



U.S. DEPARTMENT OF THE TREASURY
COMMUNITY DEVELOPMENT
FINANCIAL INSTITUTIONS FUND

CY 2026 NMTC PROGRAM AMIS NAVIGATION GUIDE

September 2026

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SECTION 1.0 - REQUIRED SOFT/HARDWARE AND GETTING STARTED

1.1 Required Software and Hardware

To use the electronic *Allocation Application*, you will need a computer system that can run the software listed below:

- The AMIS electronic application can run on any computer with an Internet connection and we recommend the browsers Google Chrome or Microsoft Edge.
 - Chrome applies updates automatically. We make every effort to test and support the most recent version. There are no configuration recommendations for Chrome.

TIP: Start completing the electronic application early. The CDFI Fund **will not** grant extensions to individual organizations experiencing technology problems or to organizations unable to submit due to system slowdowns near the application submission deadline. Discovering technology issues early will allow the CDFI Fund to assist organizations in completing the application process by the deadline.

1.2 Getting Started

Access the pdf format *Allocation Application* found on the CDFI Fund's website at <http://www.cdfifund.gov/nmtc>. Scroll down to "How to Apply Step 2," use the document as a guide for the information needed to complete the electronic application. Gather appropriate application documents and data prior to starting the electronic *Allocation Application*.

SECTION 2.0 - GETTING HELP

For **programmatic questions** about the contents of the *Allocation Application*, **an AMIS Service Request is the preferred method**. In the Service Request form, select "NMTC Program" as the Program and "Application" for the Program Topic. Additionally, you may contact the CDFI Fund at:

Mail:

Program Manager
NMTC Program
U.S. Department of the Treasury
Community Development Financial
Institutions Fund
1500 Pennsylvania Avenue
Washington, D.C. 20220

Email: NMTC@cdfi.treas.gov
(with the subject line "NMTC Allocation
Application")

Phone: (202) 653-0421

Fax: (202) 508-0084

If you require **information technology assistance** in using the electronic *Allocation Application*, **please submit an AMIS Service Request** (set the Program to “Technical Issue” and the Program Topic to “AMIS technical Problem”). Use of AMIS Service Requests is the best method to submit and track your request. You may also call (202) 653-0422 or e-mail AMIS@cdfi.treas.gov.

The CDFI Fund will provide programmatic and information technology support related to the Allocation Application between 9:00 am and 5:00 pm, Eastern Time until through the last day to contact the CDFI Fund which is specified in Table 1 of the NOAA. **The CDFI Fund will not respond to service requests, phone calls or e-mails concerning an Allocation Application submitted during the final two business days before the Application Deadline until after the Allocation Application submission deadline specified in Table 1 of the NOAA.**

TIP: The CDFI Fund recommends that you prepare as if the application due date is a week prior to the Allocation Application deadline. Thus, if you have any questions (technological or otherwise) regarding the submission of your application, the CDFI Fund can help you resolve outstanding issues prior to the application deadline.

SECTION 3.0 - LOGGING ON

3.1 Accessing CDFI Fund’s Awards Management Information System

The *Allocation Application* must be submitted electronically through the CDFI Fund’s Awards Management Information Systems (AMIS). Therefore, your organization must be registered in AMIS to complete and submit the application. You can register a new organization by visiting amis.cdfifund.gov, selecting the LOGIN tab, then selecting “Join our Community”. For more information, please visit <https://amis.cdfifund.gov/Training> and click on “Training Manual: Getting Started - Navigating AMIS.” Refer to Section 2.1 *Logging into AMIS – First Visit (for Users without an AMIS Account)*. For AMIS IT support, you may contact AMIS@cdfi.treas.gov or (202) 653-0422.

PLEASE NOTE: *Applicants* that are newly registered in AMIS may experience a delay of up to one business day in accessing the electronic NMTC *Allocation Application*. All *Applicants* are strongly encouraged to register in AMIS well before the CY 2026 NMTC Allocation Application due date (specified in the NOAA).

3.2 Starting an NMTC Allocation Application in AMIS

To start an electronic NMTC Allocation Application in AMIS:

1. Visit amis.cdfifund.gov and select the **Login** tab at the top of the page to log on to the system with your AMIS username and password.

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[AMIS HOME](#) | [AMIS NEWS](#) | [AMIS TRAINING MATERIALS](#) | [AMIS FAQs](#) | **LOGIN**

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Username

Password

SIGN IN

[Forgot your password?](#) | [Join our Community](#)

AMIS Login

- On the AMIS home page, select the **Organizations** tab.

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COMMUNITY DEVELOPMENT
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Search AR Test AR

[Home](#) | **[Organizations](#)** | [Allocations](#) | [Contacts](#) | [Service Areas](#) | [Service Requests](#) | [Awards](#) | [Reporting Schedule](#) | [More](#)

Recent Items

- [AR Test AR](#)
- [ARO-21573258](#)
- [ARO-21573257](#)
- [ARO-21573256](#)
- [ARO-21573255](#)
- [ARO-21573260](#)

My Tasks

Today **New**

Completed	Date	Status	Subject

Calendar

January 4, 2026-January 10, 2026

GMT -5	SUN 4	MON 5	TUE 6	WED 7	THU 8	FRI 9	SAT 10
6am							

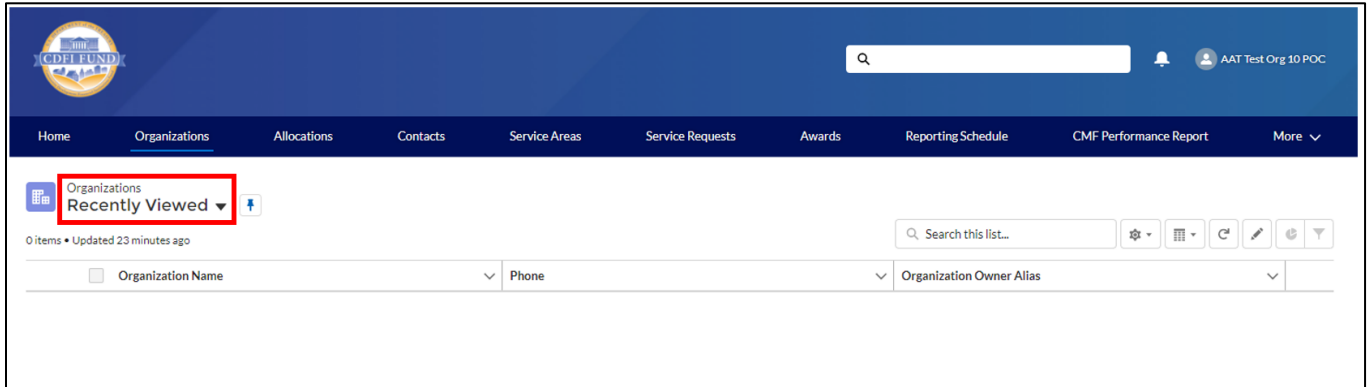
Navigation: < > Today < > New Event

Calendar View: JANUARY 2026

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3

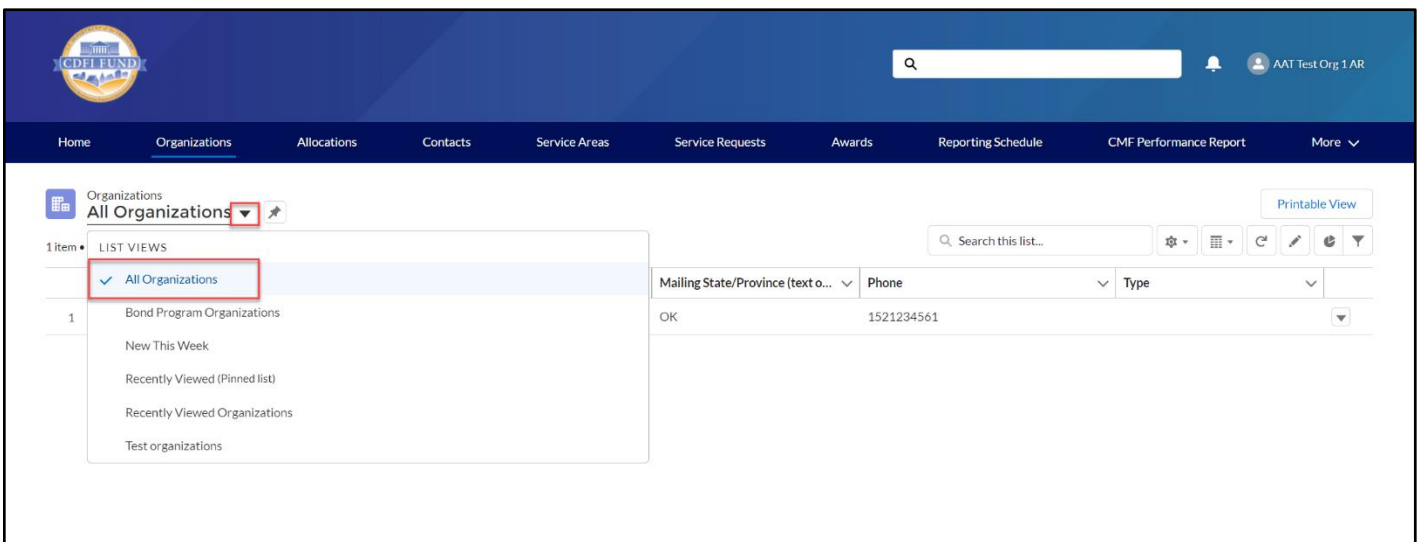
AMIS Home Page

3. The Organization page opens with the default view as 'Recently Viewed'.



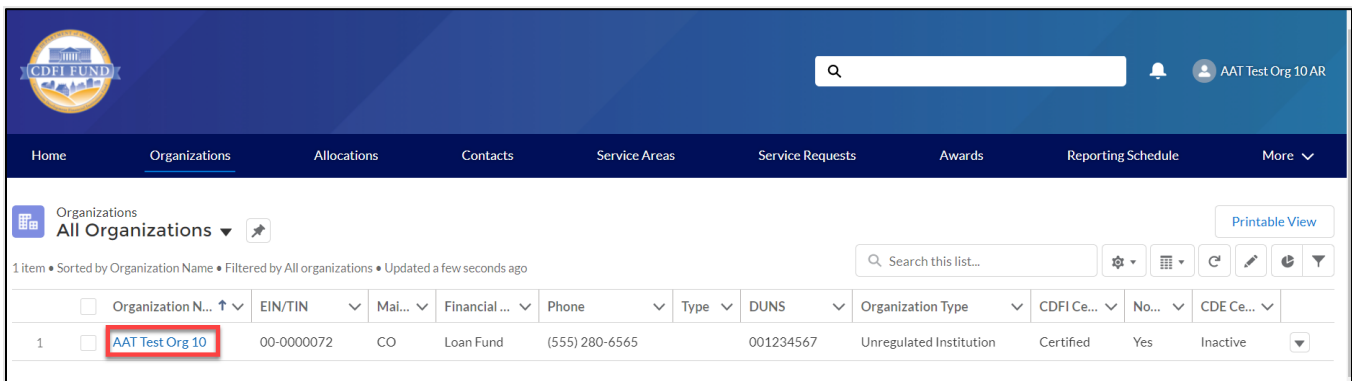
Organization Page – Recently Viewed List View

4. If you don't see your organization under the 'Recently Viewed' list view, select 'All Organizations' from the list view dropdown menu. You can pin the Organization page to always list 'All Organizations' (or another option in the dropdown menu) for this record by clicking on the push pin icon just to the right of the list view dropdown menu



All Organizations List View

5. Once all the organizations that you have access to are displayed in the list view, select the appropriate **organization and open it**.



List View Page of all Organizations

6. On your organization's page, select the **Related** tab.

The screenshot shows the 'AAT Test Org 10' organization page. The 'Related' tab is highlighted with a red box. The page displays various fields for the organization, including Type, Phone, Website, Organization Owner, Industry, and Mailing Address. Below these fields, there are two tabs: 'Details' and 'Related'. The 'Related' tab is selected and highlighted with a red box. Below the tabs, there are two rows of information: 'Organization Name' (AAT Test Org 10) and 'Parent Relationship'.

Record Type	Program Profile Name	CIMS Mapping Tool
BEA	P-087665	CIMS for BEA
BGP	P-087668	
CDE-CERT	P-087662	
CDFI-CERT	P-087666	
CDFI-NACA	P-087663	CIMS for CDFI-NACA
CMF	P-087664	CIMS for CMF

Organizations Page – Related Tab

7. Scroll down to Active Program Profiles and select **View All**.

The screenshot shows the 'Active Program Profiles' section. It displays a table with columns for Record Type, Program Profile Name, and CIMS Mapping Tool. The 'View All' button is highlighted with a red box in the bottom right corner of the table.

Record Type	Program Profile Name	CIMS Mapping Tool
BEA	P-087665	CIMS for BEA
BGP	P-087668	
CDE-CERT	P-087662	
CDFI-CERT	P-087666	
CDFI-NACA	P-087663	CIMS for CDFI-NACA
CMF	P-087664	CIMS for CMF

Active Program Profiles

8. Select the **NMTC** Program Profile Name.

The screenshot shows the 'Active Program Profiles' table. The 'NMTC' row is highlighted with a red box. The table has columns for Record Type, Program Profile Name, and CIMS Mapping Tool. The 'NMTC' row is the 7th row in the table.

Record Type	Program Profile Name	CIMS Mapping Tool
1	BEA	P-087665
2	BGP	P-087668
3	CDE-CERT	P-087662
4	CDFI-CERT	P-087666
5	CDFI-NACA	P-087663
6	CMF	P-087664
7	NMTC	P-087667
8	SDL	P-127960

Active Program Profiles – NMTC

9. To create a new application, click on the “**Apply for NMTC Allocation**” button.

The screenshot shows the CDFI Fund website interface. At the top is a navigation bar with links: Home, Organizations, Allocations, Contacts, Service Areas, Service Requests, Awards, Reporting Schedule, and More. Below this is a header section with the CDFI Fund logo on the left and a search bar on the right. The main content area displays 'Program Profile P-087667'. On the right side of this section, there are two buttons: 'Apply for NMTC Allocation' (highlighted with a red box) and 'Printable View'. Below the header, there are tabs for 'Detail' and 'Related'. Under the 'Detail' tab, there is a section titled 'Organization Data' with fields for 'Organization' (AAT Test Org 10) and 'Program Profile Name' (P-087667). The EIN/TIN is listed as 00-0000072.

Applications - Apply for NMTC Allocation

10. This will launch the NMTC application.

The screenshot shows the NMTC Application Home Page. At the top, there is a navigation bar with links: AAT Test Org 6, View PDF, AR Test AR, and Exit. Below this is a header section with four boxes: 'Control Number' (26NMA991118), 'Due Date' (1/29/2026 5:00 PM EST), 'Remaining Time' (22 days 4 hours 1 minutes), and 'Progress: 0% Complete'. The main content area is titled '2026 NMTC Application' and contains 'Application Instructions'. The instructions welcome users to the New Markets Tax Credit (NMTC) Electronic Allocation Application and provide a link to the application instructions: <https://www.cdffund.gov/programs-training/programs/new-markets-tax-credit/apply-step>. On the left side, there is a 'Table of Contents' with links to: Application Instructions, NMTC Application Registration, Application Materials, Assurances and Certifications, Applicant Information, and Part I: Business Strategy.

NMTC Application Home Page

11. You can exit the application at any time and return to it as needed.

12. To access the application after it has been created or to access previously submitted applications from rounds 2017 and later), click on the **“Related”** tab and then click on the **“Applications”** link.

Program Profile
P-087667

New Contact New Service Request Change Record Type ▼

Chatter isn't enabled or the user doesn't have Chatter access.

DETAILS RELATED

NMTTC Reviews (0)

Applications (1) Apply for NMTTC Allocation

Applications Related List - Applications Link

13. A List of *Allocation Applications* will display

Program Profile
P-087639

Apply for NMTTC Allocation Printable View

Detail Related

Applications (3)

Application	Application Type Name	Status	PDF Link
App-055611	2020 NMTTC Application	Submitted	Download PDF
App-053684	2019 NMTTC Application	Submitted	Download PDF
App-069595	2026 NMTTC Application	New	View PDF

List of Current and Previously Submitted Applications

14. To open the current application, click on the application link associated with the status of “In Progress”
15. To open a previously submitted application, click on an application with a status of “Submitted”

3.3 Granting Multiple Users Access to your Allocation Application

All users that have access to AMIS and are a valid contact within your organization will have the ability to edit your NMTTC application.

TIP: Each user with access to your NMTTC application will be able to edit the same subsections of your application concurrently; however, the last user to click **“Save”** will overwrite all the data previously entered by other users.

3.4 Updating the Contact Type

To be designated in the Application, the individual must be listed as a contact in the organization profile with specific AMIS designation under the “Type”, “Profile” and “Is Active” as seen in the table below.

Organizations > Test Applicant Org 20

Contacts

4 items • Sorted by Last Name • Updated 3 minutes ago

	Contact Name	Title	Email	Phone	Type	Profile	Is Active
1	TestUser Org20AR01	CEO	test@tester.com.disabled		Authorized Representative	Admin User	☒
2	TestUser Org20POC01		test201801260001@exa...		Point of Contact	Admin User	☒
3	Test Tester	CEO	test@tester.com.disabled		Authorized Representative		☐

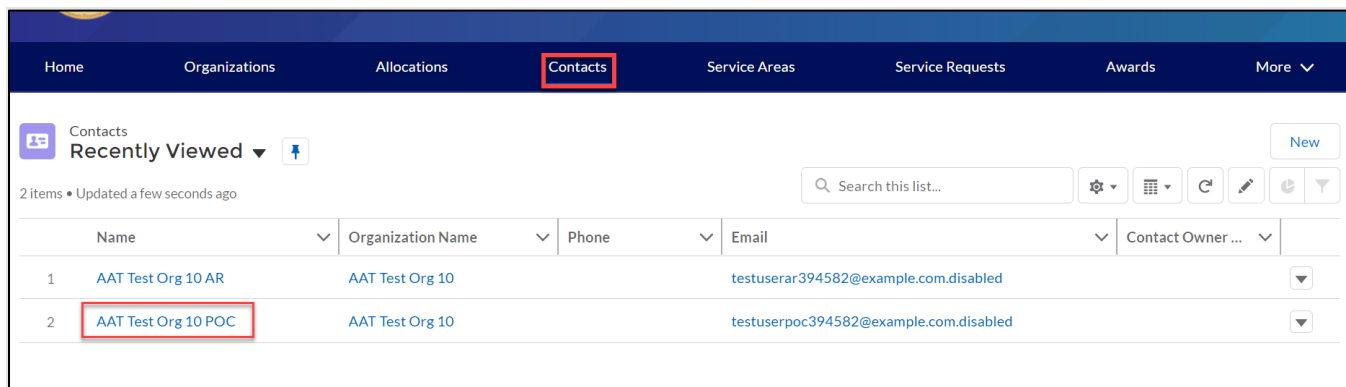
Designation in Application	Contact Type in AMIS	Profile Type in AMIS	Is Active?
Registration Q. 4(a) Primary Registration Contact Person	Authorized Representative or Point of Contact	Admin User	Must be checked
Registration Q.4(b) Secondary Registration Contact Person	Authorized Representative or Point of Contact	Admin User	Must be checked
Q. 5(a)(a) Applicant Authorized Representative Information	Authorized Representative	Admin User	Must be checked
Q. 5(a)(b) Applicant Contact Person Information	Authorized Representative or Point of Contact	Admin User	Must be checked
Q. 5(a)(c) Public Contact Person Information	Authorized Representative or Point of Contact	Admin User	Must be checked
Q. 5(b)(a) Controlling Entity Representative	Authorized Representative or Point of Contact	Admin User	Must be checked

Notes from the Application

- Registration Q. 4(a) Primary Application Registration Contact Person
 - **Only the AMIS user designated as the Primary Application Registration Contact in Registration Q. 4(a) will receive emails** when the Application Registration has been completed and saved as well as when the *Allocation Application* has been successfully submitted.
 - The CDFI Fund may contact both designated Primary and Secondary Application Registration Contact Persons in Registration Q. 4 with questions or requests prior to the Application submission deadline.
- Registration Q.4(b) Secondary Application Registration Contact Person
 - The CDFI Fund may contact both designated Primary and Secondary Registration Contact Persons in Registration Q. 4 with questions or requests prior to the Application submission deadline.
- Q. 5(a)(a) *Applicant Authorized Representative* Information
 - Only the AMIS user designated as the *Authorized Representative* in Question 5(a) will be eligible to sign the *Allocation Application*. The AMIS user selected must be listed as a contact in *Applicant's* AMIS organization profile to complete the Application attestation.
 - The *Authorized Representative* is the individual that the CDFI Fund may contact—jointly with the *Application Contact Person*—during the course of the *Allocation Application* review with questions or requests for additional information regarding the *Allocation Application*.
- Q. 5(a)(b) *Application Contact Person* Information
 - The *Application Contact Person* is the individual that the CDFI Fund may contact—jointly with the *Authorized Representative*—during the course of the *Allocation Application* review with questions or requests for additional information regarding the *Allocation Application*. It is strongly recommended that the *Application Contact Person* listed is someone other than the *Applicant Authorized Representative*.
- Q. 5(a)(c) *Public Contact Person* Information
 - Should the Applicant be selected to receive an NMTC Allocation, the CDFI Fund reserves the right to publish the *Applicant's* response to select questions in the Applicant Information and Business Strategy sections, including *Public Contact Person* information provided in Question 5(c).
- Q. 5(b)(a) *Controlling Entity* Representative
 - The *Controlling Entity* Representative is required to affirm, through submission of a Signature Page, that it is indeed the *Controlling Entity* of the *Applicant* and supports the Applicant's *Allocation Application*.

Only the user designated as the *Authorized Representative* in Application Q.5(a) can complete the attestation and submit the application.

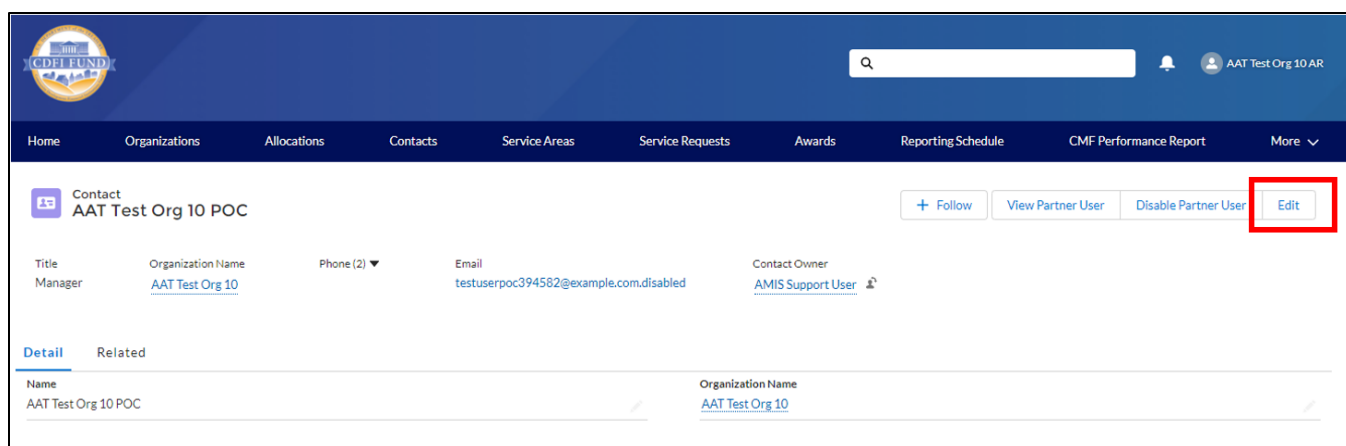
1. The steps and screenshots below show how a contact designated as "Admin User" under "Profile" column can update a User's Contact Type in AMIS.
2. Click on the Contacts tab on the home page, click on the arrow to the right of "Recently Viewed" and select "All Contacts". Select the User you would like to update .



	Name	Organization Name	Phone	Email	Contact Owner
1	AAT Test Org 10 AR	AAT Test Org 10		testuserar394582@example.com.disabled	
2	AAT Test Org 10 POC	AAT Test Org 10		testuserpoc394582@example.com.disabled	

Contacts Page

3. When the Contact's User record opens to the details page, click on the 'Edit' button in the upper right-hand corner of the record to place it into edit mode.



Contact
AAT Test Org 10 POC

+ Follow View Partner User Disable Partner User **Edit**

Title: Manager
Organization Name: AAT Test Org 10
Phone (2):
Email: testuserpoc394582@example.com.disabled
Contact Owner: AMIS Support User

Detail Related

Name: AAT Test Org 10 POC
Organization Name: AAT Test Org 10

Contact Detail Page

- Only Users with “Admin User” or “User” Profile and is in active status can update the Contact list.

The screenshot shows the 'Contact Details Page' for a contact named 'AAT Test Org 10 POC'. At the top, there's a header with the contact name and a '+ Follow' button. Below this, a summary row displays key information: Title (Manager), Organization Name (AAT Test Org 10), Phone (2), Email (testuserpoc394582@example.com), and Contact Owner (AMIS Support User). The main content area has two tabs: 'Detail' (selected) and 'Related'. Under the 'Detail' tab, there are several fields: 'Name' (AAT Test Org 10 POC), 'Organization Name' (AAT Test Org 10), 'Is Active' (checked), 'Title' (Manager), 'Type' (Point of Contact), and 'Profile' (Admin User). The 'Is Active' and 'Profile' fields are highlighted with red boxes.

Title	Organization Name	Phone (2)	Email	Contact Owner
Manager	AAT Test Org 10		testuserpoc394582@example.com	AMIS Support User

Detail Related

Name
AAT Test Org 10 POC

Organization Name
AAT Test Org 10

Is Active
☒

Title
Manager

Type
Point of Contact

Profile
Admin User

Contact Details Page

- Edit the Contact record and update the Type to either “Authorized Representative” or “Point of Contact” and click “Save”.

The screenshot shows the 'Edit Contact' form. It has a title bar 'Edit Contact'. The form contains several fields: 'Is Active' (checked), 'Title' (Manager), and 'Type' (a dropdown menu). The 'Type' dropdown is open, showing options: '--None--', 'Authorized Representative' (selected with a checkmark), and 'Point of Contact'. At the bottom right, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The 'Save' button is highlighted with a red box.

Edit Contact

Is Active
☒

Title
Manager

Type
Authorized Representative

--None--
✓ Authorized Representative
Point of Contact

Cancel Save & New **Save**

3.5 Accessing Your Previously Submitted Allocation Applications

If your organization applied in a prior round, you may access these applications via AMIS.

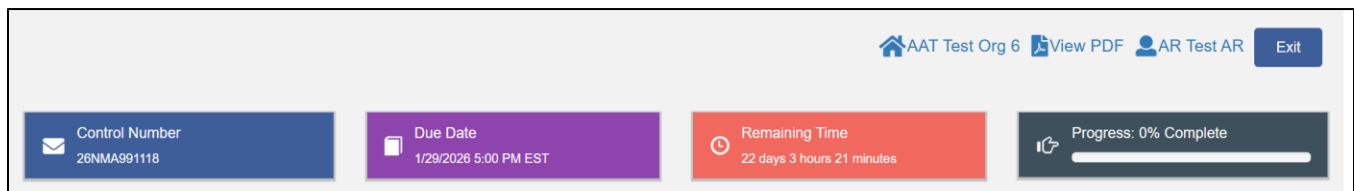
Reference section 3.2 of this guide and follow steps 1 through 8 to get to the NMTC Program Profile and then skip to steps 12 through 15 to open the previously submitted applications.

Note that to obtain access to application prior to CY 2017 allocation round, you need to submit an AMIS service request.

SECTION 4.0 – UNDERSTANDING THE USER INTERFACE

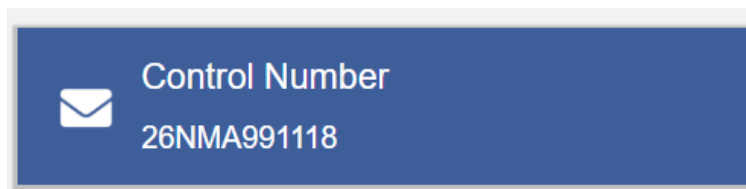
4.1 Application Layout

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

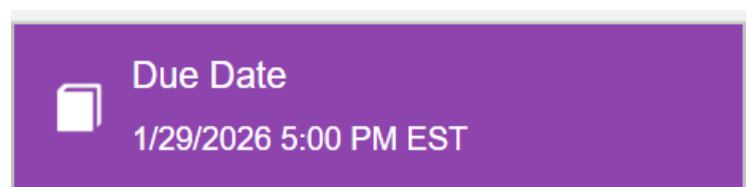


NMTC Application UI Home Page

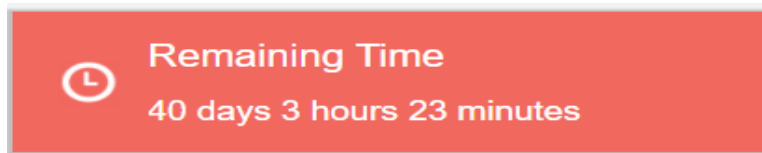
The header includes:



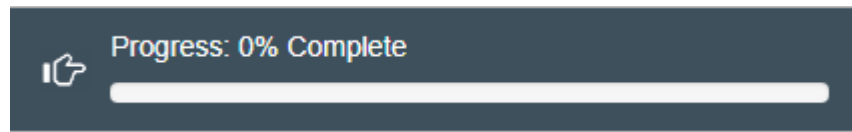
1. **Control Number:** The system-generated number assigned to your application.



2. **Due Date:** The date and time when the application must be submitted.



3. **Remaining Time:** A countdown feature that displays how much time is left to work on the application before the due date.



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



5. **Organization:** A hyperlink to your Organization's detail page. When you click this link, it will return you to your organization record in a new window.
6. **View PDF:** An option to export and view the application as a PDF file. The PDF prints the current state of the application. If blank, it will show application guidance, questions, and tables. Once responses are entered into the application, the PDF will also include responses.
7. **User:** Name of user profile currently editing the application.
8. **Exit:** Use this button to Exit the application **after** saving your work.

4.2 Using the Collapsible Menu

The table of contents on the left-hand side of the page will allow you to navigate to different sections of the application.

Table of Contents	Table of Contents
Application Instructions	Application Instructions
NMTC Application Registration	NMTC Application Registration
Application Materials	Application Materials
Assurances and Certifications	Assurances and Certifications
Applicant Information	Q.1 to Q.9 - General Certifications (Eligibility Questions)
Part I: Business Strategy	Q.10 - Q.11 (General Certifications)

Collapsible Table of Contents - Collapsed and Expanded

Click on the “**section title**” in the table of contents to expand and view subsections. This will display links to subsections below the section title in the menu bar.

Control Number

26NMA991118

Due Date

1/29/2026 5:00 PM EST

Remaining Time

22 days 3 hours 19 minutes

Progress: 0% Complete

Table of Contents

Application Instructions

NMTC Application Registration

Application Materials

Assurances and Certifications

Q.1 to Q.9 - General Certifications (Eligibility Questions)

Q.10 - Q.11 (General Certifications)

Q.12 - Certifications for the Controlling Entity (General Certifications)

2026 NMTC Application - Assurances and Certifications

Assurances and Certifications

Generally, the *Applicant* must provide the Assurances and Certifications below in order to apply for an *NMTC Allocation*.

General Certifications

With regard to the General Certifications (below):

- If the *Applicant* is unable to provide General Certifications numbered 1 through 9; the *Applicant* is ineligible to apply for an *NMTC Allocation*.
- If the *Applicant* is unable to provide General Certifications numbered 10 through 17; the *Applicant* must provide a written explanation in the text box provided in the electronic *Allocation Application*. The CDFI Fund will consider the explanation provided and determine, in its sole discretion, whether the *Applicant* is eligible to apply for an *NMTC Allocation*.

Please select "True," "False," or "Not Applicable" to each certification.

- By selecting "True" the Applicant is certifying that the corresponding statement is true.
- By selecting "False" the Applicant is certifying that the corresponding statement is not true. By selecting "Not Applicable" the Applicant is certifying that the corresponding statement is not applicable to their application.

Expanded Section and Viewing Interface

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

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

The screenshot displays the 'Subsection Page View' within the 'AAT Test Org 6' application. The interface includes a top navigation bar with links for 'View PDF', 'AR Test AR', and an 'Exit' button. Below this, a status bar shows the 'Control Number' (26NMA991118), 'Due Date' (1/29/2026 5:00 PM EST), 'Remaining Time' (22 days 3 hours 18 minutes), and 'Progress: 0% Complete'. The main content area is divided into a left sidebar and a right pane. The sidebar, titled 'Table of Contents', lists sections like 'Application Instructions', 'NMTC Application Registration', 'Application Materials', and 'Assurances and Certifications'. Under 'Assurances and Certifications', the subsection 'Q.1 to Q.9 - General Certifications (Eligibility Questions)' is selected and highlighted. The right pane displays the title '2026 NMTC Application - Assurances and Certifications - Q.1 to Q.9 - General Certifications (Eligibility Questions)' and a 'Bookmark Subsection' checkbox. The content area contains the text 'Questions 1 - 9, Please complete below:' followed by a statement: 'As the Authorized Representative of the Applicant, I hereby assure and certify that:'. Below this, two numbered questions are listed, each with a response field for the user to provide an answer.

Subsection Page View

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

To navigate to another subsection, click on the subsection title.

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

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

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

4.3 Time Management

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

4.4 Glossary of Terms

Words that are *italicized* are defined glossary terms. You can access the glossary online at <https://www.cdfifund.gov/programs-training/programs/new-markets-tax-credit/apply-step>. Once you navigate to the link, refer to the glossary terms in the “CY2026 NMTC Program Application” under the “APPLICATION MATERIALS” section.

SECTION 5.0 – USER INTERFACE NAVIGATION AND FORM FEATURES

5.1 Saving and Completing a Section

When you click “**Save**” at the bottom of a subsection page, the application will SAVE your answers and run any validations configured for that subsection and questions. You will receive on-screen error messages and guidance based on the validation rules. After clicking **Save**, you can navigate away from the subsection and your answer will be saved. **Please Note: If you navigate away before you click save you will lose your responses/answers. REMEMBER TO ALWAYS CLICK “SAVE”.**

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

Question	Response (%)
(b) Please indicate the types of Qualified Low-Income Community Investments (QLICs) in which the Applicant intends to engage (check all that apply), and what percentage of allocations (by dollar amount) will be used for each activity. (Percentages for (i) to (iv) should add up to 100 percent):	
Loans/investments will be used to finance: (these three percentages should add up to 100 percent by dollar amount)	
(1) Enter Percent (%) of Non-Real Estate Activities *	%

Sample Required Field

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

Save

Save Button

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

Question	Response (%)
(b) Please indicate the types of Qualified Low-Income Community Investments (QLICs) in which the Applicant intends to engage (check all that apply), and what percentage of allocations (by dollar amount) will be used for each activity. (Percentages for (i) to (iv) should add up to 100 percent):	
Loans/investments will be used to finance: (these three percentages should add up to 100 percent by dollar amount)	
(1) Enter Percent (%) of Non-Real Estate Activities *	This response is required. %

Validation Error Message

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

2026 NMTC Application - Application Materials - Confirmation of Application Materials

Your responses were saved successfully!

Subsection was marked as completed!

Subsection Saved and Completed Message

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

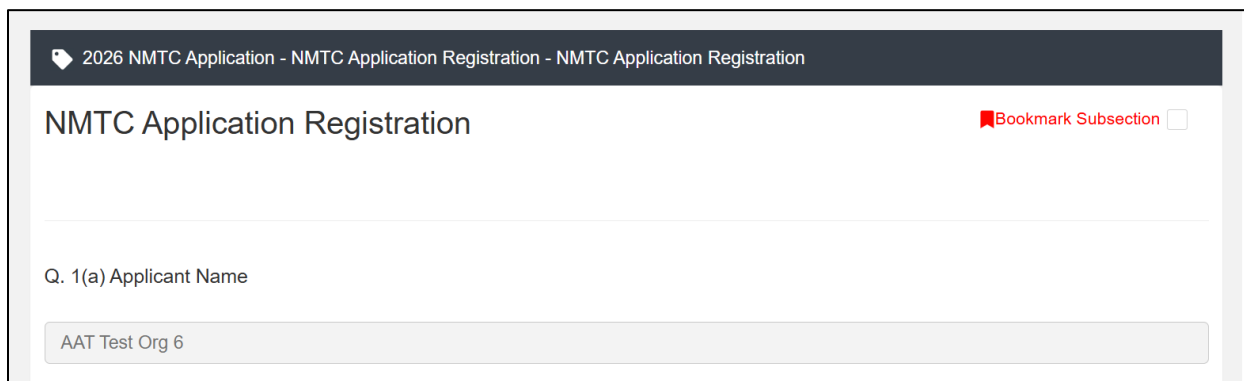
Applicant Information

☐ Q.1 - Applicant NMTC Allocation Request
☐ Q.2 - Applicant Information
☐ Q.3 - Controlling Entity Information
☐ Q.4 - Applicant Mailing Information
☐ Q.5a - Applicant Contact Information
☐ Q.5b - Controlling Entity Contact Information
☐ Q.6 - CDE Certification Information
☒ Q.7 - Service Area

Completed Subsection Checkmark

5.2 Bookmarks

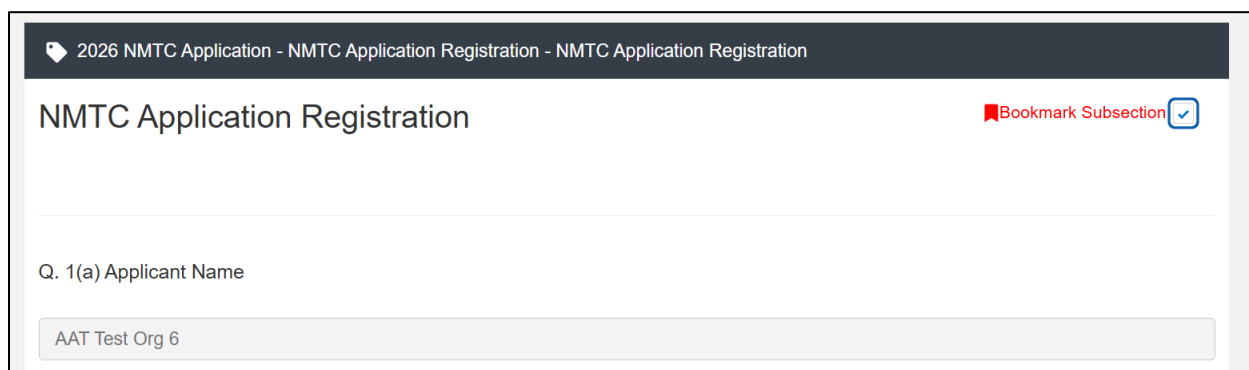
If you need to flag a subsection to return to later, use the bookmark feature. When you click on any subsection, you will see the **Bookmark Subsection** checkbox visible in the upper-right of the display.



The screenshot shows a web application interface. At the top, a dark header bar contains a breadcrumb trail: "2026 NMT Application - NMT Application Registration - NMT Application Registration". Below the header, the main content area has a title "NMT Application Registration" on the left and a "Bookmark Subsection" checkbox on the right. The checkbox is currently unchecked. Below the title, there is a label "Q. 1(a) Applicant Name" followed by a text input field containing the value "AAT Test Org 6".

Bookmark Subsection Checkbox

Click the “checkbox” to bookmark the subsection. A bookmark symbol will appear next to that subsection in the application menu.



This screenshot is identical to the previous one, but the "Bookmark Subsection" checkbox is now checked, indicated by a blue checkmark inside the box.

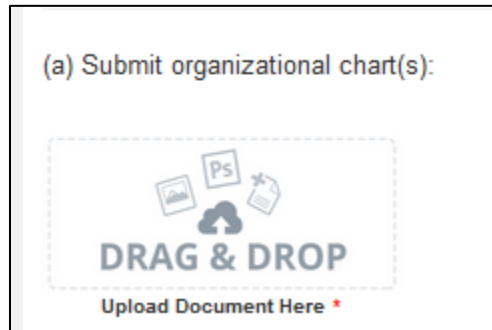
Bookmarked Subsection

To remove a bookmark, simply uncheck the checkbox.

5.3 Validation Rules, Error Messages, and Guidance

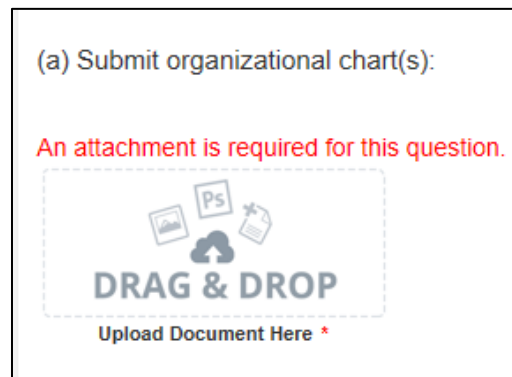
There are validation rules associated with required fields and other information in the application. When you **Save** a subsection, all validations will be executed. If there are errors detected, you will see error messages displayed by the field that needs to be adjusted. Please follow all error message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

These errors may range from inputting an invalid value to omitting a required field. For example, you may be asked to upload documents using the Drag & Drop feature.



Upload Attachment Required Field

If you skipped over this required document upload feature, you would receive the following error message when you try to save:



Missing Attachment Error Message

You will receive a similar error message if you omit a response in any other required field, like the picklist field below. If left blank, you will receive an error message "This response is required."

(c) Please indicate if the *Applicant* plans to finance *

This response is required.

Missing Required Field Error Message

In numerical entry fields, there are often specific guidelines the applicant must follow. For example, in the field below the percentage value entered must be more than 20%.

(b)(ii) For Applicants that selected '20%', provide the maximum commitment percentage.

*

The maximum commitment percentage should be greater than equal to 20%.

10 %

0 Decimal Places

Numerical Entry Error Message and Guidance

If less than 20% is entered, you will receive guidance that activities must be greater than 20%.

The guidance provided in these error messages will give you a clear idea of how to correct the validation error.

5.4 Application Registration

The Application Registration is the first step of the NMTC Application, and it must be completed by 11:59 PM (ET) on the date specified by in the CY 2026 NOAA. If the Application Registration is not completed by this time, the NMTC Application Status will be changed to Abandoned. Abandoned Applications cannot be edited or submitted.

Most of the questions in the Application Registration are pre-populated with your organization’s data in AMIS. Changing your organization’s data in AMIS will also change these pre-populated responses.

Table of Contents

- Application Instructions
- NMTC Application Registration**
- Application Materials
- Confirmation of Application Materials
- Assurances and Certifications
- Q.1 to Q.9 - General Certifications

2026 NMTC Application - NMTC Application Registration

NMTC Application Registration

All Applicants must complete and save all responses to the Application Registration section of the NMTC Allocation Application in AMIS by 5pm ET on the Application Registration deadline specified in the NOAA in order to submit the remaining sections of the Allocation Application. To complete the Application Registration, Applicants must provide a response to each question in this section, select "Yes", click the checkbox to lock its responses, and press the save button. AMIS will not allow additional edits to the Application Registration once it has been completed and saved.

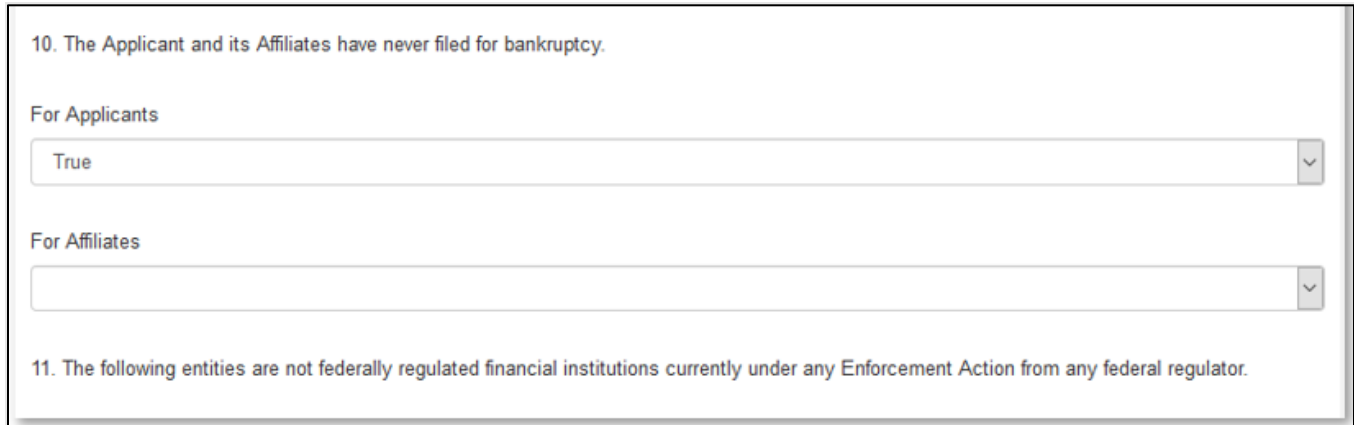
Once the Application Registration deadline passes, AMIS will not allow the creation of any new NMTC Allocation Applications. Additionally, Applicants will not be permitted to submit NMTC Allocation Applications if the Application Registration section of those Applications remains incomplete and unsaved after the Application Registration deadline. Please see the NMTC Program Allocation Application Frequently Asked and the AMIS User instructions (Section 6.2) for more details on completing the Application Registration section

NMTC Application Registration

Section **6.2 Application Registration Details** contains more information for completing this part of the NMTC Application.

5.5 Dependent Questions and Subsections

Responses to some questions will trigger the applicability of other dependent questions or subsections/tables later in the application. Be careful when changing the responses to these types of questions because the answers you input in earlier sections may affect the required fields and dependent subsections you will have to complete later in the application.



10. The Applicant and its Affiliates have never filed for bankruptcy.

For Applicants

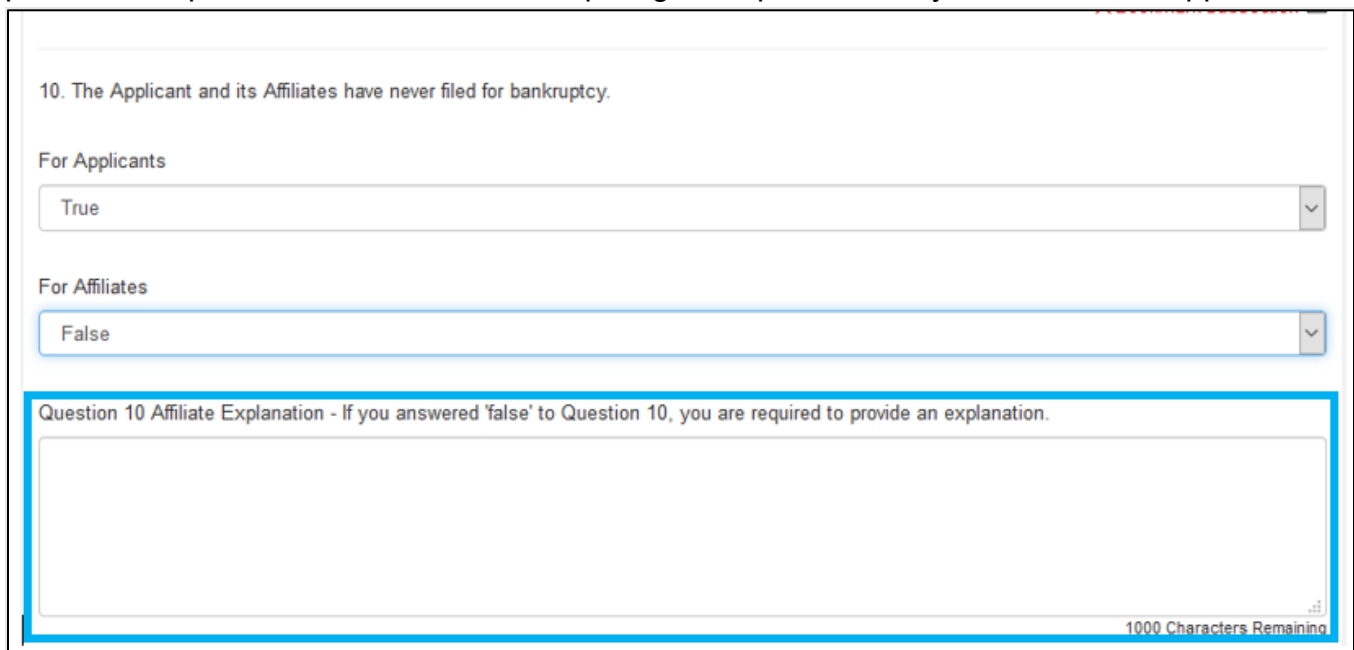
True

For Affiliates

11. The following entities are not federally regulated financial institutions currently under any Enforcement Action from any federal regulator.

Sample Questions with Possible Dependent Questions

A **Dependent Question** will appear on the question page you are editing when your response requires additional responses or explanations. For example, if you select False from the picklist in response to Q10, a text box requiring an explanation of your answer will appear.



10. The Applicant and its Affiliates have never filed for bankruptcy.

For Applicants

True

For Affiliates

False

Question 10 Affiliate Explanation - If you answered 'false' to Question 10, you are required to provide an explanation.

1000 Characters Remaining

Dependent Question

Dependent questions typically are required fields.

For all questions requiring a narrative response, please note that each text response field has an identified maximum character length (which, depending on font size, will range from about a third of one page to about two pages.)

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



Character Maximums for Text Responses

TIP: Before using the electronic *Allocation Application*, type your narrative answers into a separate word processing program (e.g., Microsoft Word). Then copy and paste the answers into the appropriate sections of the electronic application. This will prevent the loss of information if you encounter problems saving your application or connection problems. It will also cut down on the time you spend directly filling out the application online.

When copying and pasting the narrative responses from a word processing program into the narrative text box, any special indentations or spacing will not carry over. Formatting, such as bold, italicized, or underlined text, will not display in the narrative. It is highly recommended that the Applicant verify their narrative answers to ensure it is accurately reflected in the AMIS Application PDF by clicking on the “Print Page” on the bottom right of the screen.

To copy and paste information in a Windows platform from a MS Word file or other word processing file:

1. Go to the document with the appropriate text.
2. Highlight the information you wish to paste. **Press and hold down the Ctrl button, then press C.** Alternatively, you can press the right button on your mouse and then select **Copy**.
3. Go to the electronic application. Click in the applicable text box. **Press and hold down the Ctrl button, then press V.** This will paste the information into the text box. Alternatively, you can press the right button on your mouse and then select **Paste**.
4. The text boxes only allow basic text. Any formatting (e.g., italics, bold, bullets) will be simplified to a basic font. Charts and tables cannot be pasted or created in the text boxes. Additionally, you will not be able to check for spelling or grammatical errors within the electronic application.

A **Dependent Subsection** is a subsection that is enabled or disabled for the applicant to complete based on input the applicant has entered in the application. This feature is designed to make it easier for you to navigate the application by disabling sections that do not apply to your application.

In the example below, applicants are asked if they have a track record of providing loans/equity investments to certain groups. If an applicant had such a track record, they would be required to complete several tables later in the application detailing this record.

The screenshot shows the 'Exhibit B: Track Record of Activities' section. On the left, a navigation bar lists four tables: TABLE B1: TRACK RECORD OF LOANS/EQUITY INVESTMENTS TO REAL ESTATE AND OPERATING BUSINESSES (EXCLUDING RESTRICTED NMTC BUSINESS ACTIVITIES), TABLE B2: TRACK RECORD OF LOANS/EQUITY INVESTMENTS TO OTHER CDEs, TABLE B3: TRACK RECORD OF LOAN PURCHASES FROM OTHER CDEs, and TABLE B4: TRACK RECORD OF LOANS/EQUITY INVESTMENTS. The first three tables are highlighted with green checkmarks. On the right, three questions are listed, each with a 'Yes' button highlighted by a red box. The questions are: (a) Does the Applicant, or its Controlling Entity, have a track record in any of the following activities listed below? Your selection should correspond to the activities selected in Question #13 and described in Question #17. Check all that apply. A narrative is required (Question #19(b)) if at least one activity is selected. Directly providing or otherwise facilitating loans or Equity investments to Real Estate and Operating Businesses (excluding Restricted NMTC Business Activities)(If selected, complete Question #19(b) and Table B1) *; Directly providing loans or Equity investments to other CDEs (If selected, complete Question #19(b) and Table B2) *; and Purchasing loans from other CDEs (If selected, complete Question #19(b) and Table B3) *.

Enabled Dependent Subsections

If you have not yet selected an answer or do not select “Yes”, the corresponding tables (B1-B3) will not be visible in the navigation bar. Only after selecting “Yes” will the tables appear for you to complete.

If you select “No”, you will not be required to complete these tables. Once you click “**Save**”, those tables will disappear from the navigation bar

The screenshot shows the 'Exhibit B: Track Record of Activities' section. On the left, a navigation bar lists four tables: TABLE B4: TRACK RECORD OF LOANS/EQUITY INVESTMENTS, Exhibit C: Staff and Board Qualifications, Exhibit D: Asset Management and Income & Operating Expenses, and Exhibit E: Asset Management and Income & Operating Expenses. Only Table B4 is highlighted with a red box. On the right, three questions are listed, each with a 'No' button highlighted by a red box. The questions are: (a) Does the Applicant, or its Controlling Entity, have a track record in any of the following activities listed below? Your selection should correspond to the activities selected in Question #13 and described in Question #17. Check all that apply. A narrative is required (Question #19(b)) if at least one activity is selected. Directly providing or otherwise facilitating loans or Equity investments to Real Estate and Operating Businesses (excluding Restricted NMTC Business Activities)(If selected, complete Question #19(b) and Table B1) *; Directly providing loans or Equity investments to other CDEs (If selected, complete Question #19(b) and Table B2) *; and Purchasing loans from other CDEs (If selected, complete Question #19(b) and Table B3) *.

Disabled Dependent Subsections

It is important to complete the application in numerical order because questions in earlier sections may trigger or disable dependent subsections later in the application.

List of Dependent Questions and Subsections:

1. Q. 3 in the Application Information section - Is the *Applicant* Designating a *Controlling Entity*?
 - a. A “No” response hides the *Controlling Entity* Certification page and Q. 5b
2. Q.13(b) (i-iv) Table - *QLICI* Uses and Activities

- a. Q. 13(b)(i) – % Percent Investments in, or loans to, *Qualified Active Low-Income Businesses (QALICB)*
Table A1 and Table A5 will be visible if the percentage exceeds zero.
 - b. Q. 13(b)(ii) - % Percent Investments in, or loans to, other *CDEs*
Table A2, Table A5, and Question 14c will be visible if the percentage exceeds zero.
 - c. Q. 13b(iii) - % Percent Purchases of loans from other *CDEs*
Table A3 and Question 16 will be visible if the percentage exceeds zero.
 - d. Q. 13b(iv) – % Percent *Financial Counseling and Other Services*
 - i. Table A4 will be visible if the percentage exceeds zero.
3. Q. 20 – Track Record (Table B1-B3) Does the *Applicant*, or its *Controlling Entity*, have a track record in any of the following activities listed below?
 - a. Does the *Applicant*, or its *Controlling Entity*, have a track record of directly providing or otherwise facilitating loans or Equity investments to Real Estate and Operating Businesses? A “No” response hides Table B1.
 - b. Does the *Applicant*, or its *Controlling Entity*, have a track record of providing or otherwise facilitating loans or Equity investments to *CDEs*? A “No” response hides Table B2.
 - c. Does the *Applicant*, or its *Controlling Entity*, have a track record of providing or otherwise facilitating loan purchases from *CDEs* which correspond to the activities in Question #13 and described in Question #17? A “No” response hides Table B3.
 - d. A “No” response to all three prior questions will hide Q.26(b).
4. Q. 21 Track Record (Table B4) Does the *Applicant*, or *Controlling Entity*, have a track record of successfully providing loans, *Equity Investments*, and/or financial counseling that do not directly correspond to the selections in Question 13 (e.g., Restricted NMTC Activities, loans and/or investments in NMTC investment funds or non-CDE financial institutions, personal or consumer loans, and residential mortgages) but are relevant to the proposed NMTC activities?
 - a. A “No” response hides Table B4.
5. Q. 25(a) – Will the *Applicant* commit to providing at least 85 percent of its QLICIs (in terms of aggregate dollar amounts) in areas that are either: (1) characterized by at least one of items 1-5 on the above list for each QLICI; or (2) characterized by at least two of items 6-12 on the above list for each QLICI?
 - a. A “No” response hides Q. 25(b).
6. Q25(b) - (i) If the Applicant selected “Yes” to Question 25(a), select the percentage of its QLICIs (in terms of aggregate dollar amounts) the Applicant will commit to providing in areas characterized by at least one of four items in the list below for each QLICI? *
 - a. A “0” response hides Q. 25(b)(ii), Q. 25(b)(ii)1-5, and Q.25(c).
 - b. A “5,” “10,” or “15” hides Q. 25(b)(ii),

7. Q. 32(b) - Is the *Applicant*, Controlling Entity, or any Affiliate a federally-regulated thrift, bank, bank holding company, or credit union?
 - a. A “No” or “Not Applicable” response hides Q. 32(c)
8. Q. 36(a) – Track Record of Raising Capital
 - a. A “No” response hides Q. 36(b)
9. Q. 37(a) - Investment Strategy
 - a. A “Yes” response hides Q.37(b), Q.37(c), & Table E1
10. Q. 40 – Percentage of *QE/s* Invested as *QLIC/s*
 - a. A “No” response hides the sub question in Q. 40(a) % of *QE* proceeds
11. Q. 41 – Minimum Request Amount
 - a. A “No” response hides Q. 41(b) & Q. 41(c)

5.6 Selecting Related Records

The application uses records associated with your organization in AMIS to help you populate information in certain fields, such as information about Contacts you would like to associate with the application.

To select related records:

1. Related record fields open a list of possible related records when you click on them. Select the name of the organization, contact, or other record you would like to use.

(c) Public Contact Person Information - Provide Name, title, and mailing address, if different from Applicant: *

Tester
Clear

Tester
 CDFI/NACA Test Org 4
 test
 Portland
 OR
 97232-2557
 test@tester.com

List of Possible Related Records

Selected Related Record

2. You can view the detail page of the record you select by clicking the **View Record** link. This will direct you to the actual record related to your organization.

(c) Public Contact Person Information - Provide Name, title, and mailing address, if different from Applicant.*

Tester Clear

View Record

Org Name: CDFI/NACA Test Org 4

Mailing Street: test

Mailing City: Portland

Mailing State/Province: OR

Mailing Zip/Postal Code: 97232-2557

Email: test@tester.com

View the AMIS Detail Record and Remove the Record

3. Related record fields that have a **“Clear”** option next to them allow you to remove the current record so that you can select another record. Simply click on the **“Clear”** link to remove the record. If a field allows for multiple selections, an **“Add”** option will also appear next to it.

5.7 Adding Attachments

Required attachments must be uploaded using the Drag & Drop feature in the AMIS Application. External attachments will not be allowed. You will see the Drag & Drop box below any question that requires an attachment.

Submit organizational chart(s) that depict the following:

- The Applicant's relationship to its Controlling Entity as well as any Affiliate or Subsidiary entities (if applicable); and
- The Applicant's staffing structure (including names of key personnel), including Advisory Board/Governing Board and key board committees.

TIP: Be sure to refer to the Applicant Instructions (page ii) for information regarding the submission of these documents. All attachments must be submitted online through the Applicant's AMIS account.

(a) Submit organizational chart(s):

DRAG & DROP

Upload Document Here *

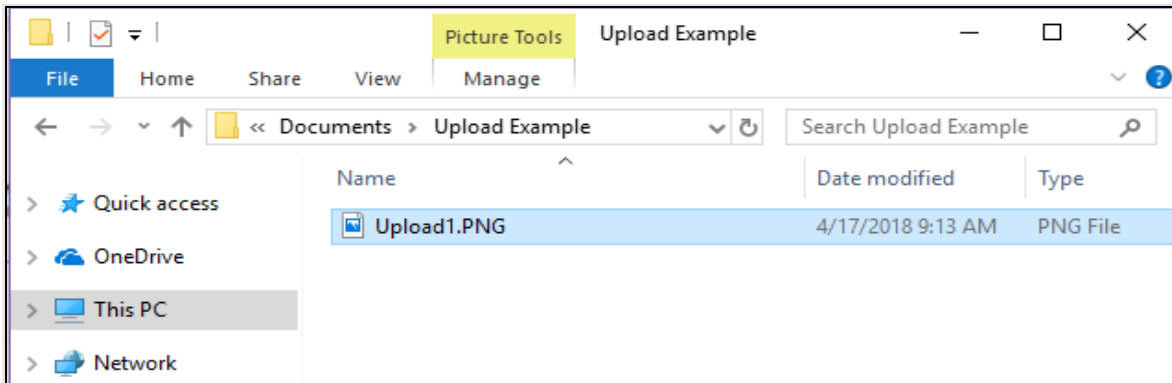
Drag & Drop Upload Box

In the CY 2026 Application, this box appears in the following questions and sections:

- Q. 28(a) – Submit organizational chart(s)
- Q. 37(b) – Commitment Letters, Letters of Interest/Intent
- Controlling Entity's Certification – *Controlling entity* Signed Certification

To upload using the Drag & Drop:

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



Attachment to Upload in File Explorer

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

Submit organizational chart(s) that depict the following:

- The *Applicant's* relationship to its *Controlling Entity* as well as any *Affiliate* or *Subsidiary* entities (if applicable); and
- The *Applicant's* staffing structure (including

TIP: Be sure to refer to the *Applicant* Instructions submitted online through the *Applicant's* AMS

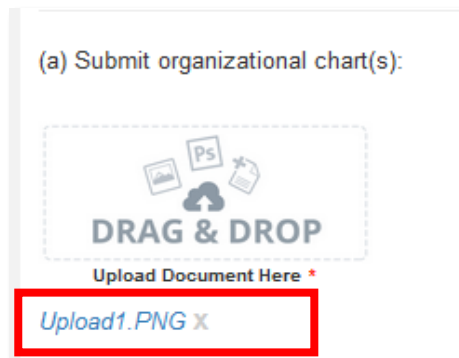
(a) Submit organizational chart(s):



(b) Complete Table C2. Identify personnel, including consultants and board members (if applicable) that will have a key role in:

Upload File Using Drag & Drop

3. Once it is successfully uploaded, the file name will appear below the Drag & Drop box.



Successful File Upload

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

5.8 Dynamic Record Tables

The NMTC application may require the applicant to enter a list of records, like Projects or Transactions as part of the application. These records are a series of questions that are repeated to the applicant and are collected dynamically through the application. An applicant may need to add 2 records or 15 records depending on the application question.

The application features both dynamic record entry tables and direct-entry tables. (For instruction on entering data into direct-entry tables, please see section 5.9).

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

Overview (1) Add Row						
Record Number	Completed	Name of Investor	Type of Investment	Using Leverage Structure?	Affiliate of the Applicant?	Previous Investor?
New Row (active)						
◀ ▶ Add Row						

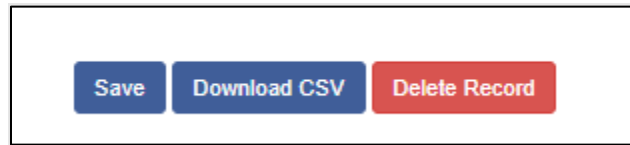
Empty Dynamic Entry Table

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

New Row	
Record Number (Enter a number to identify the Entry - Example 1,2,3,4 etc.)	
Total (Roll-up) of ALL Funding Provided from 2013-2018 (if previous investor)	
Total (Roll-up) of ALL Dollar Amounts Sought	
Question	Response
Name of Investor *	40 Characters Remaining
Type of Investment ¹ *	
Using Leverage Structure? *	
Affiliate of the Applicant? *	

New Row Entry Fields

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



Dynamic Table Buttons and Footnotes

To add or edit dynamic table records:

1. Complete the field entry form for your first record. On the form you will see:
 - a. Record Number – Example “1,2,3,4”. This is your record number. Once you save, this will become the number of the row in the table overview where it will be hyperlinked, allowing you to return to the record at any time. This field allows up to one decimal place.
 - b. Totals or Roll-Ups – You will not enter any information into these fields, rather, they will display results of calculations based on the data you input into the rest of the form. When one or more fields are totaled across all records it will be displayed as shown and labeled accordingly. Sums are updated with each save.
 - c. Record Questions and Responses – Enter your responses to the questions for this record collection. When all fields are complete, click “**Save**”.

Record Number (Enter a number to identify the Entry - Example 1,2,3,4 etc.) a

Total (Roll-up) of ALL Funding Provided from 2013-2018 (if previous investor)

Total (Roll-up) of ALL Dollar Amounts Sought b

Question	Response
Name of Investor *	40 Characters Remaining
Type of Investment *	
Using Leverage Structure? *	
Affiliate of the Applicant? *	
Previous Investor? ² *	c
Total Funding Provided from 2013-2018 (if previous investor) *	\$ 0 Decimal Places
Dollar Amount Sought *	\$ 0 Decimal Places
Status of Request ³ *	40 Characters Remaining
Estimated or Actual Date for Receipt of Funds *	

Fields Entry for New Record

- When you have finished entering data for a new record, click the **“Save”** button. This will create a new row in the table overview at the top of the page and display any calculated sums in the rollup fields.

Record Number	Completed	Name of Investor	Type of Investment	Using Leverage Structure?	Affiliate of the Applicant?	Previous Investor?	Total Funding Provided from 2013-2018	
1.0 (active)	✓	ABC Investor	Debt	Yes	Yes	Yes	300,000	50,000
4								

[Add Row](#)

1.0

Record Number (Enter a number to identify the Entry - Example 1,2,3,4 etc.)

1.0

Total (Roll-up) of ALL Funding Provided from 2013-2018 (if previous investor)

300,000

Total (Roll-up) of ALL Dollar Amounts Sought

50,000

New Record Row in Table Overview and Updated Rollup Fields

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

Record Number	Completed	Name of Investor	Type of Investment	Using Leverage Structure?	Affiliate of the Applicant?	Previous Investor?	Total Funding Provided from 2013-2018	D
1.0 (active)	✓	ABC Investor	Debt	Yes	Yes	Yes	300,000	50,000

[Add Row](#)

4. Active Record Indicator and Add Row Link

This will create a new active record row in the overview table. Fill in the empty fields in the New Row section below just as you did for the first record. Click **"Save"** to populate the table overview with your second record's data and to update calculated fields.

Overview (2)							Add Row
Record Number	Completed	Name of Investor	Type of Investment	Using Leverage Structure?	Affiliate of the Applicant?	Previous Investor?	
New Row (active)							
1.0	✓	ABC Investor	Debt	Yes	Yes	Yes	

[Add Row](#)

New Active Record Row

- Repeat this process to add additional records as needed.
- To edit any record, click on the hyperlink of the record name in the overview table.

Record Number	Completed	Name of Investor	Type of Investment	Using Leverage Structure?
1.0	✓	ABC Investor	Debt	Yes
2.0 (active)	✓	DAC Investor	Equity	No

Selected Active Record

- Some tables have maximum entry limits. The remaining rows will appear on the bottom right corner.

Overview (1)

Record Number	Completed	Name	Firm
New Row (active)			

14 Remaining Rows

8. This will pull up the record's field form. Update any information as needed and **Save**.

To delete dynamic table records:

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



Delete Record

To Download CSV:

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



Download CSV Button

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

	A	B	C	D	E	F	G	H	I	J	K	L
							Total Funding Provided from 2013-2018	Dollar Amount Sought	Status of Request	Est or Actual Date for Receipt of Funds	Table E3 - Question 10	Table E3 - Question 11
1	Name	Name of Investor	Type of Investment	Using Leverage Structure?	Affiliate of the Applicant?	Previous Investor?						
2	1	ABC Inves	Debt	Yes	Yes	Yes	300,000	50,000	Pending	6/27/2019	4,300,000	70,000
3	2	DAC Inves	Equity	No	No	No	4,000,000	20,000	Pending	6/27/2019	4,300,000	70,000
4												

Sample CSV of Dynamic Record Table

5.9 Direct-Entry Tables

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

Calendar Year(s)	2013	2014	2015	2016	2017
1 Total # CDEs financed	1	1	1	1	1
2 Total \$ amount of financing	\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000
3 \$ Amount of financing (debt)	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000
4 \$ Amount of financing (equity)	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000

Sample Direct-Entry Table

In the sample table above, you can see that a direct-entry table simply allows you to enter responses to multiple question rows for a number of different columns at the same time.

To navigate the table, simply use the “left to right” slide bar. If the number of columns exceeds the standard screen format, the slide bar will allow you to access the columns to the right. If using the Tab key during data entry, please note Tab moves the cursor to the field in the column to the right.

Some tables have formula fields that auto-calculate a sum based on the formula configured and the table data entered. These fields will populate as you are updating the table once all table fields included in the embedded formula are entered. Sum calculations only display after clicking SAVE.

2018 YTD	Totals (2013-2018)	Totals to Business (2013-2018)
1	6	
\$ 100,000	600,000	\$
\$ 50,000	300,000	\$
\$ 50,000	300,000	\$

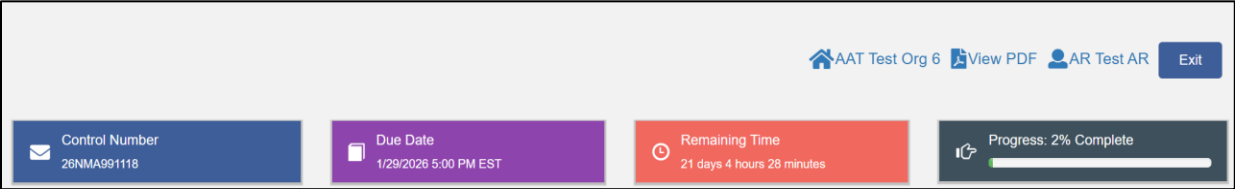
Formula Field Calculated Totals

5.10 Export to PDF

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

To generate a PDF version of the application:

- 1. Navigate to the stationary menu bar at the top of the application.



UI Menu Bar

- 2. Select **View PDF**.

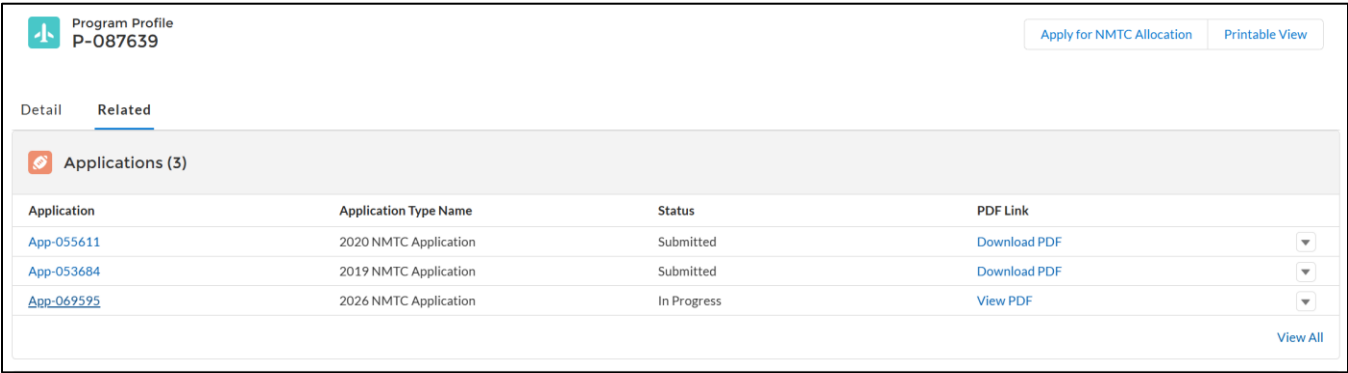


View PDF

- 3. This will open a PDF of the application and your organization’s responses in a new window. Download and save the PDF using your browser’s download function.

To view the PDF from the Program Profile page:

- 1. Log in to AMIS.
- 2. Click on the “Organizations” tab and select your organization. On your organization’s detail page, navigate to the Active Program Profiles related list.
- 3. Select the NMTC Program Profile.
- 4. On the Program Profile Related tab, navigate to the Applications related list.



Applications Related List

- 5. Select the **View PDF** link to generate a PDF of the application.

Note: Once the application is submitted, you will no longer be able to launch the application and generate a PDF in the UI. However, you will still have access to a PDF of your application from the Program Profile detail page.

SECTION 6.0 - INSTRUCTIONS FOR SELECTED SPECIFIC QUESTIONS

TIP: The best strategy for filling out application questions must be completed in numerical order to ensure accurate saved responses in the electronic application. Answers to certain questions may affect other parts of the electronic application. You may be required to fill out additional questions/exhibits or prevented from filling out questions/exhibits based on your responses to previous questions.

6.1 Allocation Application Homepage

- 1) When you first enter the electronic application, you will be required to certify that you have read all the resources provided by the CDFI Fund.
- 2) You will also be notified with an alert message if the organization through which you are applying is certified as a *Subsidiary CDE* in the CDFI Fund's IT systems and, as such, is not able to apply for an *NMTC Allocation*. You will not be able to continue to the *Allocation Application* if you receive this alert. If you require information technology assistance in using the electronic *Allocation Application*, please submit an AMIS Service Request (set the Record Type to "Technical Issue" and the Program Topic to "AMIS technical Problem"). Use of AMIS Service Requests is the best method to submit and track your request. The *Allocation Application* must be submitted by the parent *Applicant CDE* by logging into the parent *Applicant CDE's* AMIS account and using that account to access the electronic application.

6.2 Application Registration Details

The Application Registration consists of 7 questions. Some of the questions have multiple fields to answer (e.g., mailing address). In total, 25 fields will be submitted when complete. All the questions, and every sub-field, are required.

The Application Registration must be submitted by the registration deadline date. To submit the registration, the applicant needs to **save and lock** it. The applicant can save the registration—without locking—and return to it for further updates at any point up to the registration deadline. To save and lock the registration, the applicant must answer the final question on the registration that asks if the registration should be locked. Once locked, the registration questions cannot be changed. A Timestamp of Completion will be auto-generated populated when both the checkbox "Yes" dropdown option and the "Save" button are selected.

Lock and Save Question

Select "Yes" to lock all answers in this section then click the "Save" button to complete the Application

A Timestamp of Completion will be auto-populated when both the "Yes" dropdown option and the "Save" button are selected.

*

This response is required.

Yes - I want to Lock and Save my Application Registration

When the registration is "Locked and Saved", most of the answers in the registration flow directly to specific questions in the Application. Once locked, the corresponding application answers cannot be changed.

TIP: You will no longer be able to edit your Application Registration after locking and saving your responses. Since your registration answers directly impact several Application questions, it is a good idea to keep your registration unlocked until you're ready to submit it prior to the registration deadline.

The screenshot shows the '2026 NMTC Application - NMTC Application Registration' page. On the left is a 'Table of Contents' sidebar with links to 'Application Instructions', 'NMTC Application Registration', 'Application Materials', and 'Confirmation of Application Materials'. The main content area is titled 'NMTC Application Registration' and includes a 'Bookmark Subsection' checkbox. Below the title, there are two questions: 'Q. 1(a) Applicant Name' with a text input field containing 'AAT Test Org 6', and 'Q. 1(b) Applicant Employer Identification Number'.

Example of Questions in Application Registration

The screenshot shows the '2026 NMTC Application - Applicant Information - Q.2 - Applicant Information' page. The 'Table of Contents' sidebar on the left lists various sections, including 'Q.15 - Certifications for the Applicant', 'Q.16 - Q.17 Individuals or Entities of the Applicant (General Certifications)', 'Q.1 - Applicant NMTC Allocation Request', 'Q.2 - Applicant Information', 'Q.3 - Controlling Entity Information', and 'Q.4 - Applicant Mailing Information'. The main content area is titled 'Q.2 - Applicant Information' and includes a 'Bookmark Subsection' checkbox. It contains three questions: '(a) Applicant Name' with a text input field containing 'AAT Test Org 6', '(b) Applicant Employer Identification Number' with a text input field containing '25-2525252', and '(c) Structure of the Applicant:' with a dropdown menu. Below the dropdown, there is a question 'Is the Applicant a For-profit or Non-profit entity?*' with a corresponding dropdown menu.

Example of Corresponding Questions in Applicant Information

Answers to each field are populated in one of three ways:

1. pre-populated* based on your organization's data in AMIS;
2. selected through a dropdown picklist; or
3. selected through a lookup where the user begins typing into the field and the possible answers, based on data in AMIS, display from which the user must select.

*Note that to change an answer to a pre-populated question, you must change it in AMIS first. The answer will flow to the registration. (You may need to refresh the application for the change to update in the registration.) Changes made in AMIS after the registration is locked will not be reflected.

To modify the pre-populated data:

1. Log in to AMIS.
2. Click on the "Organizations" tab and select your organization.
3. On your organization's detail page, find the information you want to edit and double click the field.
4. Edit the field and click "**Save**".

Registration Questions 1(a) to 7

- Question 1(a) *Applicant* Name
 - Pre-populated from AMIS
 - Answer flows to the Application section 'Applicant Information' Q. 2(a)
- Question 1(b) Applicant Employer Identification Number
 - Pre-populated from AMIS
 - Answer flows to the Application section 'Applicant Information' Q. 2(b)
- Question 1(c) is the Applicant a domestic corporation or partnership for federal tax purposes?
 - Picklist selection
 - Answer selected flows to the Application section 'Applicant Information' Q. 2(e)
 - If the applicant is neither a domestic corporation or partnership for federal tax purposes, it is not eligible to apply for an NMTC Allocation
- Question 1(d) Applicant's date of incorporation or formation (month/day/year)
 - Pre-populated from AMIS
 - Answer flows to the Application section 'Applicant Information' Q. 2(f)*
 - Note that this question corresponds to Application Q. 2(f) **not** Q. 2(h)
- Question 1(e) Applicant's fiscal year end (month/day) (update in AMIS)
 - Two sub-fields ('Fiscal Year End Month' and 'Fiscal Year End Day') are pre-populated from AMIS
 - Both sub-fields flow to the Application section 'Applicant Information' Q. 2(h)*
 - Note that this question corresponds to Application Q. 2(h) **not** Q. 2(f)
- Question 2(a) Would the Applicant like to designate a *Controlling Entity* (CE)?
 - Picklist selection

- The “Yes” or “No” “Yes” or “No” answer is related to—but **does not** automatically flow to—the Application section ‘Applicant Information’ for Q.3 *Controlling Entity Information*
- If the applicant selects “Yes” to this question, two sub-fields display:
 - Q. 2(b) Controlling Entity Name – Response allows for 100 characters of text. This information will automatically flow to the Application Section for Q.3(a) Controlling Entity Information as well as the Controlling Entity Signature Page.
 - Q. 2(c) Controlling Entity Employer Identification Number – Response allows for 10 characters of free text. This information will automatically flow to the Application Section for Q.3(b) Controlling Entity Information
 - Both sub-fields Q. 2(b) and Q. 2(c) from the Registration section flow to the Application section ‘Applicant Information’ Q. 3(a) and Q. 3(b)
 - Note that you will need to select “Yes” to the ‘Applicant Information’ Q. 3 in the Application section, “Is the Applicant designating a Controlling Entity?” to see the populated fields for Questions 3(a) and 3(b)
 - The applicant must fill out the Application Q.3 subquestions (c)-(f) as directed in the instructions
- If the applicant selects “No” to this question in the Registration section, sub-fields Q. 3(a) and Q. 3(b) **will not** display in either Registration or Application sections, and no further action is required for this question
 - Note that a “No” response to this question in the registration disables Q. 3(a) and Q. 3(b) in the ‘Registration’ section and you will not be able to edit Q. 3(a) and Q. 3(b) in the “Application” section. This is true even if you select “Yes” to the parent Q 3 in the Applicant” section
- Question 3(a) Applicant Mailing Address (update in AMIS)
 - Four sub-fields (‘Address’, ‘City’, ‘State’, and ‘Nine-Digit Zip Code’) are pre-populated from AMIS
 - All four sub-fields flow to the Application section ‘Application Information’ Q. 4 for ‘Applicant Mailing Address’
- Question 3(b) Applicant Shipping Address (update in AMIS)
 - Four sub-fields (‘Address’, ‘City’, ‘State’, and ‘Nine-Digit Zip Code’) are pre-populated from AMIS
 - All four sub-fields flow to the Application section ‘Application Information’ Q. 4 for ‘Applicant Shipping Address’
- Question 4(a) Primary Registration Contact Person -
 - Lookup field – The applicant starts typing in the field and a list of the organization’s Authorized Representatives displays to select from.
 - Confirm Organization Name and Email for selected individual are correct.
- Question 4(b) Secondary Registration Person Information - Provide Name,
 - Lookup field – The applicant starts typing in the field and a list of the organization’s Contacts displays to select from.

- Confirm Organization Name and Email for selected individual are correct.
- Question 5(a) Has the Applicant already been certified as a CDE by the CDFI Fund or submitted a CDE Certification Application by the deadline in the NOAA?
 - Picklist selection
 - The select answer flows to the Application section 'Application Information' Q. 6(a)
- Question 5(b) CDE Certification Number
 - The CDE Certification control number will be pre-populated from AMIS if an Applicant is certified as a CDE. If the field does not populate correctly, please submit a Service Request as soon as possible.
- Question 5(c) By the stated deadline in the NOAA, is the Applicant filing a service area amendment in connection with this application?
 - Picklist selection
 - The select answer flows to the Application section 'Application Information' Q. 6(b)
- Question 42 Is the prior CDFI Award information complete?
 - Picklist selection
 - The Applicant should review the Award information in the Application section 'Part V: Information Regarding Previous Awards' before selecting "Yes" or "No"..
 - The selected answer from the Registration section flows to the Application section 'Part V: Information Regarding Previous Awards' Q. 42
- Question 43 Is the prior NMTC Award information complete?
 - Picklist selection
 - The Applicant should review the Award information in the Application section 'Part V: Information Regarding Previous Awards'
 - The selected answer from the Registration section flows to the Application section 'Part V: Information Regarding Previous Awards' Q. 43

Once you have completed all the Application Registration questions, you can lock your responses using the dropdown shown below. Select **"Yes"** from the dropdown and click **"Save"**.

After the Application Registration has been saved and locked, you **will no longer be able to make changes to it.**

Once the Registration section has been saved, a Timestamp will generate.

Timestamp of Completion

01/08/2026 12:39 PM EST

Save

Timestamp

After completing the Application Registration, the Primary Registration Contact Person designated in the Registration section will receive an email with the following message:

Hello,

This message is a confirmation that you have successfully completed the NMTC Application Registration Section of the CY2024-2025 Allocation Application.

You must complete the remaining sections of the CY 2026 Allocation Application by the deadline in the NOAA.

Note: Your organization's designated Authorized Representative will need to validate the required certifications/attestations and press the "Submit the Application" button on the "Attestation and Submission" page to successfully submit the completed Allocation Application.

-The CDFI Fund

Notification of Completed NMTC Application Registration

6.3 Assurances and Certifications

You will be asked to complete the Assurances and Certifications section. The Assurances and Certifications section is divided into nine subsection pages in the electronic application (Questions 1-17 and additional certifications).

 Assurances and Certifications
☐ Q1 to Q9 - General Certifications (Eligibility Questions)
☐ Q10 - Q11 (General Certifications)
☐ Q12 - Certifications for the Controlling Entity (General Certifications)
☐ Q13 - Certifications for the Applicant (General Certifications)
☐ Q14 - Certification for the following individuals or entities of the Applicant (General Certifications)
☐ Q15 - Certifications for the Applicant (General Certifications)
☐ Q16 - Q17 Individuals or Entities of the Applicant (General Certifications)
☐ Certification Regarding Debarment, Suspension, and Other Responsibility Matters — Primary Covered Transactions
☐ Supplemental Certification

Assurances and Certifications Section in Application Menu

Please select “True”, “False”, or “Not Applicable” (where available as an option) to each certification in these sections. By selecting “True” the *Applicant* is certifying that the corresponding statement is true. By selecting “False” the *Applicant* is certifying that the corresponding statement is not true. By selecting “Not Applicable” the *Applicant* is certifying that the corresponding statement is not applicable to their application.

- 1) General Certifications 1-9 (Eligibility Questions): To proceed and complete other sections of the electronic application, the *Applicant* must respond “True” to certify to these General Certification questions. If the *Applicant* responds “False” in this section, an error message will appear stating that the *Applicant* is **ineligible to apply** if they are unable to provide General Certifications 1-9.

As the *Authorized Representative* of the *Applicant*, I hereby assure and certify to the General Certification Questions 1 through 9 above: *

The Applicant is not eligible to apply if the Applicant is unable to provide General Certifications numbered 1 through 9.

False

▼

General Certifications Error Message

- 2) General Certifications 10-17: If the *Applicant* answers “False” to any of the statements in this section, then the *Applicant* is required to provide an explanation stating the reasons the *Applicant* is unable to make that certification.

10. The Applicant and its Affiliates have never filed for bankruptcy.

For Applicants *

True

▼

For Affiliates *

▼

General Certification Question- “True” Response

When the *Applicant* selects “False”, a text box will appear on the form where the *Applicant* will be required to provide an explanation.

10. The Applicant and its Affiliates have never filed for bankruptcy.

For Applicants *

False

Question 10 Applicant Explanation - If you answered 'false' to Question 10, you are required to provide an explanation.

1000 Characters Remaining

General Certification Question- "False" Response and Text Box

- 3) Certification Regarding Disbarment, Suspension, and Other Responsibility Matters-Primary Covered Transactions: **If the *Applicant* answer "False" to any of the statements in this section, then the *Applicant* is required to submit a written explanation stating the reasons the *Applicant* is unable to make that certification.** When the *Applicant* selects "False", a textbox will appear on the form where the *Applicant* will be required to provide an explanation. Please refer to the Supplemental Certification for Assurances and Certifications in the pdf application.

6.4 Applicant Information

PLEASE NOTE: Some application questions do not have corresponding guidance below. For questions without guidance below, *Applicants* should refer to the prompts within the electronic application and any other published application materials.

- Questions 2 & 3:** You will be asked to provide general information about the *Applicant* and *Controlling Entity* (if applicable).
- a) The *Applicant's* name will be populated automatically by the data in your AMIS account. You will not be able to alter this data point in the electronic application.
 - b) The *Applicant's* EIN will be populated automatically by the data in your AMIS account. You will not be able to alter this data point in the electronic application. **If you need to modify your EIN, you will have to file a service request through AMIS.**
 - c) The *Applicant* will indicate if their organization is a For-Profit or Non-Profit entity by selecting from the picklist. In the Multi-picklist below, select all that apply to your organization. To select multiple entries, hold down the Ctrl key as you click on each descriptor. If none of these descriptors apply, please select "None of the Above" at the bottom of the list.

- d) You will be asked in Qs. 2(d) and 3(e) if the *Applicant* and *Controlling Entity* (if applicable) is *Native American-owned or Native American-controlled*. Applicants should refer to the glossary for the definition of *Native American-owned or Native American-controlled*.
- e) You will be asked in Q. 2(d) if the *Applicant* is a domestic corporation or partnership for federal tax purposes. **If the *Applicant* is not a domestic corporation or partnership for federal tax purposes, it is not eligible to apply for a NMTC Allocation.**
- f) The *Applicant's* date of incorporation will be populated automatically by the data in your AMIS account. You will not be able to alter this data point in the electronic application.
- g) The *Applicant* will enter their total assets as of the publication date of this Allocation Application.
- h) The *Applicant's* fiscal year end (month/day) will be populated automatically by the data in your AMIS account. You will not be able to alter this data point in the electronic application. If this information is incorrect you may return to your Organization record by clicking the Organization hyperlink on the top of the application page. This will open your Organization record and the Fiscal Year end, (month/day) can be changed in the "Organization Type Section".

You will be asked in Question 2(i) if *Affiliates* of the *Applicant* are also applying for a NMTC allocation in the CY 2026 NMTC Round. **If you select "Yes", then the *Applicant* is not eligible to apply for a NMTC Allocation.** In Question 3, you will be asked if the *Applicant* is designating a *Controlling Entity*. You must select the answer again **regardless** of how you respond to the question in the registration. In Question 3, you will be asked to select the track record of either the *Applicant* or *Controlling Entity* to complete all tables in Exhibit B, as well as Table D1. Your selection will be pre-populated in the tables.

Questions 5:

You will be asked to select, from a drop-down menu, the individual(s) from your organization that you would like identified as the *Applicant Authorized Representative*, *Controlling Entity Representative* (if applicable), *Application Contact Person* (for this application), and *Public Contact Person*. Once you select their name from the drop-down search, their org name and email information will be prepopulated. Only the *Applicant Authorized Representative* associated with the Applicant organization will be able to complete attestation and submit the application. If any of this contact information needs to be edited, the contact must log in to their AMIS account and edit their own information. If you would like to identify an individual that does not appear on this list, you will need to add this

person to the list of users for the *Applicant* organization in your AMIS account.

It is **strongly** recommended that the *Application Contact Person* listed is someone other than the *Applicant Authorized Representative* since the CDFI Fund will contact both individuals during the course of the *Allocation Application* review with questions or requests for additional information regarding the *Allocation Application*.

Question 6:

If the *Applicant* selects “Yes” to indicate they have already been certified as a *CDE* by the CDFI Fund or submitted a CDE Certification Application by the deadline in the *NOAA* in the Application Registration, a field will appear on the page auto-populated with the *CDE* Control Number by data in the CDFI Fund’s *CDE* certification database. If a *CDE* certification Control Number is not automatically populated in Q. 6, this means that the CDFI Fund has not approved a *CDE Certification Application* from the *Applicant*. **The Applicant will not be able to submit an electronic CY 2026 NMTC Allocation Application if a CDE Certification Control Number is not populated in Question 6.**

If you believe the *Applicant* has submitted a *CDE Certification Application*, and thus a Control Number should appear in Question 6, please submit an AMIS Service Request, set the Record Type to “General Inquiry” and the Type to “*CDE* Cert – General Question.”

In the meantime, you may continue to complete and save information in other parts of the application. However, you cannot submit an electronic *Allocation Application* until such time as a **CDE Certification Control Number** automatically populates in Question 6.

Questions 7-8:

You will be asked to select your service area, which **must be the same as the service area designated by the CDFI Fund in its official letter of CDE Certification** for your organization. If your organization has not yet been certified as a *CDE*, then it should be the same service area designated in your *CDE Certification Application*. If your organization has indicated in 6(b) that you are requesting a service area amendment, you should describe your service area including the requested amendment.

- a) Select a service area in Q. 7 (i.e., national, multi-state, statewide or local). Click “**Save**” and navigate to Q. 8.

- b) In Question 8, Select “Yes” if a National Service area then identify the state(s) you intend to serve. Select states by using the multi-select dropdown list of states. Use the CTRL key while clicking to select multiple states. Click “**Save**”.

Question 12:

You will be asked to estimate how long the Allocation Application took to complete. Enter the number of hours used to complete the application.
You must answer this question in order to complete and submit the electronic application. No extensions will be given for failure to complete this question and submit the electronic Allocation Application by 5:00pm ET on the application deadline (specified in the NOAA).

6.5 Part I: Business Strategy

Question 13:

You will be asked to indicate the types of Quality Low Income Community Investment (*QLICI*) activities in which you intend to engage.

- a) If you answer “No” for Q. 13(a) **you will be deemed ineligible** and cannot submit an Allocation Application.
- b) In Question 13(b) – Table, you will be prompted to answer a question about whether or not you will have values (Greater than zero) for each of four categories and you will be asked to provide the percentages of your allocation that will be used for each of the four categories of *QLICI* activities. If ZERO, please enter “0”. The percentages apportioned to each activity (i-iv) must total 100 percent for (i) through (iv) The table at the bottom of the page will sum (i) through (iv) once values are entered and saved.
- i. For (i), Table A1 and Table A5 will be visible if the percentage exceeds zero.
 - ii. For (ii), Table A2, Table A5, and Q.14(c) will be visible if the percentage exceeds zero.
 - iii. For (iii), Table A3 and Q.16 will be visible if the percentage exceeds zero.
 - iv. For (iv), Table A4 will be visible if the percentage exceeds zero.
- c) In Question 13(b) – Dependent Questions, upon clicking “**Yes**”, a second level of sub-questions may be required for additional data for applicable *QLICIs* (e.g., if you indicated a percentage greater than 0 for “Investment, or loans to, other *CDEs*”, then you will be asked to indicate if you plan to originate loans or capital/equity, and you will also

be asked to quantify the activities in which the recipient *CDEs* will engage).

d) Once you have entered the additional data required, click “**Save**”.

(i) Will the Applicant make investments in, or loans to, *Qualified Active Low-Income Businesses (QALICBs)*? If yes, the responses below are required. *

Yes

Loans/investments in *QALICBs* will be used to finance: (these three percentages should add up to 100 percent by dollar amount)

----- (1) Enter percent of *Non-Real Estate Activities* *

----- (2) Enter percent of *Real Estate Activities* where the real estate will be owned (either directly or through an *Affiliate*) and principally occupied by an *Operating Business*. *

----- (3) Enter percent of *Real Estate Activities* where the real estate will be principally leased to third party tenants or sold to a third party. *

Total of (1), (2) and (3) Must Equal **100%**

(ii) Will the Applicant make investments in, or loans to, other *CDEs*? If yes, the responses below are required. *

(iii) Will the Applicant purchase loans from other *CDEs*? If yes, Table A3 is required. If no, Table A3 is not required and will no longer be visible in this application. *

(iv) Will the Applicant provide *Financial Counseling and Other Services*? If yes, the response below is required. If yes, Table A4 is required. If no, Table A4 is not required and will no longer be visible in this application. *

Example of Second Level Questions

Question 14:

a) Indicate the number of financial products the Applicant intends to offer with capital raised from an NMTC Allocation. A financial product may consist of one or more financial notes. Applicants may describe up to three separate financial products.

b) For each Financial Product you intend to offer, provide a narrative to describe the product in the first field; and indicate the expected percentage of the Allocation that product will make up in the second field.

c) For an *Applicant* that indicated under Q. #13(b) that it intends to finance other *CDEs*, describe the strategy by which the *Applicant* will ensure that those *CDEs* will pass along the NMTC benefits to their *QALICB* borrowers in the form of more favorable rates or terms.

Click “**Save**” when complete to save your work and mark this section complete.

NOTE: The total percentage of Financial Products must add up to 100%.

Question 15:

This is a picklist question. The *Applicant* will select the statement that best completes this statement.

“The Applicant will commit that 100 percent of its QLICs will.” Please read each statement carefully and select the corresponding option, a, b, c, d, e, or f, from the dropdown list.

a) **Click “Save” when finished to save your response.**

Question 16:

For an *Applicant* that indicated under Q. 13(b)(iii) above that it plans to purchase qualifying loans from other CDEs:

Provide a “Yes” or “No” response to Q.16(a). Will the *Applicant* require the CDE from which it purchases loans to reinvest all or a portion of the proceeds from the loan sales in QLICs?

Provide a narrative response for Q. 16(b). Describe the extent to which the *Applicant* intends to purchase loans that include rates, terms and/or with conditions that would not be possible without the benefit of an NMTC Allocation. **Click “Save” when finished to save your responses.**

Questions 20 & 21 Questions 20 & 21 will appear in the same subsection and on the same page.

- a) For Q. 20(a), based on which “Yes” or “No” response it selected, it will enable Tables B1-B3. **Click “Save” when finished to save your responses.**
- b) For, Q. 20(b) provide a narrative discussion of the organization’s track record relevant to each type of activity selected (including *FCOS*) in Question 13, referencing data included in Tables B1-B3, as appropriate.
- c) Next, Q. 21(a) you will be instructed to complete Table B4, as applicable.
- d) For Q. 21(b) provide a narrative discussion of the organization’s track record referencing Table B4 as appropriate. **Click “Save” when finished to save your responses.**

Question 22:

You will be asked to indicate if at least 50 percent of the *Applicant’s* total financing activities over the past five years, as shown in Exhibit B, have been directed to *Non-Metropolitan Counties*.

- a) First, provide a “Yes” or “No” response to Q. 22(a).
- b) Enter the number of years (ranging from 0-6) that you provided direct financing to *Non-Metropolitan Counties* as shown in Exhibit B.
- c) Enter a number for the minimum percentage of *QLICs* you are willing to commit to providing in *Non-Metropolitan Counties*.

- d) Enter a number for the maximum percentage of *QLICs* you are willing to commit to providing in *Non-Metropolitan Counties*.
- e) If the response to Q. 22(d) is greater than zero, subsection Q. 22 (e-f) will be enabled when you save your responses for Q. 22(a, b, c, d). If the response to Q. 22(d) is less than or equal to zero you will not have to complete these additional questions and they will not be visible on the application.
- f) If the Q. 22 (e-f) subsection is enabled, you will be required to complete a narrative for both questions.. **Click “Save” when finished to save your responses.**

Questions 23 & 24: In Q. 23, you will be asked if you intend to use substantially all of the proceeds of the *QEI*s to make investments in *Unrelated Entities*. In Q. 24 you will be asked to describe any potential situations in which you or your *Affiliates* will receive financial benefits from the *QALICBs* financed with the *QLICs*.

- a) First, provide a “Yes” or “No” answer to Q. 23. Click **Save**.
- b) In Q. 24, provide a “Yes” or “No” response to 24(a) – 24(e). If you select “Yes” you will need to provide the required narrative for Q. 24(a) – 24(e).
- c) Once you have provided all required data and narratives, click **Save**.

6.6 Part II: Community Outcomes

Question 25: In Q. 25, you will be asked if you intend to use your *QEI* proceeds to finance *QLICs* made in one or more geographic areas characterized by higher distress.

First, indicate the areas of higher distress you intend to serve by selecting a YES/NO response for each area of higher distress indicated.

- a) In Q. 25(a), you will be asked if you commit to providing at least 85% of your total *QLICs* (in terms of aggregate dollar amount) in areas that are either (1) characterized by at least one of items 1-5 on the list provided in the electronic application for each *QLIC*; or (2) characterized by at least two of items 6-12 on the list provided in the electronic application for each *QLIC*.
- b) In Q. 25(b)(i), you will be asked to select the percentage of *QLICs* (in terms of aggregate dollar amounts) the Applicant will commit to providing in areas characterized by at least one of five items in the list below for each *QLIC*?

NOTE: If the percentage is greater than ‘20’, select ‘20’ from the dropdown. You will enter the maximum percentage in Q. 25(b)(ii).

- i. If selecting '0', questions (b)(ii)1-4 and (c) will not be visible.
- ii. If selecting '5', '10' or '15', questions (b)(ii)1-4 and (c) will display.
- iii. If selecting '20', questions (b)(ii) 1-4 and (c) will display.

Question 26:

You will be asked to indicate the community development outcomes you expect to achieve as a result of the projected *QL/C/s* described in the Business Strategy section.

- a) In Q. 26(a), indicate which outcomes you expect to achieve, by selecting a "Yes" or "No" response for each impact. For each outcome where you provide a "Yes" response, a text box will appear for you to provide a narrative.
- b) In Q. 26(b) you will be asked to describe how the *Applicant* will track and document the community development outcomes it expects to achieve as a result of receiving an *NMTC Allocation*. Enter narrative in the text box provided. **Click "Save" when finished to save your responses.**

6.7 Part III: Management Capacity

Question 32:

If the *Applicant* or its *Controlling Entity* is a federally-regulated financial institution, in Q. 32(c) you must provide the name of that entity's federal regulator and certification number. If the *Applicant* has an Affiliate (other than the *Controlling Entity*) that is a federally-regulated bank, then the Applicant must provide the Affiliate's name, the name of its primary federal regulator and its certification number.

- a) Selecting "Yes" to Q. 32(b) will display subsection Q. 32(c) on a separate page – the 'Regulated Entity' Table. Users are required to complete Q.32(c) if "Yes" to Q. 32(b) is selected. Only one entry is allowed for "*Applicant*" and "*Controlling Entity*" types. Users can provide multiple entries for "*Affiliates*".
- b) Within the "FDIC/NCUA/FRB Certification or OTS Docket#" Column, only integers are allowed. Credit unions should provide their NCUA number in this field. Holding companies should provide their Federal Reserve Board number.

Question 33:

You will be asked to describe the financial health of the *Applicant* (or *Controlling Entity*):

- a) First, indicate if your response is: (1) for the *Applicant*; (2) for the *Controlling Entity*; or (3) not applicable.

- b) If you indicated “not applicable”, your responses for Qs. 33(a)–(d) should be “N/A.”
- c) If you indicated *Applicant* or *Controlling Entity*, you will need to provide “Yes” or “No” responses in Qs. 33(a)-(d). Where applicable, the form will provide text boxes to add narrative explanations of their responses. **Click “Save” when finished to save your responses.**

6.8 Part IV: Capitalization Strategy

Question 37:

Q. 37 includes multiple sub-questions. Based on the *Applicant’s* responses it will be prompted to complete additional sub-questions and/or tables in Exhibit E. In Q. 37(a), you must indicate whether the *Applicant* (or its Subsidiary *CDEs*) has received *QEI*s that meet the criteria outlined in the question.

- a) If the *Applicant* responds “Yes” to Q. 37(a), then no additional questions will display.
- b) If the response is “No” to Q. 37(a), then it should complete Q. 37(b), 37(c) and Table E1.
- c) In Q. 37(b), upload Commitment letters; Letters of Interest/Intent.
- d) In Q. 37(c), the *Applicant* can discuss the extent to which the *Applicant* may raise capital from equity and/or debt investors not listed in Table E1.

Question 38:

In Part (a) of this question, you will be asked to indicate if your current or prospective investors will originate or otherwise identify transactions in which the *Applicant* will invest. In Part (b), you will be asked to indicate if the *Applicant* will receive *QEI*s from *Affiliates*. If you answer “Yes” to either part (a) or (b), you should complete Part (c). If you answer “No” to both parts, you should enter “N/A” in response to Part (c). **Click “Save” when finished to save your responses.**

Questions 40 & 41: In Question 40, you will be asked to indicate if more than 85 percent of *QEI* proceeds will be invested/re-invested in *QLIC*s. If you select “YES,” please indicate the percentage in the data entry box that appears on the form. In Question 41, you will be asked to indicate if there is an absolute minimum below which you would not accept a *NMTC Allocation*. Provide a “Yes” or “No” response. If “Yes”, provide the minimum allocation amount you will accept in the data entry box that appears and a narrative response in the text box. **Click “Save” when finished to save your responses.**

6.9 Part V: Information Regarding Previous Awards

Questions 42-44: For Q. 42 and Q. 43 the *Applicant* can view their previous awards and allocations – under any of the CDFI Fund’s programs. Previous awards and allocations of any *Affiliates* will also be viewable in Qs. 42 and 43, to the extent that your *Affiliates* have been recorded in your AMIS account prior to beginning the *Allocation Application*.

If all previous awards and allocations are not pre-populated, the CDFI Fund strongly encourages you to update the *Applicant’s Affiliates on your AMIS account*. Please review your AMIS account and follow the instructions below to update any *Affiliates*. This will ensure that past award and allocation information will be viewable in future electronic applications.

- a) Log in to AMIS using your e-mail address and password.
- b) Select your Organization.
- c) You will see your AMIS Organization Record.
- d) Click on the “Related” tab
- e) Scroll down to the *Affiliates* section.
- f) Click “New *Affiliate*”.
- g) Enter the *Affiliate* Name and 9-digit EIN, click “Save”.

In Q. 44, you will be asked if the *Applicant* has received any previous allocations. if you are a previous *NMTC Allocatee*, *QEI* investor, or have Control of an *Allocatee*, you should select “Yes” and answer narrative questions a-e to discuss those previous *NMTC Allocation(s)*.

Question 45: You will be asked if the *Applicant* and/or any of its *Affiliates* assumed Control of a *CDE* that received a *NMTC Allocation* in a prior round.

- a) This question is a picklist field below the Overview table and *Allocatee* field.
- b) If you indicated “Yes” to Q. 45, answer the new questions that appear about your investments that assumed Control of another *CDE*. Add all the relevant information for an individual investment, then click “**Save**”. Locate the “Add Row” link on the overview table at the top of the page to add each additional investment. When you have finished entering data for all of these awards, review that all the information in the table is correct, then click “**Save**”.
- c) If you indicated “No” to Q. 45, you are not required to complete the remainder of Q. 45. Proceed to the next section of the application.

SECTION 7.0 – INSTRUCTIONS FOR EXHIBITS AND TABLES

- 1) Read the tips on each exhibit homepage and follow the instructions at the top of the page for each table.
- 2) The application features both dynamic record tables and direct-entry tables.
 - a. Dynamic record tables- Table rows are generated by creating individual records using the form below the overview table. The user will utilize the form fields to create as many records as needed for the table.
 - b. Direct-entry tables- The table is already laid out on the page and the user can directly enter data into each table field.
- 3) For an extended explanation on how to recognize and enter data into both types of tables, refer to Sections 5.8 (dynamic record tables) and 5.9 (direct-entry tables).

7.1 Exhibit A - Projected Activities

- 1) The system will only require you to complete those tables in Exhibit A that correspond to the *QLICI* activities you indicated you would engage in per Q. 13.
- 2) Tables A1-A4 are direct-entry tables. Fill in responses for each table field. Gray formula fields will auto-calculate sums once all fields included in the formula calculation are entered. For further details on how to enter records into a direct-entry table, please see section 5.9.
- 3) Table A5 is a dynamic record entry table. Add as many records as needed to list all proposed transactions. For further details on how to enter records for a dynamic record table, please see Section 5.8.

7.2 Exhibit B - Track Record of Activities

- 1) If you answered "Yes" to any of the Questions under 20(a) to indicate that you have a track record of providing the types of *QLICI* activities that you intend to offer, you will be required to complete the charts in Tables B1-B3 as applicable.
- 2) For those tables that are applicable, either *Applicant* or *Controlling Entity* will be displayed based on your selection made in Q. 3. If you wish to change this response you must change it in Q. 3. You must select one entity or the other.
- 3) Each table in this section is a direct-entry table. Fill in responses for each table field. Gray formula fields will auto-calculate sums once all fields included in the formula calculation are entered. For further details on how to enter records into a direct-entry table, please see section 5.8.
- 4) If you answered "Yes" to Q. 21, you will be required to complete Table B4. Follow the instructions on the table to provide accurate data.

7.3 Exhibit C – Staff and Board Qualifications

- 1) Follow the instructions provided on the subsection page for each table.
- 2) Both tables are dynamic record tables, for further detail on how to enter records for a dynamic record table, please see section 5.8.
- 3) The *Applicant* has a maximum of 15 entries in Table C2.

7.4 Exhibit D – Asset Management

- 1) In each applicable table, follow the instructions provided on the screens for each table.
- 2) Table D1 is a direct-entry table. Fill in responses for each table field. For further details on how to enter records into a direct-entry table, please see section 5.9.
 - a. For Table D1, your choice of using the track record of the *Applicant* or *Controlling Entity* will be prepopulated based on the response you provided in Question 3 of the “Application Information” section. If you need to change this, you must edit your response to the last field in Question 3 asking you to select the track record of either the *Applicant* or *Controlling Entity* to complete Exhibit B and Table D1.
 - b. For Table D1, the applicant is asked to select the entity’s most recently **completed** Fiscal Year. Once selected that year will display on the ‘Fiscal Year End’ row, under the far right column as ‘Year 3’. ‘Year 1’ and ‘Year 2’ columns will be prepopulated with two prior Fiscal Years accordingly based on the Fiscal Year selected for ‘Year 3’.
 - c. For Table D1 you may check “N/A” if the *Applicant* does not have a portfolio of *Operating Business Loans & Equity Investments*. You can also select “N/A” if the *Applicant* does not have a portfolio of *Real Estate Loans & Equity Investments*. The Applicant must enter “0” in all answer fields even if “N/A” is selected.
- 3) Table D2, is a dynamic record table, for further details on how to enter records for a dynamic record table, please see section 5.8.
 - a. Table D2 must be completed by all *Applicants*.
 - b. For Table D2, data must be provided for the *Applicant*. Do **not** provide data for the *Controlling Entity*.
- 4) Table D3 is a direct-entry table. Fill in responses for each table field. Gray formula fields will auto-calculate sums once all fields included in the formula calculation are entered. For further details on how to enter records into a direct-entry table, please see section 5.9.

7.5 Exhibit E – Investor Strategy

- 1) You should only complete Table E1 if you answer “No” to Q. 37(a).
- 2) Table E1 is a dynamic record entry table, for further details on how to enter records for a dynamic record table, please see section 5.8.

- 3) If you complete Table E1, you are required to submit copies of your investor letters with your application. If you fail to submit such letters, you will not be able to complete and submit the application. The required investor letters that accompany Table E1 cannot be uploaded on the table subsection page. Investor letters or any other necessary documentation can be uploaded in the table's corresponding subsection, Q. 37(b).

SECTION 8.0 – PRINTING AND USEFUL FUNCTIONS

8.1 Printing your Application

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



View PDF Button

This will generate a PDF of your application you can download using your browser's download function that you will be able to save to your computer and print. For more information on how to generate a PDF in this application, please see section 5.10 of this document.

8.2 Controlling Entity's Certification

If you designate a *Controlling Entity* in response to Q. 3, you will be required to complete a *Controlling Entity's Certification*. Navigate to the *Controlling Entity's Certification* page towards the bottom of the navigation menu. If not, this page will be hidden because it is not applicable.

Applicant:

Control Number:

18NMAPending

Controlling Entity Name:

Controlling Entity Representative Name:

Controlling Entity Representative Title (Please Print): _____

Controlling Entity Representative Signature (Please Sign): _____

Date (Please Print): _____

Controlling Entity Signed Certification:


DRAG & DROP

Controlling Entity Certification Page

To complete this certification page:

- 1) Review and confirm that the pre-populated data below for the *Controlling Entity* Name is accurate. If this information is not correct, please return to Application Registration Page. To correct the *Controlling Entity* Name, you will need to submit a service request to make a change once the Registration Page is locked.
- 2) Review and confirm that the pre-populated data for the *Controlling Entity* Representative Name is accurate. If this information is not correct, please return to Application Question 5 and select the correct *Controlling Entity* Representative.
- 3) Click the “Print Page” link located at the bottom right hand corner of the page to open a window that displays the *Controlling Entity* Signature Page for printing. Print this page.
- 4) The *Controlling Entity* Representative must manually write his/her title at the *Controlling Entity*, signature, and date for the printed *Controlling Entity* Signature Page. Please make sure the Signature Page includes all three fields.
- 5) Scan and upload the signed *Controlling Entity* Signature Page to your computer.
- 6) Access the signed *Controlling Entity* Certification Page that you have uploaded to your computer. Then, drag and drop it from the file on your computer to the ‘Drag and Drop’ location on the CY 2026 NMTC Application template under the *Controlling Entity* Signature Page sub section.
- 7) There should be a link present with the name of the document that you just uploaded to indicate that you successfully attached the signed *Controlling Entity* Signature Page.
- 8) Click the “**Save**” button to complete this sub-section.

8.3 Submitting your Application

- 1) To check which subsections have been marked complete, look for a green checkmark next to that section on the menu bar. Sections that are incomplete will not have a checkmark and will prevent you from successfully submitting the application. **You will not be able to submit an application until all items are marked complete. If you attempt to submit your application before all subsections are complete, you will receive an error explaining which subsections remain incomplete. Go back and correct those subsections.**

You cannot submit this application. Designated Authorized Representatives can submit this application.
 A validation error occurred in section "Applicant Information - Q.3 - Controlling Entity Information".
 The section "Assurances and Certifications - Q.10 - Q.11 (General Certifications)" has not been marked as completed.
 The section "Assurances and Certifications - Q.12 - Certifications for the Controlling Entity (General Certifications)" has not been marked as completed.
 The section "Assurances and Certifications - Q.13 - Certifications for the Applicant (General Certifications)" has not been marked as completed.
 The section "Assurances and Certifications - Q.14 - Certification for the following individuals or entities of the Applicant (General Certifications)" has not been marked as completed.
 The section "Assurances and Certifications - Q.15 - Certifications for the Applicant" has not been marked as completed.
 The section "Assurances and Certifications - Q.16 - Q.17 Individuals or Entities of the Applicant (General Certifications)" has not been marked as completed.
 The section "Assurances and Certifications - Certification Regarding Debarment, Suspension, and Other Responsibility Matters — Primary Covered Transactions" has not been marked as completed.

Example of Error Message for incomplete sub-sections

If you believe that items that are complete are incorrectly showing up as incomplete, please submit an AMIS Service Request, set the Record Type to "Technical Issue" and the Program Topic to "AMIS technical Problem."

- 2) The last question you must complete is Q. 12 (Time to complete). Return to this section and answer. **You must answer this question to successfully submit your application.**
- 3) Before you submit your application, the CDFI Fund recommends that you print and review your application (see section 8.1). **ONCE SUBMITTED, YOUR APPLICATION RESPONSES MAY NOT BE ALTERED.**
- 4) The *Authorized Representative* will need to attest that the information provided in the application is accurate and complete to the best of your organization's knowledge. Before proceeding to this section, make **SURE** your application is complete, including the upload of all required supplementary documents and table information that may be required in the question or exhibit pages.
- 5) If you designate a *Controlling Entity* in response to *Allocation Application* Q. 3, you must click the "*Controlling Entity* Signature Page" link, follow instructions to generate and print a *Controlling Entity* signature page. After the *Controlling Entity* signature page is signed by the *Controlling Entity Representative*, it will need to be uploaded it as an attachment to the Allocation Application in AMIS.

To Attest and Submit an application:

- 1) The *Authorized Representative* designated in the *Applicant* should log in.
- 2) Select the **Attestation and Submission** tab from the very bottom of the menu bar.

Attestation and Submission

Authorized Representative Signature

By selecting the checked box: I hereby consent to conducting this transaction by electronic means, and I hereby agree that I have executed an electronic process that constitutes, and provides the CDFI Fund with, my electronic signature, which shall be treated as an original signature and as having signed this Application, just the same as a pen-and-paper signature; I hereby acknowledge that all information contained in this Application and any attachments or supplements thereto will be subject to disclosure pursuant to the Freedom of Information Act (FOIA) 5 USC 552, et seq.; I hereby certify that all of the information that the Applicant has provided in this Application is true, correct, and complete to the best of my information, knowledge and belief; I hereby certify that the execution and submission of this Application has been duly authorized by the governing body of the Applicant; and hereby certify that I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, title 218, Section 1001).

☒ By selecting this checkbox, I agree to the terms stated above. *(Designated Authorized Representatives)*

Name: AR Test AR

Date: 1/9/2026 12:05 PM EST

Submit Application

Attestation and Submission Page

- 3) Read the **Electronic Signature Attestation** sections and signify agreement with the statement by selecting the checkbox.
- 4) Once the statement is attested to, click “**Submit Application**”. A dialog box will appear. Confirm that you would like to submit the application and understand the application cannot be edited after this point.

Submission

After submitting the application, you can no longer edit the application. Are you sure you would like to submit?

Close

Submit Application

By selecting this checkbox, I agree to the terms stated above. *(Designated Authorized Representatives)*

Submission Dialog Box

- 5) If any of your sections/subsections are incomplete, your submission attempt will be unsuccessful. An error message will identify which section is incomplete.

2026 NMTC Application

You cannot submit this application. Designated Authorized Representatives can submit this application.

A validation error occurred in section "Applicant Information - Q.3 - Controlling Entity Information".

The section "Assurances and Certifications - Q.10 - Q.11 (General Certifications)" has not been marked as completed.

The section "Assurances and Certifications - Q.12 - Certifications for the Controlling Entity (General Certifications)" has not been marked as completed.

The section "Assurances and Certifications - Q.13 - Certifications for the Applicant (General Certifications)" has not been marked as completed.

The section "Assurances and Certifications - Q.14 - Certification for the following individuals or entities of the Applicant (General Certifications)" has not been marked as completed.

The section "Assurances and Certifications - Q.15 - Certifications for the Applicant" has not been marked as completed.

The section "Assurances and Certifications - Q.16 - Q.17 Individuals or Entities of the Applicant (General Certifications)" has not been marked as completed.

Application Submission- Failed Attempt Error Message

- 6) If your submission is successful, the application will return this message:

2026 NMTC Application

Thank you for submitting your application.

Attestation and Submission

Authorized Representative Signature

By selecting the checked box: I hereby consent to conducting this transaction by electronic means, and I hereby agree that I have executed an electronic process that constitutes, and provides the CDFI Fund with, my electronic signature, which shall be treated as an original signature and as having signed this Application, just the same as a pen-and-paper signature; I hereby acknowledge that all information contained in this Application and any attachments or supplements thereto will be subject to disclosure pursuant to the Freedom of Information Act (FOIA) 5 USC 552, et seq.; I hereby certify that all of the information that the Applicant has provided in this Application is true, correct, and complete to the best of my information, knowledge and belief; I hereby certify that the execution and submission of this Application has been duly authorized by the governing body of the Applicant; and hereby certify that I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, title 218, Section 1001).

☒ By selecting this checkbox, I agree to the terms stated above.(Designated Authorized Representatives)

Name: Meredith Clay

Date: 1/5/2026 11:07 AM EST

Submit Application

Application Submission- Successful Attempt Message

- 7) There will also be a Timestamp (separate from the Attestation Timestamp) for the Date, Time Submitted, and Time Zone.

2026 NMTC Application

Attestation and Submission

Authorized Representative Signature

By selecting the checked box: I hereby consent to conducting this transaction by electronic means, and I hereby agree that I have executed an electronic process that constitutes, and provides the CDFI Fund with, my electronic signature, which shall be treated as an original signature and as having signed this Application, just the same as a pen-and-paper signature; I hereby acknowledge that all information contained in this Application and any attachments or supplements thereto will be subject to disclosure pursuant to the Freedom of Information Act (FOIA) 5 USC 552, et seq.; I hereby certify that all of the information that the Applicant has provided in this Application is true, correct, and complete to the best of my information, knowledge and belief; I hereby certify that the execution and submission of this Application has been duly authorized by the governing body of the Applicant; and hereby certify that I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, title 218, Section 1001).

☒ By selecting this checkbox, I agree to the terms stated above. (Designated Authorized Representatives)

Name: Meredith Clay
Date: 1/5/2026 11:07 AM EST

Submit Application

Application Submitted Timestamp: 1/9/2026 12:12 PM EST

- 8) Only the Primary Registration Contact Person designated in the Application Registration will receive an email confirming that your application has been submitted:

From: CDFI Fund
Date: Friday October 6th 2023 at 5:57p.m.
Subject: Sandbox: AMIS Application App-052144 Submitted
To: test@test.com

You don't often get email from replyd@cdfi.treas.gov. [Learn why this is important](#)

Our records indicate that your application, App-069614 (26NMAPending), has been submitted at 2026-01-15 11:11:20 EST.

No further action is required at this time for your CY 2026 New Markets Tax Credit (NMTC) Program Allocation Application.

If you require assistance, please submit a service request in AMIS using "General Inquiry" as the Record Type and "NMTC-General Question" as the Type. Please refer to Section 8 of the CY 2026 NMTC Program AMIS Navigation Guide, AE101: Getting Started – Navigating AMIS (for CDFI Fund External Users) for a detailed guide on submitting a Service Request available [here](#).

Thank you for your interest in the NMTC Program.

-The CDFI Fund

TIP: You will be prevented from submitting an electronic application in AMIS after **5:00 pm ET on the day of the Application Deadline (specified in the NOAA)**. The system prevents submission of an electronic application if it is incomplete, on behalf of an ineligible entity, or past the date/time of the application deadline. **Once an application is submitted in AMIS, it may not be altered.**