

CIIS Compatible Software Policies

The Fund posts software that is compatible with its Community Investment Impact System's (CIIS) Transaction Level Report (TLR). The TLR includes detailed data on each loan and investment in a Community Development Financial Institution's (CDFI's) and Community Development Entity's (CDE's) portfolio.

The Fund's CIIS Compatible Software Policies

- Vendors may demonstrate that their software is compatible with CIIS by successfully uploading an XML file to the current version of CIIS.
- Upon demonstrating that a software product is CIIS Compatible, the Fund will post the vendor's information to the "CIIS Compatible Software" section of the website as follows:
 - Vendor Name
 - Vendor Contact Information (name, telephone number, email address)
 - Product Name
 - CIIS Compatible Reporting Period (report year, version)
 - CDFI / CDE / Both CIIS Compatible
 - Testing Begin Date
 - Testing Completion Date

Maintaining "CIIS Compatible" Status

The Fund releases major changes to CIIS at the beginning of each reporting year. The schedule of the annual release has changed from year-to-year. The Fund also makes mid-year changes as the need arises.

- The Fund requires that vendors demonstrate their product is compatible with each release of CIIS.
- The Fund will notify CIIS Compatible Software vendors of new CIIS releases at least 90 days in advance of the production date.
- The Fund will provide these vendors an updated XSD file and final changes to CIIS at least 30 days in advance of the production date.
- Vendors may demonstrate compatibility with CIIS by successfully uploading an xml file to the most recent version of CIIS.
- Upon demonstrating compatibility with CIIS, the Fund will update post the vendor's information to the "CIIS Compatible Software" section of the website.
- Upon the release of the updated version of CIIS, previously CIIS Compatible vendors that have not demonstrated compatibility with the latest version of CIIS will be moved to the "Software Not Current with CIIS" section of the website.
- Vendors that fail to demonstrate compatibility with a new version of CIIS by more than 365 days will be removed from the website entirely.

Vendor Responsibilities

- Vendors are responsible for updating their software and maintaining compatibility with CIIS.
- Vendors are responsible for testing with each new release of CIIS to maintain posting on the website.

CIIS Help Desk Role

- The CIIS Help Desk can be reached at 703-373-1516 or at ciishelp@kearneyco.com.
- The CIIS Help Desk is available to:
 - Answer basic questions about CIIS;
 - Answer questions about the XSD document;
 - Provide a conduit through which vendors may submit test data; and
 - Return results of XSD processing to vendors.
- The CIIS Help Desk is NOT available to:
 - Answer questions about CIIS instructions or requirements. The instructions and requirements are established by the Fund. Please refer these questions to Heidi Kaplan at Kaplanh@cdfi.treas.gov
 - Step-by-step instructions on submitting the TLR. Please refer to the instructions to for information about submission.