



Creating Organization Board Records in AMIS for Collective Review

Office of Certification Policy and Evaluation (OCPE)

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

www.cdfifund.gov

Resources



- Full guidance on Organization Board Records found under Step 2: Apply at www.cdfifund.gov/cdficert.

CDFI Certification Collective Review Process Overview



- Individual and Collective CDFI Certification Requirements for:
 - Target Market; and
 - Accountability.

Presentation Structure



Creating a New Board Record when Accountability is Provided for Entity Itself



Creating a New Board Record when Accountability is Provided by Controlling Entity



Creating a New Board Record When the Relevant Entity is a Controlling Entity Relevance to Certification Review Form

Presentation Structure

A yellow graphic element consisting of a central solid circle, two smaller hollow circles above and below it, and a curved line passing through them.

Creating a New Board Record when Accountability is Provided for Entity Itself

Creating a New Board Record when Accountability is Provided by Controlling Entity

Creating a New Board Record When the Relevant Entity is a Controlling Entity Relevance to Certification Review Form

Presentation Structure

A decorative yellow graphic element on the left side of the slide, consisting of a vertical line that curves to the right, passing through two empty yellow circles and ending in a solid yellow circle at the bottom.

Creating a New Board Record when Accountability is Provided for Entity Itself

Creating a New Board Record when Accountability is Provided by Controlling Entity

Creating a New Board Record When the Relevant Entity is a Controlling Entity Relevance to Certification Review Form

Presentation Structure

A large, solid yellow circle with a thin yellow line extending from its top-left edge, curving downwards and to the right.

**Creating Board Member
Records**

A large, hollow yellow circle with a thin yellow line extending from its bottom-left edge, curving upwards and to the right, overlapping the top of the circle.

**Changing Board Status for
Submission**

Presentation Structure

A yellow graphic element consisting of a large solid circle at the bottom, a smaller hollow circle above it, and a curved line connecting them, resembling a stylized leaf or a speech bubble tail.

**Creating Board Member
Records**

**Changing Board Status for
Submission**