



AMENDMENT REQUEST GUIDANCE: TECHNICAL AMIS GUIDE FOR CMF

Capital Magnet Fund (CMF)

July 2025

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1.0 Introduction to Amendments in AMIS

Overview

This document will guide Organizations in how to request a CMF Amendment in AMIS.

Utilizing a Service Request, an organization will create a new amendment-focused request. A customized intake form, called Amendment, will guide the Organization in providing all relevant information and necessary attachments. When an organization has finished completing their initial intake form, they will submit any required documents.

High-Level Workflow

A high-level workflow for Amendment Requests is outlined here:

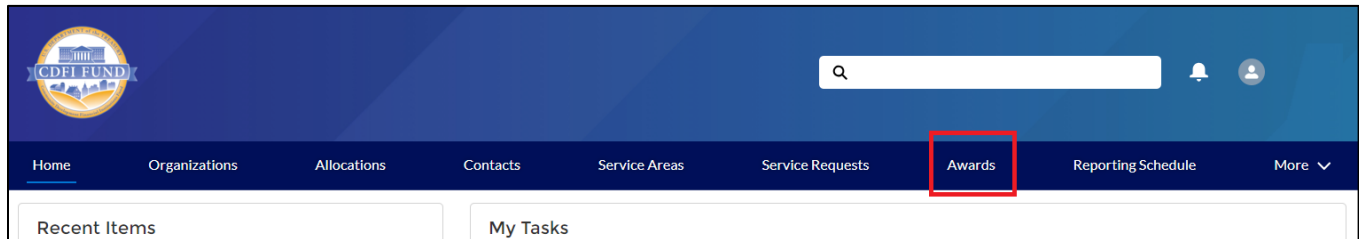


2.0 How to Submit a Capital Magnet Fund (CMF) Amendment Request

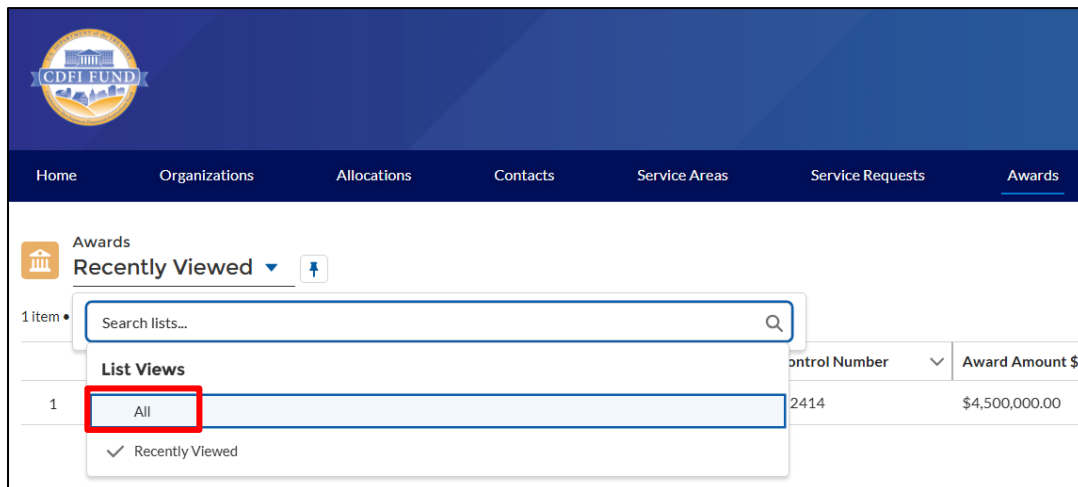
Create Service Request

Create a Service Request in AMIS to begin the Amendment process using the steps below. For additional information on how to create Service Requests, please review Section 8 of the training manual, [Getting Started – Navigating AMIS](#).

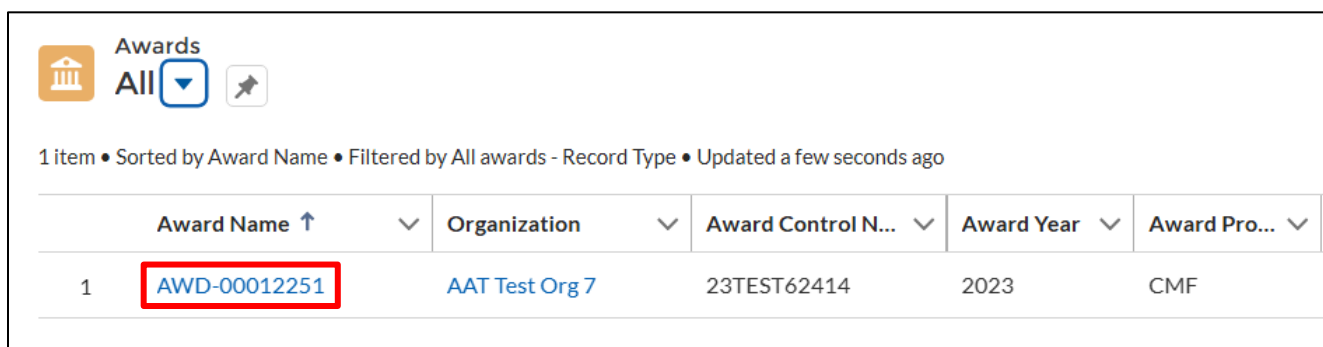
1. Open AMIS and select “Awards”



2. Change the List View to “All” to display all Organization Awards



3. Select the desired Award by clicking on the Award Name starting with “AWD” from the List View to open the Award page.



4. Navigate to the Related Tab and locate the Service Request section

The screenshot shows the CDFUND system interface. At the top is a navigation bar with links: Home, Organizations, Allocations, Contacts, Service Areas, Service Requests, Awards, Reporting Schedule, and More. Below the navigation bar, the main content area displays 'Award AWD-0000'. To the right of the award ID are buttons for 'Edit', 'New Performance Report', and 'Payment Request'. Below this, there are fields for 'Organization', 'Total Award/Loan Amount', and 'Total Pending Payments' (showing \$0.00). At the bottom, there are two tabs: 'Detail' and 'Related'. The 'Related' tab is highlighted with a red box. Below the tabs, there is a table with columns 'Organization' and 'Award Name'.

5. Select “New” to create a new Service Request for this Award

The screenshot shows the CDFUND system interface for 'Award AWD-00002275'. The navigation bar is the same as in the previous screenshot. Below the navigation bar, the main content area displays 'Award AWD-00002275'. To the right of the award ID are buttons for 'Printable View', 'New Note', and 'Edit'. Below this, there are tabs for 'Detail' and 'Related'. The 'Related' tab is selected. Under the 'Related' tab, there are several sections: 'Forms of Award (1)', 'Program Goals and Measures (0)', 'SF-425 (0)', and 'Service Requests (0)'. The 'Service Requests (0)' section is highlighted with a red box, and a 'New' button is visible in the bottom right corner of this section.

6. Fill out the required information for a Service Request:
 - a. Set "Program" equal to "**Capital Magnet Fund**"
 - b. Set "Amendment Type" equal to "**Performance Goals and Measures.**"
 - c. Set "SR related to existing Award/Allocation?" to "**Yes**"
 - d. The Award information will be pre-populated.

Geographic Area County FIPS Code State

New Service Request: General Inquiry

* = Required Information

Service Request Information

Service Request Owner
AR Test AR

Service Request Number

Contact Name

Organization Name

* Program
Capital Magnet Fund

Program Topic

Funding Application ⓘ
Search Funding Applications...

* SR related to existing Award/Allocation? ⓘ
Yes

Enter existing CDFI Fund AWD- (not NMTC) ⓘ
AWD-00012251

Enter existing NMTC Award- (NMTC only) ⓘ
Search Allocations...

Validated
--None--

[View all dependencies](#)

Amendment Type
Performance Goals & Measures

Requested By Date
7/23/2025

Cancel Save & New Save

7. Enter values for “Subject” and “Description” that capture the purpose of the request. Note: This is not where you will enter the Performance Goal justification. Instead, you will enter a short summary of the request (e.g., Subject: “Amendment for FY 2020 CMF Award,” Description: “Requesting to extend the Project Completion Date by one year”).

New Service Request: General Inquiry

Additional Information

* Status

New

Completed Date

[View all dependencies](#)

* Service Request Origin

Web

Priority

Medium

Description Information

* Subject

* Description

Resolution

Resolution

Web Information

Web Email

Web Company

Web Name

Web Phone

Cancel

Save & New

Save

8. Select Save to create the Service Request. You will then see this screen.

Service Request

FY 2023 test

Clone

Edit

Printable View

Priority

Medium

Status

Closed

Service Request Number

00069241

To create an Amendment, navigate to Related tab and click the New button within the Amendments section. To edit an existing Amendment, navigate to Related tab and click on the Amendment linked within the Amendments section. Submit when completed.

Detail

Related

Service Request Owner

Service Request Number

00069241

Contact Name

[AR Test AR](#)

Organization Name

[AAT Test Org 7](#)

Contact Phone

Contact Email

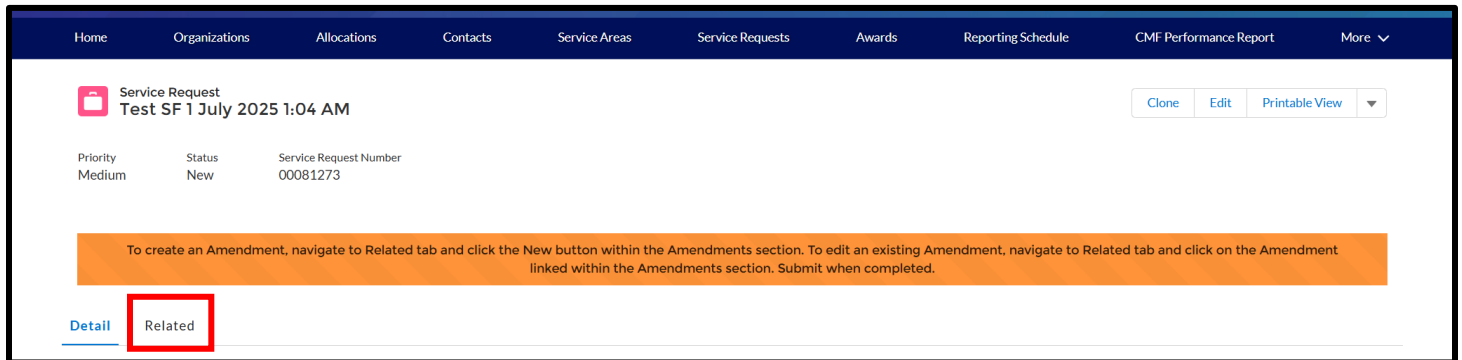
Funding Application

SR related to existing Award/Allocation?

CMF | Amendment Request Guidance: Technical AMIS Guide for CMF | Page 7 of 20

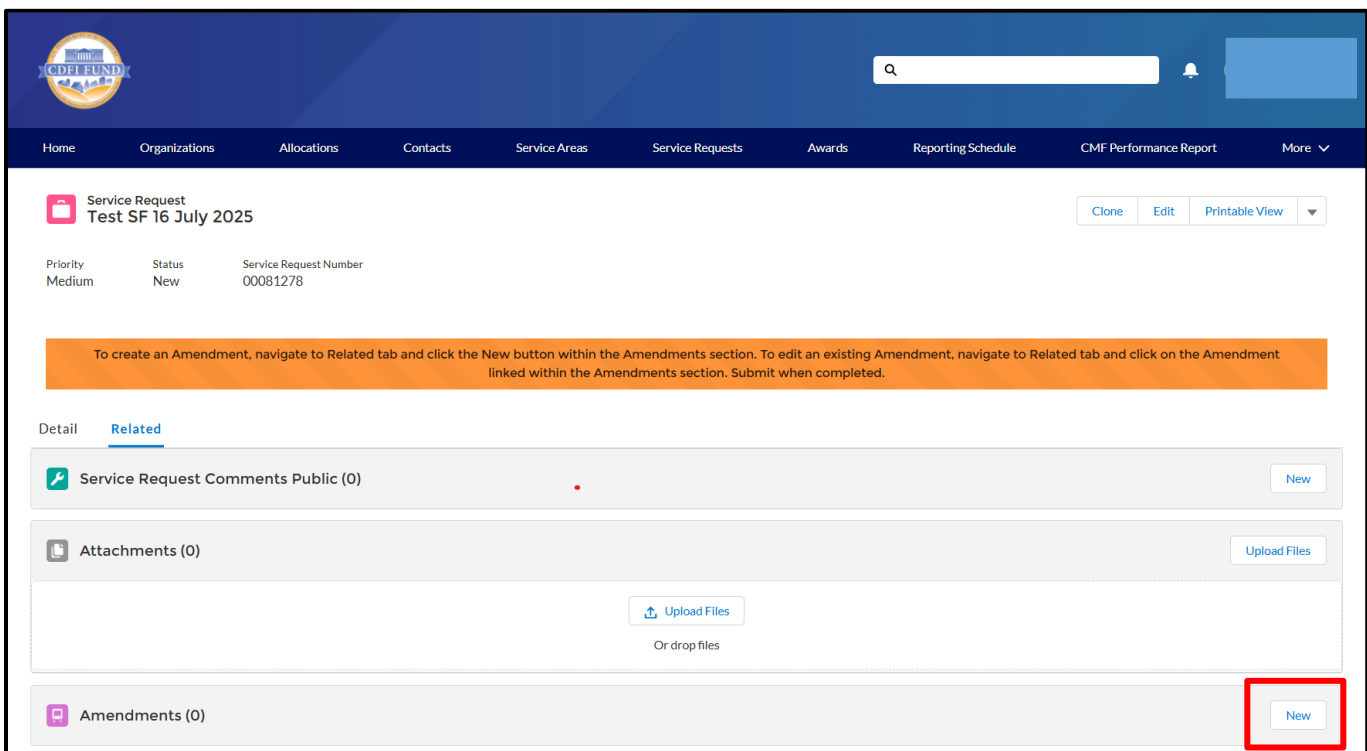
Create the Amendment

1. Select “Related” on the Service Request.



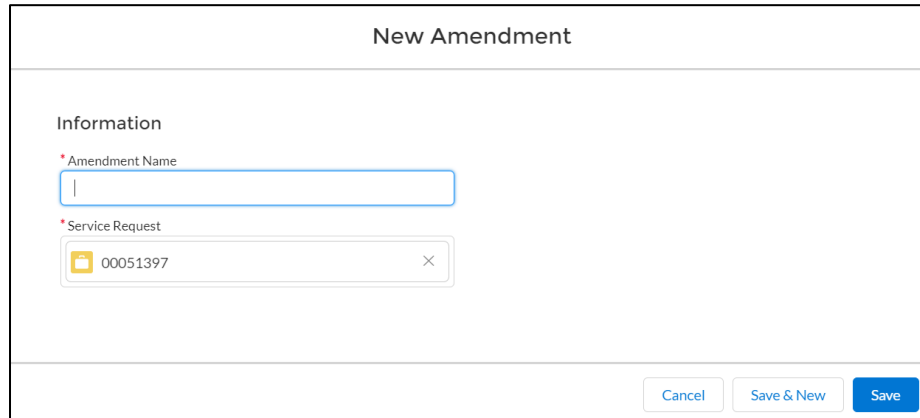
The screenshot shows the 'Service Request' page for 'Test SF 1 July 2025 1:04 AM'. The page has a dark blue header with navigation links: Home, Organizations, Allocations, Contacts, Service Areas, Service Requests, Awards, Reporting Schedule, CMF Performance Report, and More. Below the header, there's a section with a pink icon and the text 'Service Request Test SF 1 July 2025 1:04 AM'. To the right of this text are buttons for 'Clone', 'Edit', and 'Printable View'. Below this, there's a table with three columns: 'Priority' (Medium), 'Status' (New), and 'Service Request Number' (00081273). An orange banner contains instructions: 'To create an Amendment, navigate to Related tab and click the New button within the Amendments section. To edit an existing Amendment, navigate to Related tab and click on the Amendment linked within the Amendments section. Submit when completed.' At the bottom, there are two tabs: 'Detail' and 'Related'. The 'Related' tab is highlighted with a red box.

2. Locate the Amendment Section and create a new Amendment by Selecting “New.”



The screenshot shows the 'Service Request' page for 'Test SF 16 July 2025'. The page has a dark blue header with navigation links: Home, Organizations, Allocations, Contacts, Service Areas, Service Requests, Awards, Reporting Schedule, CMF Performance Report, and More. Below the header, there's a section with a pink icon and the text 'Service Request Test SF 16 July 2025'. To the right of this text are buttons for 'Clone', 'Edit', and 'Printable View'. Below this, there's a table with three columns: 'Priority' (Medium), 'Status' (New), and 'Service Request Number' (00081278). An orange banner contains instructions: 'To create an Amendment, navigate to Related tab and click the New button within the Amendments section. To edit an existing Amendment, navigate to Related tab and click on the Amendment linked within the Amendments section. Submit when completed.' Below the banner, there are two tabs: 'Detail' and 'Related'. The 'Related' tab is selected. Under the 'Related' tab, there are three sections: 'Service Request Comments Public (0)' with a 'New' button, 'Attachments (0)' with an 'Upload Files' button, and 'Amendments (0)' with a 'New' button. The 'New' button in the 'Amendments (0)' section is highlighted with a red box.

3. Enter a “Amendment Name” such as *[My Organization] [Award Control Number] PG&M Amendment [Type]*, e.g., Test Org 181CM0505321 PG&M Amendment Rural



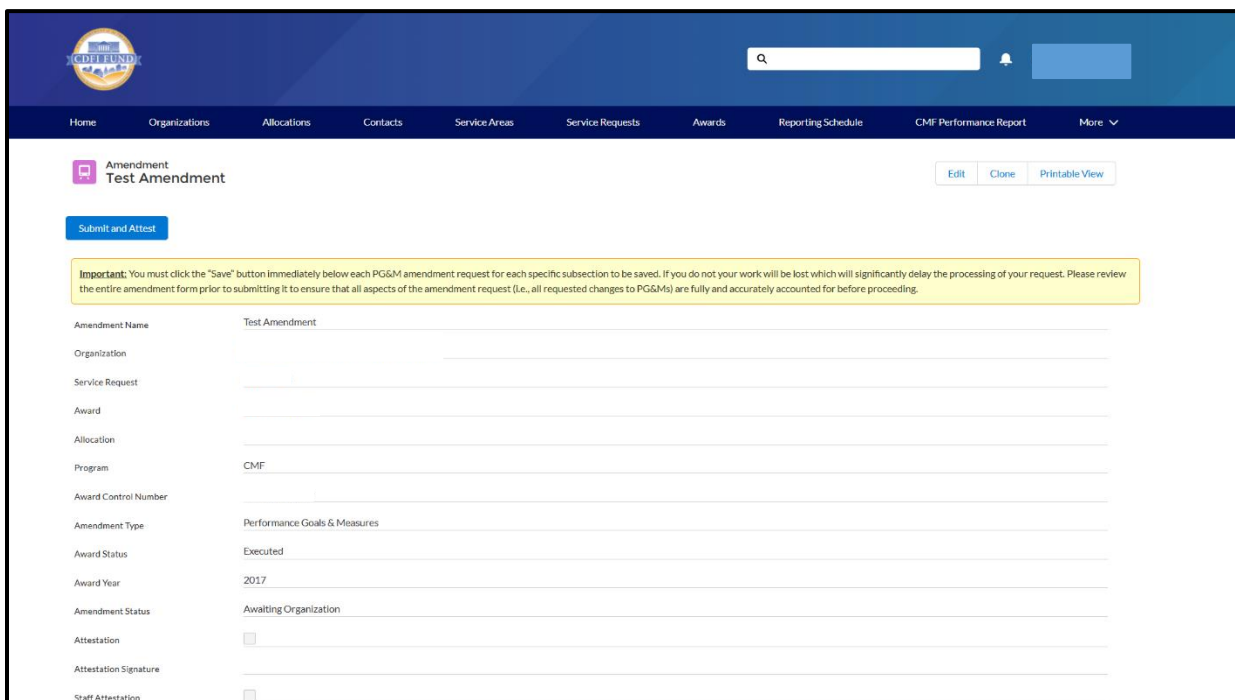
4. Select Save

Enter Amendment Information

1. Open the newly created Amendment by selecting the Amendment Name hyperlink:



2. This will open the following page:



3. The CMF Amendment page is broken down into sections for each amendable Performance Goal.

There are three types of potential amendments (click hyperlink to jump to applicable section):

- [Project Completion Date](#)
- Geographic Areas ([Removal](#) and [Addition](#))
- [Performance Goals and Measure Benchmark](#)

Note: **Each** amendment request section has its own Save button. **You must click Save for each individual section for which you are requesting a change.** If you request an amendment and type a justification, but do not click the Save button immediately below the justification text box, your work will NOT be saved. You will know that your work has been saved when you see a green banner across the top of the page that looks like this:



Project Completion Date

- Enter the Requested Project Completion Date by typing in the date (MM/DD/YYYY) or selecting the date on using the calendar button on the right side of the field
- Enter the Justification text
- Select Save

Note: Extensions are limited to one year, per the CMF Program Amendments Guide and Intake Steps

A screenshot of a web form for "Project Completion Date". It features two date input fields at the top: "Project Completion Date" (pre-filled with "9/15/2027") and "Requested Project Completion Date". Below these is a text box for "(EXTERNALLY VISIBLE) CDFI Fund Feedback:". Underneath is a large text area for "Justification (5,000 character limit):" with a rich text editor toolbar above it. The toolbar includes options for font face (Salesforce Sans), size (12), bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, and text color. A blue "Save" button is located at the bottom left of the form.

Geographic Area Removal

- Check the “Remove Geographic Area” box for the geographic area you are requesting to remove from the Award
- Enter Justification text for Geographic Area Removal.
- Select Save for each removal request

Geographic Area: Arizona

Geographic Service Type: Service Area

☐ Remove Geographic Area?

Justification:

Salesforce Sans12BBIU

(EXTERNALLY VISIBLE) CDFI Fund Feedback:

Save

Geographic Area Addition

- Select all Geographic Areas you are requesting to add to the Award. Do this by clicking the state or territory abbreviation in the “Available” column, then clicking the left arrow to move it to the “Selected” column. If you make an error, you can select a state in the “Selected” column and click the right arrow to move it back to the “Available” column.
- Enter Justification text for adding these areas
 - Note there is just one justification box for all addition requests; be sure to provide an explanation for each geographic area you are requesting to add
- Select Save for the geographic area addition

Note the maximum number of States for an Award are as follows:

- 2017 – 2019: 10 States
- 2020 and forward: 15 States

Request New Areas

Available

Selected

AK

AL

AR

AZ

CA

CO

Justification (5,000 character limit):

Salesforce Sans12BBIU

(EXTERNALLY VISIBLE) CDFI Fund Feedback:

Save

Performance Goal and Measure Benchmarks

- Identify the PG&M Benchmark(s) you are requesting an amendment for
- Enter a new value into the field “Requested Benchmark (numeric)”
- Enter Justification text for why this change is requested
- Select Save for each benchmark request

Please note that certain PG&Ms only accept benchmark values of “0” or “1”. See the PG&M declarative business statement below as an example.

Name:PGM-040049
PG&M Goals: 3.2(a)
Benchmark: 0
Declarative Business Statement: The Recipient may use its CMF Award to Capitalize an Affordable Housing Fund (Yes=1 and No=0).

Requested Benchmark (numeric):

Justification (5,000 character limit):

Salesforce Sans

12

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(EXTERNALLY VISIBLE) CDFI Fund Approvable Benchmark (numeric):


(EXTERNALLY VISIBLE) CDFI Fund Feedback (text):

Save

Upload Documents as Needed

1. Locate the File Upload section at the bottom of the Amendment page.

Upload files - files will be stored on related Service Request

 Upload Files

Or drop files

2. Upload documents as needed.

[illegible]

Note: Files uploaded to the Amendment will be stored and accessible from the related Service Request. They will not be visible on the Amendment page.

Submit and Attest

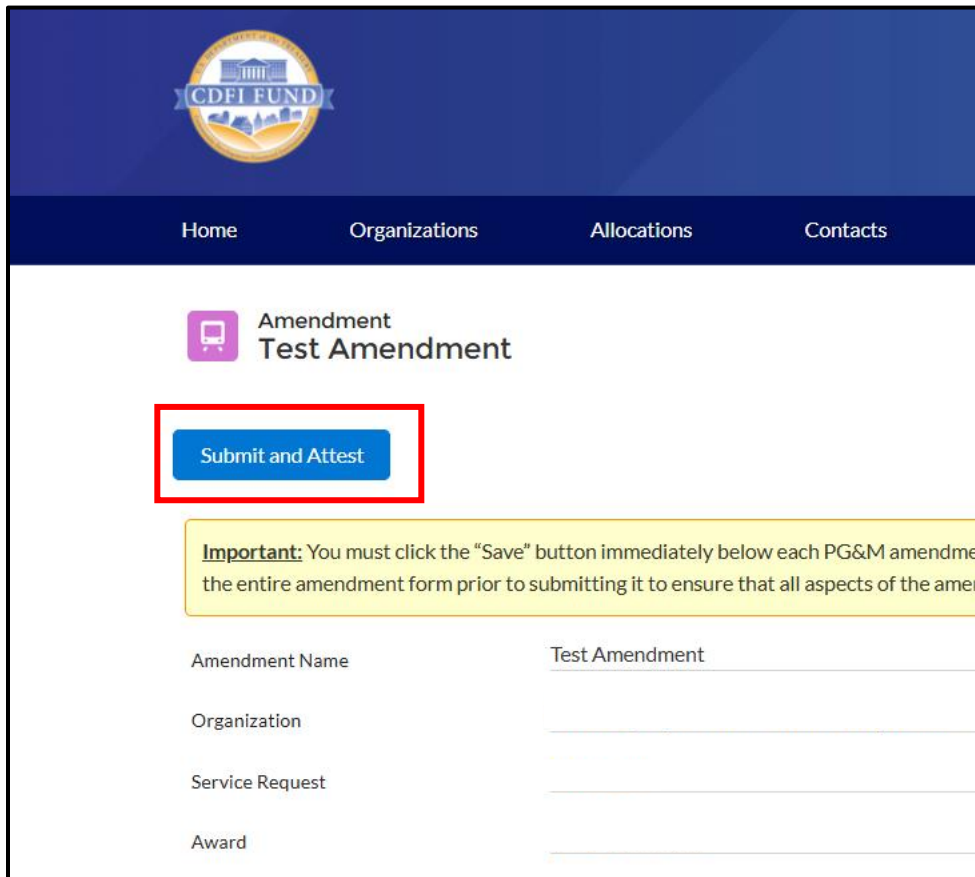
The Amendment will not be sent to the CMF Team until it is Submitted. Only Submit and Attest once all information pertaining to the Amendment Request has been entered.

Only users who have been designated **as an “Authorized Representative” in AMIS** will have the ability to Submit and Attest **the Amendment record.**

Note: All users under an Organization can now see all Service Requests associated with that Organization. Therefore, the Amendment record can be started by a non-Authorized Representative, but it must be submitted by one.

If the Amendment object is not open already, open it (navigate to the appropriate Service Request, then go to the “Related” menu to find the Amendment object, and click on its hyperlinked name).

1. Review all subsections to make sure that all requests are captured. (Recall that when inputting Amendment requests and justification text, the “Save” button needs to be clicked after EACH subsection to save your work.)
2. Select “Submit and Attest”



The screenshot displays the CDEFI FUND web application interface. At the top is a dark blue header with the CDEFI FUND logo on the left and navigation links for Home, Organizations, Allocations, and Contacts. Below the header, the main content area shows a purple icon and the text 'Amendment Test Amendment'. A red rectangular box highlights a blue button labeled 'Submit and Attest'. Below this button is a yellow warning box with the text: 'Important: You must click the “Save” button immediately below each PG&M amendment the entire amendment form prior to submitting it to ensure that all aspects of the amendment are captured.' At the bottom of the form, there are four input fields labeled 'Amendment Name', 'Organization', 'Service Request', and 'Award'. The 'Amendment Name' field contains the text 'Test Amendment'.

3. Review the Amendment Attestation and select Continue if the attestation text is true.

**AUTHORIZED REPRESENTATIVE - AMENDMENT REQUEST
ATTESTATION**

I certify and attest that (a) all information provided as part of this Amendment Request is true and accurate to the best of knowledge and belief, and (b) as a duly Authorized Representative, I have the requisite authorization to make this Amendment Request on behalf of my organization. I understand that this Amendment Request will be reviewed by the CDFI Fund and may, or may not be approved, as requested. I further understand that if the CDFI Fund approves any Amendment to my organization's Assistance Agreement, in order for the Amendment to take effect, it must be executed (i.e. signed and countersigned) by an Authorized Representative of my organization, and the CDFI Fund, before it takes effect. Until that time, my organization is responsible for adhering to all previously agreed to terms and conditions of the existing Assistance Agreement, and any previously agreed to and fully executed Amendments thereto.

Cancel

Continue

The Amendment is required to be Submitted and Attested for original submission and for every modification to the Amendment request during the entirety of Amendment processing.

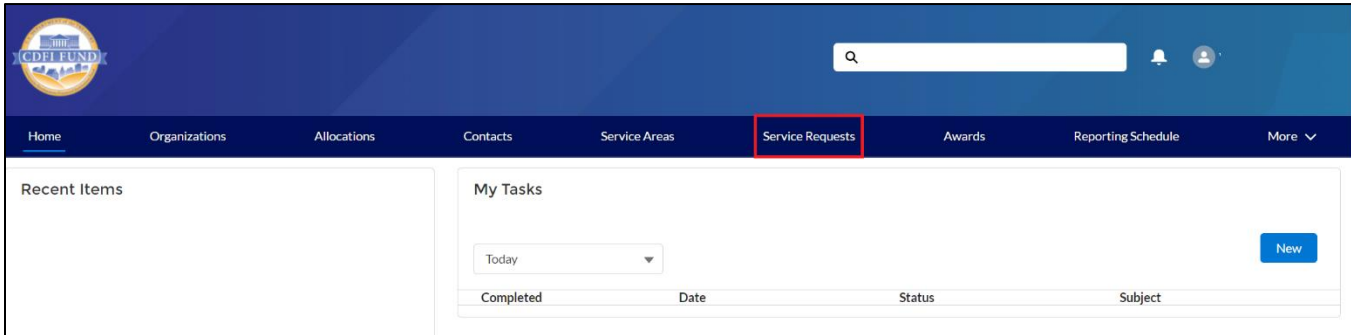
Successful submission of an Amendment can be verified by closing the Amendment, re-opening it, and referencing the Amendment Status. Once submitted, the Amendment Status will become “Initial Review”.

3.0 Tasks After Submitting an Amendment

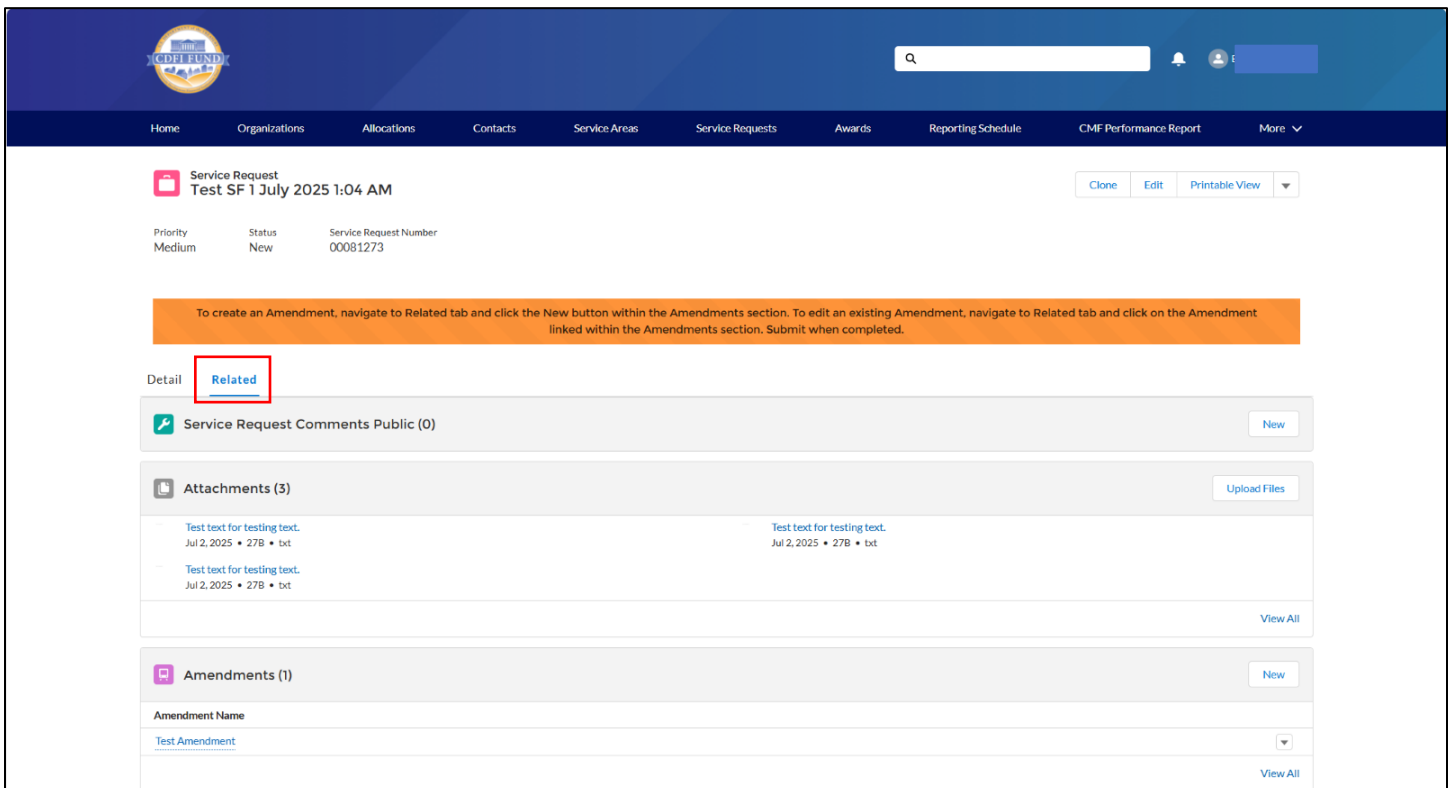
Communication with CDFI

Communication with CDFI during an Amendment follows the same process as other Service Requests.

1. Open AMIS and select Service Requests



2. Open the applicable Service Request related to the Amendment request (do not open a new Service Request)
3. Select “Related” tab.



4. Locate the section for Service Request Comments Public and select New.

The screenshot shows a web application interface for 'Service Request Comments Public'. At the top, there is a navigation bar with links: Home, Organizations, Allocations, Contacts, Service Areas, Service Requests, Awards, Reporting Schedule, CMF Performance Report, and More. Below the navigation bar, the main content area displays the 'Service Request' details for 'Test SF 1 July 2025 1:04 AM'. The details include Priority: Medium, Status: New, and Service Request Number: 00081273. An orange banner provides instructions on how to create or edit an amendment. Below this, there are three sections: 'Service Request Comments Public (0)' with a 'New' button highlighted by a red box; 'Attachments (3)' with an 'Upload Files' button and a 'View All' link; and 'Amendments (1)' with a 'New' button and a 'View All' link. The 'Amendments (1)' section shows a table with one entry: 'Test Amendment'.

5. Enter message and select “Save.” Upon pressing Save, the CMF Analyst assigned to your Service Request will be alerted you have submitted a new message.

The screenshot shows a form titled 'New Service Request Comment Public'. The form has a section labeled 'Information' with a text area for 'Body' and a checkbox for 'Public'. The 'Body' text area is currently empty. At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'.

Providing Additional Information & CMF Recommended Benchmarks

The submitter of the amendment will be notified if the Amendment is returned via an AMIS-generated email. Amendments may be returned for a few different reasons, including inability to amend or if the request has a material competitive impact.

When an Amendment is returned, it will be editable again in order for the Recipient to make updates or provide additional information to the Amendment record.

CMF Staff processing the submitted Amendment Request have the option to add a recommendation and return the Amendment for review. Staff recommendations can include an alternative recommended benchmark value as well as information on why the CDFI recommendation is different than the requested value.

To move forward with the Amendment, for each PGM request:

1. Modify the “Requested Benchmark” to match the “CDFI Fund Approvable Benchmark”.
2. Update the “Justification” text as needed.
3. Press “Save”

After all PGM requests have been updated, select “Submit and Attest” after making any changes, following the guide [above](#).

Name:PGM-040072
PG&M Goals: 3.2(d)(i)
Benchmark: 100
Declarative Business Statement: Homeownership Housing - Of all Affordable Housing units produced or supported with Eligible Project Costs, the total percentage for Low-Income, Very Low-Income, or Extremely Low-Income Families (%) or located in Areas of Economic Distress (%).

Requested Benchmark (numeric):

* Justification (5,000 character limit):

Salesforce Sans
12
B I U
List
Link
Image

The Community Development Financial Institutions Fund (CDFI Fund) plays an important role in generating economic growth and opportunity in some of our nation's most distressed communities. By offering tailored resources and innovative programs that invest federal dollars alongside private sector capital, the CDFI Fund serves mission-driven financial institutions that take a market-based approach to supporting economically disadvantaged communities. These mission-driven organizations are encouraged to apply for CDFI Certification and participate in CDFI Fund programs that inject new sources of capital into neighborhoods that lack access to financing.

(EXTERNALLY VISIBLE) CDFI Fund Approvable Benchmark (numeric):

(EXTERNALLY VISIBLE) CDFI Fund Feedback (text):

Save

An Amendment may also be rejected outright if it falls out of allowable reasons for making a change. In such instances, the submitter of the amendment will receive a notification via email, the related Service Request will be closed, and instructions will be provided for next steps.

Signing Letters

Amendments in AMIS provide the functionality for digital signatures. The Authorized Representative submitter of the Amendment will be notified via email if they are required to provide a digital signature for any documents related to processing the Amendment. To sign the amendment letter, complete the following steps:

1. Open the Service Request that contains the Amendment and then open the Amendment record within that Service Request.
Note: The link to the amendment will be in the email sent to the Authorized Representative
2. Review the Amendment Letter and updated Schedule 1. To review the Amendment Letter, scroll to the bottom of the page and locate the “Amendment Letters” section at the bottom of the Amendment Form

Amendment Letters (1)			
Amendment Letter Name	Award	Created By	Created Date
CMF Amendment	AWD-00010742	Jake Butterworth	10/5/2023 1:15 PM


[View All](#)

3. Open the Amendment Letter record by selecting the Amendment Letter Name

Amendment Letters (1)			
Amendment Letter Name	Award	Created By	Created Date
CMF Amendment	AWD-00010742	Jake Butterworth	10/5/2023 1:15 PM

[View All](#)

4. Review the Letter



Search

HomeOrganizationsAllocationsContactsService AreasService RequestsAwardsReporting ScheduleMore

Amendment Letter
CMF Amendment

DETAILSRELATED

Amendment Letter Name
CMF Amendment


Owner
Jake Butterworth

Amendment
CMF Amendment

Award
AWD-00010742

Read aloud

1 of 2



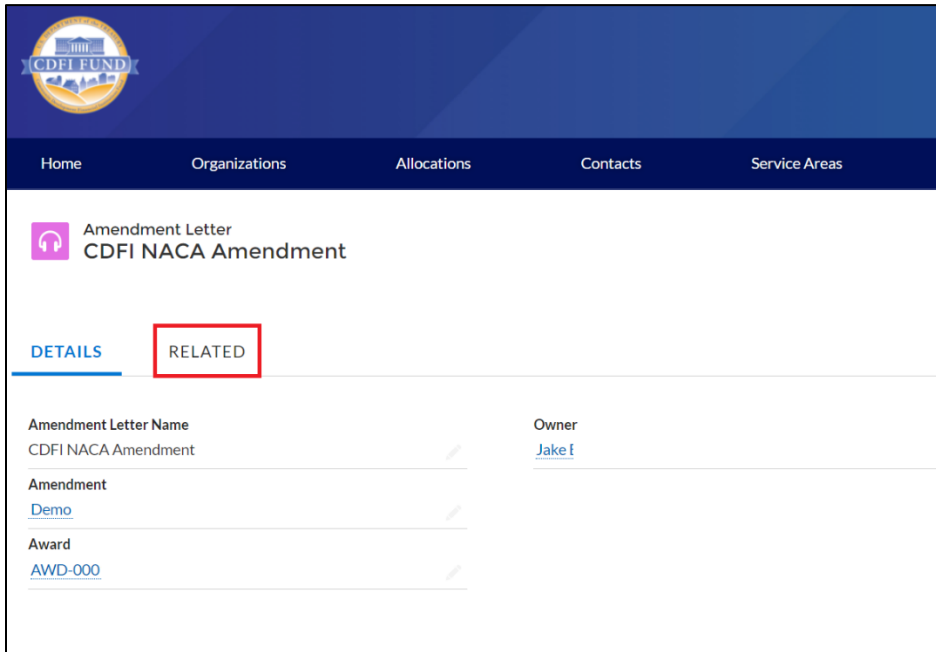
DEPARTMENT OF THE TREASURY
WASHINGTON, D.C. 20220

COMMUNITY DEVELOPMENT
FINANCIAL INSTITUTIONS FUND

October 05, 2023

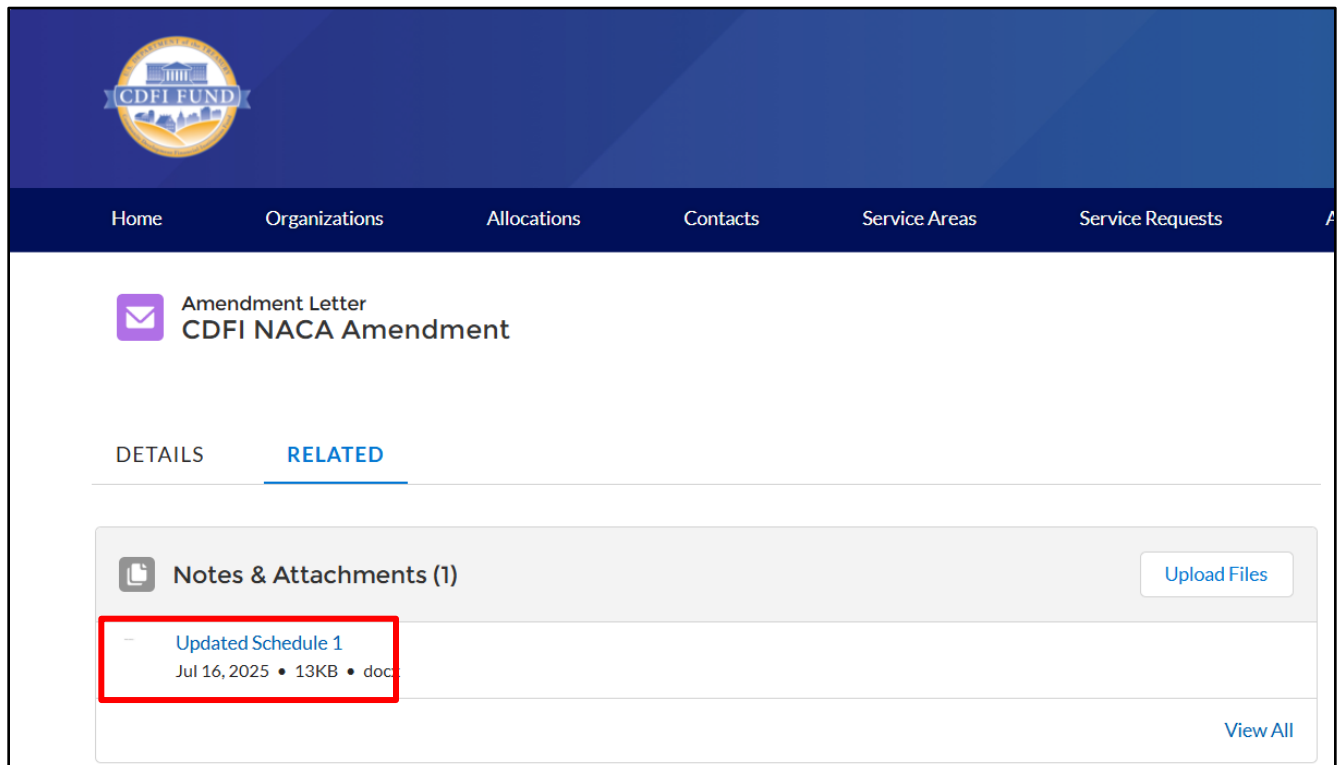
VIA ELECTRONIC MAIL

5. To review the updated Schedule 1, select “Related”



The screenshot shows the CDFI Fund portal interface. At the top is a dark blue header with the CDFI Fund logo on the left and navigation links: Home, Organizations, Allocations, Contacts, and Service Areas. Below the header, the main content area displays 'Amendment Letter CDFI NACA Amendment' with a purple icon. Underneath, there are two tabs: 'DETAILS' and 'RELATED'. The 'RELATED' tab is highlighted with a red rectangular box. Below the tabs, there is a table with three rows: 'Amendment Letter Name' with value 'CDFI NACA Amendment', 'Owner' with value 'Jake f', and 'Amendment' with value 'Demo'. The 'Award' field shows 'AWD-000'.

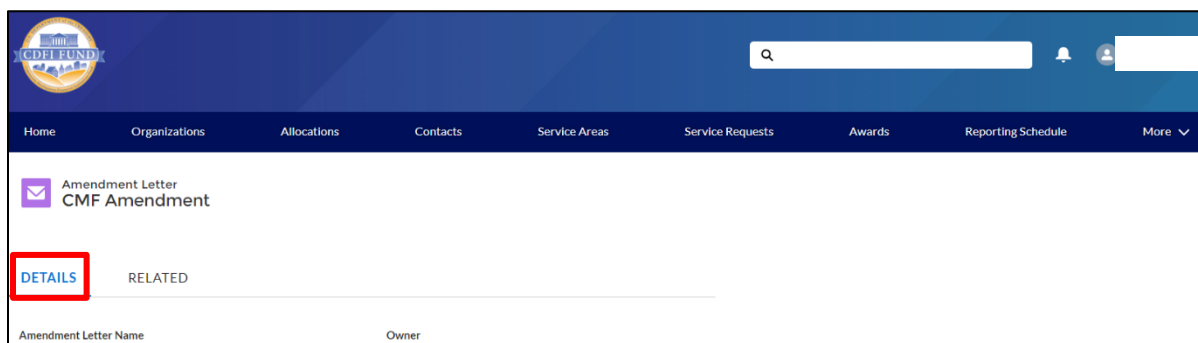
6. Locate the “Notes and Attachments” section. Select the Updated Schedule 1 attachment to open in viewer



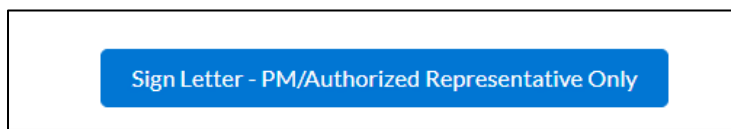
The screenshot shows the CDFI Fund portal interface. At the top is a dark blue header with the CDFI Fund logo on the left and navigation links: Home, Organizations, Allocations, Contacts, Service Areas, and Service Requests. Below the header, the main content area displays 'Amendment Letter CDFI NACA Amendment' with a purple icon. Underneath, there are two tabs: 'DETAILS' and 'RELATED'. The 'RELATED' tab is highlighted with a blue underline. Below the tabs, there is a section titled 'Notes & Attachments (1)' with a document icon. To the right of this section is a button labeled 'Upload Files'. Below the section title, there is a list of attachments. The first attachment is 'Updated Schedule 1', which is highlighted with a red rectangular box. Below the attachment name, it shows 'Jul 16, 2025 • 13KB • doc'. At the bottom right of the attachment list, there is a link labeled 'View All'.

7. Review attachment. If you have any questions regarding the content of the Amendment Letter or the revised Schedule 1, reach out to CDFI Fund staff via the Service Request associated with the Amendment, **BEFORE** signing. If you have no questions, proceed to the next step.

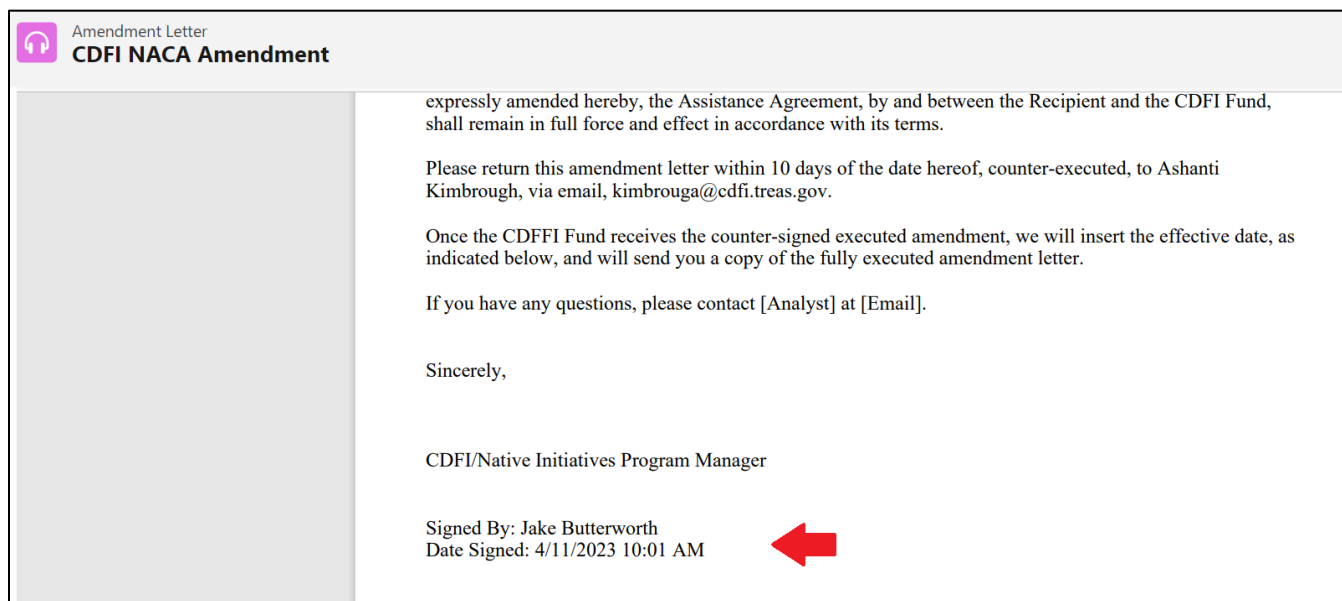
8. Return to the Amendment Letter by clicking on the “Details” tab and scrolling down to the letter.



9. Locate the Sign Letter button at the bottom of the Amendment Letter Details tab. Click “Sign Letter – PM/Authorized Representative Only” button to digitally sign



10. Confirm your signature has been added to letter



Notification of Completion

After signature, the amendment will return to the CDFI Fund for the Program Manager signature and placement of the Effective Date of the Agreement. Once these steps have been complete and the CDFI Fund implements the AMIS changes, the Authorized Representative will receive an AMIS-generated email with a subject that includes, “CDFI Fund Amendment Request Completed” notifying of successful implementation, with the fully executed Amendment Letter and Updated Schedule 1 attached to the email. No further action is required.