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Q: I'VE TRIED TO RESET MY AMIS PASSWORD BY CLICKING ON THE "FORGOT PASSWORD?" LINK, BUT I'M NOT RECEIVING THE EMAIL TO RESET IT. WHAT DO I DO?

Q: WHAT IS THE DIFFERENCE BETWEEN A CONTACT AND AN EXTERNAL CONTACT?

Q: CAN I CHANGE MY PRIMARY ORGANIZATION?

Q: I'M A CERTIFIED CDFI AND AM INTERESTED IN BECOMING A CDE. WHAT DO I NEED TO DO?

Q: I'VE MADE CHANGES TO MY ORGANIZATION DATA WITHIN AMIS BUT THOSE CHANGES AREN'T REFLECTED IN MYCDFIFUND. WHEN CAN I EXPECT THESE CHANGES TO BE SEEN IN MYCDFIFUND?

Q: What is AMIS?

A: AMIS is the CDFI Fund's new Awards Management Information System (AMIS). It is an enterprise-wide business system, built on a commercial off-the-shelf product called Salesforce that has been configured to meet the CDFI Fund's specific needs. AMIS will support all CDFI Fund programs through each phase of the programs' life cycle, including requirements and processes related to:

- Certification, program awards and allocations
- Pre-award, award, compliance and reporting
- Data analysis and reports

AMIS is replacing all awards management and reporting systems at the CDFI Fund except CIMS3 and CIIS.

Q: Who will be using AMIS?

A: Because AMIS will be replacing almost all of the CDFI Fund's current business systems, AMIS will be used by all applicants, all award and allocation recipients, all certified CDFIs and CDEs, in addition to application reviewers and other individuals or organizations that have a need to do business with the CDFI Fund.

Q: What is the schedule? Will every CDFI Fund program be using AMIS immediately?

A: AMIS is being implemented in separate planned releases with specifically defined scopes and schedules for each. The AMIS portal was initially launched in September 2015 and provided functionality to:

- Register organizations and users
- Update organization profile – Enter CDFI Fund high level organizational data
- Update CDE Certification Program Profile – Enter organizational data specific to CDE certification
- Submit CDE Certification Applications (Type A, B, and C)
- Submit "Service Requests" to CDFI Fund. The Service Request functionality is used for things such as requests for amendments, submission of material event changes, program questions, IT issues, etc. This will be used in lieu of sending emails for such items, keeping correspondence between you and the CDFI Fund in one system

Additional functionality, including CDFI Program Payments (formerly known as disbursements) and CDFI/NACA program Matching Funds will be made available throughout October 2015.

By the Fall of 2016, all CDFI Fund programs (including CDFI Certification, CDFI Program, NACA Program, BEA Program, Bond Guarantee Program, the Capital Magnet Fund, and the NMTC Program) will be incorporated in AMIS. Keep an eye on the AMIS landing page for more information about what programs and processes will be available through the AMIS Portal in future releases.

Q: How do I access AMIS?

A: All you need to access AMIS is a computer, access to the Internet, and a compatible web browser: Internet Explorer version 9 or above, Mozilla Firefox, Google Chrome, or Apple Safari. Once you're set with these items, type "AMIS.CDFIFund.gov" into the web browser and you will be brought to the AMIS landing page. Please note that your browser may give you a one-time security certificate message; if so, just click "continue" and you will continue to the AMIS landing page.

Q: What should I do if I get a certificate warning/error message when I first click amis.cdfifund.gov?

A: Simply choose "continue" or "OK" once the message pops up and you will continue to the AMIS landing page. You should only see this message when you first access the web page.

Q: Is it mandatory that I use AMIS if I want to work with the CDFI Fund?

A: Yes. AMIS must be used by all applicants, all award and allocation recipients, all certified CDFIs and CDEs, in addition to application reviewers and other individuals or organizations that have a need to do business with the CDFI Fund.

Q: What are the benefits I can expect from AMIS?

A: Once AMIS is fully implemented in the Fall of 2016, you can expect to see many benefits, including:

1. Online certification and funding applications: CDFIs and CDEs will be able to submit all applications to the CDFI Fund via AMIS. By having one centralized location, you will be able to more easily review and perform quality checks on your applications, reducing the number of data entry errors.
2. Pre-population of certain organization and program data into your application, reducing the number of data entry errors and time associated with entering data.
3. Application fields based upon business rules to help ensure compliance when submitting applications.
4. Easier maintenance of organizational data: AMIS will allow a much simpler user interface and will ease the burden of maintaining critical data (e.g., mailing and shipping addresses) within the new system.
5. Streamlined interaction with the CDFI Fund: AMIS comes with a "service request" feature, which allows external AMIS users to submit program-specific requests (for example, requests for amendment) and IT issues through the AMIS application.
6. Transparency of data across an organization.

Q: Will training be provided on how to use AMIS?

A: There are web-based training manuals and online user guides available, which detail what you'll need to know and how to access and use AMIS. These guides are available on the AMIS landing page (AMIS.CDFIFund.gov). In addition, you will also find a Frequently Asked Questions (FAQs) document on the AMIS landing page. We will regularly update the AMIS FAQs to reflect the questions we are receiving related to the new system.

Q: Now that AMIS is live, who do I contact if I have questions about AMIS?

A: After you have your login ID and password, submit a "service request" through the AMIS application. Guidance on submitting a service request can be found in the AMIS training manuals.

Q: Does AMIS prevent individuals who are not CDFIs/CDEs (e.g., consultants, application reviewers) from access previously provided by the myCDFIFund portal?

A: AMIS provides access to individuals, such as consultants and application reviewers, in a manner similar to how the myCDFIFund system provided access to these users. In myCDFIFund, an organizations' Administrators managed user access on the "Manage Users" page (under Organization Profile / Users). All users associated with organizations in myCDFIFund that were shown as "Enabled" in the Manage Users page (Organization Profile / Users) have been transferred to that organization's new AMIS account. To make changes, please contact your organization's AMIS Administrator.

Q: I'm not an organization's site "Administrator" but have supported a CDFI and/or CDE. How do I ensure I have access to AMIS?

A: Contact the organization's Administrator so that he/she can ensure your access to AMIS continues.

Q: I've tried to reset my AMIS password by clicking on the "Forgot Password?" link, but I'm not receiving the email to reset it. What do I do?

A: Some AMIS users might already have a Salesforce account. If your email address previously had been associated with a Salesforce account, clicking on the "Forgot Password?" link will not work. Please send an email to AMIS@cdfi.treas.gov and request a password reset. Once we receive your request, we will send you an email message with a link to reset your password and login to AMIS. Your AMIS user name will be your email address with ".amis" appended to it. For example, if your email address is myname@gmail.com, your AMIS username would be myname@gmail.com.amis.

Q: What is the difference between a Contact and an External Contact?

A: AMIS requires that each user be assigned one primary organization; for this primary organization, you will be listed as a “contact.” For any other organizations to which you have access, you will be listed as an “external contact.” This does NOT mean you have more capabilities at an organization of which you are identified as “contact”; rather, it is simply a way for AMIS to tie you to at least ONE organization. Your identification as a “contact” or an “external contact” will not restrict what access you have to that organization with one exception: in order for a user to log into AMIS, that user’s profile MUST be enabled (i.e., as a Viewer, User, or Admin User). Only an Admin User for an organization can enable another user’s profile within that organization and an Admin User must be a “contact.”

Q: Can I change my primary organization?

A: Yes. Please submit a Service Request using “General Inquiry” as the record type, and “Cross Program-AMIS technical problem” as the type. Provide the EIN and name of the organization you want as your primary organization. After the change is made, you will be listed under the External Contacts for your original primary organization.

Q: I’m a certified CDFI and am interested in becoming a CDE. What do I need to do?

A: In order to be considered as a CDE, an organization that is currently certified as a CDFI by the CDFI Fund must submit a CDE Type A application. Please see the on-line training manual *AE102: CDE Certification Application Submission (for CDE Certification Applicants)* for more detail on how to submit the Type A application.

Q: I’ve made changes to my organization data within AMIS but those changes aren’t reflected in myCDFIFund. When can I expect these changes to be seen in myCDFIFund?

A: Currently, there is a technical process that automatically kicks off every 20 minutes that “pushes” certain data updates made in AMIS (for example, updates to organizational data) back to myCDFIFund. If the changes you’ve made are not yet reflected, please make sure you wait the appropriate 20 minutes and check again. If the changes still aren’t being shown after you’ve waited the 20 minutes, please submit an AMIS service request. Use “General Inquiry” as the record type, and “Cross Program-AMIS technical problem” as the type.