COMMUNITY DEVELOPMENT
FINANCIAL INSTITUTIONS FUND
www.cdfifund.gov

AMIS Training Manual

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

September 2023

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1 Introduction

The Community Development Financial Institutions (CDFI) Fund's Awards Management Information System (AMIS) is an enterprise-wide awards management system that allows the CDFI Fund to manage the certifications and awards life-cycle processes without reliance on manual or paper-based methods. AMIS provides higher accuracy, transparency, and scalability to the CDFI Fund's mission-critical processes across all CDFI Fund programs – CDFI, NACA, BEA, BGP, NMTC, CMF, SDLP, and CDE and CDFI

Certifications. AMIS runs on the Salesforce cloud-based application platform. As an external user (i.e., CDFI Fund applicant or recipient user), AMIS provides:

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

1.1 Purpose

The purpose of this training manual is:

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

1.2 Scope

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

2 Accessing AMIS

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

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

If your organization has an existing SAM.gov account, check to ensure the information put into AMIS is accurate, and matches your SAM.gov account information, as these two systems interact with each other for awards, payments, and other purposes. Ensuring the data is correct and matches between these two systems at this point, helps avoid potential issues in the future.

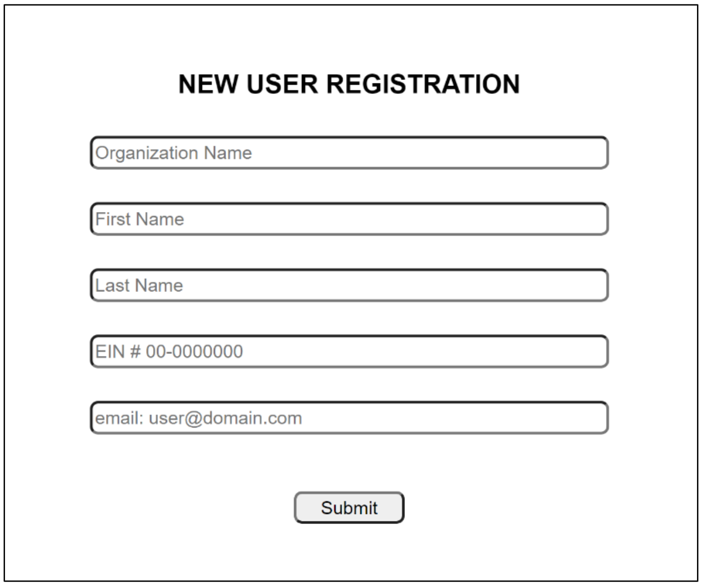
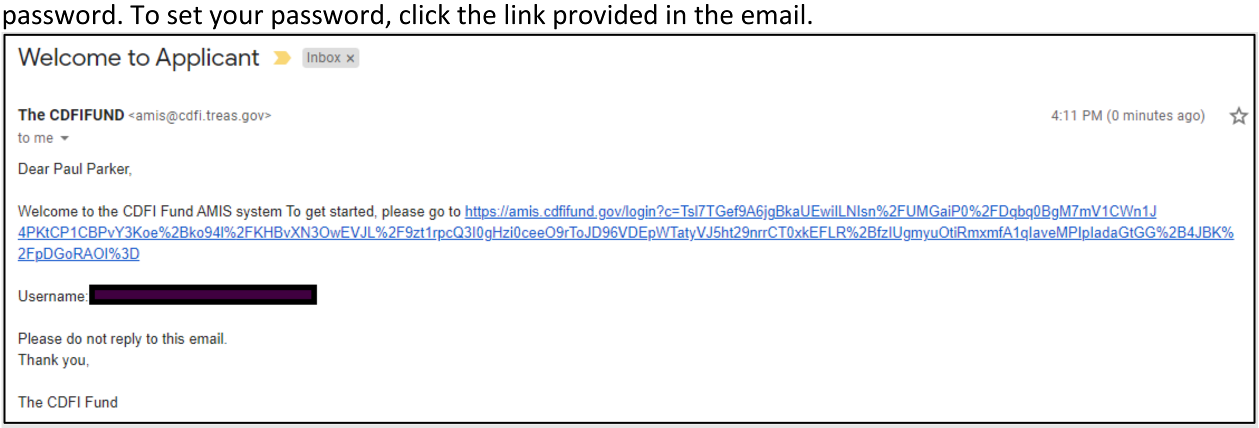


Figure 1. AMIS New User Registration Page

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

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



Welcome to Applicant Inbox ×

The CDFIFUND <amis@cdfi.treas.gov> 4:11 PM (0 minutes ago)
to me

Dear Paul Parker,

Welcome to the CDFI Fund AMIS system To get started, please go to https://amis.cdfifund.gov/login?c=Tsl7TGef9A6jgBkaUEwilLNIsn%2FUMGaiP0%2FDqbq0BgM7mV1CWn1J4PKtCP1CBPvY3Koe%2Bko94I%2FKHBvXN3OwEVJL%2F9zt1rpcQ3I0gHzi0ceeO9rToJD96VDEpWTatyVJ5ht29nrrCT0xkEFLR%2BfzIUgmyuOtiRmxmfA1qlaveMPlpladaGtGG%2B4JBK%2FpDGoRAOI%3D

Username: [redacted]

Please do not reply to this email.
Thank you,

The CDFI Fund

Figure 2. AMIS User Registration Email

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

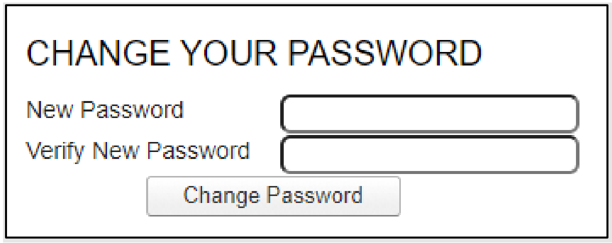


Figure 3. AMIS User Password Change Screen

NOTE: Passwords expire and must be reset every 60 days. Passwords must also adhere to the CDFI Fund's password requirements:

a. Be at least eight characters.
b. Contain at least one lower case letter, one upper case letter, one number, and one special character.

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

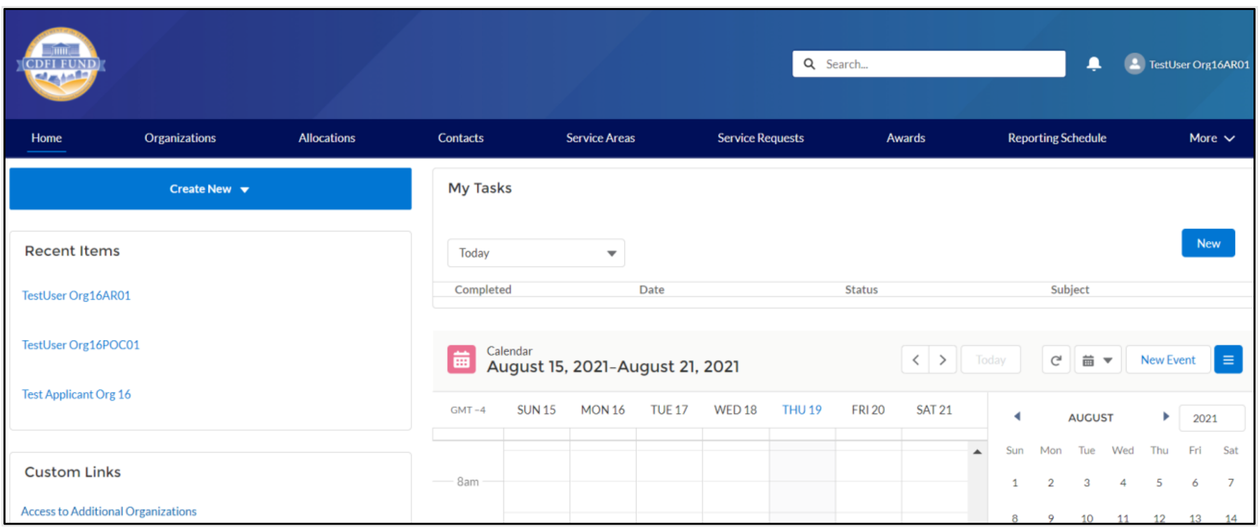


Figure 4. AMIS Home Page

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

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

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

2.2 Logging into AMIS – Subsequent Visits

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

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

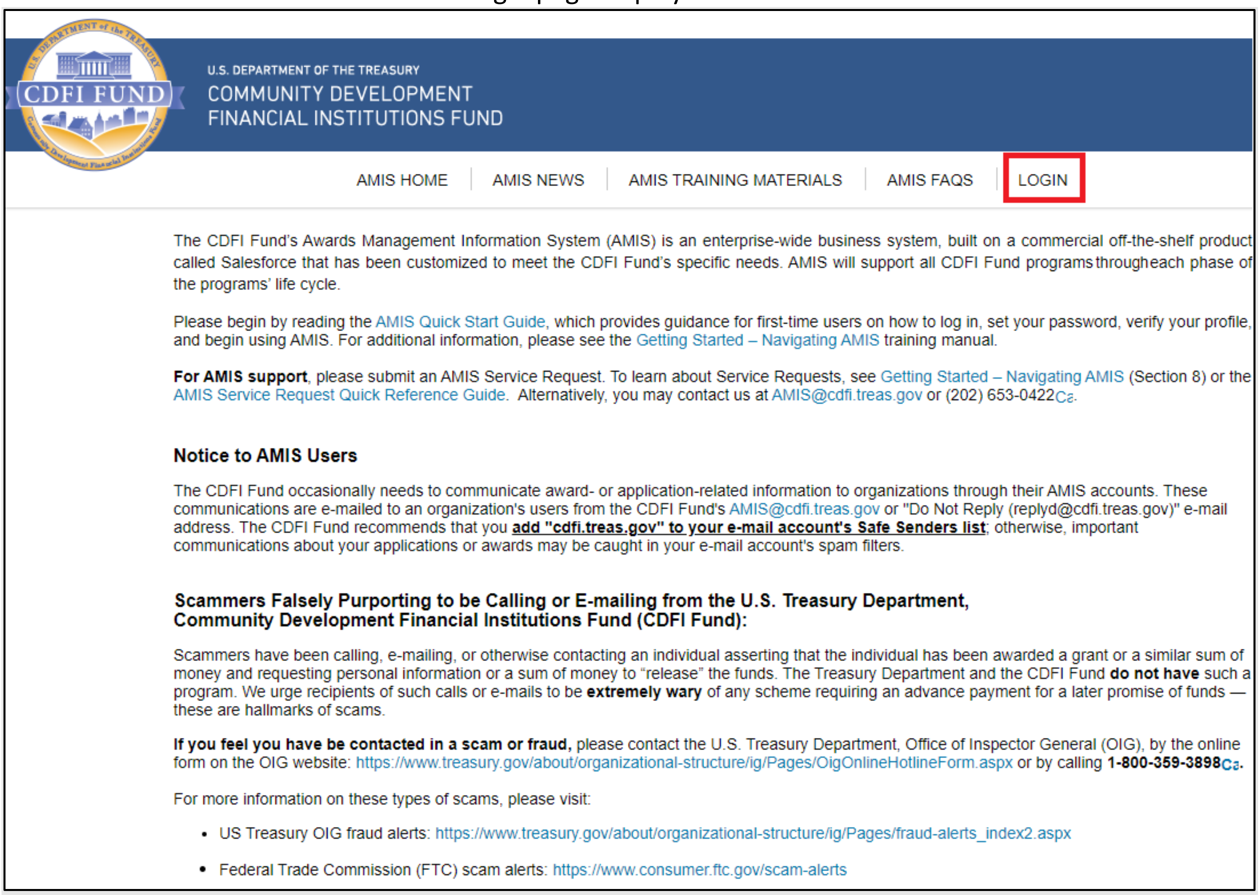


Figure 5. AMIS Landing Page

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

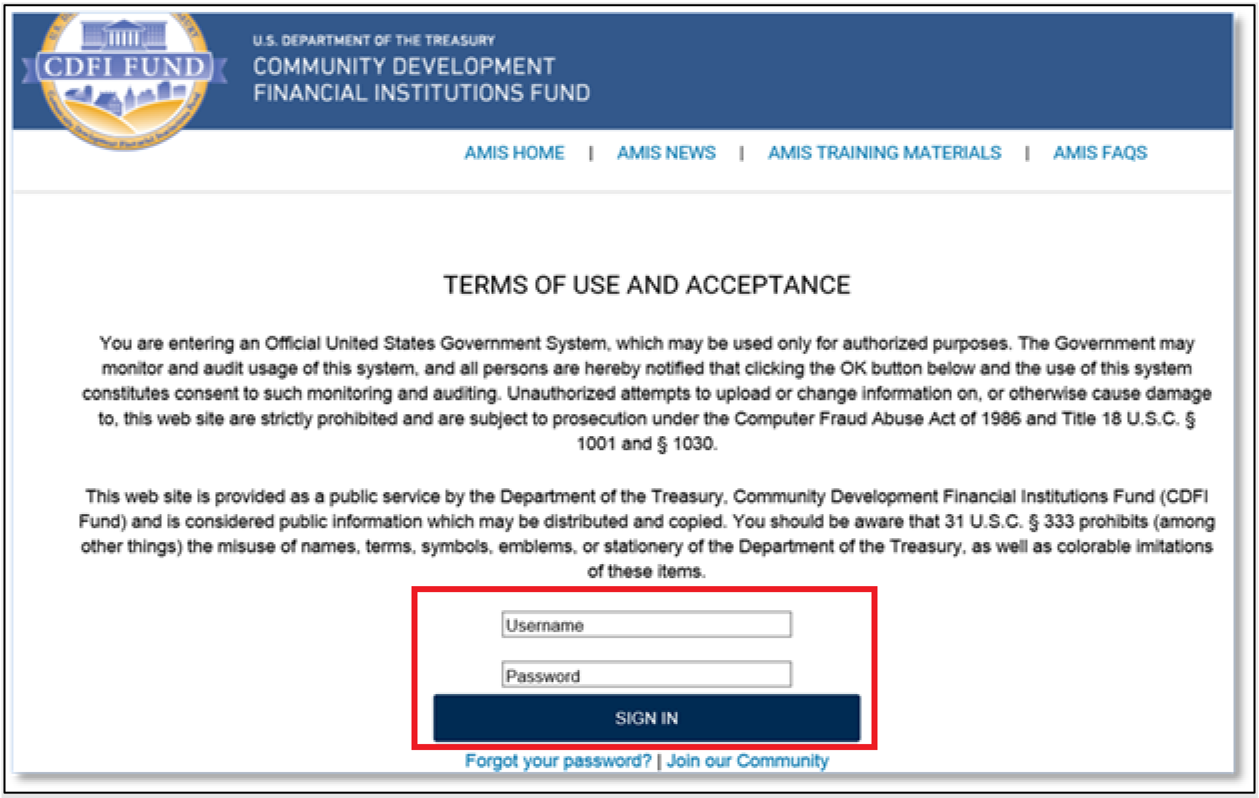


Figure 6. AMIS Login Page

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

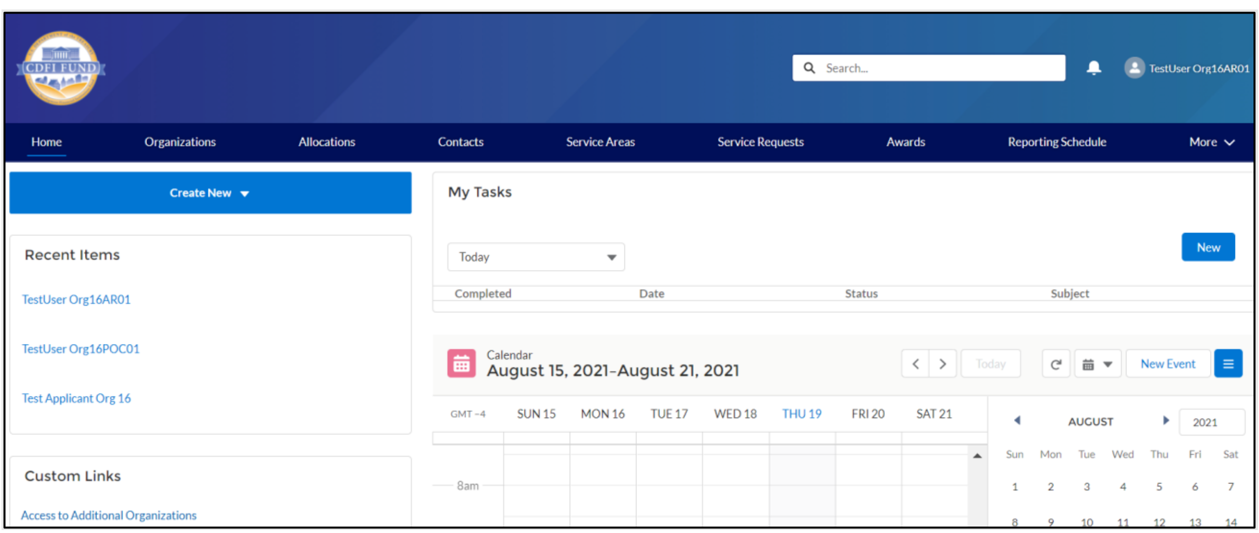


Figure 7. AMIS Home Page

2.3 Permissions and Security

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

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

2.4 Session Timeout

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

2.5 Resetting Your Password

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

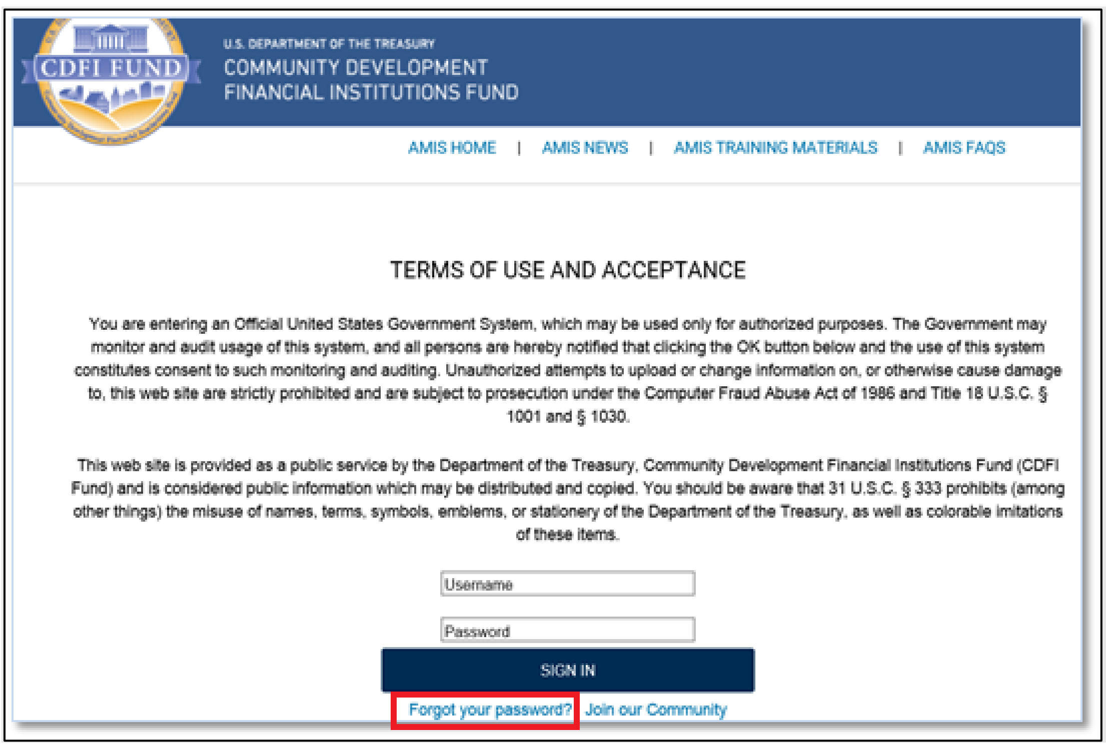


Figure 8. AMIS Login Page – Forgot Password Link

3 Log Out of AMIS

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

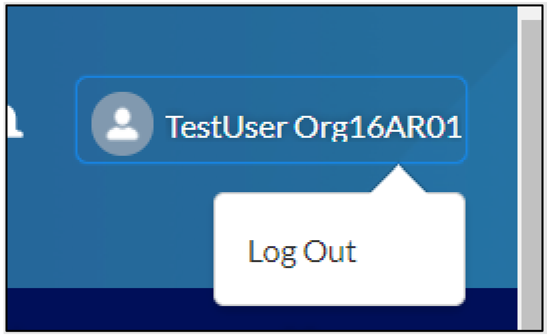


Figure 9. AMIS Logout Screen

4 Overview of the Home Page

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

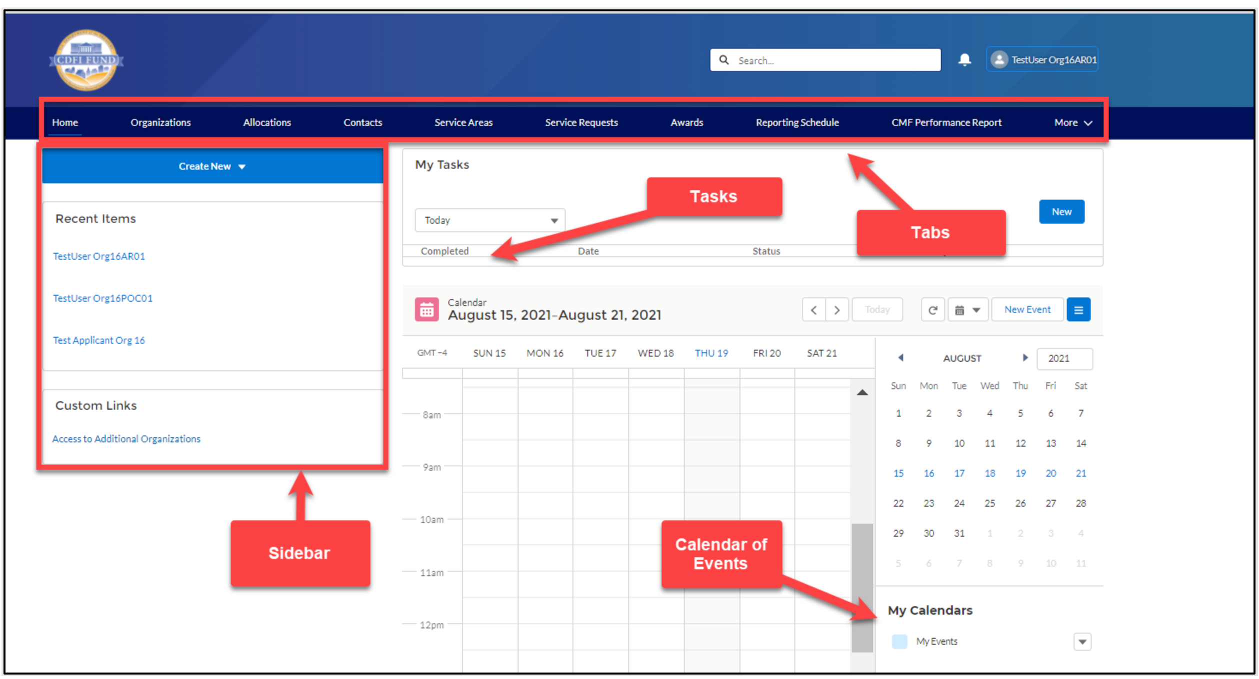


Figure 10. AMIS Home Page

The sidebar appears on the left on most AMIS pages with multiple components that improve usability. These components provide convenient access to:

- Create new records (e.g., tasks and service requests)

- Open your recently viewed items
- View important messages and alerts
- Open custom links, if any.

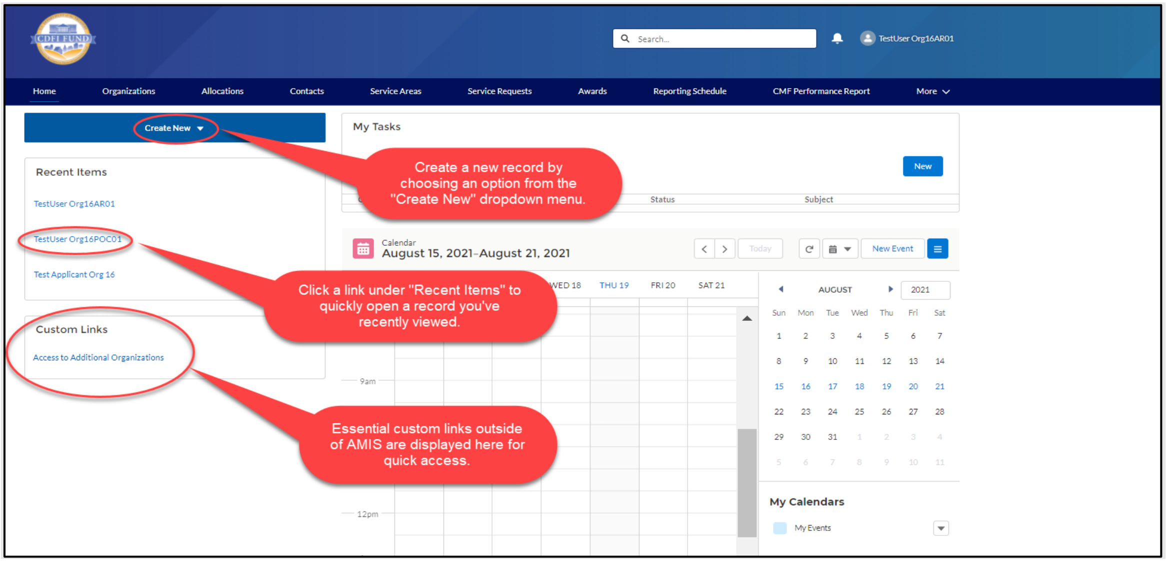


Figure 11. Sidebar Components

5 Tabs, Objects, and Records

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

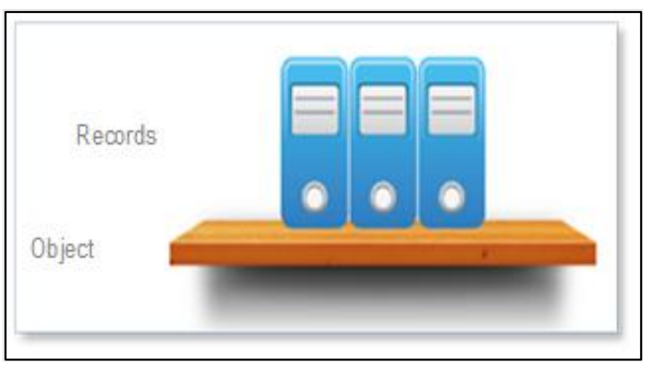


Figure 12. Records and Objects

Figure 13. Award Record and Object

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

Click the Organizations tab to view data on your organization.

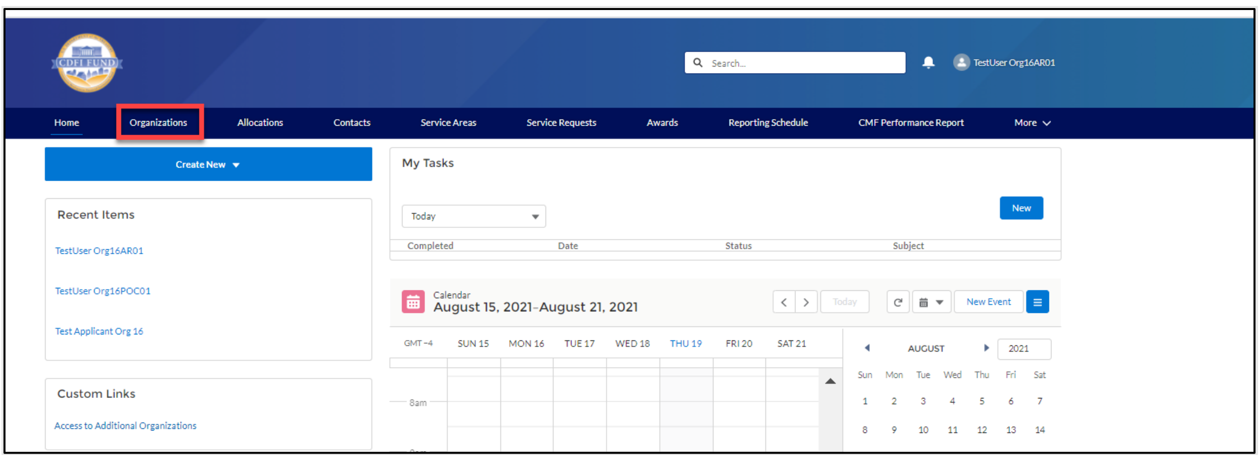


Figure 14. Organizations Home Page

From within each tab, you can:

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

5.1 Access Existing Lists of a Record

A list of your Recently Viewed records is displayed when you click a tab. This is the default Salesforce behavior. In most instances, you will have one record for your organization under the Organizations tab. However, under other tabs such as Service Requests or Awards, you will see multiple records if you have created multiple service requests or have received more than one award.

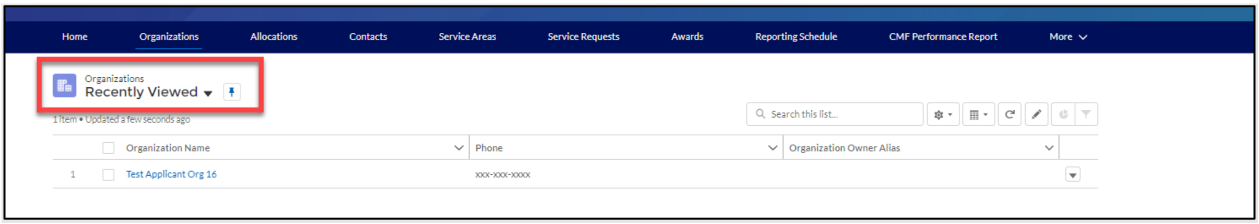


Figure 15. Recently Viewed Organizations

You can also access customized list views with specific customized columns by selecting an option next to the View drop-down menu. Select All Organizations and click the Go! button.

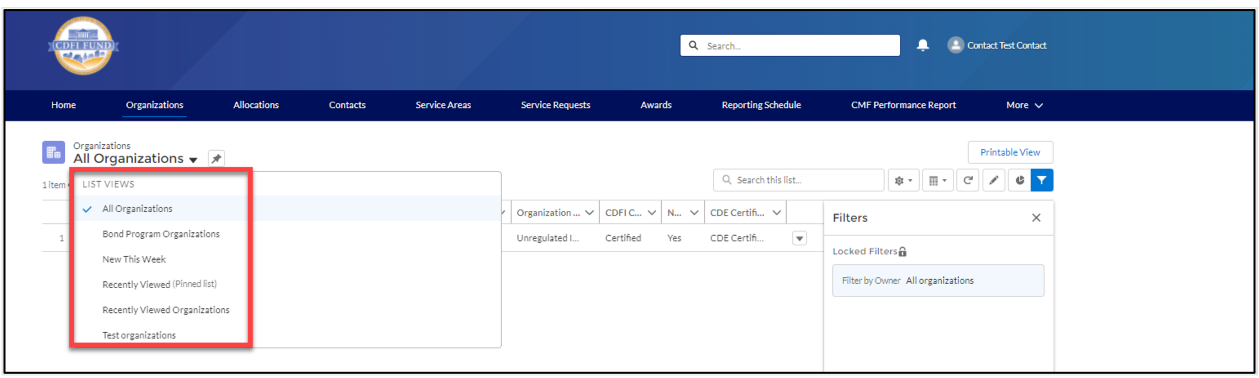


Figure 16. All Organizations View

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

Figure 17. Organizations List View

5.2 Create/Edit a Record

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

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

To edit your organization record:

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

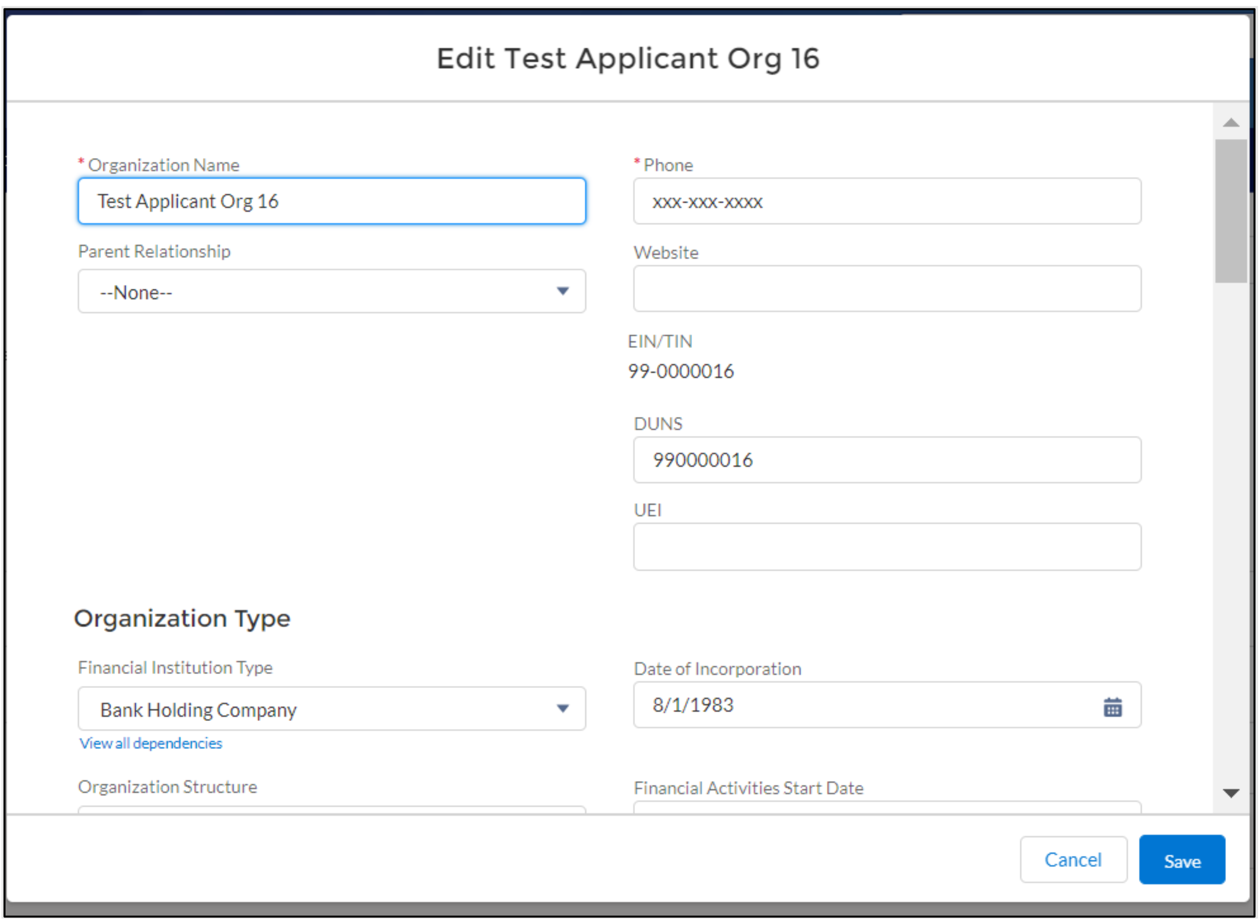


Figure 18. Organization Edit Pop-Up Page

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

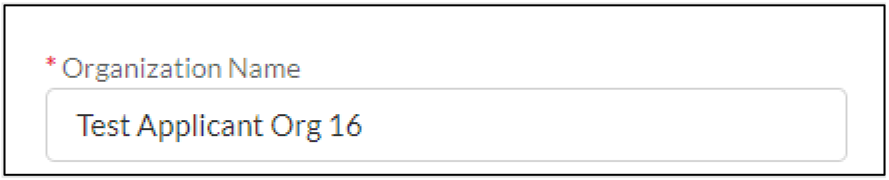


Figure 19. Organization Edit Page – Required Information

3. Notice the Field-Level Help link displayed as an Information icon to the right of the Fiscal Year End Month. These links provide instructions about a particular field on the page. For example, Fiscal Year End Month has a Field-Level Help link that explains that this is the month the fiscal year ends.

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

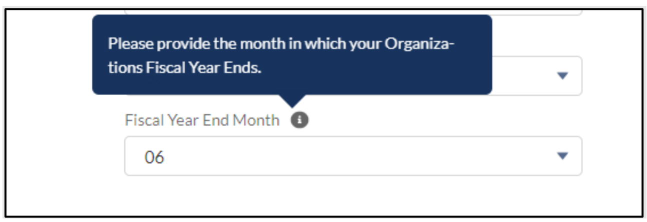


Figure 20. AMIS Field-Level Help Link (Information Icon)

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

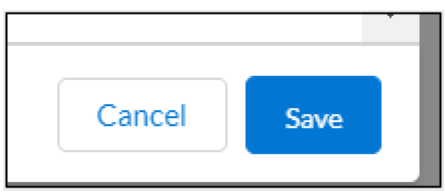


Figure 21. Save Button

   b. Clicking the Save button on any Edit page saves the record and forwards you to the Detail page which is not editable.
   c. Clicking the Save & New button on any Edit page saves the record and re-displays another blank form to create a new record. Use this button when you want to create several records quickly.
   d. Clicking the Cancel button allows you to cancel the action.

5.3 View Details of a Record

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

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

*Click on the Quick Access dropdown arrow to view additional options.

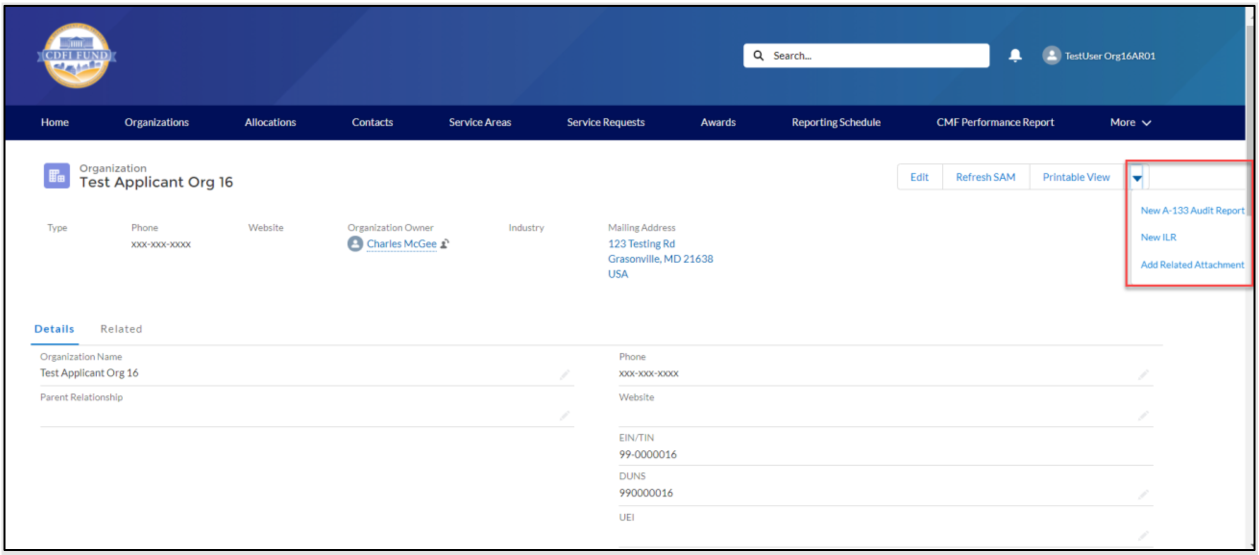


Figure 22. Organization Detail Page and Quick Access Options

5.4 In-Line Editing of a Record

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

1. Move the mouse next to a field's value, on the right, from the Detail page. A Pencil icon will be displayed. The Pencil icon allows you to do in-line editing.

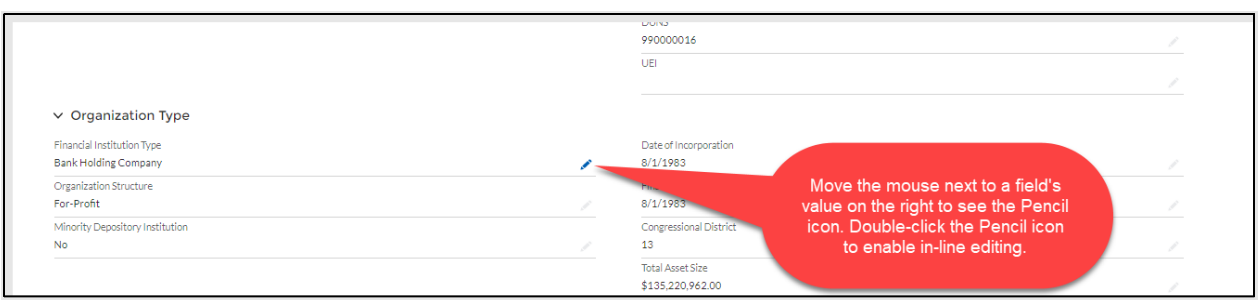


Figure 23. In-Line Editing

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

NOTE: You will not be able to edit fields that are non-editable. A Lock icon will appear instead of the Pencil icon if you move the mouse next to a non-editable field.

5.5 Delete a Record

The option to delete a record is displayed in the Detail page or list view, only if a user is allowed to delete records.

1. To delete a record, ensure you are on the Organization Detail page.
    a. Click the Organizations tab.
    b. Click the Organization Name to be forwarded to the Detail page.
2. Click the Delete button from the Detail page.
    a. A confirmation is displayed in a new window with options to choose Delete to delete the record or Cancel to cancel the action.

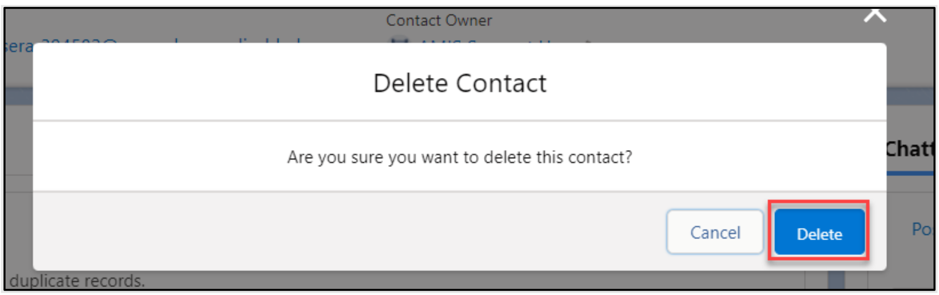


Figure 24. Delete Confirmation

3. Click the Cancel button to cancel the action.

NOTE: Once a record is deleted, it is deleted forever and cannot be retrieved.

5.6 View Related Lists of a Record

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

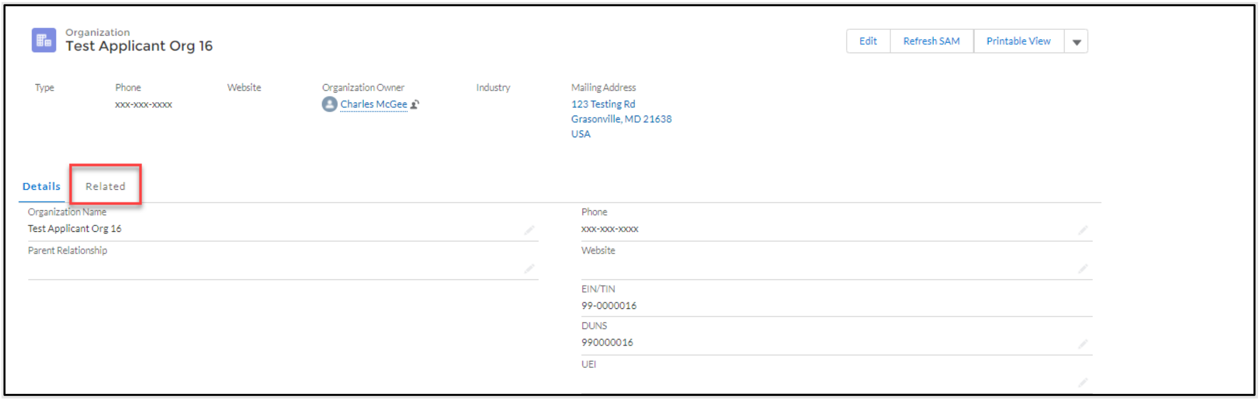


Figure 25. Organization Related Tab

Once you click on the Related tab, you will be directed to the Related List's page.

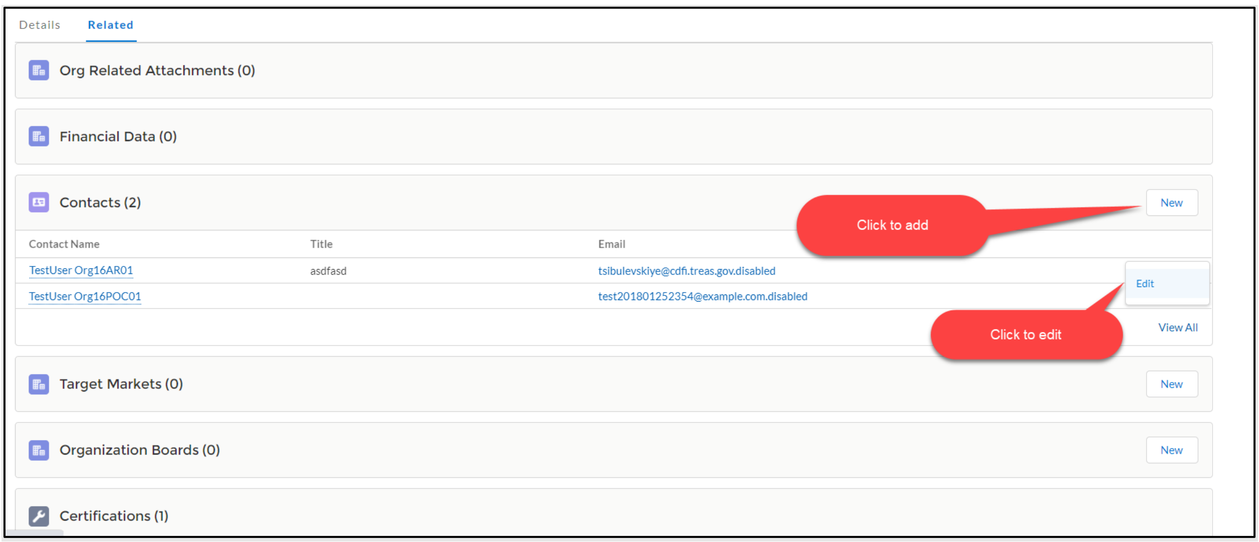


Figure 26. Organization Related Lists (Child Records)

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

Figure 27. Notes & Attachments Related List

b. Click the Upload Files button in the Notes & Attachments related list.

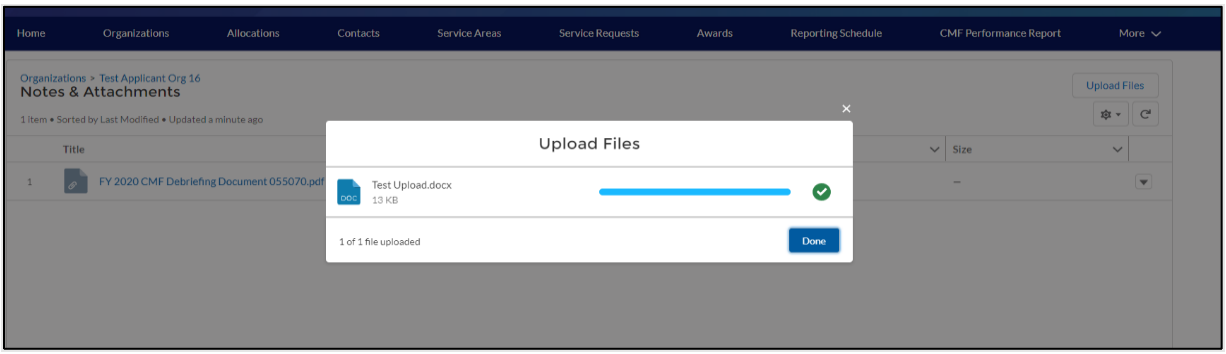


Figure 28. Attach File Screen

c. Select the file from your computer.
d. Click the Done button.

The attached file will be displayed under Notes & Attachments.

6 Update Organization and Program Profiles

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

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

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

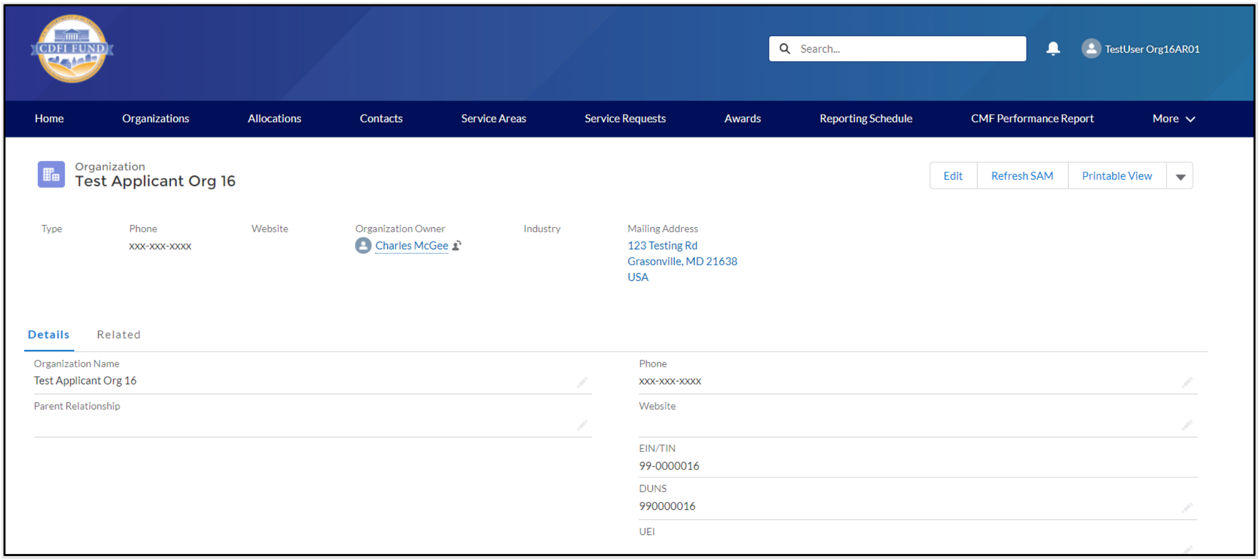


Figure 29. Organization Detail Page

In this section, you will learn how to:

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

6.1 Update Your Organization Profile

To edit the organization detail information:

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

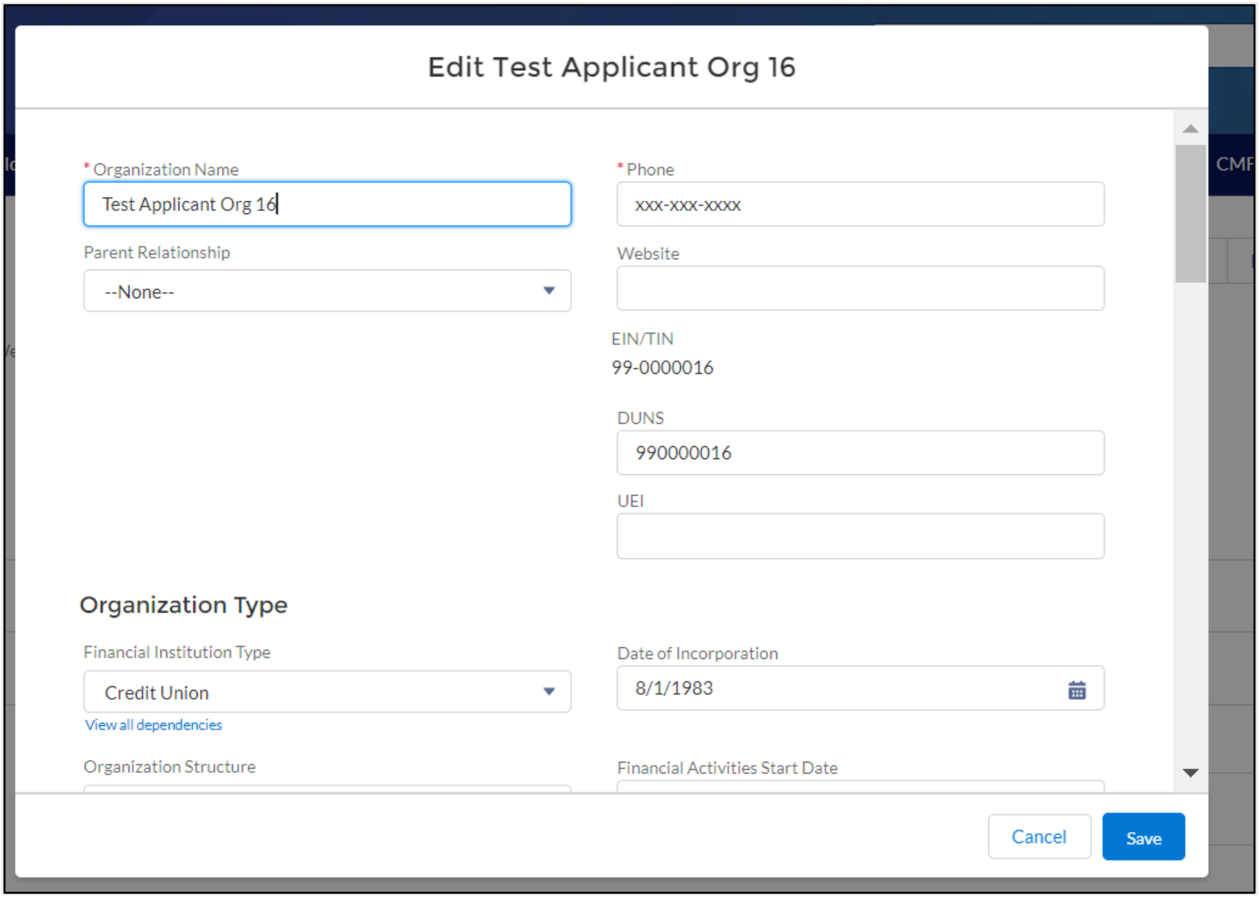


Figure 30. Organization Edit Pop-Up Page

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

6.2 Grants.gov

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

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

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

6.3 Add/Update Contacts

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

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

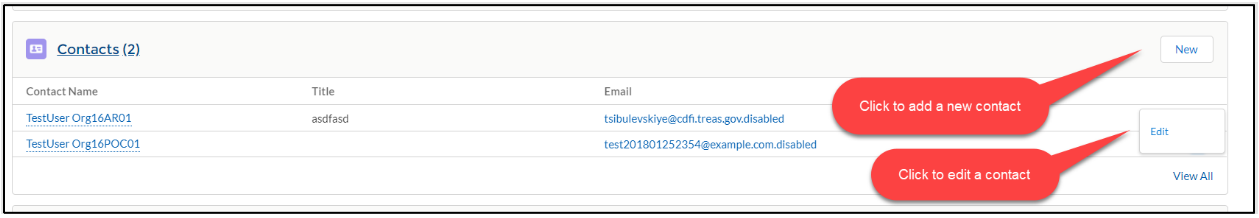


Figure 31. Contacts Related List

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

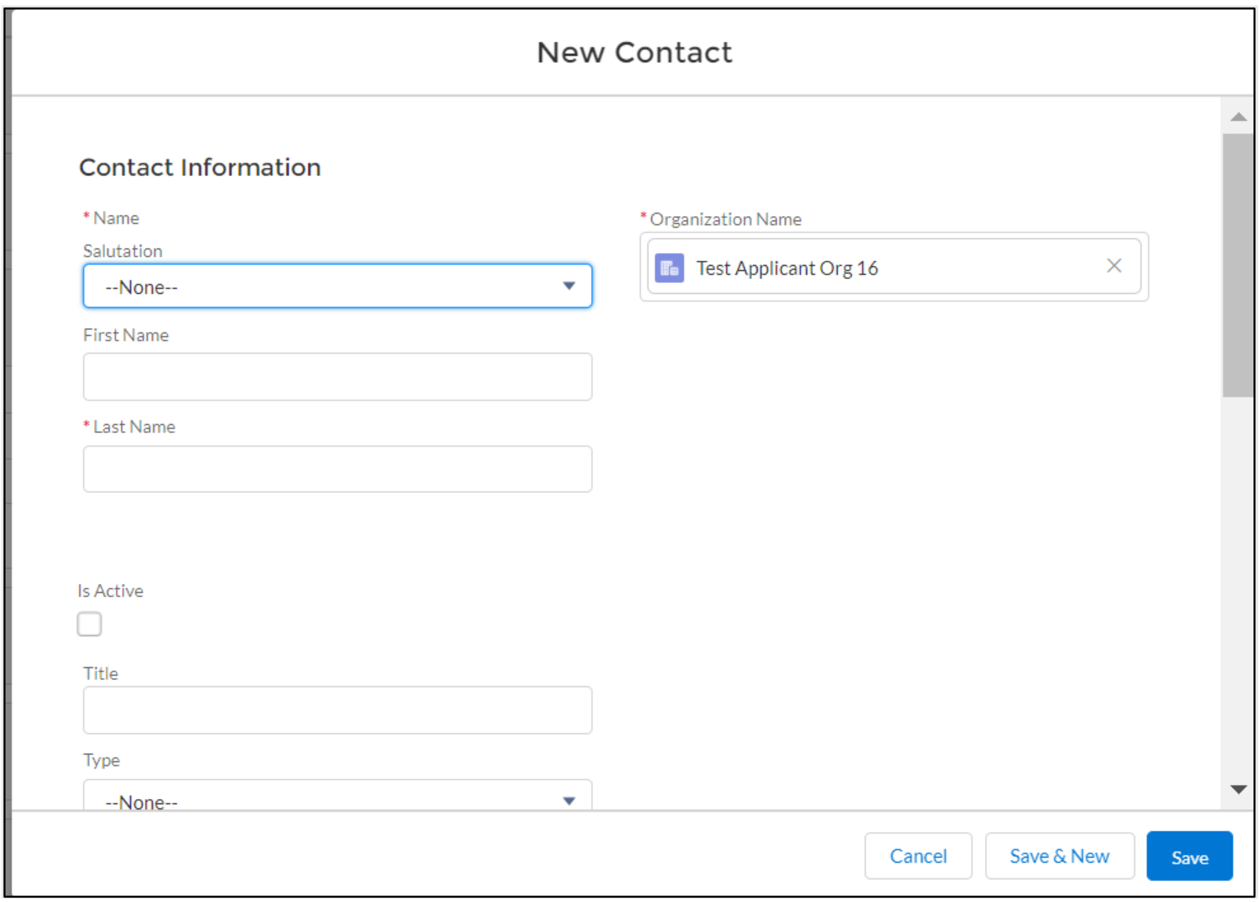


Figure 32. Contact Edit Page

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

6.4 Assign a Profile to a Contact

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

To assign a profile to a contact:

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

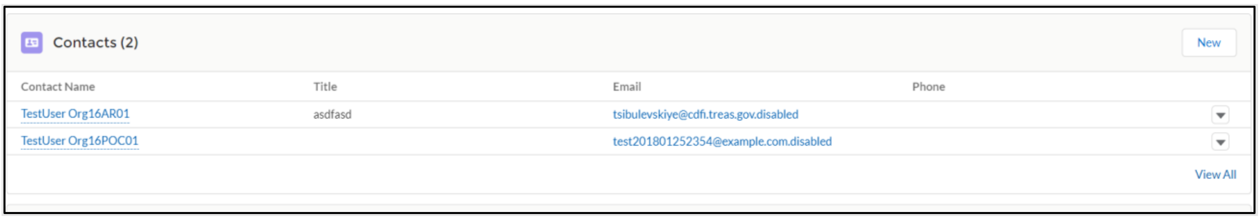


Figure 33. Contacts Related List

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

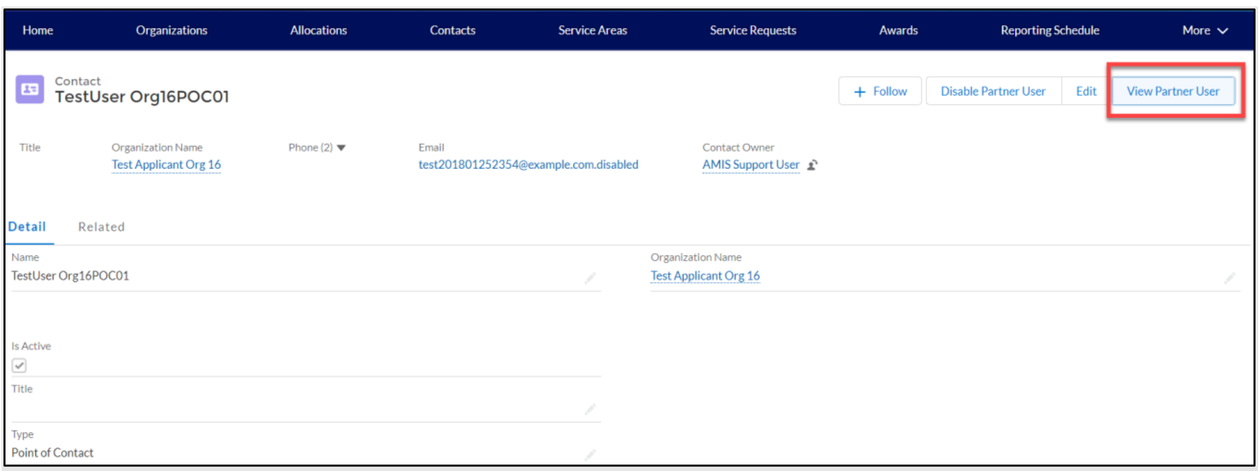


Figure 34. Contact Detail Page

3. From the Contact Detail page, click the View Partner User Button.
4. Click the edit button.

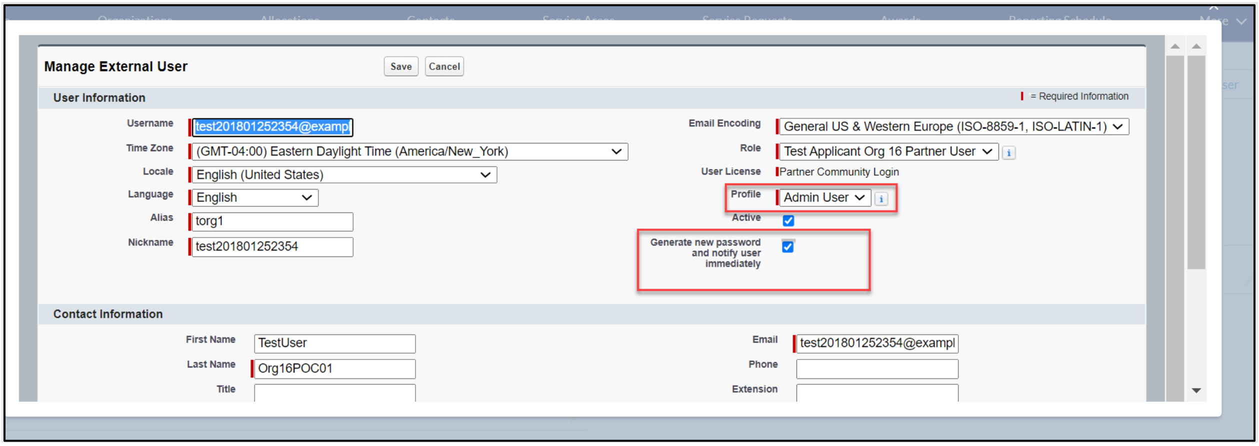
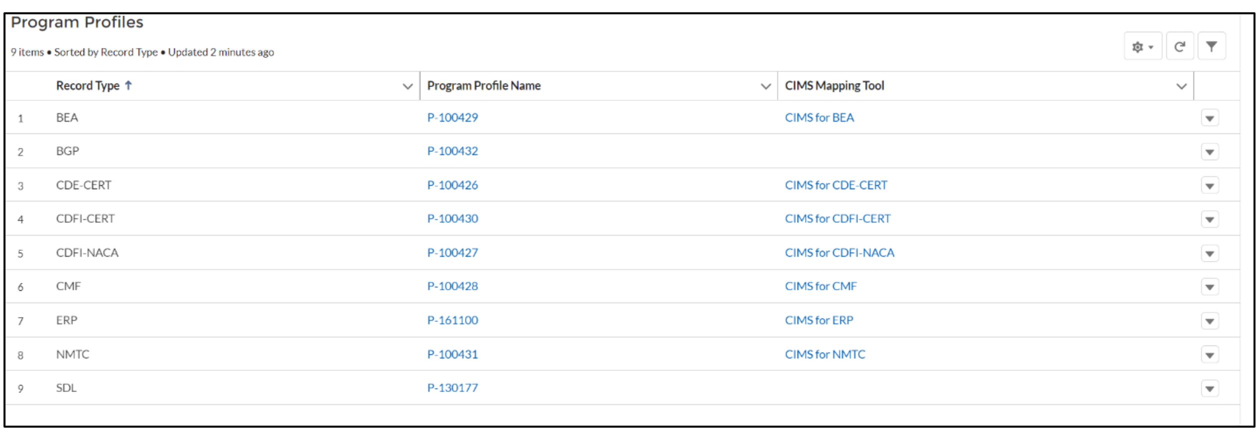


Figure 35. Manage External User Page

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

6.5 Add/Update Program Profiles

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


Program Profiles
9 items • Sorted by Record Type • Updated 2 minutes ago

	Record Type ↑	Program Profile Name	CIMS Mapping Tool
1	BEA	P-100429	CIMS for BEA
2	BGP	P-100432	
3	CDE-CERT	P-100426	CIMS for CDE-CERT
4	CDFI-CERT	P-100430	CIMS for CDFI-CERT
5	CDFI-NACA	P-100427	CIMS for CDFI-NACA
6	CMF	P-100428	CIMS for CMF
7	ERP	P-161100	CIMS for ERP
8	NMTC	P-100431	CIMS for NMTC
9	SDL	P-130177	

Figure 36. Program Profiles Related List

To edit a Program Profile:

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

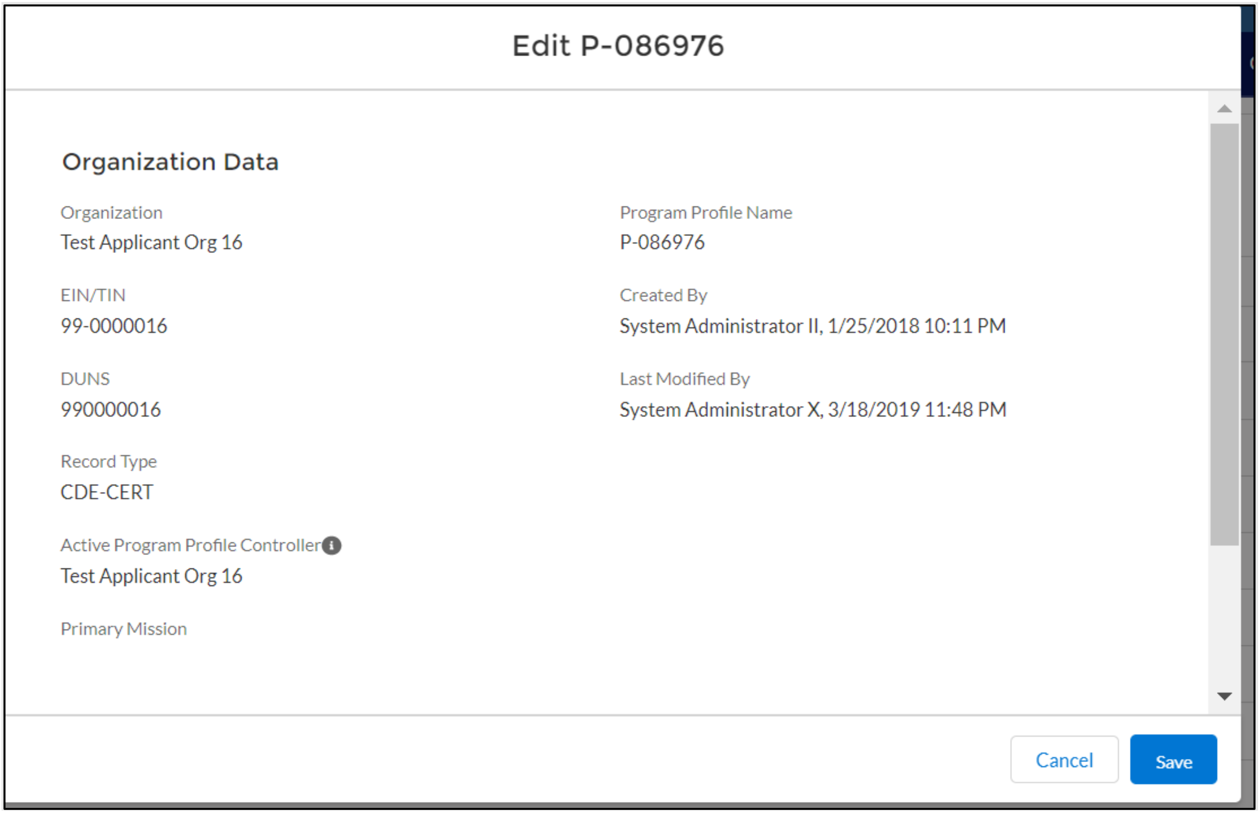


Figure 37. Program Profile Edit Page

2. Complete all the information on the page.
3. Click the Save button. You will be forwarded to the Organization Detail page.
4. You are now ready to complete your CDE Certification Application. Scroll down to the Program Profile related list. From the Program Profile related list, click the Program Profile Name link next to the CDE-CERT Record Type to be forwarded to the CDE Certification Program Profile Detail page.
    a. Observe the Certification Applications related list.
    b. To complete a CDE Certification Application, click the New Certification Application button. Please refer to the *AE102: CDE Certification Application Submission (for CDE Certification Applicants)* training manual to learn how to complete your application.

6.6 Add/Update Affiliates

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

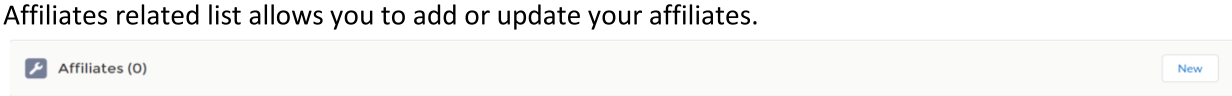


Figure 38. Affiliates Related List

To add an affiliate:

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

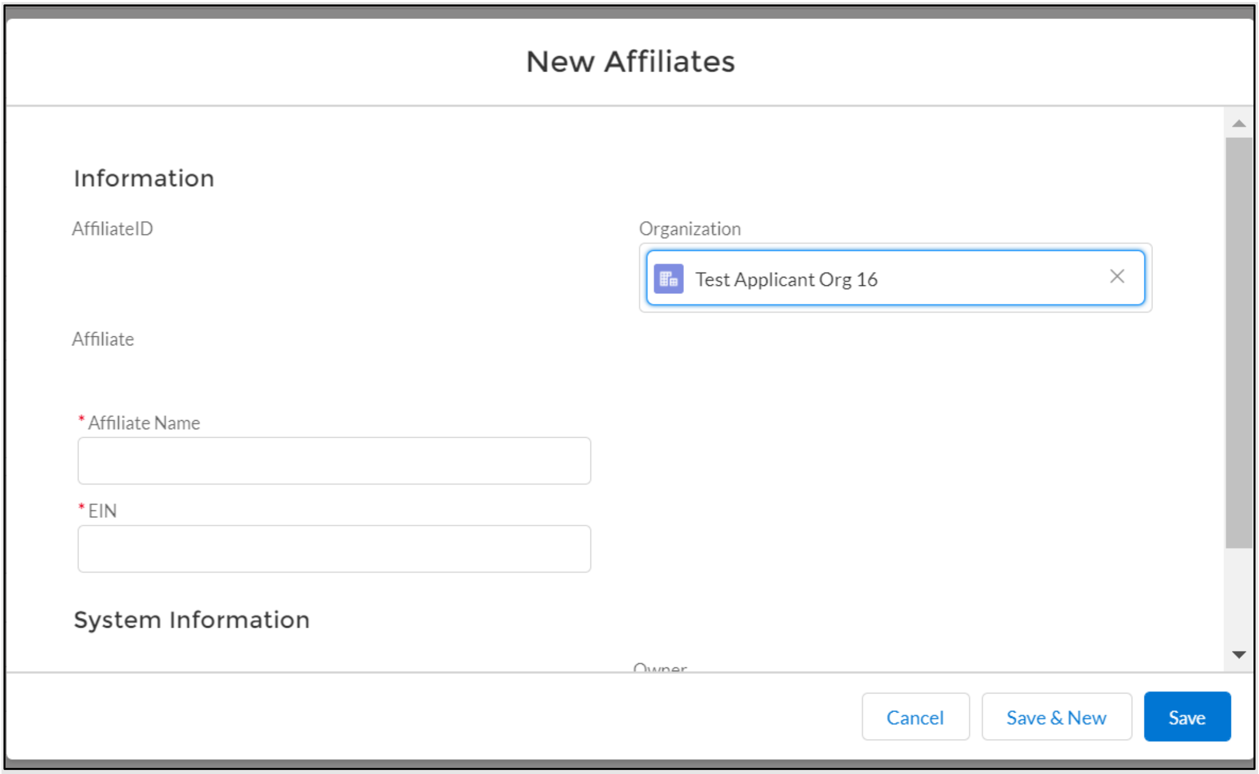


Figure 39. Affiliates Edit Pop-Up Page

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

7 CIMS4

The CDFI Information Mapping System, version 4 (CIMS4) provides mapping and geocoding capabilities to support the certification application process for CDFIs and CDEs, and to assess the program eligibility of investments, lending and financial and development services activities in specific geographic areas for CDFI Fund programs.

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

This document provides step-by-step instructions for common functions in CIMS4, including:

- How to Access CIMS4;

- Basic CIMS4 Functionality;
- Help within CIMS4;
- Target Markets in CIMS4;
- How to Perform Bulk Address Geocoding.

In addition, the CDFI Fund has recorded a video tutorial on "How to Use CIMS4 to Create, Analyze, and Validate a Target Market." This tutorial also describes some basic CIMS4 functionality.

7.1 How to Access CIMS4

CIMS4 has two interfaces: Public Viewer and Authenticated User.

7.1.1 Public Viewer

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

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

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

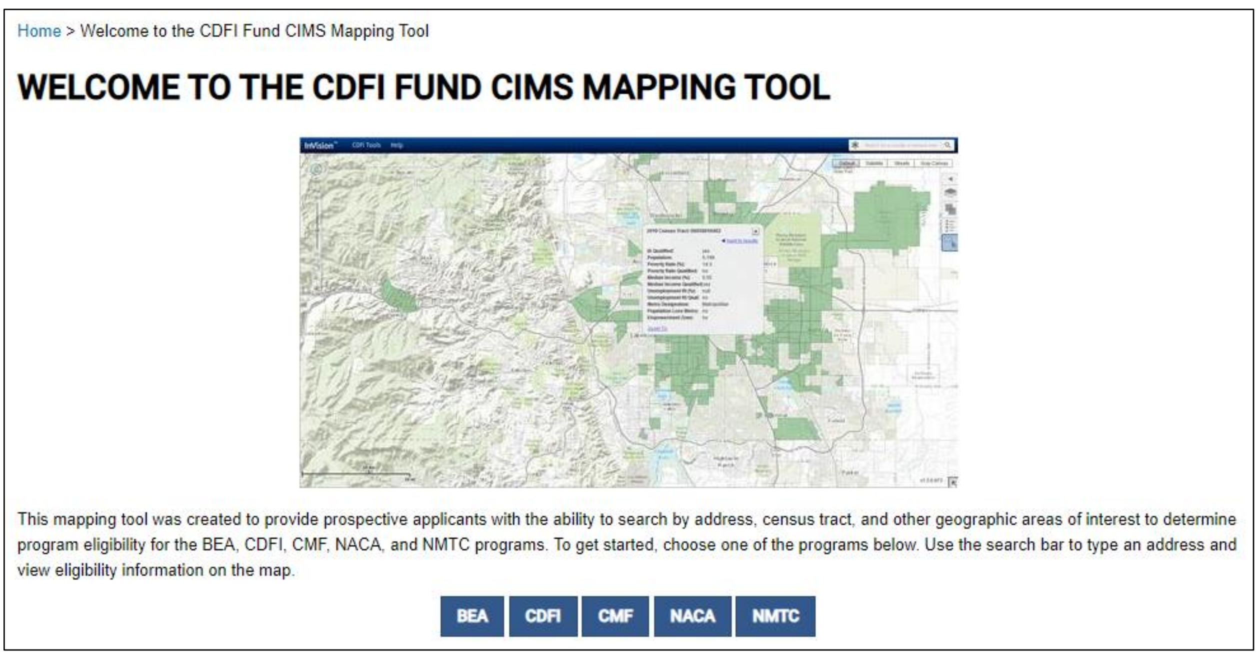


Figure 40. Landing Page for CIMS Public Viewers

Select the CDFI Fund Program button of choice to launch CIMS4 for that program.

7.1.2 Authenticated User

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

1. Login to AMIS and select the relevant organization[1].

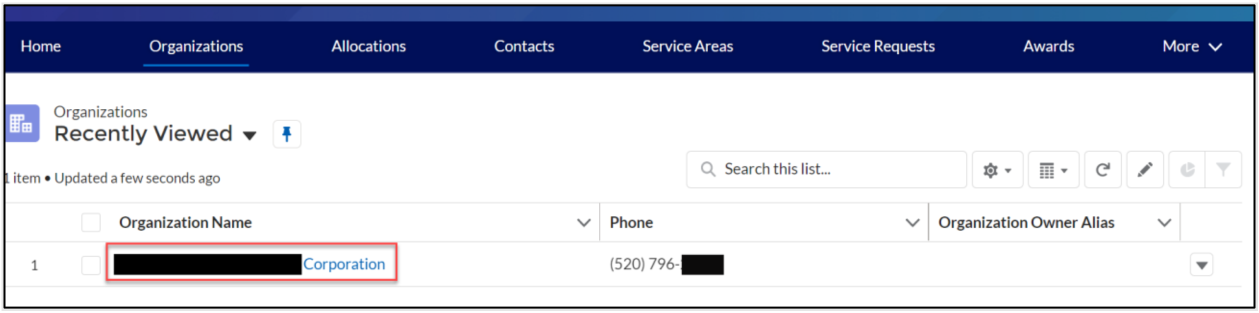


Figure 41. Organizations

2. Click on the **Related** tab.

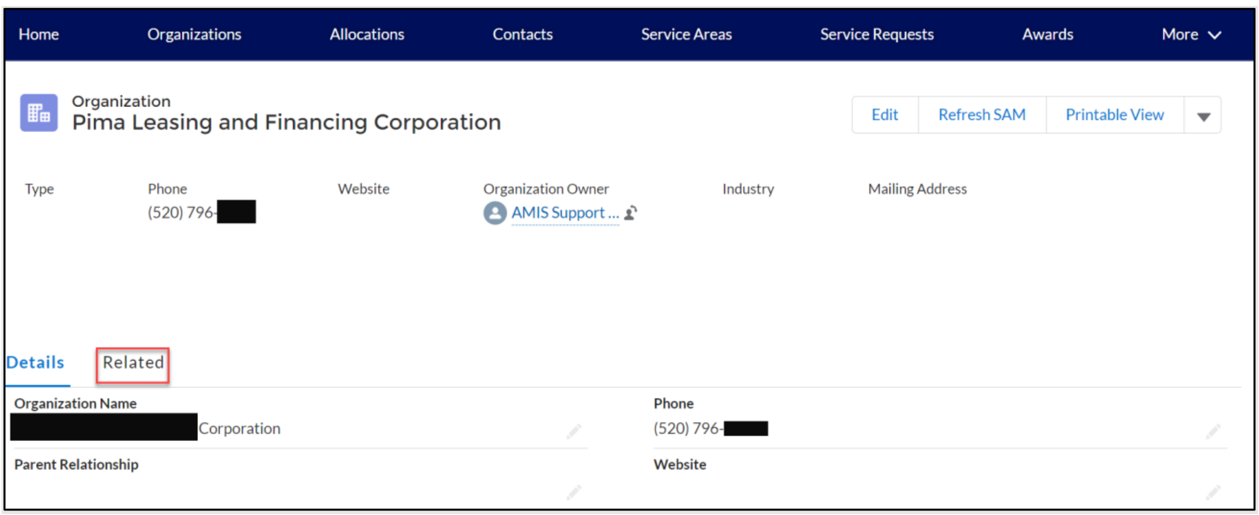


Figure 42. Organizations – Related Tab

3. Scroll down to the Active Program Profiles section and select the CIMS Mapping Tool link for the CDFI Fund Program of choice to launch CIMS.

[1] Internal CDFI Fund users have an additional login step of changing their Community to "Applicant" from the Community dropdown list in the top left-hand side of the page.

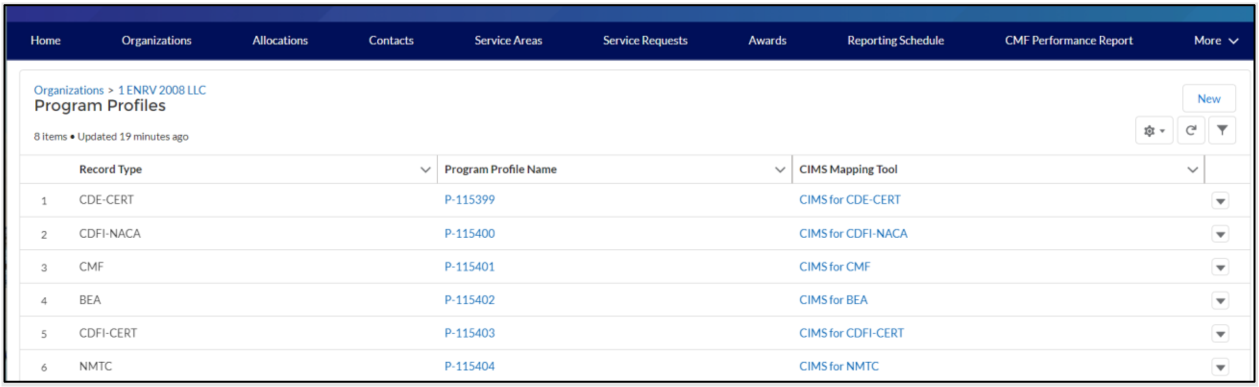


Figure 43. Program Profiles Section

NOTE: Some AMIS users (including CDFI Fund users) have access to maps for more than one AMIS Organization. If you launched CIMS4 for one Organization, then want to use CIMS4 for a different Organization, please close and restart your browser before launching CIMS4 for that second Organization.

7.2 Basic CIMS4 Functionality

This section provides an overview for how to navigate and use CIMS4.

7.2.1 CIMS4 Controls

Upon choosing the CDFI Fund program, CIMS4 is launched in a new tab on your browser. CIMS4 has the following layout.

- In the top left corner is the Search Bar. Search options include by Address, Census Tract, Congressional District, County, and State.
- Underneath the Search Bar are four tabs for Details, Layers, Legend, and Selections.
    - The DETAILS Tab provides you information about the feature that you selected on the map.
    - The LAYERS Tab lets you turn map layers on and off. You can also change the "view by" of certain map layers here.
    - The LEGEND Tab lets you see how the features on the map are displayed by color and symbol.
    - The SELECTIONS Tab is where you create your target market and validate that target market. *(Authenticated Users only)*
- Underneath the tabs are any saved maps *(Authenticated Users only)*
- In the top right corner are controls to Zoom In, Zoom Out, use your current Location, and the current Basemap. Types of Basemaps include:
    - Topographic
    - Light Gray Canvas Map
    - Imagery with Labels
    - World Street Map
- At the bottom of the page is the button to make a New Selection *(Authenticated Users only)* and the Actions Menu.

- The Actions Menu includes two buttons. One button to share a link of the map that you are viewing with your Team. Another button to measure lines and polygons on the map.

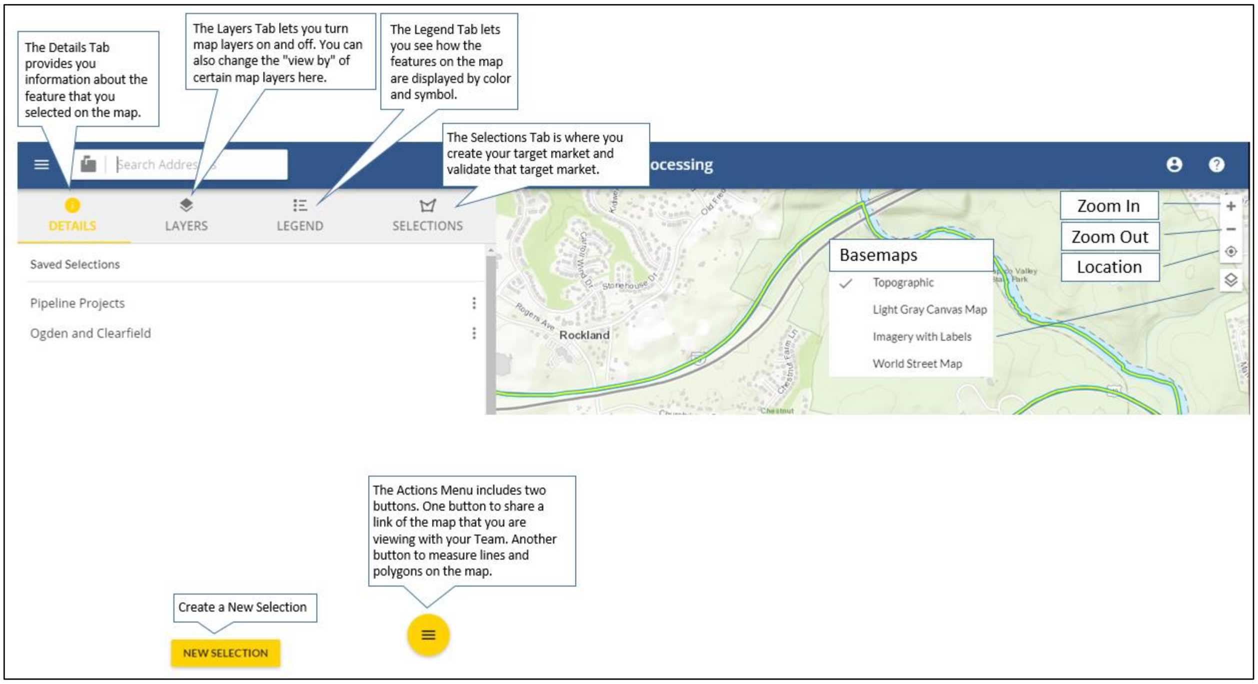


Figure 44. CIMS4 Layout

7.2.2 Control Layer Visibility within a Selection

Layers are the mechanism used to display geographic datasets in the CIMS4 mapping application. Select the LAYERS tab to show the list of available CIMS4 layers, and toggle the visibility (on or off) of any of the available layers. Users should be aware that in CIMS4 numerous layers of geography (county, census tract, etc.) can be displayed on the screen at the same time. Also, the list of layers will change depending on the CDFI Fund program selected.

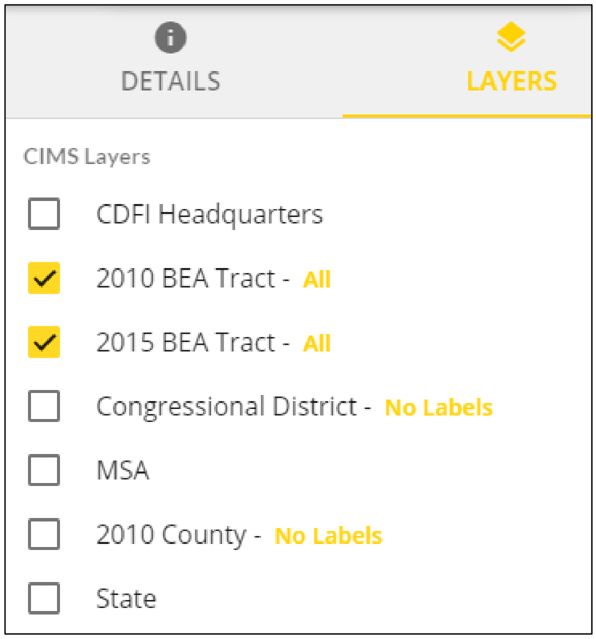


Figure 45. CIMS4 Layers for BEA

7.2.3 View a Legend for the Visible Layers on a Selection

Select the LEGEND tab to display the legend for the currently visible map layers.

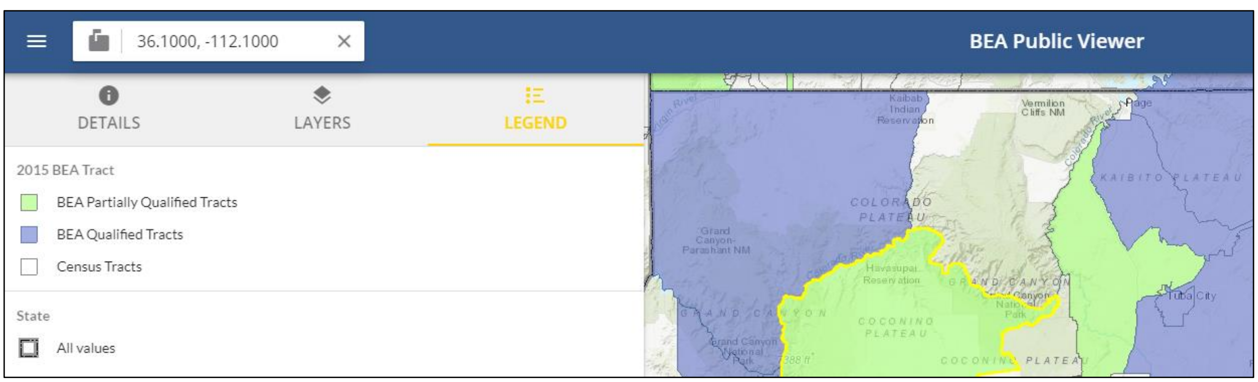


Figure 46. CIMS4 Legend for BEA

7.2.4 Search for a Location

Click on the icon to the left of the selection box to select a map layer.

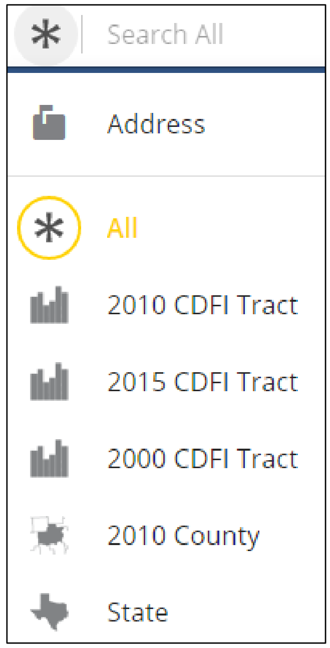


Figure 47. Search Bar Map Layers

Then, type in the search box the feature that you need to find. If the feature exists, the map will zoom to it and you will get its information in the DETAILS Tab.

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

- Latitude/Longitude: 36.1000, -112.1000 (Grand Canyon)
- Address: 1600 Pennsylvania Ave NW, Washington, DC (Valid address)
- 2010 Census Tract: 08031980000 (Valid Census Tract ID)
- Congressional District: 01 (Valid format)
- County: Knox (Valid county)
- State: Maine (Proper format for State search)

7.2.5 View Program Eligibility and Demographic Information for Individual Census Tracts

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

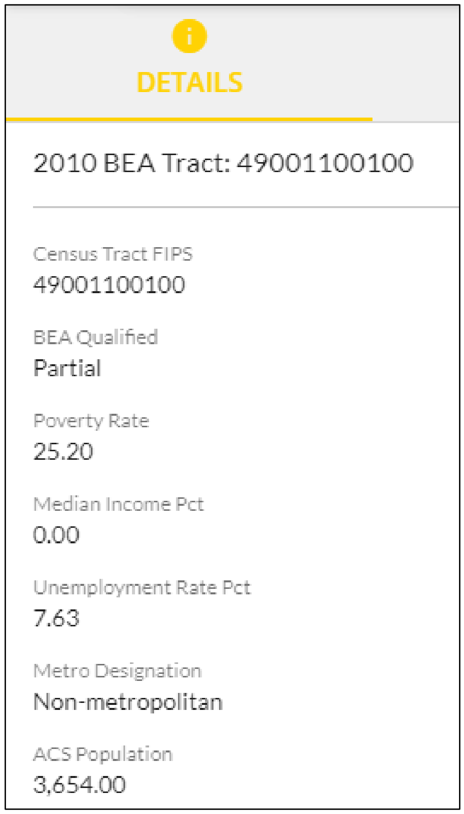


Figure 48. Census Tract Details

7.3 Help within CIMS

1. CIMS4 has robust, built-in help features. Click the help icon (question mark) in the top right corner of the browser. You will see 3 options: Getting Started, Announcements, and Support.

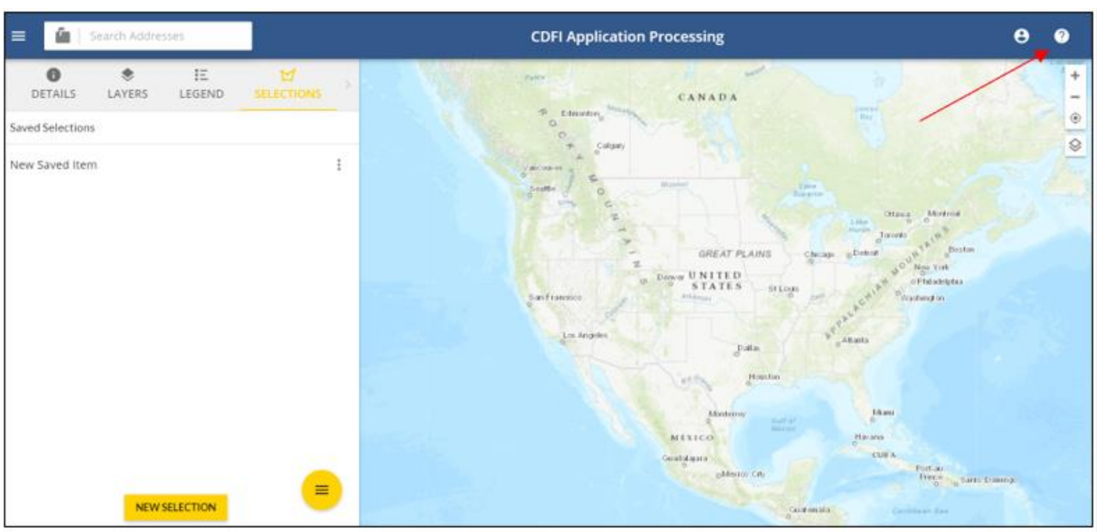


Figure 49. Help Icon

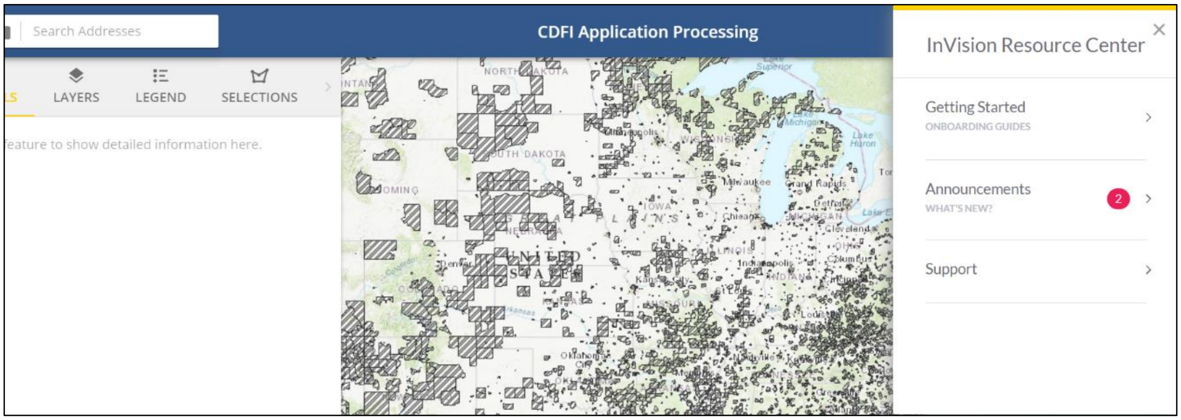


Figure 50. Help Options

2. Click Getting Started to begin an overview of the CIMS Explorer.

3. In addition, many of the CIMS4 controls have an information icon  that displays additional information about that control when you hover over the icon.

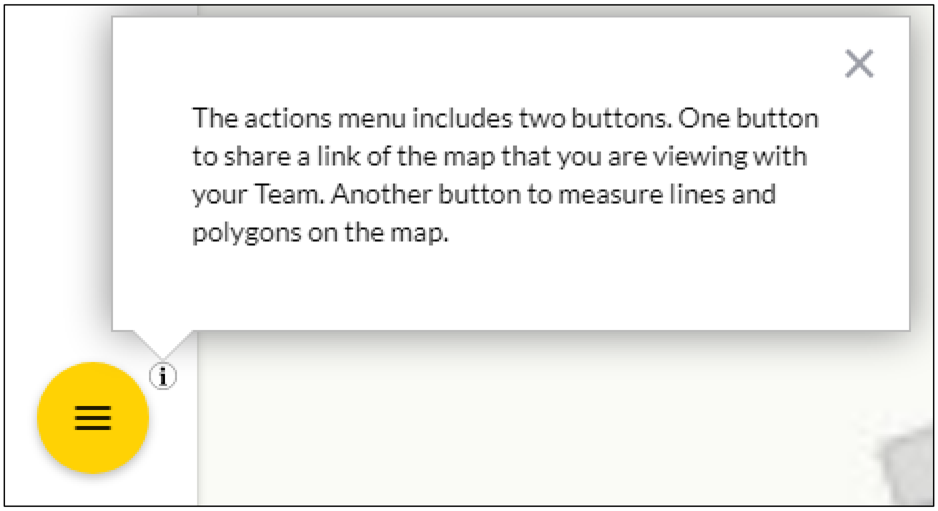


Figure 52. Information Icon for a Control

4. Note the information icon next to the help icon. Selecting it displays a tutorial on how to create and analyze a target market.

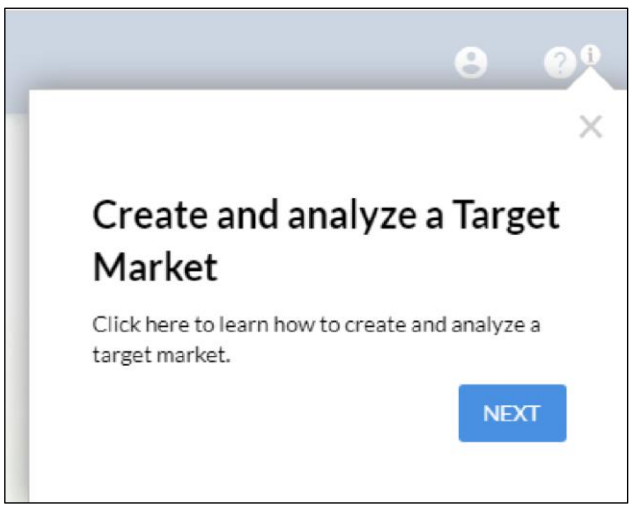


Figure 53. Tutorial on How to Create and Analyze a Target Market

7.4 Target Markets in CIMS4

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

7.4.1 Contiguity for BEA and CDFI programs

Both the CDFI and BEA programs require calculating whether census tracts are contiguous. In the case of the CDFI program, Applicants must create and submit Target Market Maps for each of their individual

Target Markets. Each distinct Investment Area will need a separate map. Targeted Populations that share the same geographic boundaries may be combined in one map; however, those that do not share the same geographic boundaries will need separate maps. Therefore, CDFI Target Market Maps may be either 1) contiguous if the boundaries of census tracts, counties or states connect via a point or boundary; or 2) non-contiguous.

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

7.4.2 Investment Areas, Low-Income Targeted Populations, Other Targeted Populations

For the purpose of CDFI certification, an eligible Investment Area (IA) is a geographic unit (state, county, census tract, block group, Indian/Native area), or contiguous geographic unit entirely located within the United States geographic boundaries that:

- Has a population poverty rate of at least 20%; or
- Has an unemployment rate 1.5 times the national average; or
- For a Metropolitan area – has a median family income (MFI) at or below 80% of the greater of either the metropolitan or national metropolitan MFI; or
- For a Non-Metropolitan area – has an MFI at or below 80% of the greater either the statewide or national non-metropolitan MFI; or
- Is wholly located within an Empowerment Zone or Enterprise Community.

For the purpose of CDFI Certification, a low-income targeted population (LITP) for a geographic unit is comprised of individuals whose family income is:

- For a Metropolitan area – has a median family income (MFI) at or below 80% of the greater of either the metropolitan or national metropolitan MFI; or
- For a Non-Metropolitan area – has an MFI at or below 80% of the greater either the statewide or national non-metropolitan MFI; or
- Is wholly located within an Empowerment Zone or Enterprise Community.

Serving an Other Targeted Population (OTP) requires providing financial products to an identifiable group of individuals that lack adequate access to capital and have historically been denied credit. The designated Other Targeted Populations are:

- African Americans
- Alaska Natives residing in Alaska
- Hispanics
- Native Americans; Native Hawaiians residing in Hawaii
- Other Pacific Islanders residing in other Pacific Islands
- Other (reviewed and approved on a case-by-case basis)
- For a Metropolitan area – has a median family income (MFI) at or below 80% of the greater of either the metropolitan or national metropolitan MFI; or
- For a Non-Metropolitan area – has an MFI at or below 80% of the greater either the statewide or national non-metropolitan MFI; or
- Is wholly located within an Empowerment Zone or Enterprise Community.

For the purpose of the NMTC program, an eligible NMTC area is a geographic unit (state, county, census tract, block group, Indian/Native area) that:

- Has a population poverty rate of at least 20%; or
- For a Metropolitan area – has a median family income (MFI) at or below 80% of the greater of either the metropolitan or national metropolitan MFI; or
- For a Non-Metropolitan area – has an MFI at or below 80% of the greater either the statewide or national non-metropolitan MFI.

For the purposes of the Bank Enterprise Award, an eligible area is a contiguous geographic area located within the boundaries of a General Local Government that:

- Has a population of not less than 4,000 if any part of the area is located in a Metropolitan Area with a population of 50,000 or greater; or
- Have a population of not less than 1,000 if no portion of the area is located within a Metropolitan Area of a population with a population of 50,000 or greater; or
- be located entirely within an Indian Reservation and is a distressed area where:
- At least 30 percent of the eligible residents have incomes that are less than the national poverty level, as of the most recent decennial census, and
- An unemployment rate at least 1.5 times the national average, as determined by the 2010 U.S. Bureau of Labor Statistics.

Validations for these criteria are included in the functionality of CIMS4.

7.4.3 How to Create and Manage Target Market Maps

Users can use CIMS4 to create new maps for target markets, edit existing target market maps, or delete maps that are no longer needed.

1. Login into AMIS. Navigate to the Program Profile for your Organization, and click the link for the CIMS Mapping Tool. CIMS4 will open in a new tab.

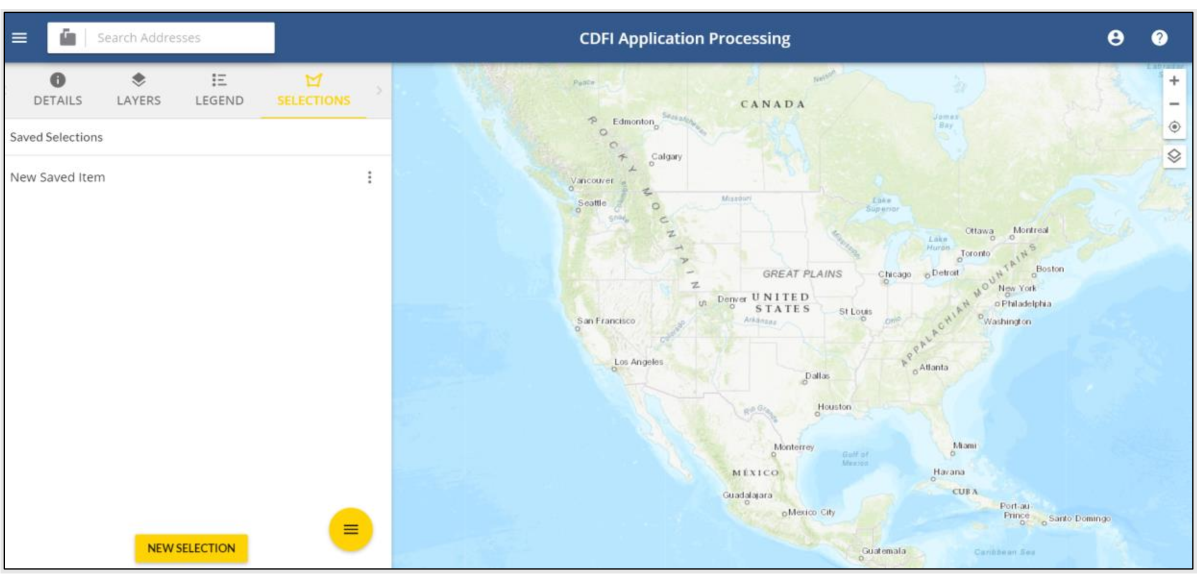


Figure 54. CIMS Mapping Tool

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

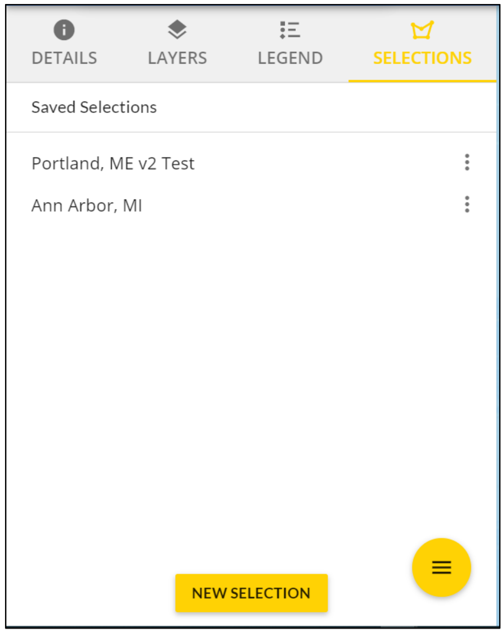


Figure 55. Selections Tab

3. Click New Selection, then click the pencil icon. Rename and Save your map.

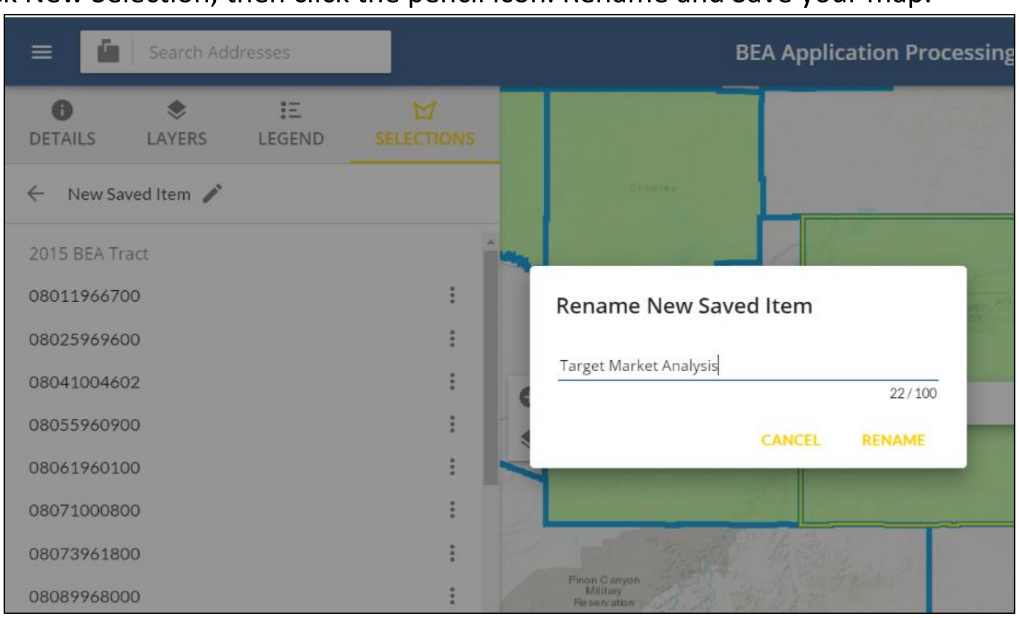


Figure 56. Rename Map Window

4. Click the layers button and select which features you want to analyze.

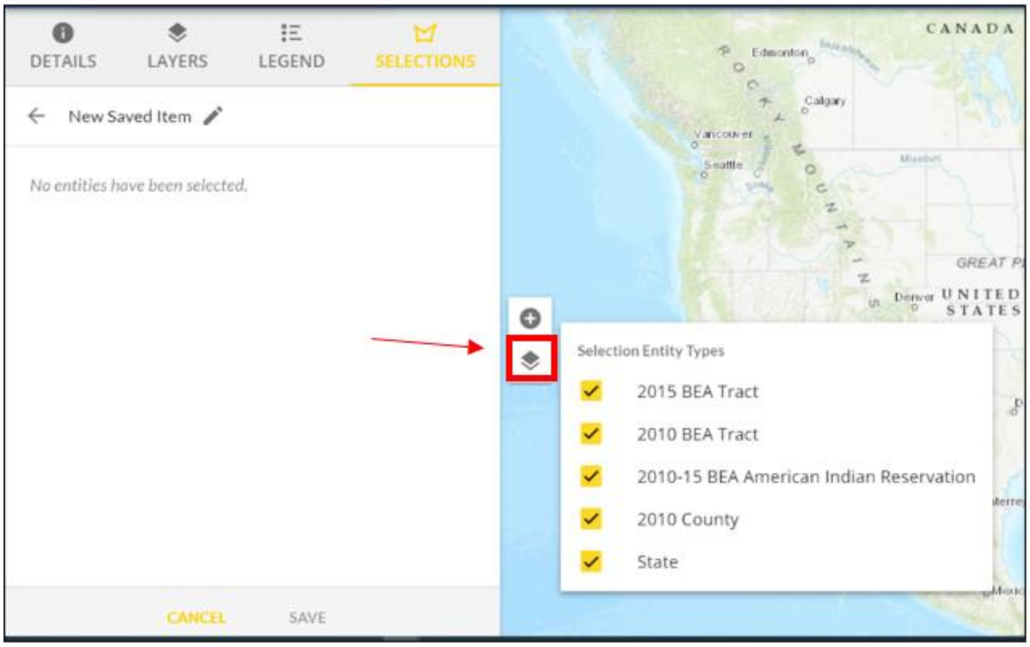


Figure 57. Layers Tool

5. Click the plus button and choose Add to make a new map, Subtract to delete a map, or Replace to replace an existing map.

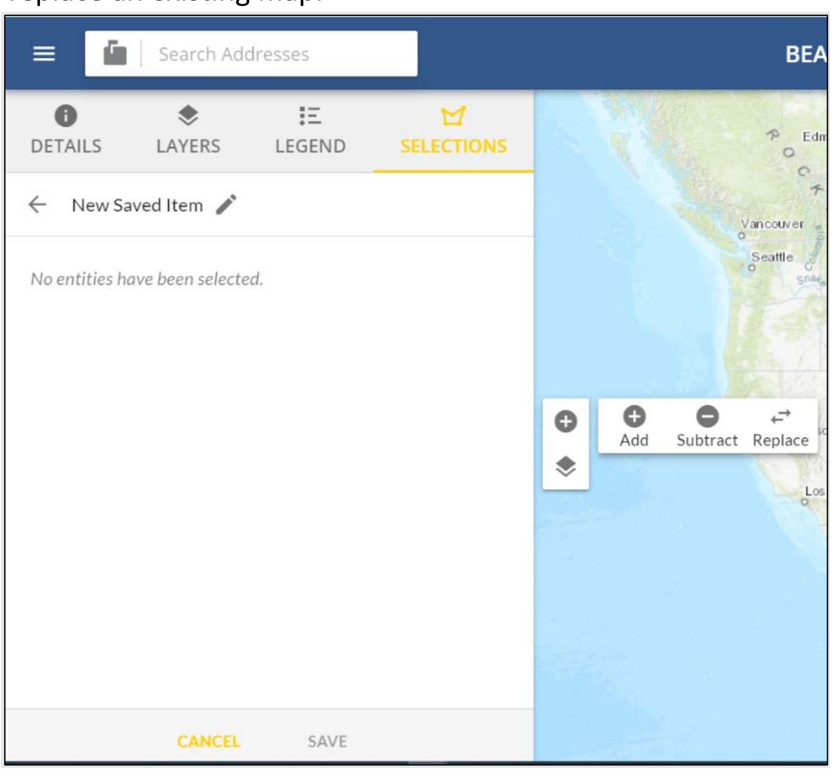


Figure 58. Add, Subtract, and Replace Options

6. Select features on the map to create a target market. You can also click the ellipses next to a feature then click Identify to identify the feature. When you're finished, click Save.

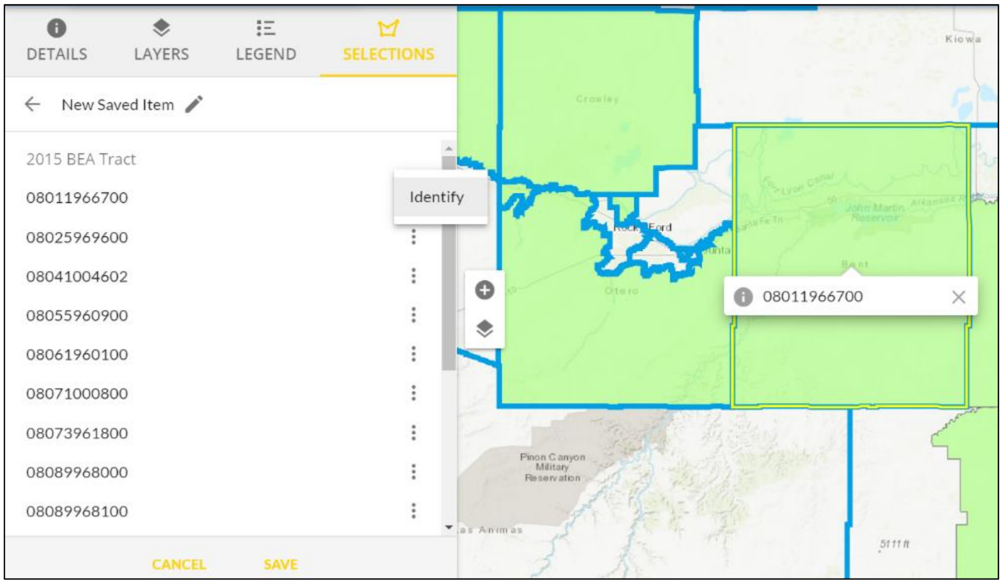


Figure 59. Select Target Market Features

7. Go back to Target Market Analysis.

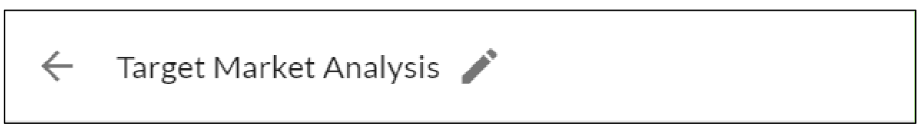


Figure 60. Target Market Analysis

8. Click the ellipses to the right of your saved map and choose the validation option you want to perform.

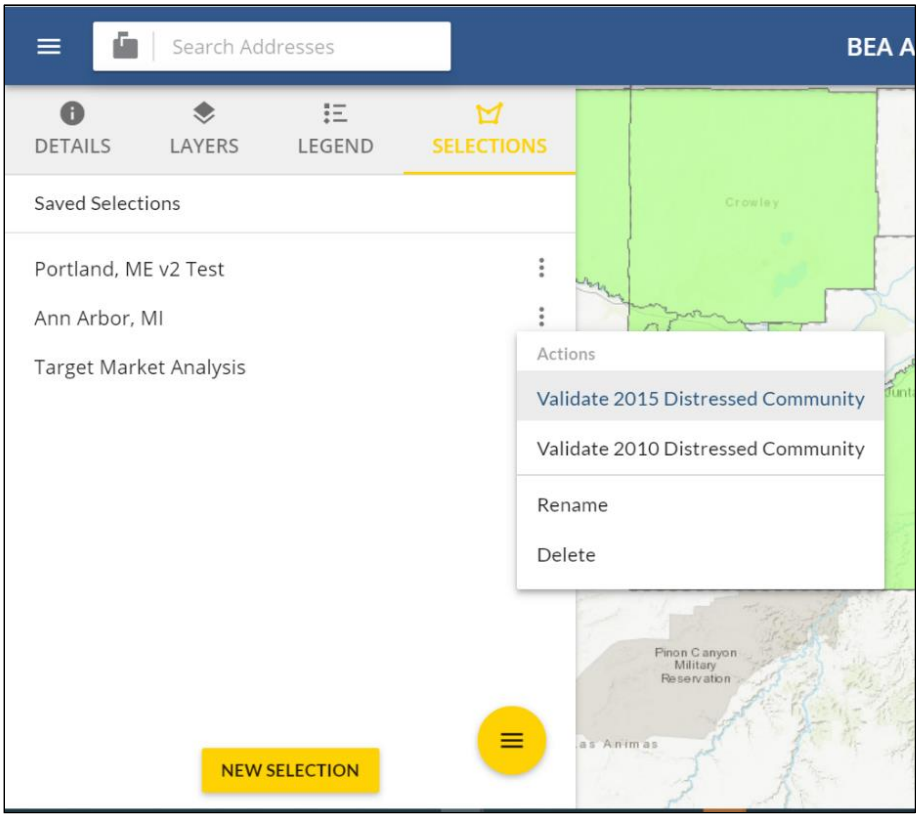
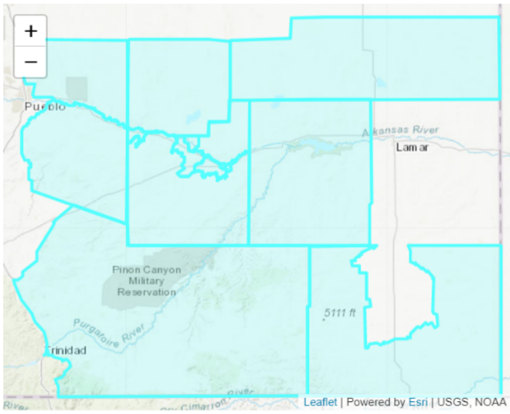


Figure 61. Validation Options

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



Target Market Analysis

Results of Distressed Community Eligibility:

- Not all the tracts are qualified.
- The tracts are not all in the same county.
- The tracts are contiguous.
- Population: 41,495
- The population meets the requirement.
- The poverty rate is below 30%.
- The unemployment rate is less than 1.5 times the national average.

Not Qualified

Print Report

Census Tract FIPS	BEA Qualified	Unemployment Rate %	Metro Designation	Population	Workforce Population
08101003200	No	4.37	Metropolitan	3426.0	1612.91
08025969600	Partial	4.5	Non-Metropolitan	5551.0	1311.0
08089968100	Partial	4.96	Non-Metropolitan	2764.0	1102.7
08089968200	No	6.3	Non-Metropolitan	2965.0	1342.55
08089968400	Partial	5.74	Non-Metropolitan	1000.0	393.89

Figure 62. Results Tab

7.5 Bulk Address Geocoding

1. In AMIS, open the dropdown on the right-hand side of the page. Select TLR Import/Export Certify Page.

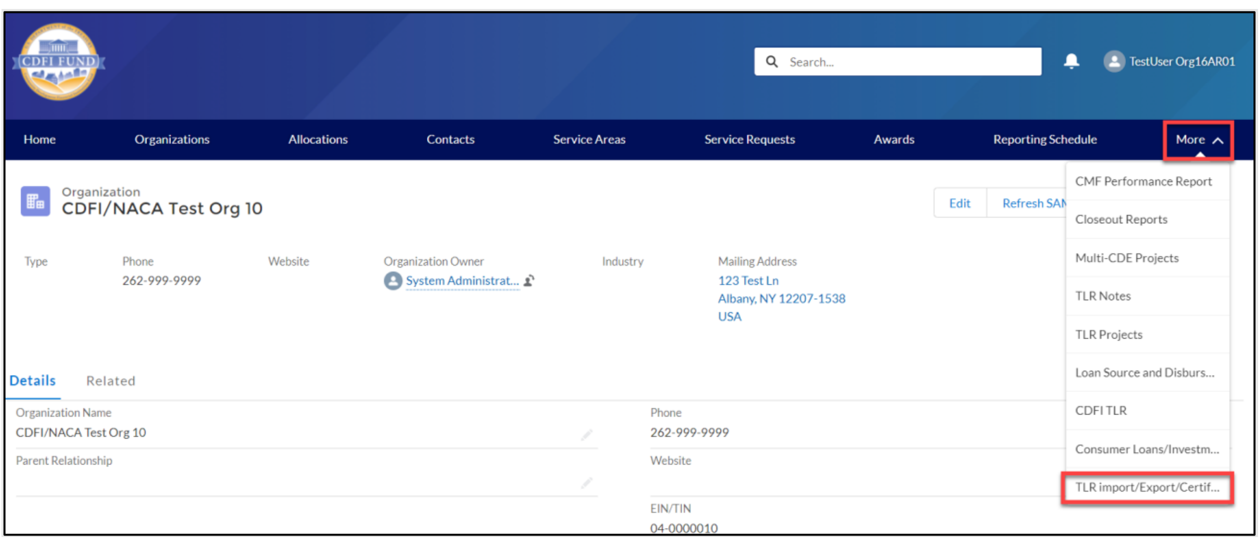


Figure 63. Menu Dropdown

2. On the TLR Import/Export Certify page, search for the organization by clicking on the magnifying glass icon.

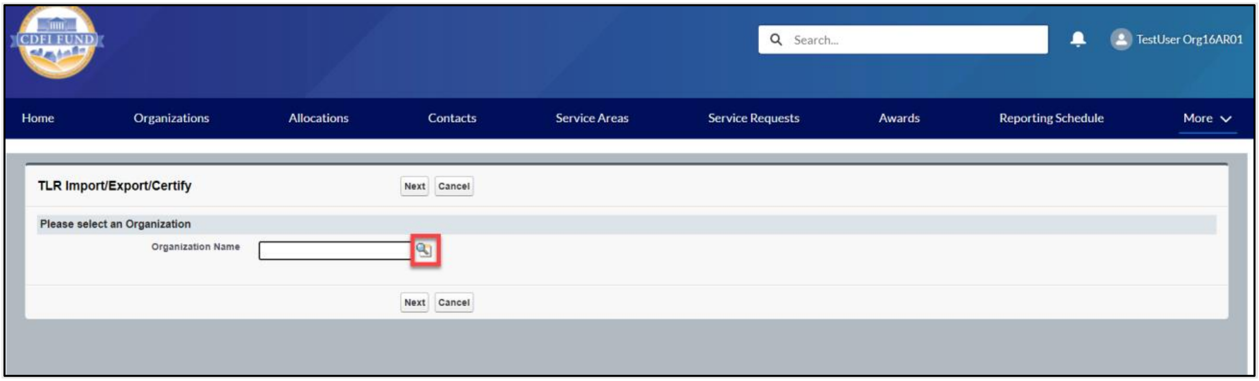


Figure 64. Search Function on TLR Page

3. A Lookup page will open. You can enter the full or partial organization name in the search box and click the Go! button to see search results. Remember to use the "*" wildcard for partial searches.

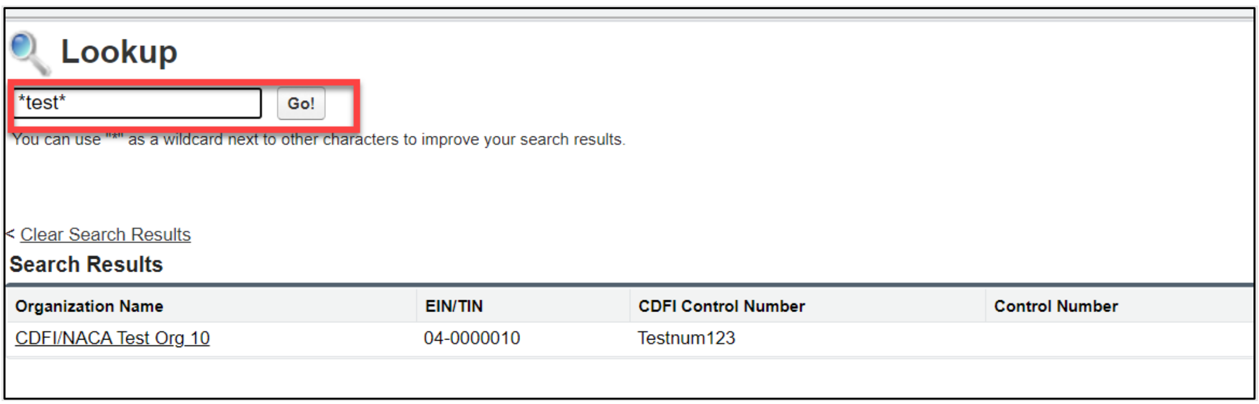


Figure 65. Lookup Window

4. If you have recently viewed an organization, it will appear in the Recently Viewed Organizations section of the page. Click the organization name to select the organization for bulk address import.

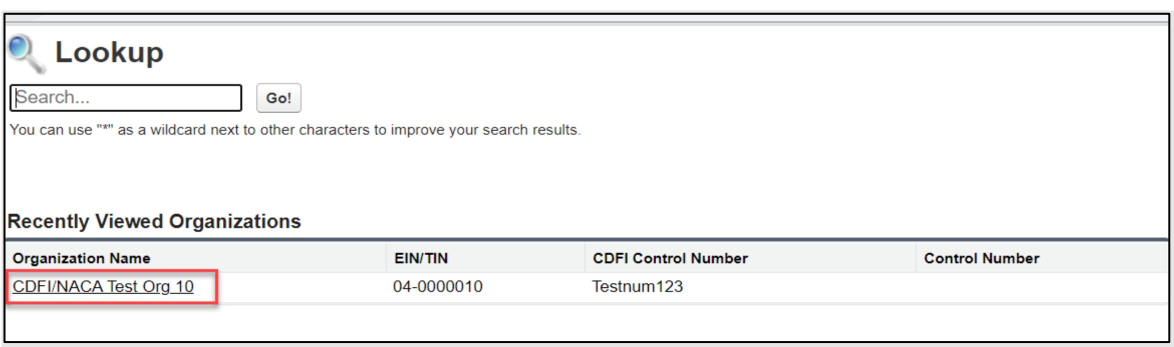


Figure 66. Recently Viewed Organizations

5. The organization name will be selected. Click Next.

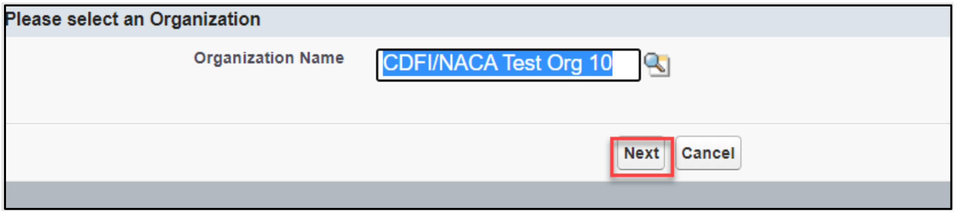


Figure 67. Selected Organization

6. The import/export page for the selected organization will be displayed. Click the **New_GEOCODING_Address.csv** link under the CDFI CSV section of the page.

Figure 68. Import/Export Page

7. Excel will open a bulk address import file. This is the file that will need to be updated with the address entries for each import. The file includes the following text fields:

   - Label
   - Project Street Address Line
   - Project City
   - Project State
   - Project Zip Code
   - Generic Field 1
   - Generic Field 2
   - Generic Field 3
   - Generic Field 4
   - Generic Field 5

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

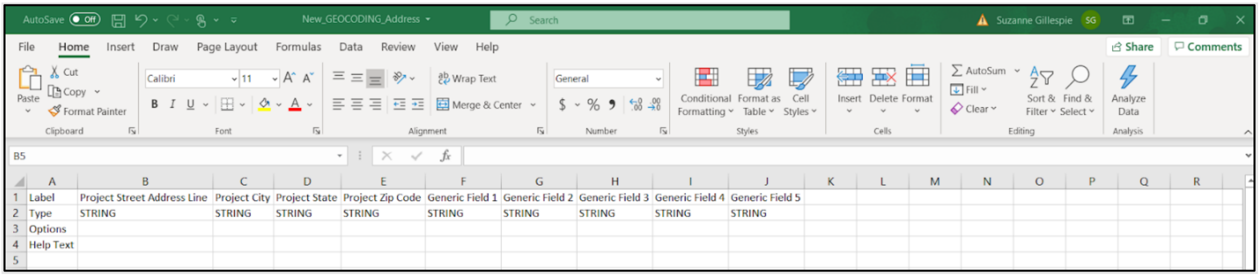
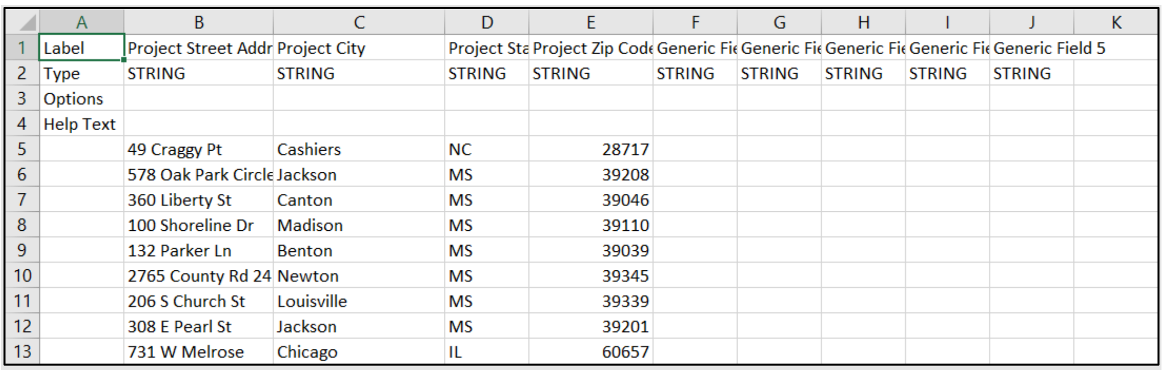


Figure 69. Sample CSV File

9. Start to enter the addresses to be geocoded on line five of the template.

*__NOTE:__ Please remove all accents and special characters from addresses prior to entering into the template to avoid errors.



	A	B	C	D	E	F	G	H	I	J	K
1	Label	Project Street Addr	Project City	Project Sta	Project Zip Code	Generic Fie	Generic Fie	Generic Fie	Generic Fie	Generic Field 5	
2	Type	STRING	STRING	STRING	STRING	STRING	STRING	STRING	STRING	STRING	
3	Options										
4	Help Text										
5		49 Craggy Pt	Cashiers	NC	28717						
6		578 Oak Park Circle	Jackson	MS	39208						
7		360 Liberty St	Canton	MS	39046						
8		100 Shoreline Dr	Madison	MS	39110						
9		132 Parker Ln	Benton	MS	39039						
10		2765 County Rd 24	Newton	MS	39345						
11		206 S Church St	Louisville	MS	39339						
12		308 E Pearl St	Jackson	MS	39201						
13		731 W Melrose	Chicago	IL	60657						

Figure 70. Sample Completed CSV File

10. Once all the entries have been made, save the Excel file and return to the organization import/export page. Click the **Import New GEOCODE Address Data** link in the TLR Data Import Links section.

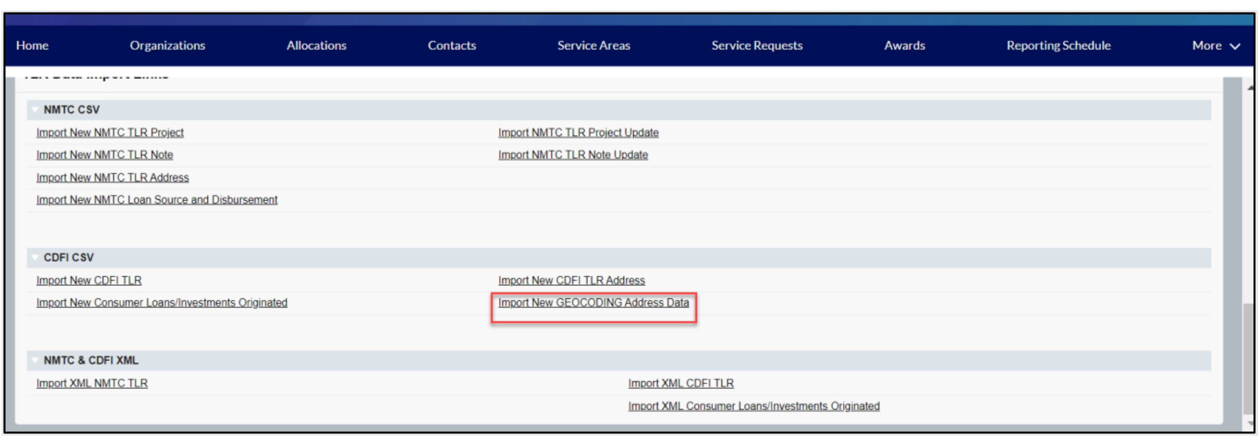


Figure 71. Import Geocoding Address Data Link

11. The GeoCoding Data File Upload page will display. Click the "Add Files…" button.

Figure 72. Geocoding Data File Upload Page

12. Browse for the import file and select it.

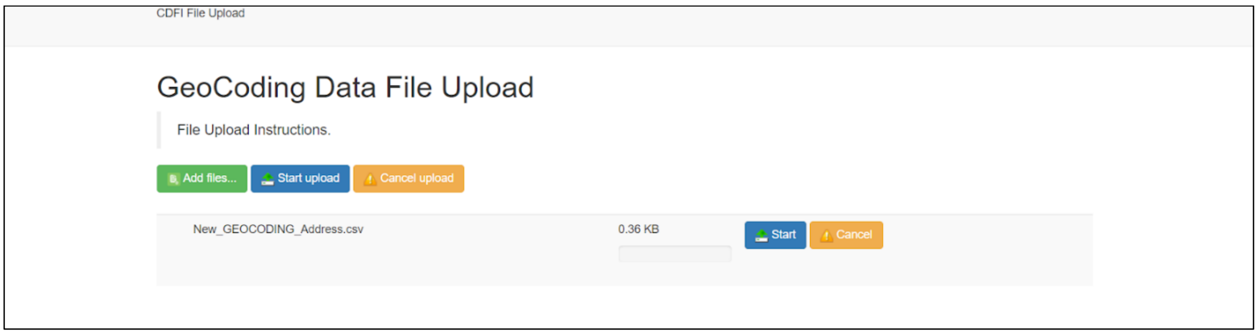


Figure 73. Sample File Selected

13. The file will display on the Upload page. Click the Start upload button. The system will validate the address entries and notify you if there are any errors in your data.

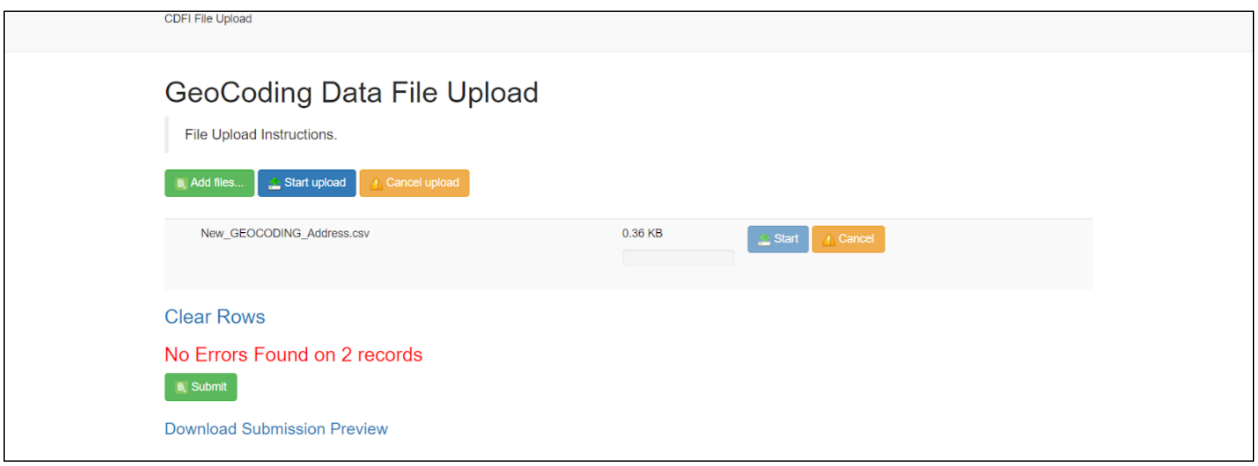


Figure 74. File Validation

14. Click the Submit button to begin the upload process.

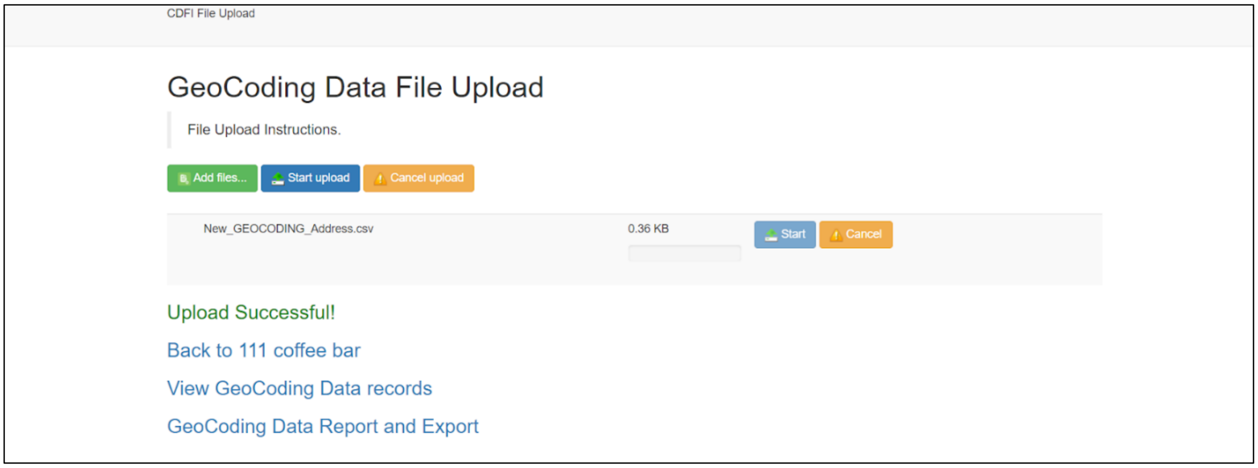


Figure 75. Successful Upload

15. Select the **View GeoCoding Data records** link to view your results. An entry will exist for each entry successfully geocoded. Click on a data result.

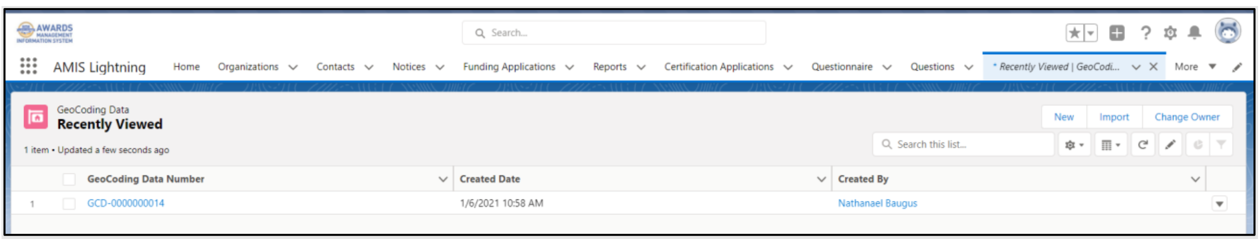


Figure 76. View GeoCoding Data Records

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

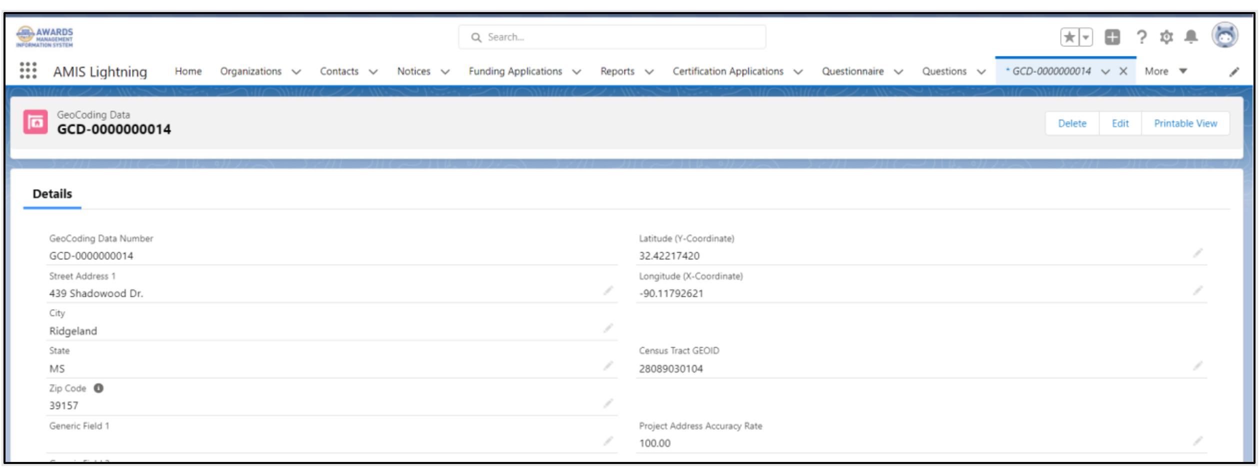


Figure 77. GeoCoding Detail Page

17. Select the **GeoCoding Data Report and Export** link. User access to object data will be via report only.

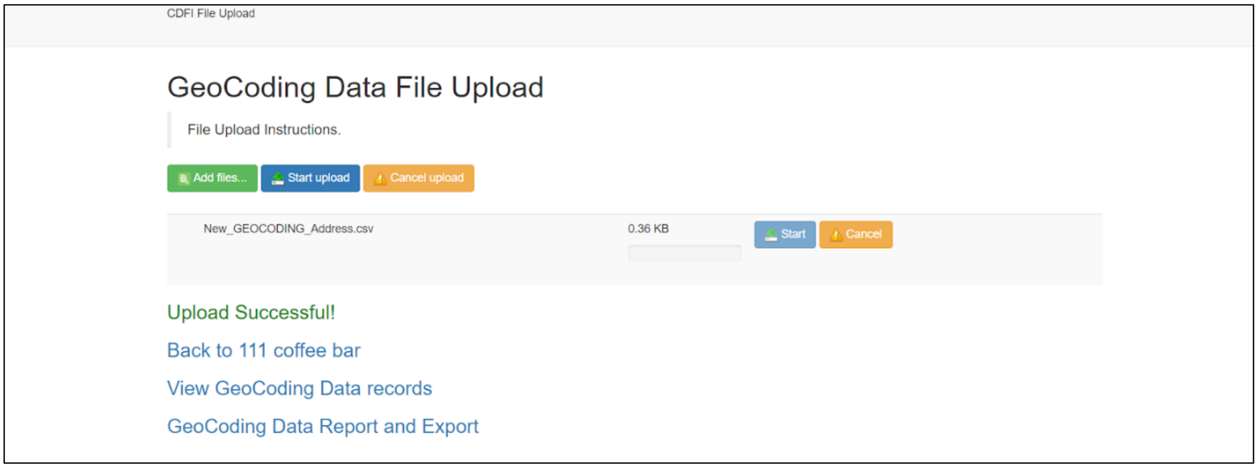


Figure 78. GeoCoding Data Report Link

18. The GeoCodingData FIPS Export Report page will display.

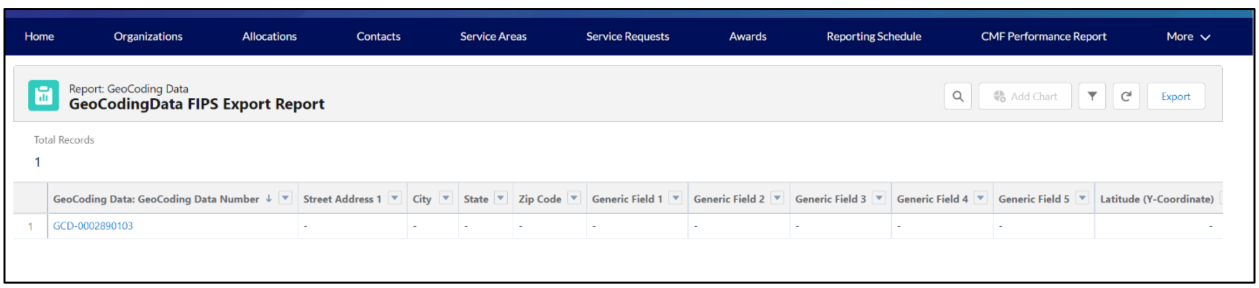


Figure 79. Export Details on Report Page

19. Click the Export button.

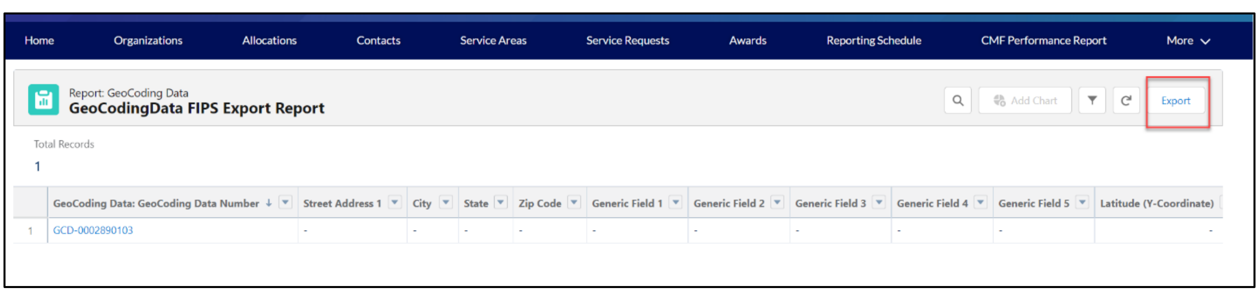


Figure 80. Export Button

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

- GeoCoding Data: GeoCoding Data Name
- Census Tract GEOID

- Temp Project Latitude X Coordinate (up to 8 decimal places)
- Temp Project Latitude Y Coordinate (up to 8 decimal places)
- City
- Street Address 1
- Zip Code
- Project Address Accuracy Rate
- Generic Field 1
- Generic Field 2
- Generic Field 3
- Generic Field 4
- Generic Field 5

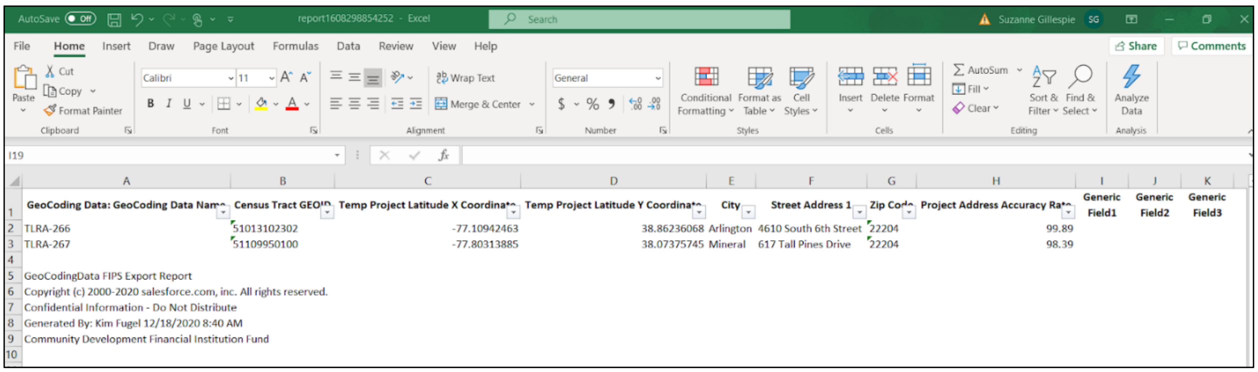


Figure 81. Sample Exported File

7.6 How to View and Export the Geocoding Report (Alternate Method)

1. Log into AMIS and click on the **'Organizations'** tab.

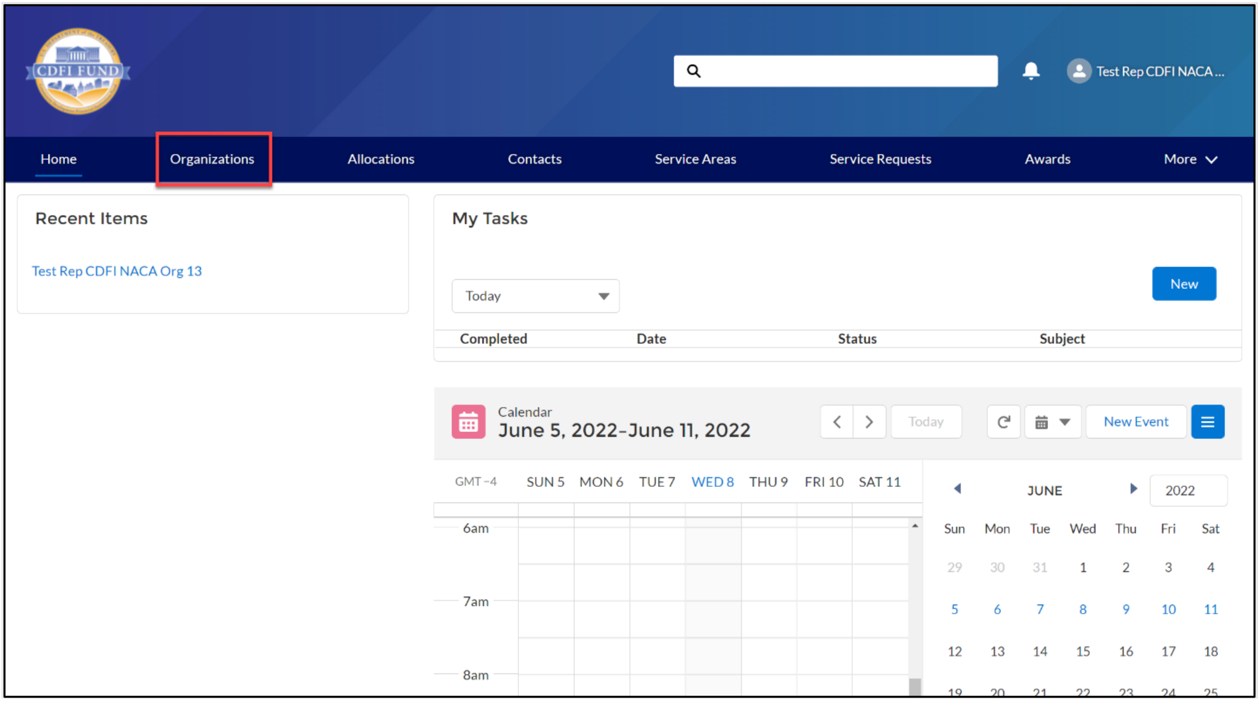


Figure 82. Home Page - Organization Tab

2. Select your **'Organization Name'**.

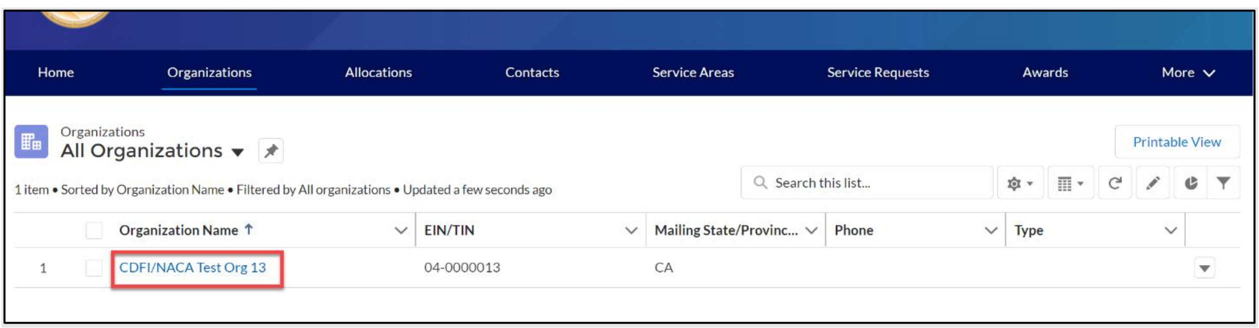


Figure 83. Organization Page - Organization Name

3. On the Details page, scroll down to the System Information section and click the **'GeocodingData FIPS Export Report'** link.

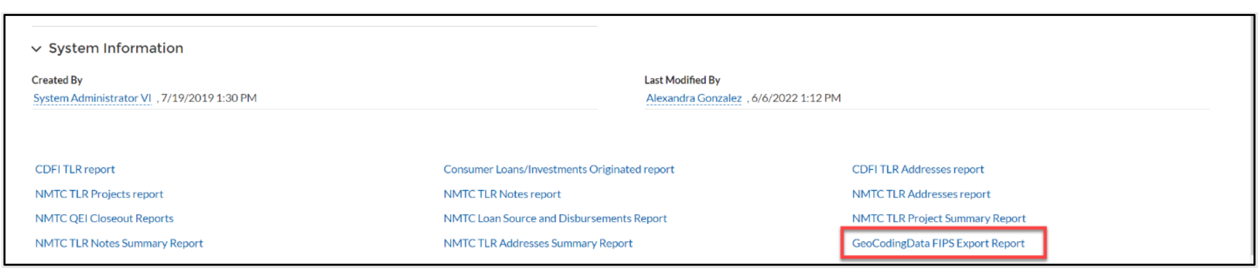


Figure 84. Details Page - GeoCodingData FIPS Export Link

4. To view the record, click on the **'GeoCoding Data Number'** link.

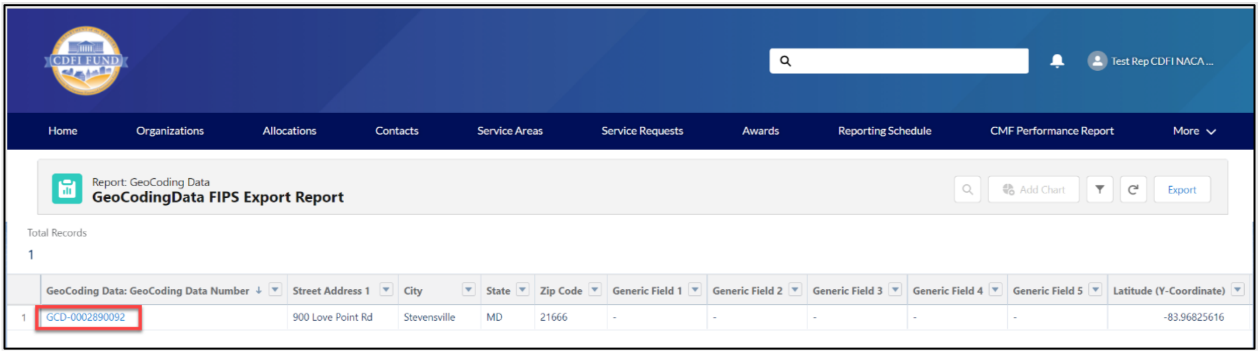


Figure 85. GeoCoding Data Number Link

5. To export the report, click the **'Export'** button.

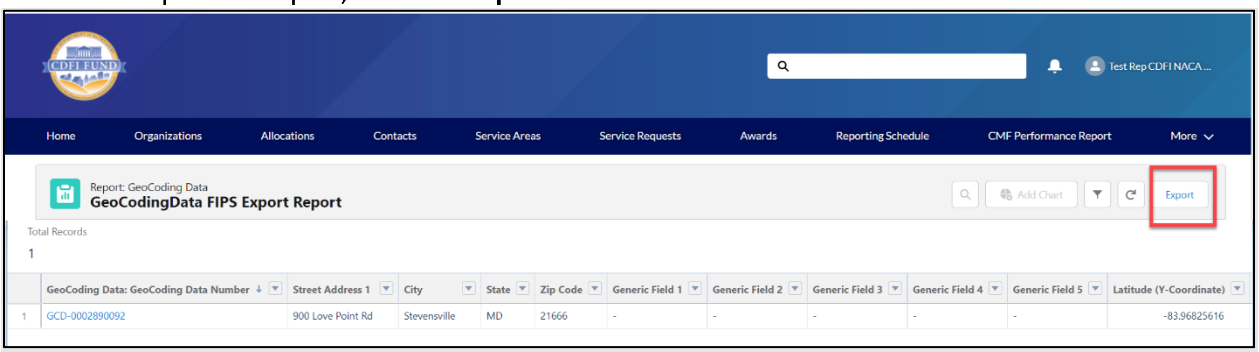


Figure 86. Export Button

8 Global Search

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

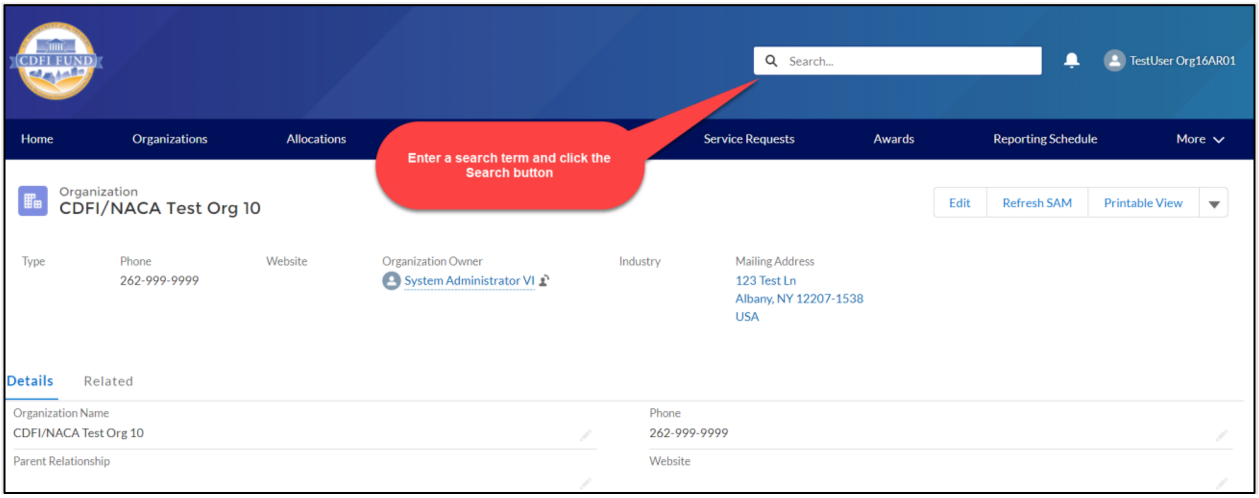


Figure 87. AMIS Global Search Screen

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

8.1 Wildcards

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

1. Use the asterisk symbol (*) to match zero or more characters in the middle or end of your search term. For example, comp* finds items like "Explanation of Noncompliance" and "Compliance Report"; 00* finds items with record IDs that have zeros. Please note that the search engine searches only for records within your organization.
   a. Enter 00* and click the Search All button.

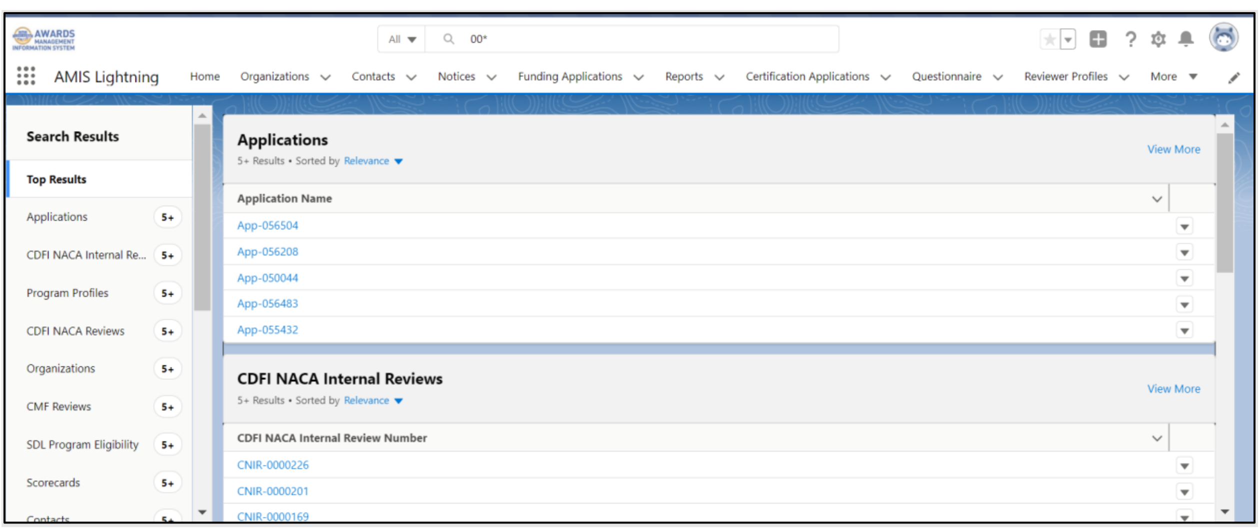


Figure 88. Search Results for Search by * Symbol

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

2. Use the question mark symbol (?) to match a single character in the middle or end (not the beginning) of your search term. For example, J?n finds names such as Jon and Jen.
    a. Search using ? in between two characters. (In the example below, a search using E?a produced the results shown below because, for example, Tracey Hayes, met the E?a search criteria.)

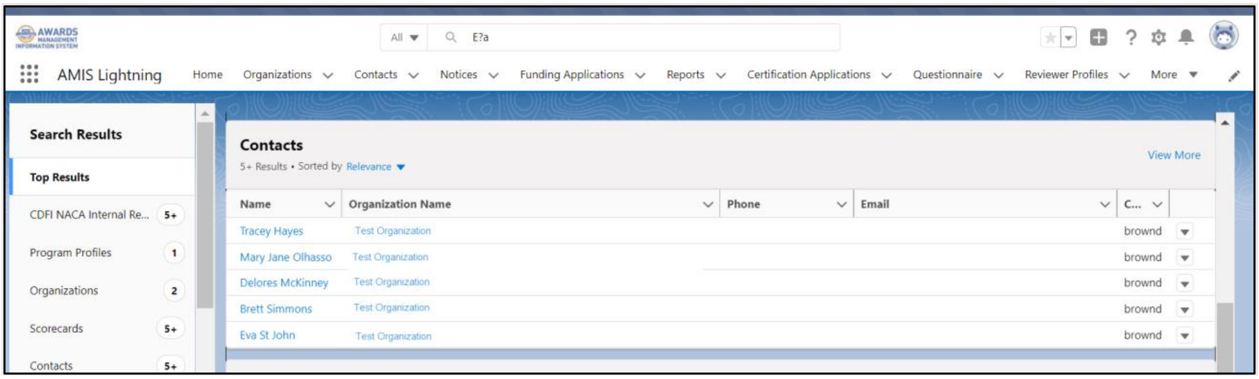


Figure 89. Search Results for Search by ? Symbol

8.2 Boolean Operators

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

Operator	Description
AND	Finds items that match all of the search terms. For example, “acme AND california” finds items with the word “acme” and the word “california”, but not items with only the word “acme”. Using AND is optional in most cases, because searching for “acme california” is the same as searching for “acme AND california”. If a search doesn’t return any results that match all of the terms, the search capability looks for matches by using the OR operator.
OR	Finds items with at least one of the search terms. For example, “acme OR california” finds items with either “acme” or “california” or both.
AND NOT	Finds items that do not contain the search term. For example, “acme AND NOT california” finds items that have the word “acme” but not the word “california”.
() (parentheses)	Groups search terms together. Grouped search terms are evaluated before other search terms in a character string. For example, “acme AND (california OR meeting)” finds items that contain “acme and california” and items that contain “acme and meeting”.
“ “ (quotation marks)	Finds an exact phrase. For example, a search for "monday meeting" finds items that contain “monday meeting”, but not items that contain “monday afternoon meeting” or “monday's meeting”. The asterisk (*) and question mark (?) function as wildcards when included in a search phrase that is enclosed in quotation marks or when an exact phrase is selected in the search scope.

9 Service Requests

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

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

9.1 Service Request Lifecycle

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

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

1. Creating. An External User logs into AMIS and submits a new SR. AMIS creates a unique Service Request Number for the SR and sends an email notification to the External User confirming receipt.
2. Assignment. When the SR is submitted, AMIS assigns it to a CDFI Fund business unit based on information in the SR. SRs then can be assigned to an individual within that business unit or assigned to another business unit if the request requires multiple groups to complete it. Although no email notifications are sent, the External User can simply look at the Service Request Owner field to see the current assignment.
3. Information Exchange. If more information is needed, a CDFI Fund user requests the information by adding a comment to the SR. AMIS sends an email notification instructing the External User to log into AMIS to view and respond to the question(s). The External User responds by adding another comment or attaching a document to the SR.
4. Validation. Once the SR has been completed, the CDFI Fund User describes the resolution in the SR. AMIS sends an email notification instructing the External User to log into AMIS within 14 days to agree or disagree. The External User responds within the SR with a Yes or No. If No, the External User adds a comment explaining the No response. If No, AMIS also sends an email notification to the External User noting that the SR has been updated and that a member of the CDFI Fund team will be in contact shortly.
5. Closing. AMIS closes the SR if the validation response is Yes. Alternatively, if 14 days pass with no response from the External User, AMIS closes the SR and sends an email notification explaining that the request was closed since no response was received, and that a new SR must be created if the issue persists.

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

9.2 Service Requests Actions

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

9.2.1 Create a Service Request

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

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

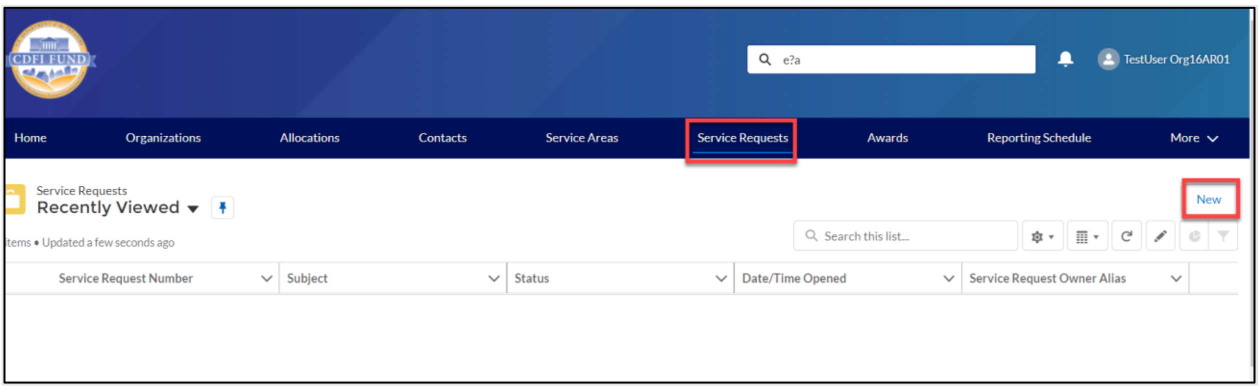


Figure 90. Service Requests Home Page

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

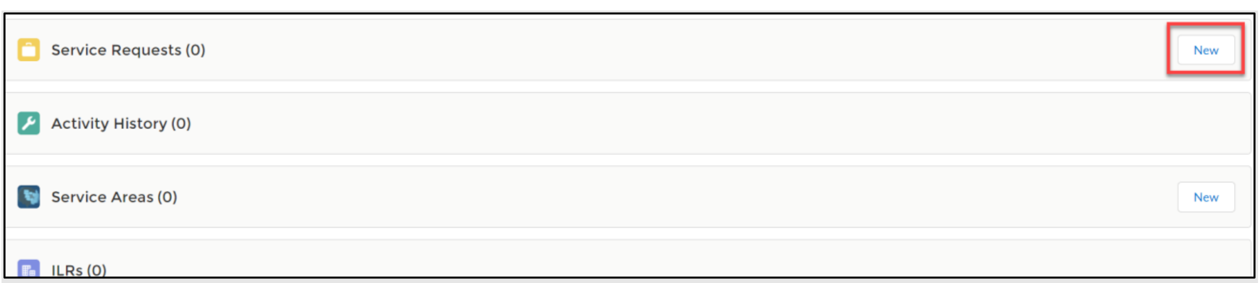


Figure 91. Service Requests Section on the Organization Related Page

3. The Service Request Edit page is displayed.

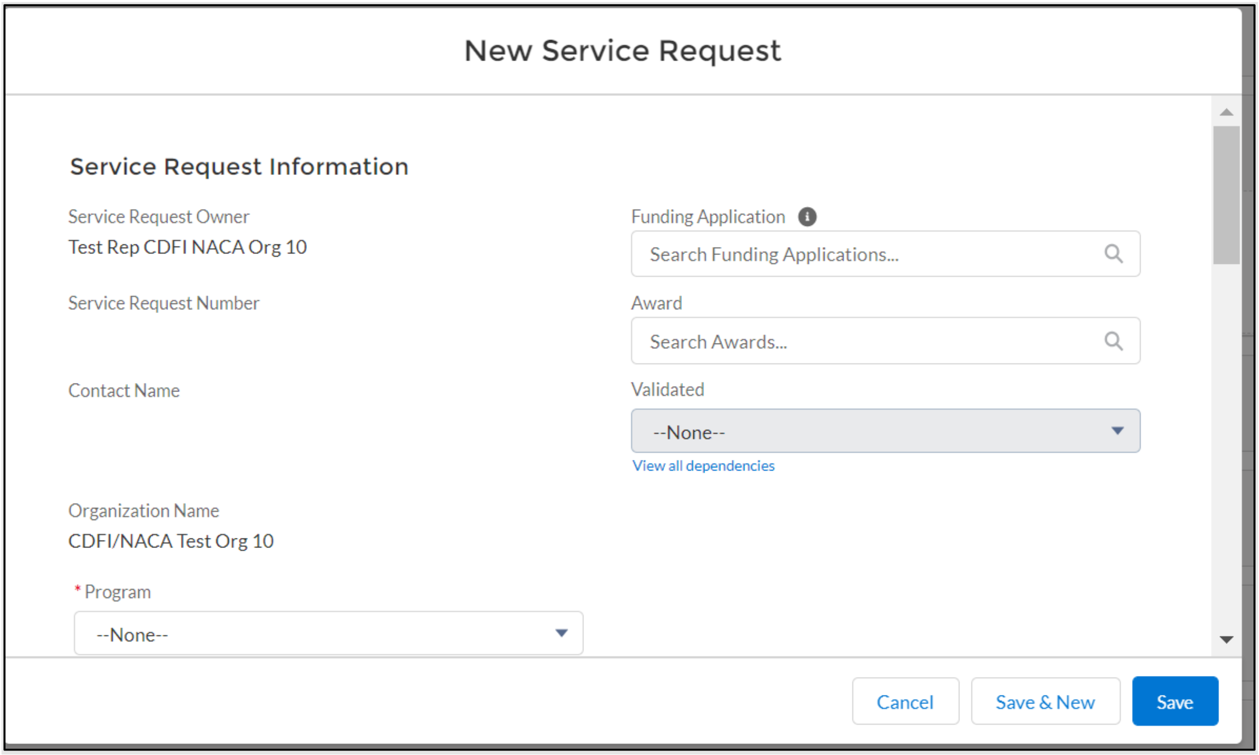


Figure 92. Service Request Pop-Up Edit Page

4. Provide the following information.
    - Program – select BEA Program, BG Program, Capital Magnet Fund, CDFI/NACA Program, Certification, Compliance & Reporting, NMTC Program, Small Dollar Loan Program, Technical Issues, or Other from the dropdown list as relevant to your question or issue.
    - Requested By Date – select the date you want the SR completed. Although this is a requested date, it indicates the urgency behind the SR. It defaults to one week in the future. You can type in a date or select a date with the calendar tool.
    - Funding Application – if the SR relates to a specific funding application, you can select the funding application by clicking the Lookup icon next to the Funding Application field, and choosing the application from the list that is displayed.
    - Award – similar to Funding Application, if the SR relates to a specific award, you can select the award by clicking the Lookup icon next to the Award field, and choosing the award from the list that is displayed.
    - Status – leave as New.
    - Priority – set to High, Medium, or Low.
    - Service Request Origin – leave as Web.
    - Subject – provide a brief title for the SR.
    - Description – provide a complete description of your question or issue. If you are submitting the Service Request on behalf on another organization or person, provide that information in the Description.

5. Click the appropriate submission button at the top (or bottom) of the page.

- Click the Submit button to submit the SR to the CDFI Fund. The Service Request Detail page will be displayed.
- Click the Submit & Add Attachment button to add an attachment and submit the SR. See Section 8.2.2.2 for the steps to add an attachment.
- Click the Save & New button to submit the SR and to have AMIS display a blank Service Request allowing you to create another SR.
- Click the Cancel button to return to the Service Request Home page without submitting the SR.

9.2.2 Respond to an Information Request

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

9.2.2.1 Add a Comment to a Service Request

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

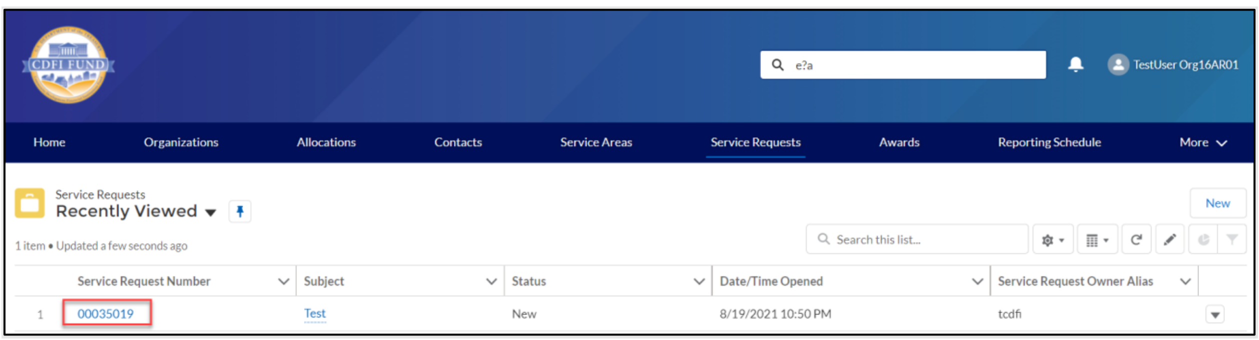


Figure 93. Service Requests Home Page

2. The Service Request Detail page will be displayed. On the Related page, scroll to the Service Request Comments Public section and select the New button to add a comment.

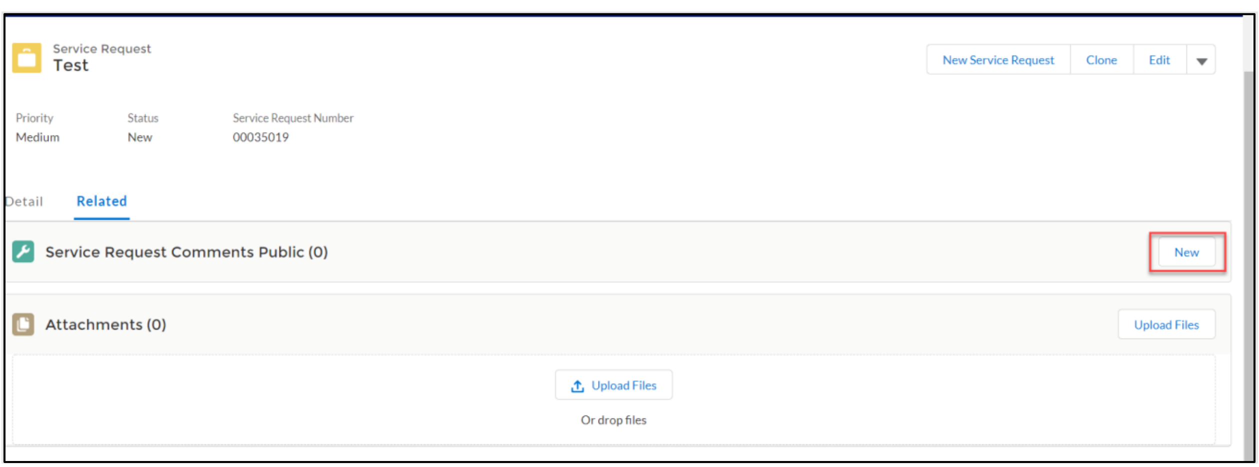


Figure 94. Service Request Comments Public Section

3. The Service Request Comment Public Edit page is displayed. It provides your SR Subject and Description. Enter your comment in the Comment box and select the Save button.

Figure 95. Service Request Comment Public Pop-Up Edit Page

4. The SR shows all comments, including who added it along with a date and timestamp.

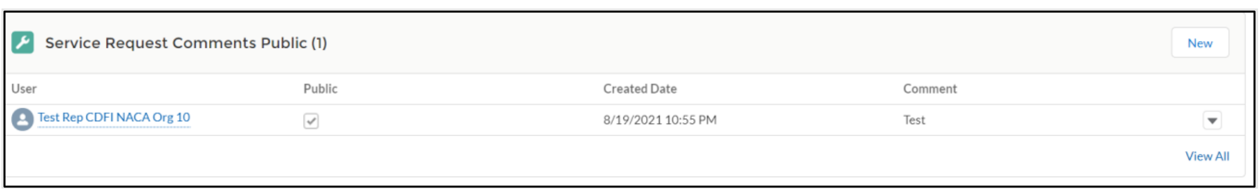


Figure 96. Comments with Attribution and Timestamp

9.2.2.2 Add an Attachment to a Service Request

1. To attach a file, select the Upload File button in the Attachments section on the Service Request Related page.

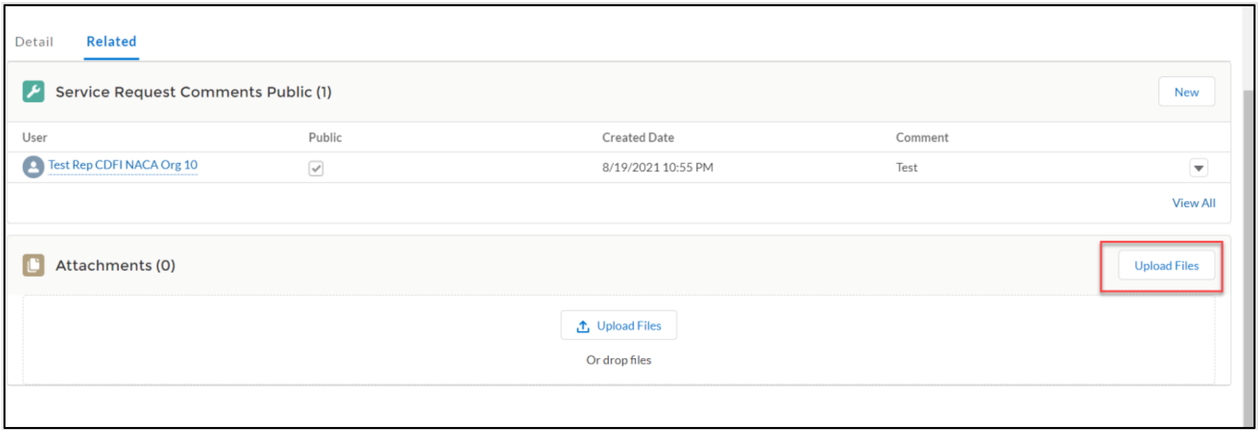


Figure 97. Attachments Section

2. Select the file from your computer and click Done.

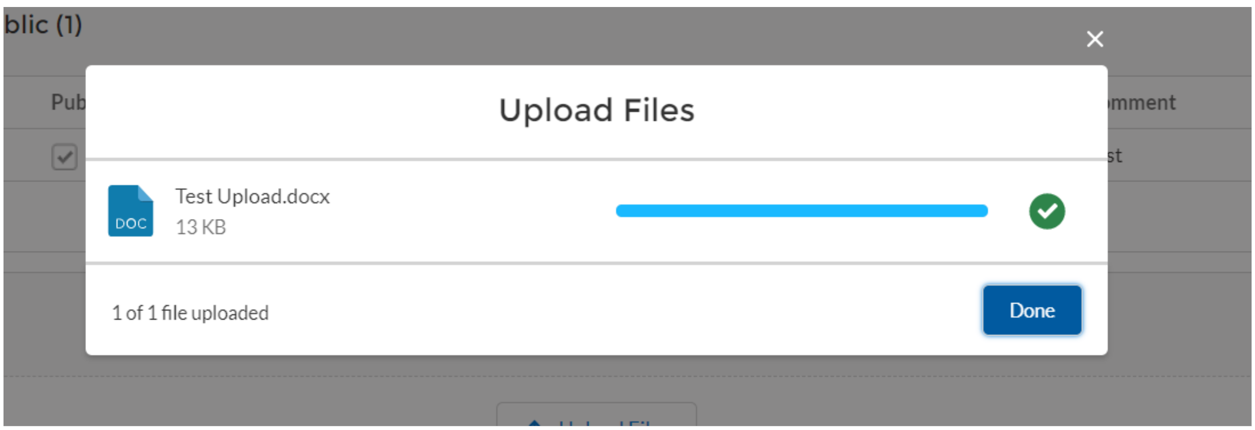
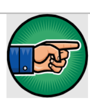


Figure 98. Upload Files to Service Request Page

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

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

4. All attachments show the file name, size, date last modified, and who created it. For each attachment, you can:
   - Edit – allows you to rename the file or add a description. You also can mark the attachment as private, but checking the Private box prohibits the CDFI Fund from seeing the file.
   - View – displays the contents of the file.
   - Delete – removes the file from the list of attachments.

Figure 99. List of Attachments to a Service Request

9.2.3 Validate a Service Request

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

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

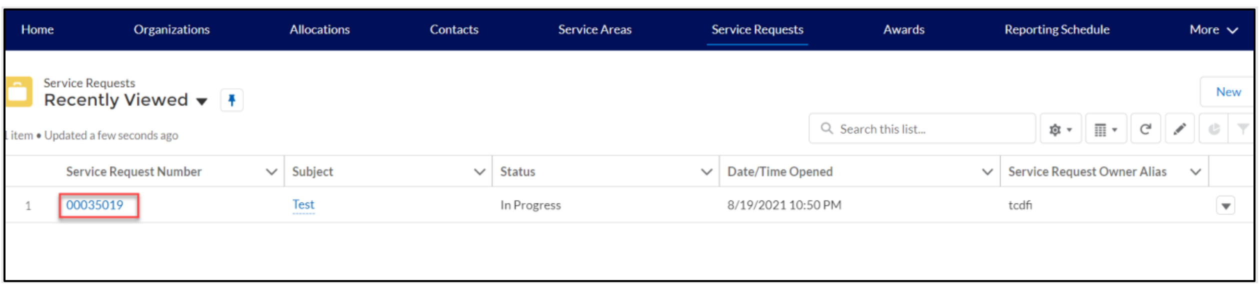


Figure 100. Service Requests Home Page

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

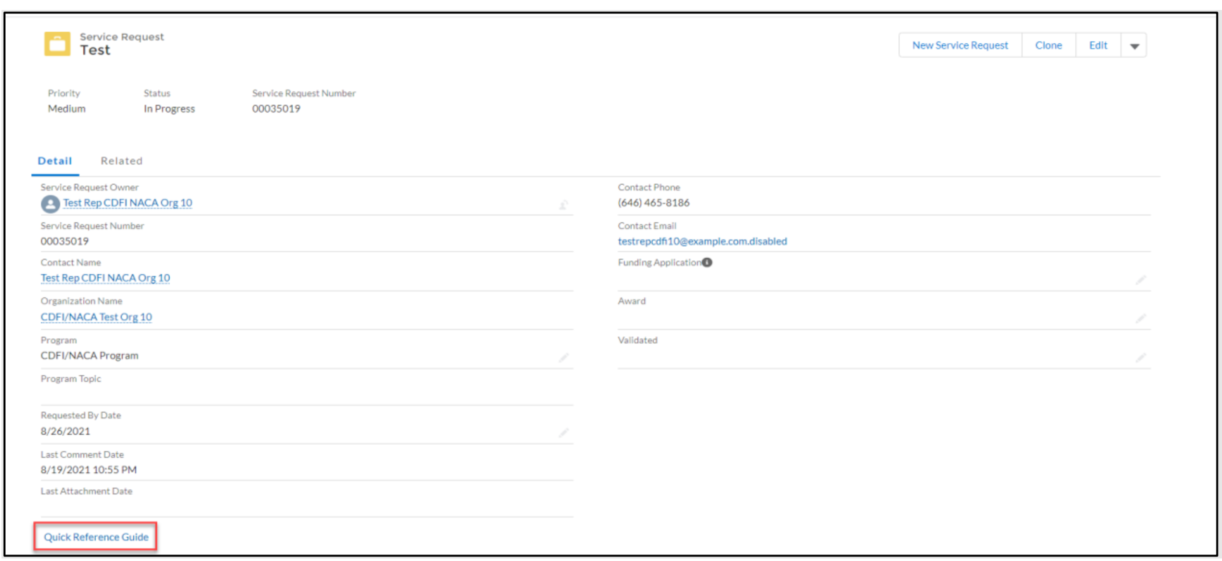


Figure 101. Service Request Detail Page

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

3. The Service Request Edit page is displayed. One this page, you can review the resolution prior to validating. If you agree that the SR has been completed, select Yes, then click the Save button. Upon saving, AMIS will close the SR. If you do not agree that the SR has been completed, select No, then click the Save button. Please add a comment (see Section 8.2.2.1) and/or an attachment (see Section 8.2.2.2) to explain what has not been completed.

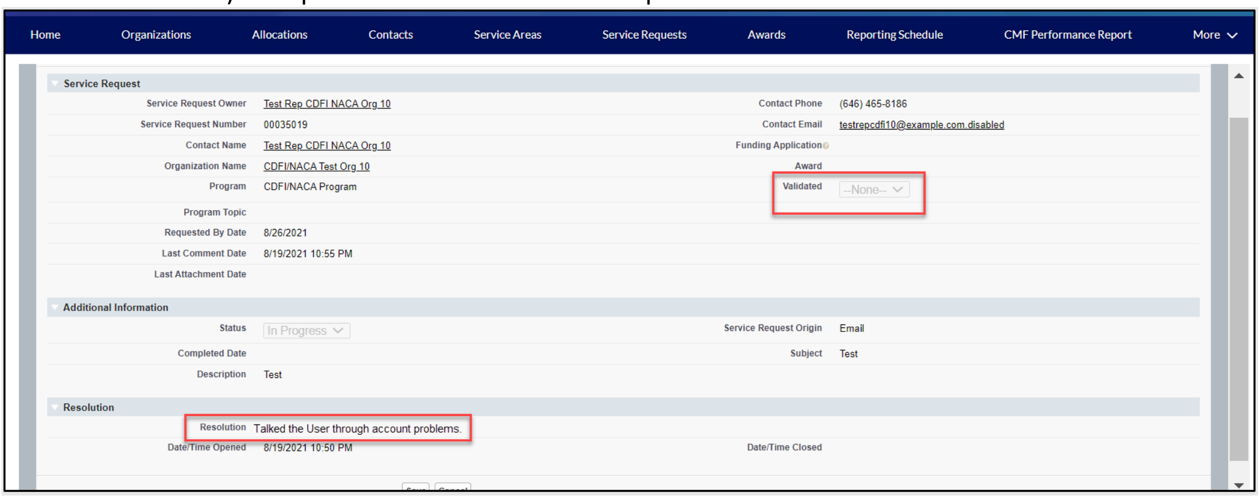


Figure 102. Service Request Edit Page

10 External Contacts

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

10.1 Request Access to an Additional Organization

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

To request access to an additional organization:

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

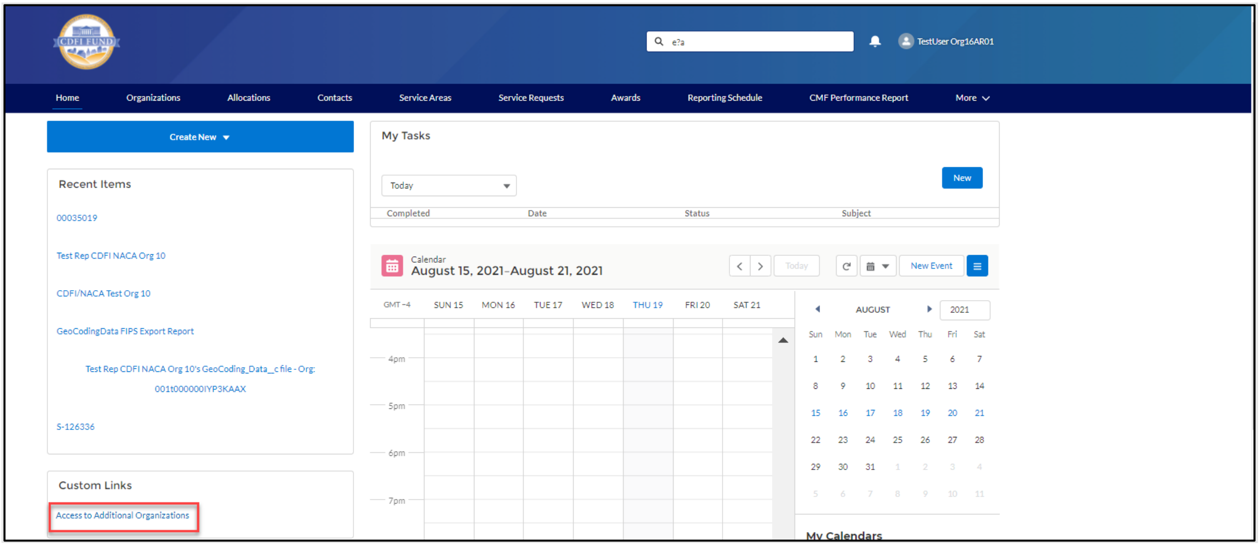


Figure 103. Home Page – Link to Request Access to Additional Organizations

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

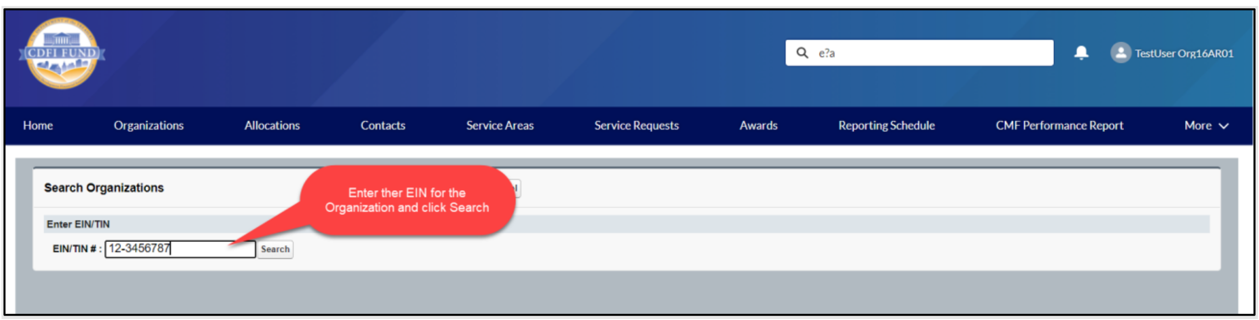


Figure 104. Request Access to Additional Organizations – Search for Organization

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

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

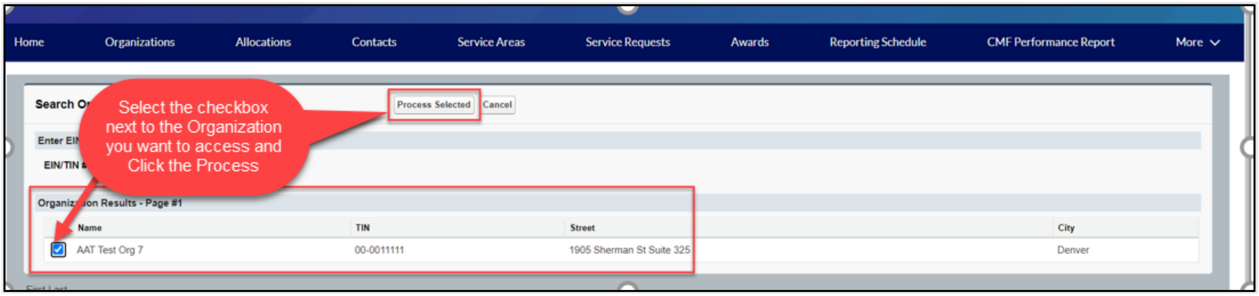


Figure 105. Request Access to Additional Organizations – Select Organization

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

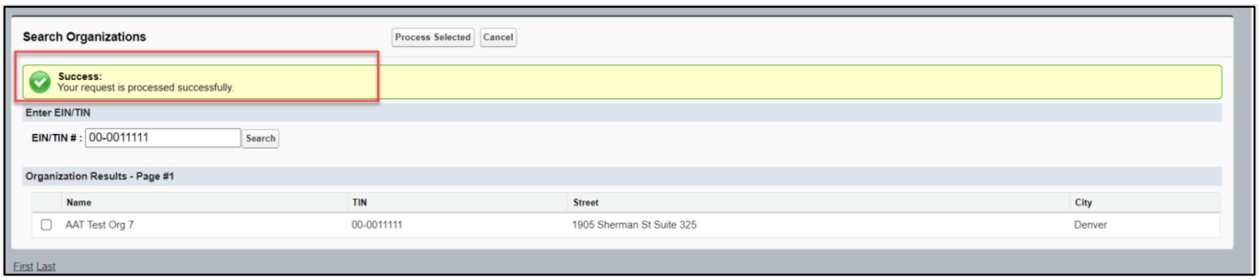


Figure 106. Request Access to Additional Organizations Results

10.2 Access Additional Organizations as an External Contact

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

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

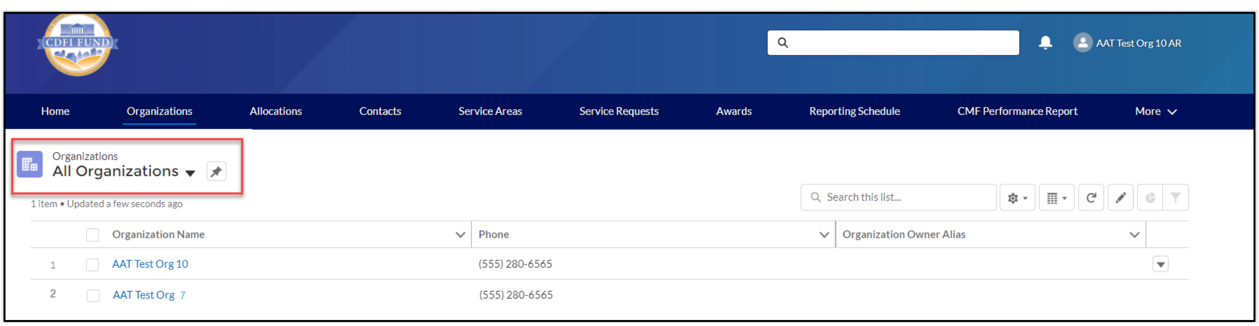


Figure 107. Organization Home

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

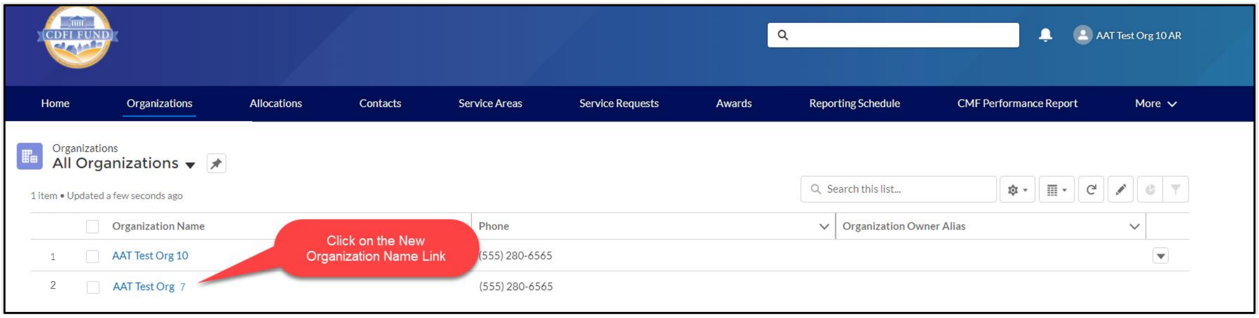


Figure 108. Organization's List Page

3. You will be forwarded to the Organization Detail page as per Section 6.1 above. Based upon your access control, you can read or edit organization data.

10.3 Grant Organization Access to an External Contact

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

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

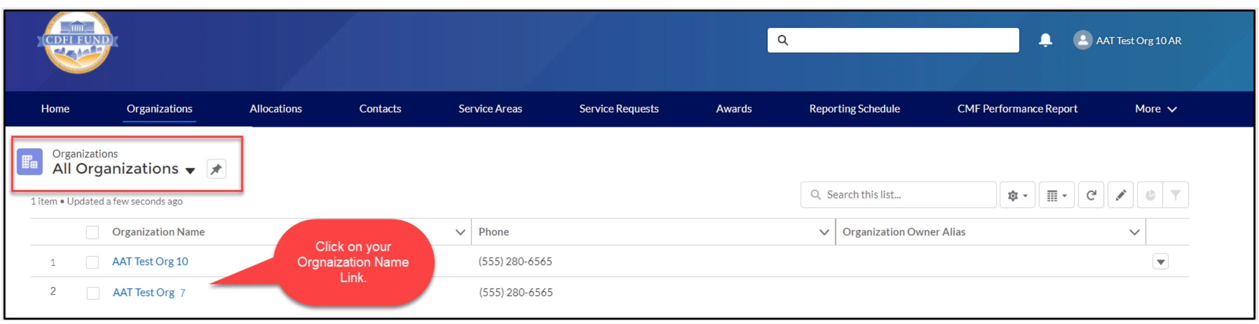


Figure 109. Organizations Home Page

2. From the Organization Related page navigate to the External Contacts related list.

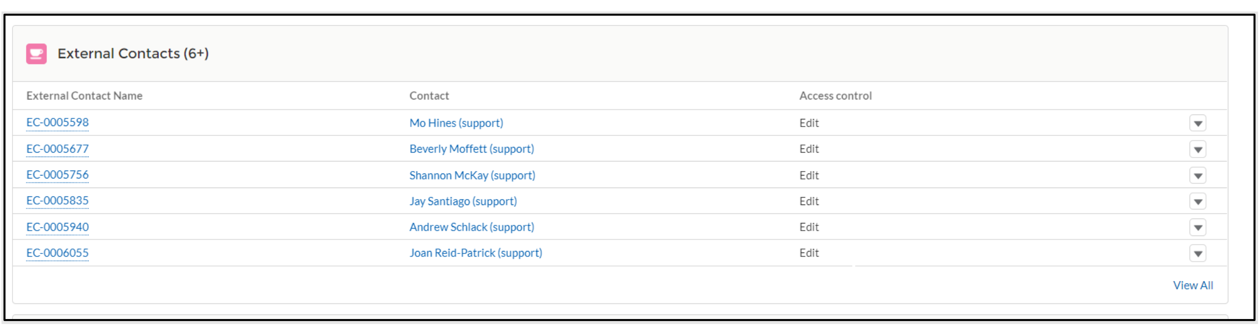


Figure 110. Organizations Detail Page – External Contacts Link

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

Figure 111. External Contacts Related List

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

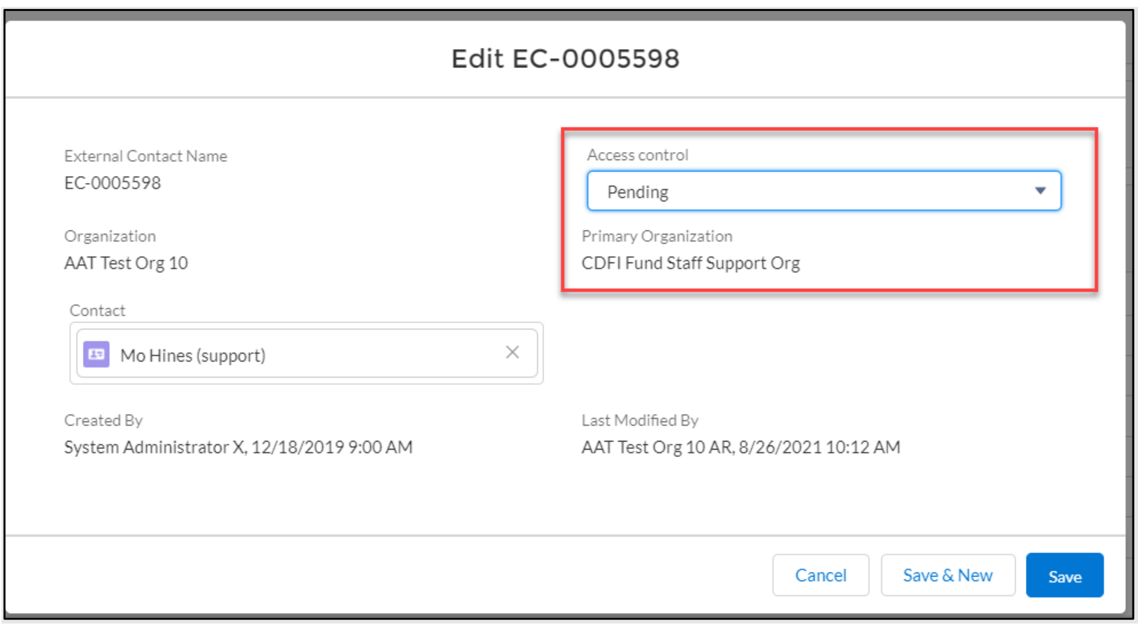


Figure 112. External Contacts Edit Page

Access Control Definitions:

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

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

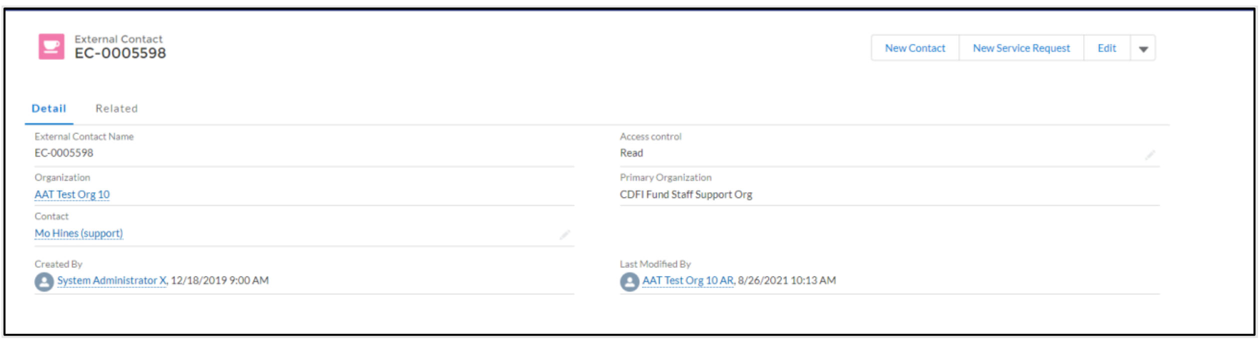


Figure 113. External Contacts Detail Page

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

11 Appendices

11.1 Acronyms

Table 10-1 – Acronyms

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