Application, please see section 3.7 of this document.

5.2 Submitting your Application

All subsections must be marked complete in order for you to submit your Application. To check which subsections have been marked complete, look for a green checkmark next to that subsection on the menu bar. Subsections that are incomplete will not have a checkmark and will prevent you from successfully submitting the Application.

You will not be able to submit an Application until all items are marked complete. If you attempt to submit your Application before all subsections are complete, you will receive error messages identifying which subsections remain incomplete or contain validation errors. Correct these subsections.



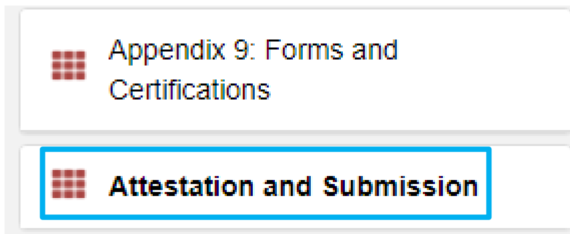
Example of Error Message for Incomplete Subsections

Before you submit your Application, the CDFI Fund recommends you closely review your Application. **ONCE SUBMITTED, YOUR APPLICATION WILL BE LOCKED AND RESPONSES CAN NOT BE ALTERED.**

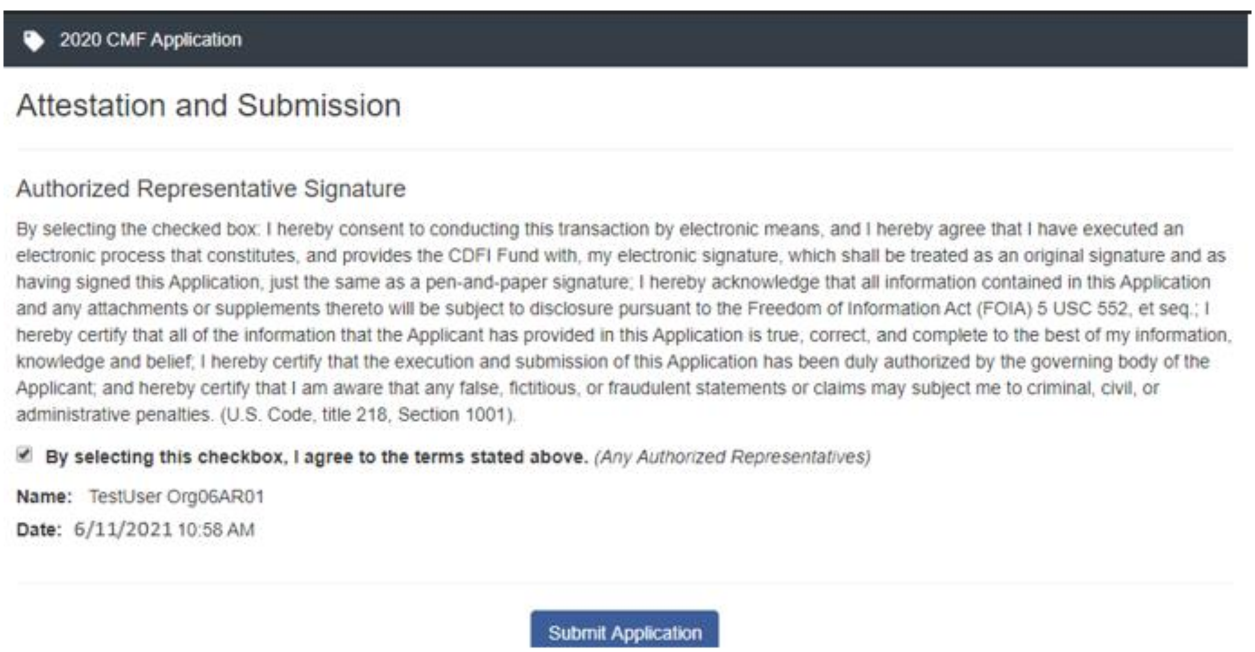
Any Authorized Representative listed as a contact for the organization in AMIS can attest that the information provided in the Application is accurate and complete to the best of your organization's knowledge. Before proceeding to this section, make **SURE** your Application is complete, including the upload of all required supplementary documents and table information that may be required in the question or appendix pages.

5.3 Attestation

1. Log in to the Application as an Authorized Representative listed in AMIS under Contacts. Only the Authorized Representative will be able to attest the Application.
2. Select the **Attestation and Submission** tab from the very bottom of the menu bar.



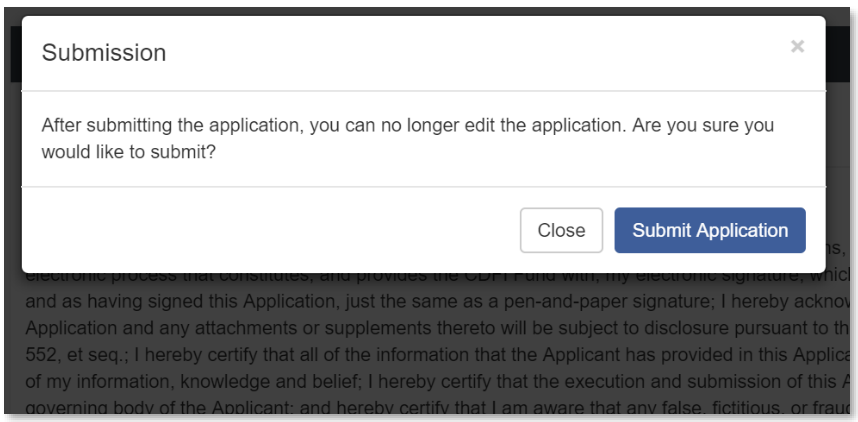
3. Read the attestation and signify agreement with the statement by selecting the checkbox. Once the checkbox is selected, the Authorized Representative's name and the time and date of attestation will appear on this page.



Attestation and Submission Page

5.4 Submission

1. Log in to the Application as an Authorized Representative or Point of Contact listed in AMIS under Contacts. Either the Authorized Representative or Point of Contact will be able to submit the Application once it has been attested by the Authorized Representative.
2. Select the Attestation and Submission tab from the very bottom of the menu bar.
3. Click **Submit Application**. A dialog box will appear. Confirm that you would like to submit the Application and understand the Application cannot be edited after this point.



Submission Dialog Box

4. If any of your subsections are incomplete, your submission attempt will be unsuccessful. An error message will identify which subsection(s) is incomplete.

6.0 Help & Support

For AMIS support, please submit an AMIS Service Request. To learn about Service Requests, see Getting Started – Navigating AMIS (Section 8) or the AMIS Service Request Quick Reference Guide. Alternatively, you may contact the AMIS Helpdesk at AMIS@cdfi.treas.gov or (202) 653-0422.