

COMMUNITY DEVELOPMENT
FINANCIAL INSTITUTIONS FUND

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AMIS TRAINING MANUAL

**CDFI Fund Annual Certification and Data Collection Report
(ACR)
Lightning Version**

December 2024

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Introduction

The CDFI Fund Annual Certification and Data Collection Report (ACR) is used by the CDFI Fund staff to ensure that Community Development Financial Institutions (CDFIs) continue to meet the requirements to be a certified CDFI.¹ Every certified CDFI must complete the CDFI Annual Certification Report within 90 days after the close of their most recent fiscal year. Emerging CDFIs² are not required to complete the ACR.

Please note:

1. If the organization's legal entity documentation has changed, certified CDFIs are required to attach the new legal entity documents to confirm the changes before submitting the report.
2. Errors and missing information are validated upon saving information and/or submitting the report. The errors may be identified in red at the top of the page and/or the fields are highlighted in red. All errors may not show up immediately but may be initially identified as errors are until other data values are entered or corrected.
3. The **Development Services Related List** must have at least one development service entry.
4. The **Financial Data Related List** must have only one financial data record.
5. The **Financial Product Portfolio Breakdown Related List** must have at least one financial data portfolio entry.
6. The **Reporting Schedule** will be created for you. Please contact support at AMIS@cdfi.treas.gov if you do not have a **Reporting Schedule**.


Purpose

The purpose of this manual is to help certified CDFIs submit a CDFI Annual Certification Report in AMIS.

¹ The following seven criteria are required to be certified as a CDFI:

1. Be a legal entity;
2. Have a primary mission of promoting community development;
3. Be a financing entity;
4. Primarily serve one or more Target Markets;
5. Provide development services in conjunction with its financing activities;
6. Maintain accountability to its defined Target Market; and
7. Be a non-government entity and not under the control of any government entity (tribal governments excluded).

² An emerging CDFI is a non-certified CDFI that has received a TA award and is expected to become certified within three years.



AE101: Getting Started – Navigating AMIS (for External Users) is a prerequisite for this training manual.

Create a New CDFI Annual Certification Report

To create and submit a CDFI Annual Certification Report:

1. After logging into AMIS, click the **Organizations** tab and select your organization. This will bring you to the **Organization Detail** page.

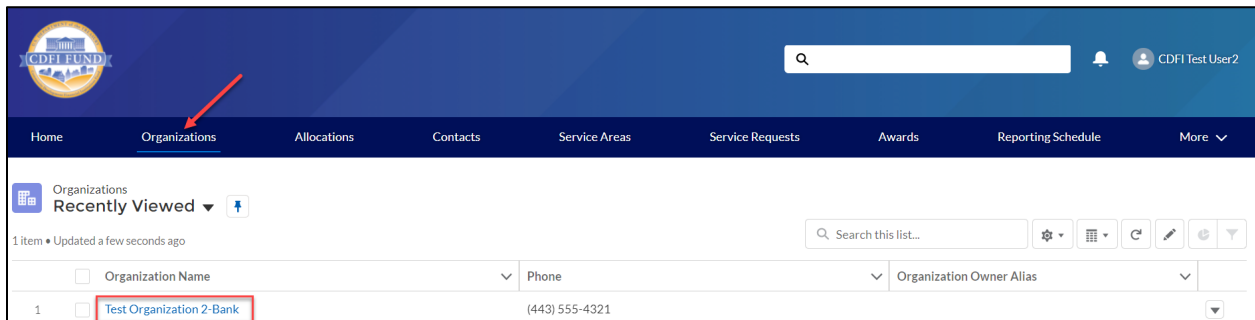


Figure 1. Organization Tab

2. From the **Organization Related** tab, scroll to the **Certifications** section.



Figure 2. Organization Related Tab - Certifications

3. From the **Certifications** section, click the link of the certification under **Certification Name**. The organization's certification control number will display (XXXCEXXXXXX) as the **Certification Name**.



Figure 3. Organization Related Tab - Certifications Name

Please Note: If there are multiple CDFI certifications, please select the certification that has a **Certification Status** of **Certified**. You can check the **Certification Status** by clicking the **Certification Name**.

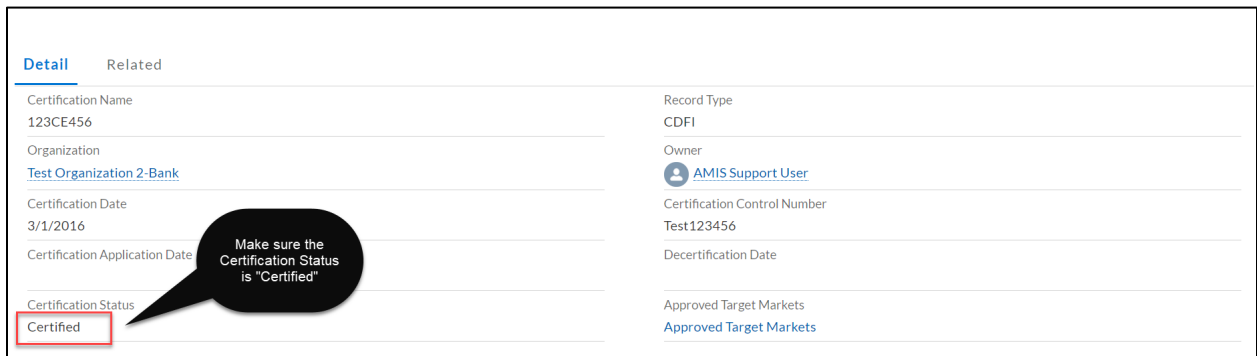


Figure 4. Certification Detail Page - CDFI Certification Status

4. Click **New CDFI Annual Certification Report** located on the Related Tab.

	New CDFI Annual Certification Report can only be selected if you have a Reporting Schedule. Contact support at AMIS@cdfi.treas.gov if you don't have a Reporting Schedule.
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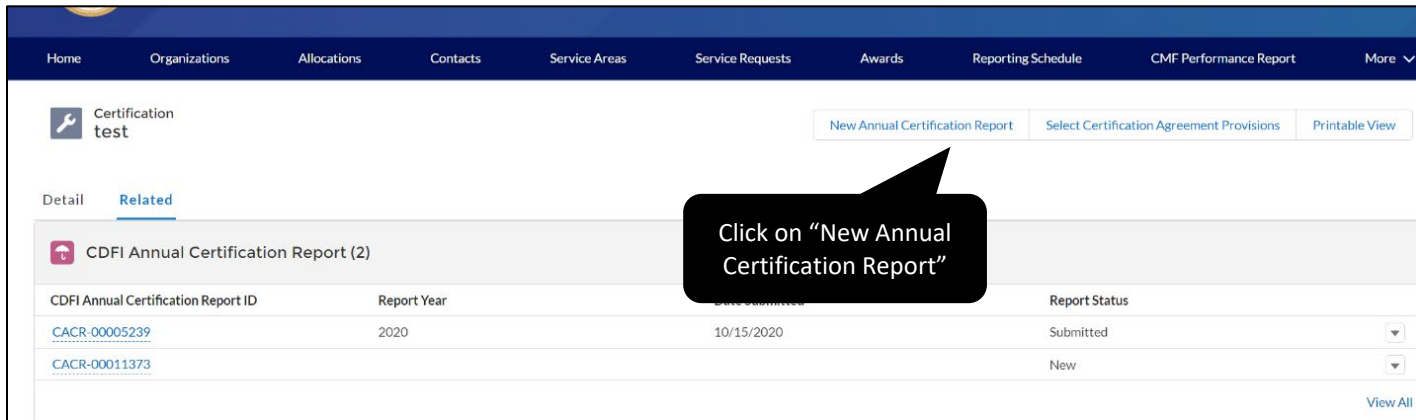


Figure 5. Certification Detail Page - CDFI Annual Certification Report

5. Complete the required information on the page. Required fields are indicated with a red bar. However, other fields may also be required based on validation rules. For more information, click on the "i" icon.

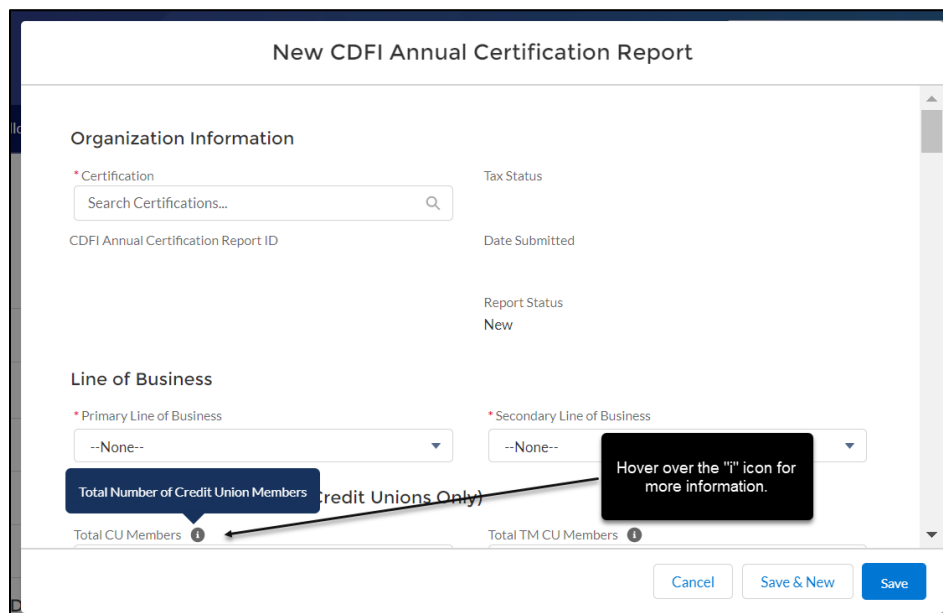


Figure 6. CDFI Annual Certification Report Edit Page - "i" Icon

6. You may need to provide additional documentation based on your selection in the Legal Entity field.

The screenshot shows the 'Legal Entity' section of the 'New CDFI Annual Certification Report' edit page. It includes a dropdown menu for 'Legal Entity attestation' set to '--None--', a text area for 'If No, explain Legal Entity attestation', a dropdown for 'Legal documentation changes' set to '--None--', and a text area for 'If No, explain documentation changes'. Below this is the 'Primary Mission' section with a dropdown for 'Primary Mission attestation' set to '--None--'. At the bottom right are 'Cancel', 'Save & New', and 'Save' buttons. A callout bubble points to the 'Legal Entity attestation' dropdown with the text: 'Based upon the responses in the Legal Entity section, additional documentation may be required.'

Figure 7. CDFI Annual Certification Report Edit Page - Legal Entity

7. Click **Save** (you will receive an error message if required fields were not completed).

The screenshot shows the 'Regulator Attestation' section of the 'New CDFI Annual Certification Report' edit page. It includes a 'Regulator Attestation Selection' dropdown menu set to '--None--' and a checkbox for 'I acknowledge the note below'. Below the checkbox is a 'Note' field. At the bottom right, the 'Save' button is highlighted with a red box, along with 'Cancel' and 'Save & New' buttons.

Figure 8. CDFI Annual Certification Report Edit Page - Save



Figure 9. CDFI Annual Certification Report Edit Page – Error: Invalid Data Message

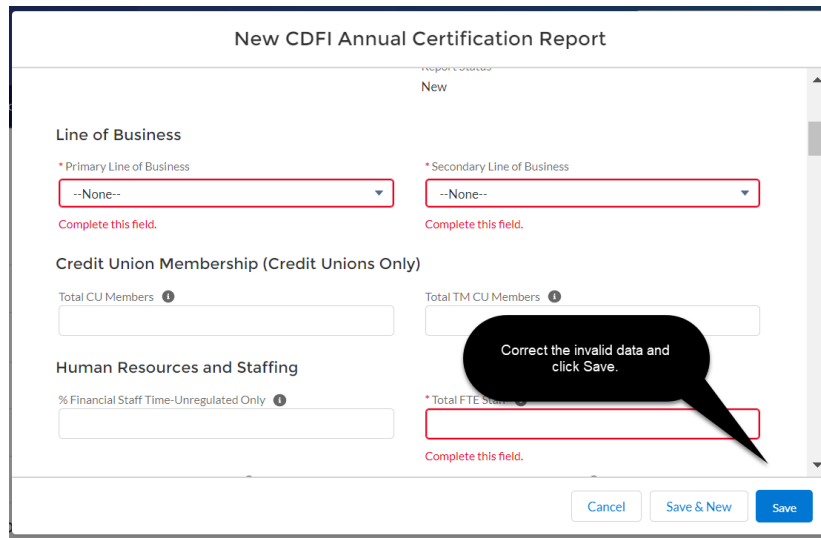


Figure 10. CDFI Annual Certification Report Edit Page – Error: Invalid Data Message

8. You will be directed to the **CDFI Annual Certification Report Detail** page. Click on the **Related Tab** to see the **Related List Sections**.

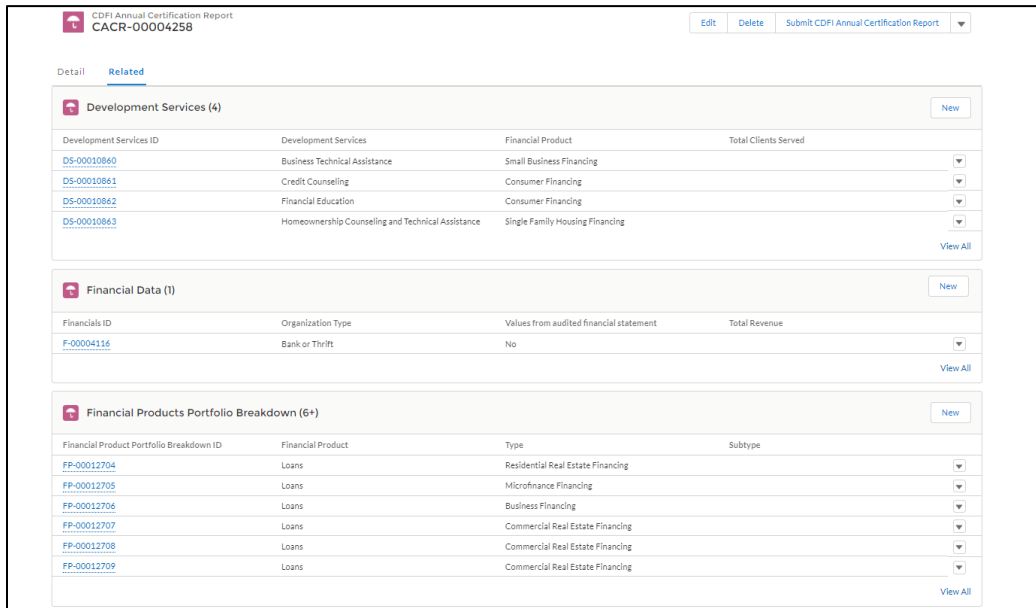


Figure 11. CDFI Annual Certification Report Related Page – Related Link Section

9. Click on each “New” button and complete the additional information required.

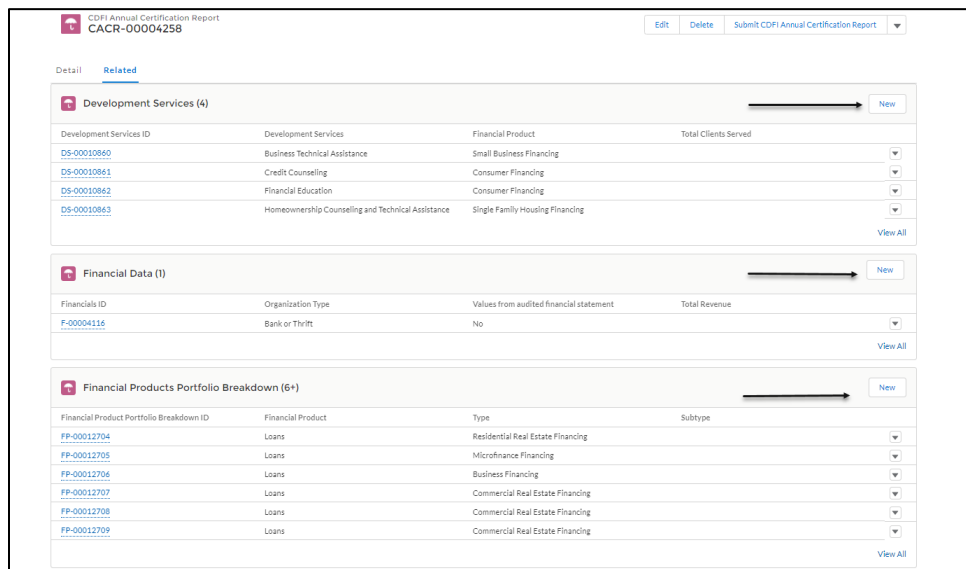


Figure 12. CDFI Annual Certification Report Related Page - Related Lists - New

1. Complete the Development Services Related List

1. From the **CDFI Annual Certification Report** Related page, click the **“New”** button within the **Development Services** section.



Figure 13. CDFI Annual Certification Report Related Page – Development Services Section

2. Complete the required information on the page and click **Save**.

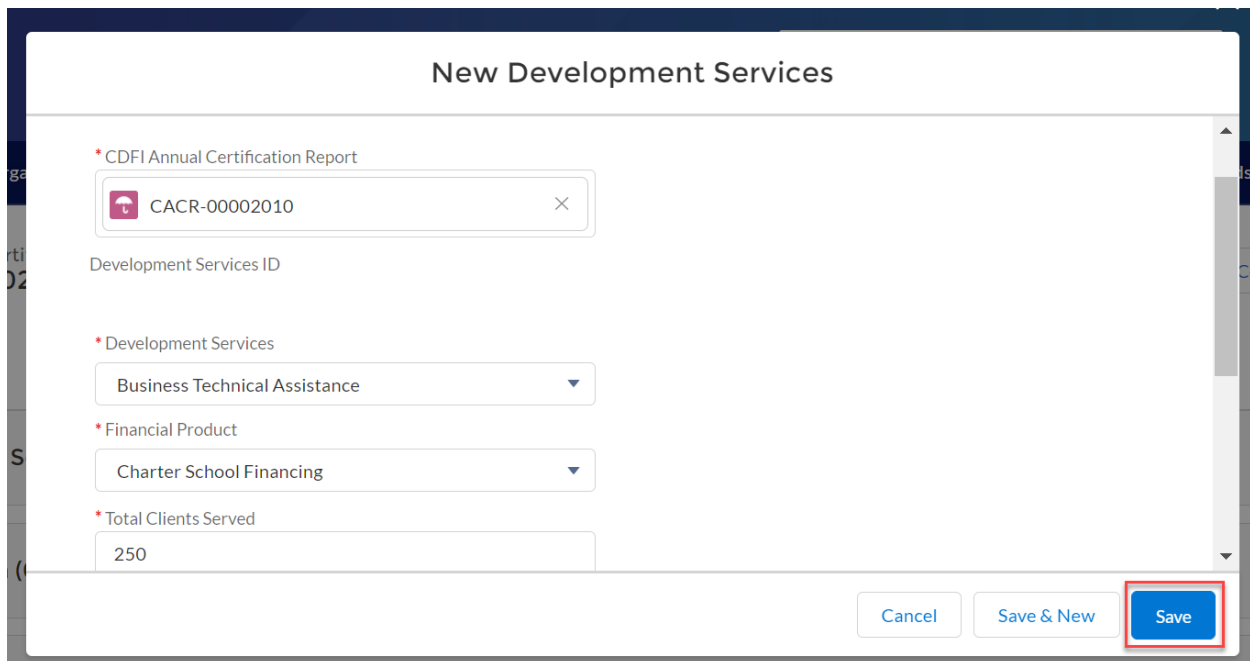


Figure 14. New Development Services Edit Page

3. You will receive a message stating the record has been saved. To view the **CDFI Annual Certification Report**, click on the Development Services ID located in the Development Services Related section.

Development Services ID	Development Services	Financial Product	Total Clients Served
DS-00015841	Business Technical Assistance	Charter School Financing	250

Figure 15. CDFI Annual Certification Report Related Page – Development Services ID

- From the Development Services Detail page, click on the **CDFI Annual Certification Report** link to navigate back to the CDFI Report Detail Page.

CDFI Annual Certification Report
CACR-00002010

Figure 16. Development Services Detail Page – Annual Certification Report Link

2. Complete the Financial Data Related List

- From the **CDFI Annual Certification Report** Related page click the **“New”** button within the **Financial Data** section.

Financials ID	Organization Type	Values from audited fin...	Total Revenue
---------------	-------------------	----------------------------	---------------

Figure 17. CDFI Annual Certification Report Detail Page – Financial Data Section - New

- Select **Record Type**.

New Financial Data
Select Financial Data Record Type

Select a record type for the new financial data. The default was selected based on the Financial Institution Type and Tax Status of your organization.

Record Type of New Record: Loan Fund and Venture Capital – For-Profit

Note to CDFI (Please read)

All numbers related to a CDFI's financial data must be entered as a positive whole integer, greater or equal to zero (">= 0"). This includes the line item for "Allowance for Loan and Lease Losses" (ALLL) listed under the "Assets" section and the line item for "Total Charge-Offs" listed under the "Loan Investment Portfolio Values" section. Auditors commonly express ALLL as a contra asset and present it as a negative number on audited financial statements. In such instances, where ALLL and Total Charge-offs are negative numbers on a CDFI's financial statements, the CDFI must convert these numbers to their absolute value (a positive number), and enter the positive number in the CDFI's Financial Data inputs subsection of the ACR for the ALLL and Total-Charge-offs line items.

In instances other than line items noted above where the CDFI has a negative value expressed on its Audit or internal financial statements, CDFIs are to enter a zero ("0") on the corresponding line item on the ACR Financial Data Inputs page. CDFIs who need to enter a "0" instead of a negative number(s) are to provide an explanation for each of these entries via a dropdown menu selection.

Figure 18. Select Financial Record Type

- The default record type displayed is based on the **Financial Institution Type** and **Tax Status** of your organization from its AMIS organizational profile. If either of these fields is blank in AMIS, select the appropriate record type from the drop-down menu and click **Continue**.

Please Note: If the **Financial Institution Type** and/or **Tax Status** fields are blank on your AMIS organizational profile, please go to your AMIS organizational profile and fill in these fields. Prior to the ACR submission deadline, all CDFIs should verify their AMIS organizational profile for accuracy to ensure there is enough time to make any adjustments which may affect their ability to submit their ACR properly and on-time.

	All numbers related to a CDFI's financial data must be entered as a positive whole integer (including 0). Specific information about this is listed on bottom of the Select Financial Data Record Type page.
--	---

- Complete all Required fields.

Please Note: Entering a negative value into a field will result in an error which will automatically replace the negative value with a “0”. In some fields, the replacement value will be the absolute value of the negative value entered.

The screenshot shows a web form with several input fields. A blue error dialog box is overlaid on the form. The dialog contains a yellow warning icon and the text: "The value cannot be negative so 0 will be entered and for the reason, please enter 'The actual numeric value is negative'". Below the text is an "OK" button. The background form has sections for "Operating Revenue", "Expenses", and "Total Value of Non-performing Assets".

Figure 19. Negative Field Error

Repeatedly entering negative values will cause the error to display an option to stop showing this alert. Please do not select this option.

The screenshot shows a web form with several input fields. A blue error dialog box is overlaid on the form. The dialog contains a yellow warning icon and the text: "The value cannot be negative so 0 will be entered and for the reason, please enter 'The actual numeric value is negative'". Below the text is a checkbox labeled "Don't let this page create more messages" and an "OK" button. The background form has sections for "Total Charge-Offs", "Total Recoveries", and "Other Real Estate Owned".

Figure 20. Negative Field Error

Entering “0” into a field will cause a dropdown to appear with a list of explanations for the 0 value. Selecting **Other** will cause a textbox to appear, in which you can enter a different explanation. A minimum of 20 characters is required in the textbox.


The screenshot shows the 'Financial Data Detail' form. At the top, it displays 'CDFI Annual Certification Report' with ID 'CACR-00004520' and 'Record Type ID' as 'Loan Fund and Venture Capital – For-Profit'. Below this, there are fields for 'Organization Type' and 'Values from audited financial statement' (set to '--None--'). There are also date pickers for 'Fiscal Year Begin Date' and 'Fiscal Year End Date', each with 'Year', 'Month', and 'Day' dropdowns (all set to '--None--').

The 'Assets' section is visible, with a table of items. The 'Zero Value Reason: RE Cash/Cash EquivInt' dropdown is open, showing several options: '--None--', 'This data point is not applicable to my organization's institution type', 'My organization's accounting system does not track this data point', 'The actual numeric value is negative', 'The actual numeric value is zero', and 'Other (please describe)'. A black callout box with white text points to the dropdown and says 'Select the appropriate explanation'.

Figure 21. Financial Data Dropdown

This screenshot shows the same 'Financial Data Detail' form as Figure 21. The 'Zero Value Reason: RE Cash/Cash EquivInt' dropdown is now closed, and the 'Other Reason: RE Cash/Cash EquivInt' field is active. A black callout box with white text points to this field and says 'If “Other” is selected, type your explanation into the textbox'.

Figure 22. Financial Data Other Textbox



Certain validation rules exist that will show error messages if the value of one field is greater than another. For example, “Current Assets” must be equal to or less than “Total Assets”.

A textbox will appear in which you can enter an explanation. A minimum of 20 characters is required in the textbox.

Assets		I = Required Information
Restricted Cash and Cash Equivalents	<input type="text"/>	
Unrestricted Cash and Cash Equivalents	<input type="text"/>	
Cash and Cash Equivalents	0.00	
Average Assets	<input type="text"/>	
Current Assets	5.00	
Validation Error:	Current Assets must be less than Total Assets and Current Assets must be greater than Cash and Cash Equivalents. If this cannot be corrected, please explain.	Validation Explanation: Current Assets
Allowance Loan and Lease Losses Reserve	<input type="text"/>	
Total Assets	4.00	
Liabilities		
Current Liabilities	4.00	
Validation Error:	Current Liabilities must be less than or equal to Total Liabilities. If this cannot be corrected, please explain.	Validation Explanation: Current Liabilities
Total Liabilities	3.00	

Figure 23. Financial Data Validation Errors

5. Complete the required information on the page, then click **Save**. You must fill in all required fields before field validations appear.

Please Note: When selecting the **Fiscal Year Begin Date** and **Fiscal Year End Date**, please make sure that the time period selected does not exceed one year or is less than one year. The **Begin Date** must be at least one year prior to the current date, and the **End date** must be on or prior to the current date.

Financial Data Detail ! = Required Information

CDFI Annual Certification Report: CACR-00004520 Record Type ID: Loan Fund and Venture Capital – For-Profit

Organization Type: Values from audited financial statement:

Fiscal Year Begin Date: Year Month Day Fiscal Year End Date: Year Month Day

Assets

Restricted Cash and Cash Equivalents

Unrestricted Cash and Cash Equivalents

Cash and Cash Equivalents: 0.00

Average Assets

Current Assets

Allowance Loan and Lease Losses Reserve

Total Assets

Liabilities

Current Liabilities

Total Liabilities

Net Assets, Net Worth, or Equity Information

Total Equity

Income

Government Grants

Interest Income

Earned Revenue

Operating Revenue

Total Revenue

Complete all required fields

Figure 24. Financial Data Edit Page for Loan Fund and Venture Capital – For Profit

Expenses

Interest Expense

Provision for Loan Losses

Operating Expenses

Total Expenses

Capital Category

Total Financing Capital

Loan and Investment Portfolio Values

Total Outstanding Investment Portfolio

Total Outstanding Loan Portfolio

Total Outstanding Ln Guarantee Portfolio

Total Charge-Offs

Total Recoveries

Total Value of Non-performing Assets

Loans 90-Days or More Past Due

Other Real Estate Owned

Figure 25. Financial Data Edit Page for Loan Fund and Venture Capital – For Profit

6. See below for additional views based on **Type** selected.

Financial Data Detail ! = Required Information

CDFI Annual Certification Report: CACR-00011614 Record Type ID: Bank or Thrift

Organization Type: Values from audited financial statement:

Fiscal Year Begin Date: Year: Month: Day: Fiscal Year End Date: Year: Month: Day:

Assets

Restricted Cash and Cash Equivalents:

Unrestricted Cash and Cash Equivalents:

Cash and Cash Equivalents: 0.00

Average Assets:

Current Assets:

Allowance Loan and Lease Losses Reserve:

Total Assets:

Liabilities

Current Liabilities:

Total Liabilities:

Net Assets, Net Worth, or Equity Information

Tier 1 Capital:

Total Equity:

Income

Government Grants:

Interest Income:

Earned Revenue:

Operating Revenue:

Total Revenue:

Expenses

Interest Expense:

Provision for Loan Losses:

Operating Expenses:

Total Expenses:

Capital Category

Total Financing Capital:

Loan and Investment Portfolio Values

Total Outstanding Investment Portfolio:

Total Outstanding Loan Portfolio:

Total Outstanding Ln Guarantee Portfolio:

Total Charge-Offs:

Total Recoveries:

Total Value of Non-performing Assets:

Loans 90-Days or More Past Due:

Other Real Estate Owned:

Figure 26. Financial Data Edit Page for Bank or Thrift

Financial Data Detail ! = Required Information

CDFI Annual Certification Report: CACR-00004333 Record Type ID: Bank or Thrift and Depository Institution Holding Company

Organization Type: --None--

Values from audited financial statements: --None--

Fiscal Year Begin Date: Year: --None-- Month: --None-- Day: --None-- Fiscal Year End Date: Year: --None-- Month: --None-- Day: --None--

Assets

Restricted Cash and Cash Equivalents:

Unrestricted Cash and Cash Equivalents:

Cash and Cash Equivalents: 0.00

Average Assets:

Current Assets:

Allowance Loan and Lease Losses Reserve:

Total Assets:

Liabilities

Current Liabilities:

Total Liabilities:

Net Assets, Net Worth, or Equity Information

Tier 1 Capital:

Total Equity:

Figure 27. Financial Data Edit Page for Depository Institution Holding Company

Income

Government Grants:

Interest Income:

Earned Revenue:

Operating Revenue:

Total Revenue:

Expenses

Interest Expense:

Provision for Loan Losses:

Operating Expenses:

Total Expenses:

Capital Category

Total Financing Capital:

Loan and Investment Portfolio Values

Total Outstanding Investment Portfolio:

Total Outstanding Loan Portfolio:

Total Outstanding Ln Guarantee Portfolio:

Total Charge-Offs:


Total Recoveries:

Total Value of Non-performing Assets:

Loans 90-Days or More Past Due:

Other Real Estate Owned:

Figure 28. Financial Data Edit Page for Depository Institution Holding Company (Continued)

 **Financial Data**

Financial Data Detail

CDFI Annual Certification Report Record Type ID
Organization Type

Values from audited financial statement

Fiscal Year Begin Date Fiscal Year End Date

Assets

Restricted Cash and Cash Equivalents

Unrestricted Cash and Cash Equivalents

Cash and Cash Equivalents

Average Assets

Current Assets

Allowance Loan and Lease Losses Reserve

Total Assets

Liabilities


Current Liabilities

Total Liabilities


Net Assets, Net Worth, or Equity Information

Total Net Worth

Figure 29. Financial Data Edit Page for Credit Unions

Income	
Government Grants 	<input type="text"/>
Interest Income	
Earned Revenue	<input type="text"/>
Operating Revenue	<input type="text"/>
Total Revenue	<input type="text"/>

Expenses	
Interest Expense	
Provision for Loan Losses	<input type="text"/>
Operating Expenses	<input type="text"/>
Total Expenses	<input type="text"/>

Capital Category	
Total Financing Capital 	<input type="text"/>



Loan and Investment Portfolio Values	
Total Outstanding Loan Portfolio	<input type="text"/>
Total Outstanding Ln Guarantee Portfolio	<input type="text"/>
Total Charge-Offs	
Total Recoveries	
Total Value of Non-performing Assets	<input type="text"/>
Loans 90-Days or More Past Due 	
Other Real Estate Owned 	

Figure 30. Financial Data Edit Page for Credit Unions

Financial Data Detail		Record Type ID	
CDFI Annual Certification Report	CACR-00000003	Loan Fund and Venture Capital – Non-Profit	
Organization Type	Loan Fund	Financials ID	F-00000002
Values from audited financial statement	Yes		
Fiscal Year Begin Date	Year: --None-- Month: --None-- Day: --None--	Fiscal Year End Date	Year: --None-- Month: --None-- Day: --None--
Assets			
Restricted Cash and Cash Equivalents	10.00		
Unrestricted Cash and Cash Equivalents	10.00		
Cash and Cash Equivalents	20.00		
Average Assets	10.00		
Current Assets	10.00		
Allowance Loan and Lease Losses Reserve	10.00		
Total Assets	1,000.00		
Liabilities			
Current Liabilities	10.00		
Total Liabilities	1,000.00		
Net Assets, Net Worth, or Equity Information			
Temporarily Restricted Net Assets	10.00		
Permanently Restricted Net Assets	10.00		
Unrestricted Net Assets	1,000.00		
Total Net Assets	1,020.00		

Figure 31. Financial Data Edit Page for Loan Fund and Venture Capital – Non-Profit

Income	
Government Grants	10.00
Interest Income	10.00
Earned Revenue	10.00
Operating Revenue	10.00
Total Revenue	1,000.00
Expenses	
Interest Expense	10.00
Provision for Loan Losses	10.00
Operating Expenses	10.00
Total Expenses	1,000.00
Capital Category	
Total Financing Capital	
Loan and Investment Portfolio Values	
Total Outstanding Investment Portfolio	10.00
Tot Outstanding Inv Port Match Indicator	WARNING - Total Outstanding Investment Portfolio is not equal to the Investments Loan Portfolio Amount on the CDFI Annual Certification Report.
Total Outstanding Loan Portfolio	10.00
Tot Outstanding Ln Port Match Indicator	WARNING - Total Outstanding Loan Portfolio is not equal to the Loans Loan Portfolio Amount on the CDFI Annual Certification Report.
Total Outstanding Ln Guarantee Portfolio	
Total Charge-Offs	10.00
Total Recoveries	10.00
Total Value of Non-performing Assets	1,000.00
Loans 90-Days or More Past Due	
Other Real Estate Owned	
Save Cancel	

Figure 32. Financial Data Edit Page for Loan Fund and Venture Capital – Non-Profit

7. If there are any validation errors within your financial data, they will be listed in a message at the top of the page after you click **Save**. Please correct all errors and click **Save** again. Errors can be corrected either by entering a valid number or by entering an explanation for the original number.

Errors

- Allowance Loan and Lease Losses Reserve: Allowance Loan and Lease Losses Reserve must be less than Total Outstanding Loan Portfolio.
- Operating Revenue: Operating Revenue must be less than or equal to Total Revenue and must be greater than or equal to the sum of Earned Revenue and Government Grants.
- Other Real Estate Owned: Other Real Estate Owned must be greater than or equal to 0 and must be less than or equal to Total Assets.
- Total Charge-Offs: Total Charge Offs must be strictly less than Total Outstanding Loan Portfolio.
- Total Financing Capital: Total Financing Capital must be less than or equal to Total Assets.
- Total Liabilities: Total Liabilities must be strictly less than Total Assets.
- Total Outstanding Investment Portfolio: Total Outstanding Investment Portfolio must be less than or equal to Total Assets.
- Total Outstanding Loan Portfolio: Total Outstanding Loan Portfolio must be less than or equal to Total Assets.
- Total Value of Non-performing Assets: Total Value of Non-Performing Assets must be greater than or equal to 0 and must be less than or equal to Total Outstanding Loan Portfolio

Financial Data

Save Cancel

Financial Data Detail

CDFI Annual Certification Report CACR-00004520
Organization Type
Values from audited financial statement Yes

Figure 33. Failed Validation Example

8. Click **CDFI Annual Certification Report** to return to the **Certification Detail** page.

AMIS Home Organizations Contacts Notices Funding Applications Reports *CACR-00005274 X More

Financial Data F-00005091 Delete Printable View

Details Related

CDFI Annual Certification Report Record Type
CACR-00005274 Loan Fund and Venture Capital – Non-Profit

Organization Type Financials ID
Loan Fund F-00005091

Values from audited financial statement No

Fiscal Year Begin Date 10/1/2019

Fiscal Year End Date

Figure 34. Final Data Detail Page

3. Complete the Financial Products Portfolio Breakdown Related List

1. From the CDFI Certification Report Related Page, click the “New” button to access the **Financial Products Portfolio Breakdown**.

Financial Product Portfolio Breakdown ID	Financial Product	Type	Subtype
FP-00012704	Loans	Residential Real Estate Financing	
FP-00012705	Loans	Microfinance Financing	
FP-00012706	Loans	Business Financing	
FP-00012707	Loans	Commercial Real Estate Financing	Community Facility
FP-00012708	Loans	Commercial Real Estate Financing	Health Care Facility
FP-00012709	Loans	Commercial Real Estate Financing	Commercial

Figure 35. CDFI Annual Certification Report Products Portfolio

2. Complete the required information on the page and click **Save** button.

New Financial Products Portfolio Breakdown

Information

* CDFI Annual Certification Report
Search CDFI Annual Certification Report...

Financial Product Portfolio Breakdown ID

* Financial Product
--None--

* Type
--None--
[View all dependencies](#)

Subtype
--None--
[View all dependencies](#)

If Type is Other Financing, Describe

* Total Portfolio #

Cancel Save & New **Save**

Subtype may be required based on Type selected.

Figure 36. Financial Products Portfolio Breakdown Edit Page

3. You will receive a message stating the record has been saved. Click **CDFI Annual Certification Report** link to return to the **CDFI Annual Certification Detail** page.

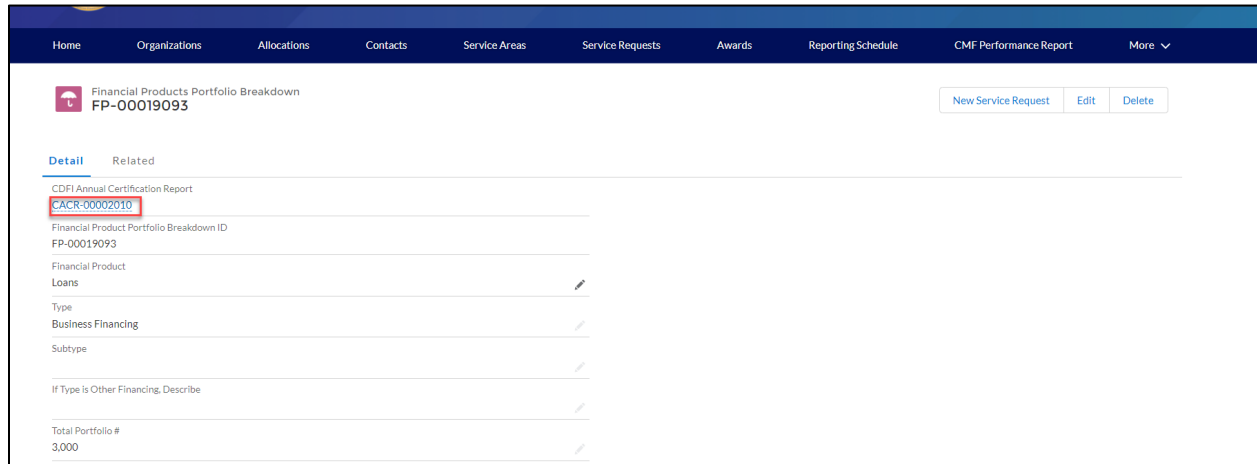


Figure 37. Financial Products Portfolio Breakdown Detail Page

4. Complete the Related Attachments Related List

1. To add attachments, select “Add Related Attachments” from the dropdown menu on the CDFI Annual Certification Report Details Page.

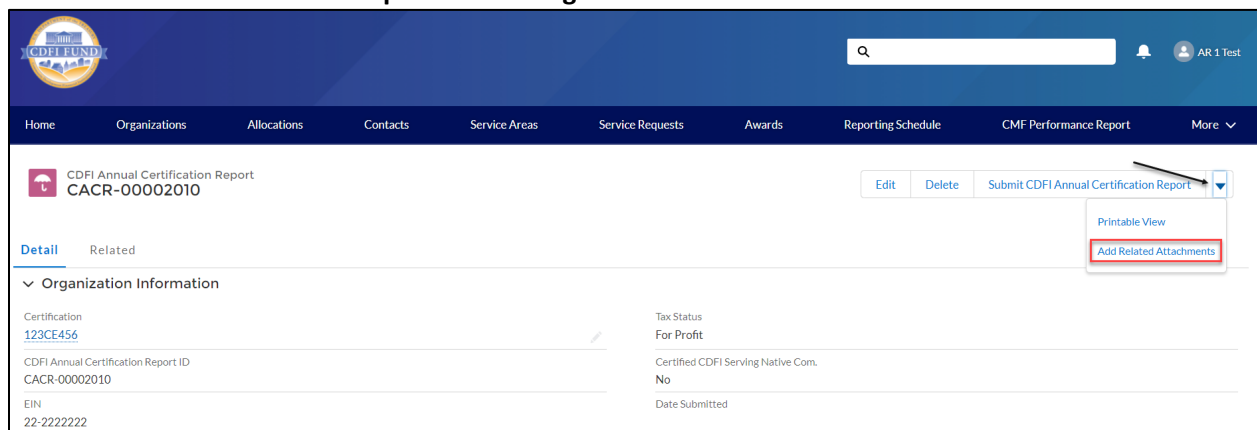


Figure 38. CDFI Annual Certification Report Detail Page

2. Click **Upload Files** to select a file from your computer or use the **Drag and Drop** option.
 - a. Select a Type from the dropdown.
 - b. Enter a brief description if necessary.
 - c. Select Date Approved by Board.

- d. Click **Attach File**.

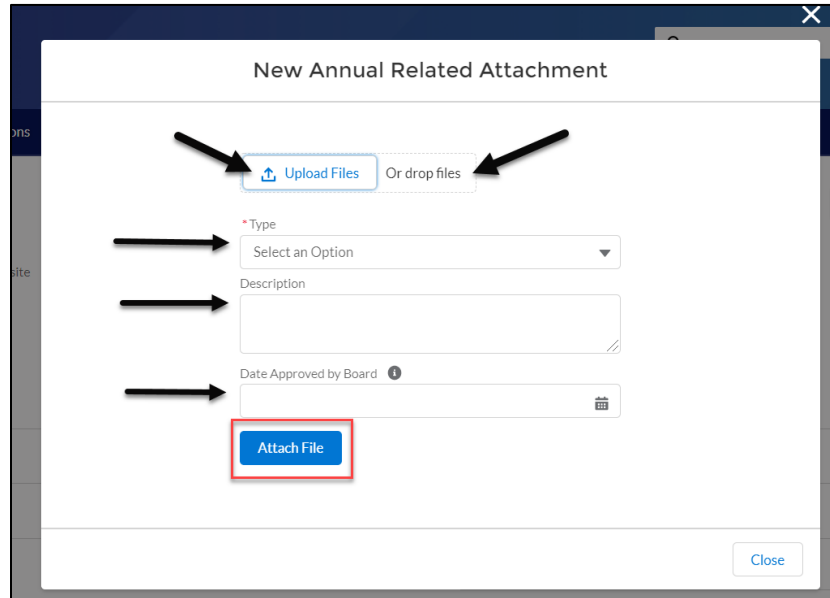


Figure 39. Attach File Page

- e. If you answered “No” to the **Legal Entity** section questions on the **CDFI Annual Certification Report Edit** page (shown below in Figure 31), select **Legal Entity Documentation changes** in the drop-down menu under **Type** before attaching any files.

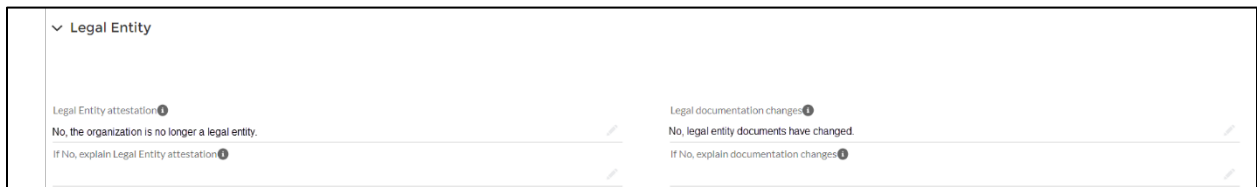


Figure 40. Legal Entity Documentation Changes Example

- f. Once all steps are complete – you will receive an “Attachment Uploaded Successfully” message.

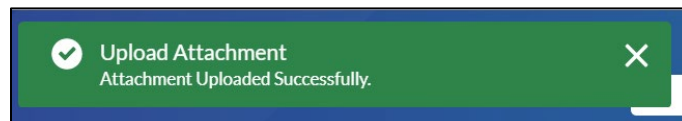


Figure 41. Attachment Uploaded Successfully Message

- 3. Click **Back to the Annual Report** to return to the **CDFI Annual Certification Report Detail** page. If needed, multiple attachments can be added by repeating the steps in this section.

5. Submit CDFI Annual Certification Report

Once all the required information has been completed on the detail page and in the related lists, the CDFI Annual Certification Report can be submitted. To submit the report:

1. From the **CDFI Annual Certification Report Detail** page, click **Submit CDFI Annual Certification Report**.

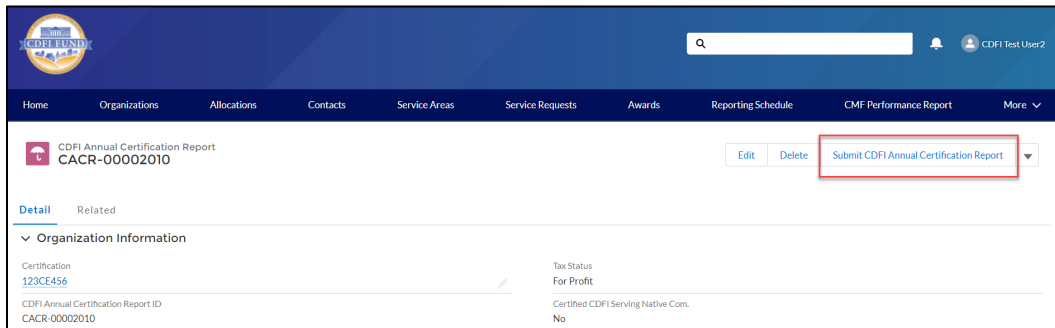


Figure 42. CDFI Annual Certification Report Detail Page

2. A pop up will appear stating that once submitted, you will not be able to update. Click **OK**.

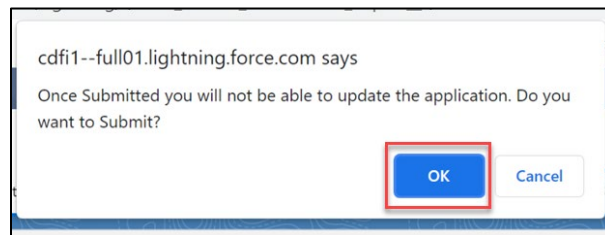


Figure 43. Do you Want to Submit? Message

Please Note: If you need to change the data once it has been submitted, you will need to submit an AMIS service request to the CCME mailbox.

3. You will then receive a Success message.

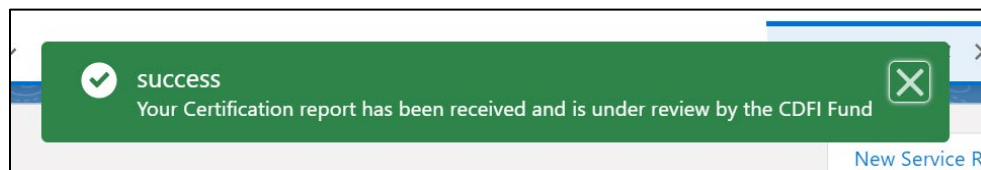


Figure 44. Submitted Report Verification Message

4. From the **CDFI Annual Certification Report Detail** page, click the **Certification** link to be directed to the **Certification Detail** page.

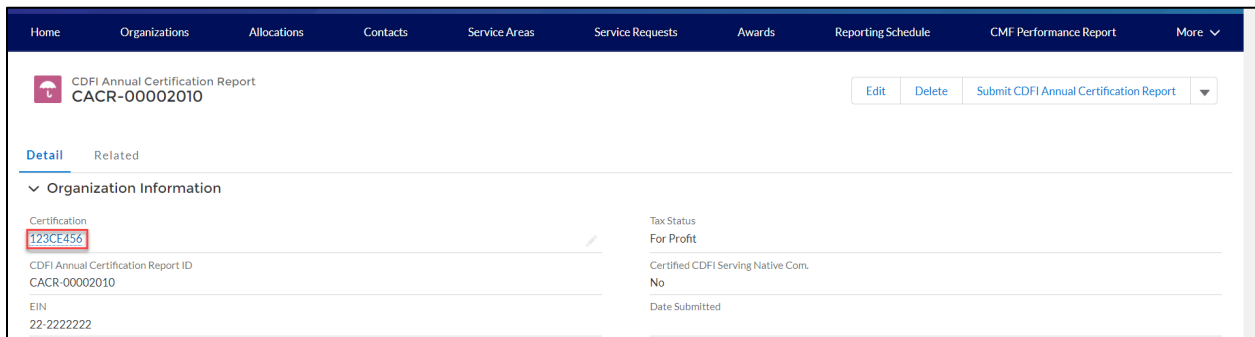


Figure 45. CDFI Annual Certification Report Detail Page

5. You can view reports and report statuses by:
 - a. Clicking on the **Related Tab**.

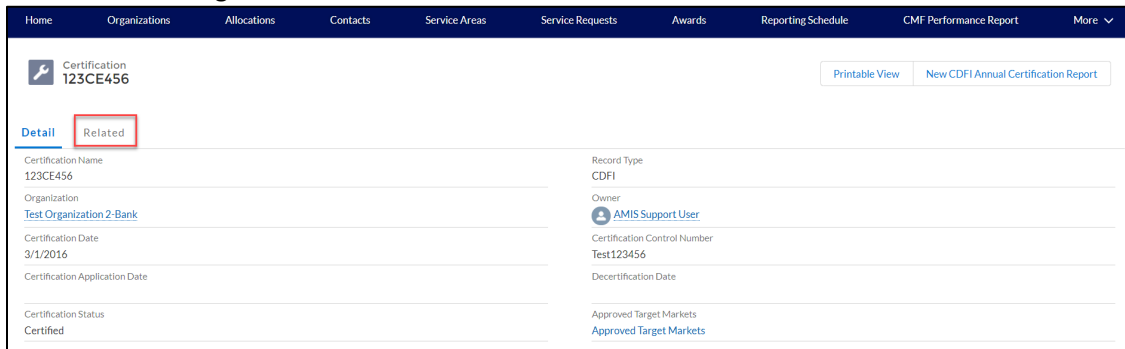


Figure 46. Certification Detail Page – Related Tab

- b. Scrolling to **CDFI Annual Certification Report** Section.

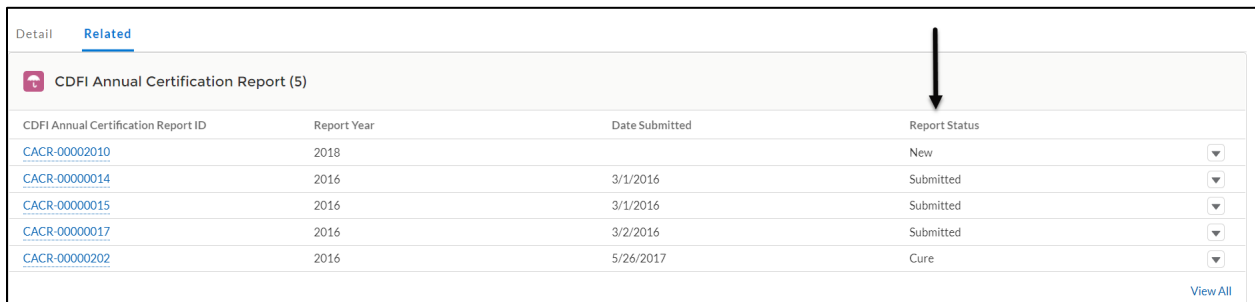


Figure 47. Certification Related Page – CDFI Annual Certification Report