

COMMUNITY DEVELOPMENT
FINANCIAL INSTITUTIONS FUND

www.cdfifund.gov



AMIS Quick-Start Guide

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1 Introduction

The objective of this document is to provide myCDFIFund users guidance on logging in, accessing, and working in AMIS during its initial release.



ASSUMPTION: This Quick-Start Guide is targeted for users who have an active myCDFIFund account which was migrated to AMIS. If you have not registered for an AMIS user account and/or are new to working with the CDFI Fund, please see the [AE101: Getting Started – Navigating AMIS](#) training manual which can be found on the AMIS Landing page at amis.cdfifund.gov.

This document provides guidance for four primary activities that first-time users will require to access and work in AMIS:

1. Logging into AMIS – First Visit
2. Logging into AMIS – Subsequent Visits
3. Verifying Profiles
4. Using AMIS to:
 - Prepare and submit a CDE Certification Application
 - Initiate a CDFI/NACA program payment (disbursement) request
 - Submit a service request
 - Access myCDFIFund for anything related to NMTC, BEA, BGP, or CDFI Certification.

2 Logging into AMIS – First Visit

Upon initial logon, you will be required to set your password:

1. Navigate to: amis.cdfifund.gov. The AMIS Landing page displays.
2. Click the **LOGIN TO AMIS** link.

A screenshot of the AMIS Landing Page. The page has a blue header with the CDFI Fund logo on the left and the text "U.S. DEPARTMENT OF THE TREASURY COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND" on the right. Below the header is a navigation bar with links for "AMIS HOME", "AMIS NEWS", "AMIS TRAINING MATERIALS", "AMIS FAQs", and "LOGIN TO AMIS". The "LOGIN TO AMIS" link is highlighted with a red box. The main content area is titled "AWARDS MANAGEMENT INFORMATION SYSTEM" and contains text about AMIS functionality being released to users as it becomes available. It lists several actions users can take: Register an organization and manage the organization profile, Register a user, Manage a program profile (CDE Certification only), Apply for and review a CDE Certification (A, B and C), and Submit service requests. It also mentions that for other business with CDFI Fund, users will still log-in to AMIS via the "Login to AMIS" link but will be re-directed to legacy systems. A link to "AMIS FAQs" is provided for additional information. At the bottom, contact information for AMIS IT support is given: AMIS@cdfi.treas.gov or (202) 653-0422.

Figure 1. AMIS Landing Page

3. The AMIS Login page displays. Click the **Forgot your password?** link.

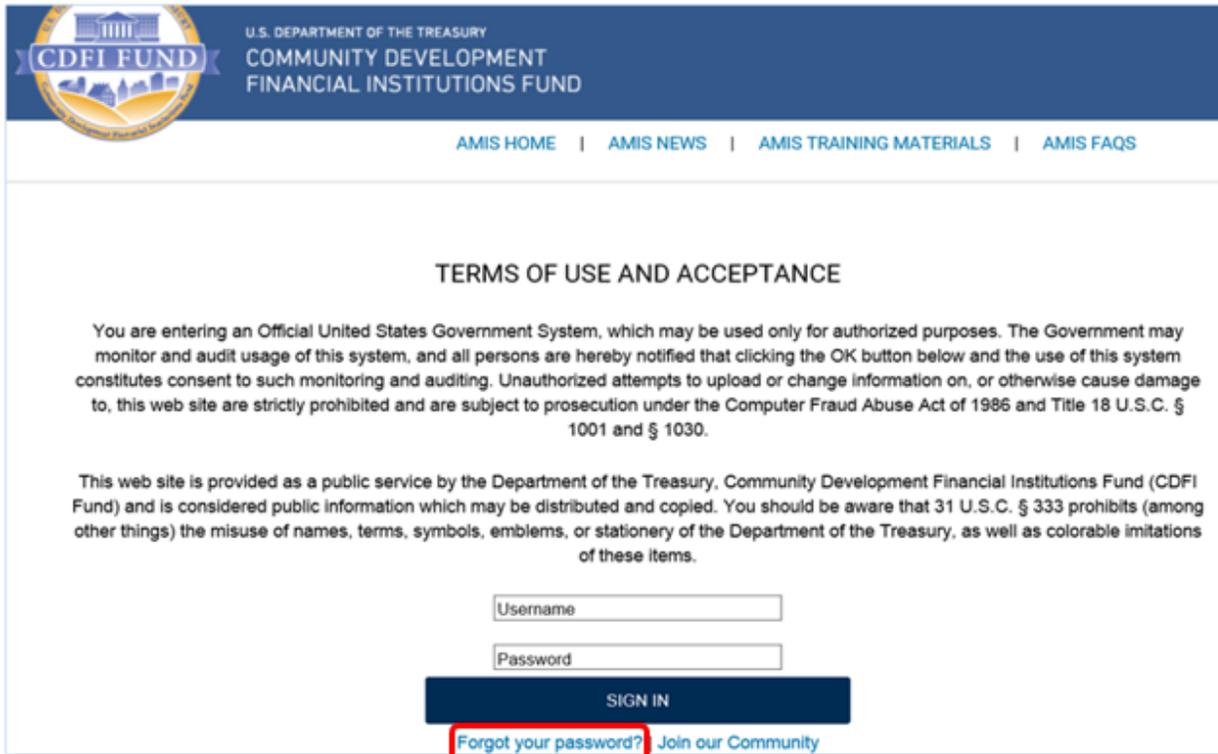


Figure 2. AMIS Login Page – Forgot Password Link

4. After clicking on the link, you will be directed to a page where you will be prompted to enter your user name. Enter your user name. Your user name is the email address you previously used for myCDFIFund.
5. Click **Submit**.

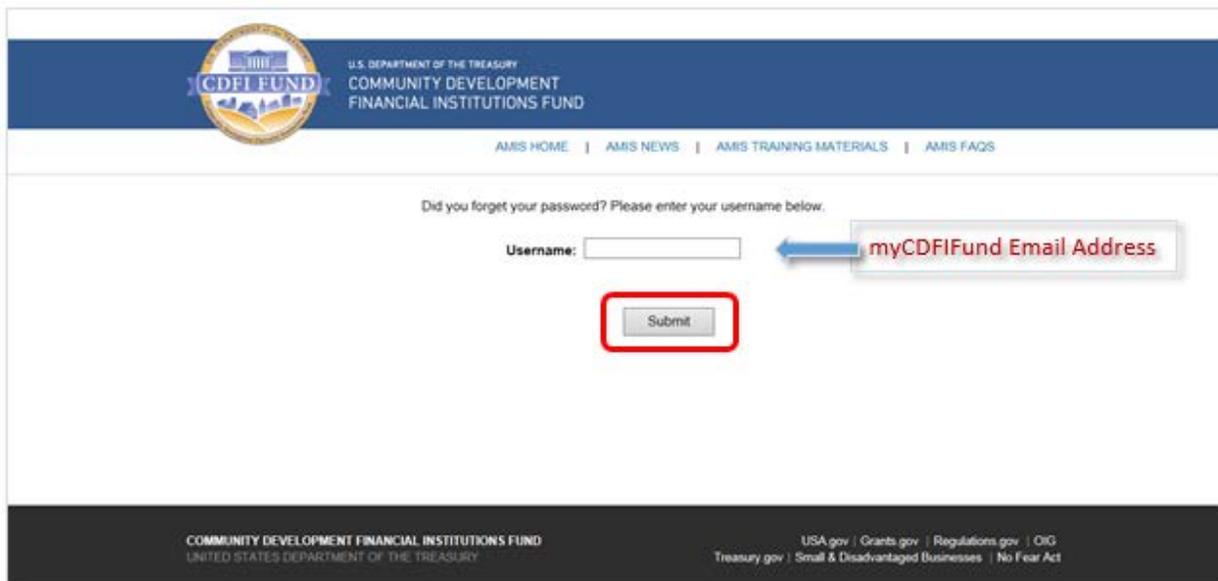


Figure 3. AMIS User Name Entry Page

6. Once you submit your user name/email address, you should receive an email with a link to update your password.
7. To reset your password, click the link provided in the email.

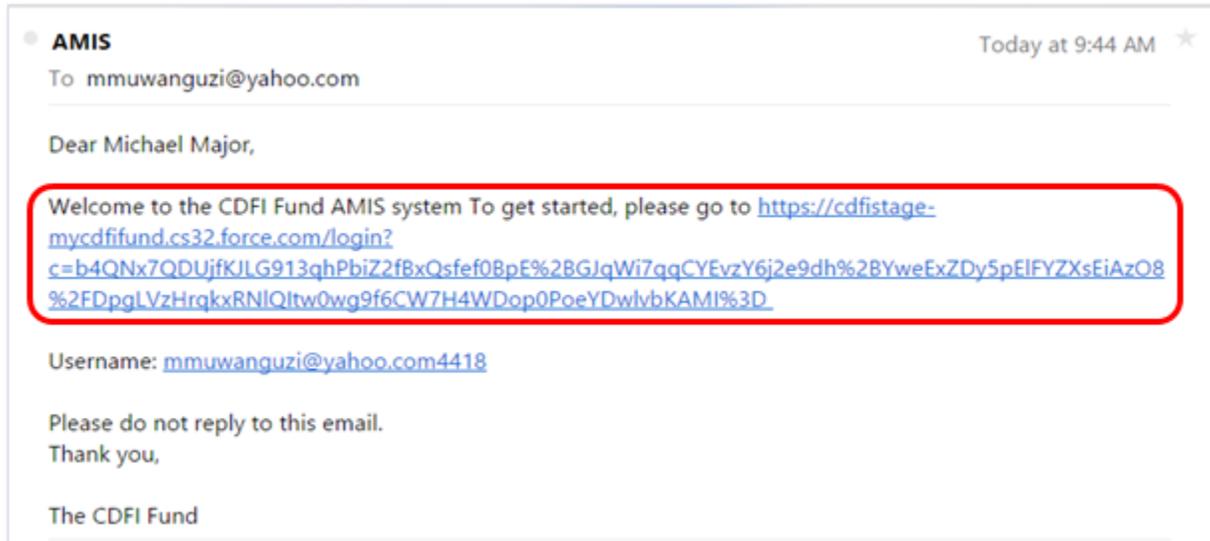


Figure 4. AMIS User Registration Temporary Password

8. After clicking on the link, you will be directed to a browser page and will be prompted to enter a new password. Enter your new password, verify, and click **Save** to log in to AMIS.

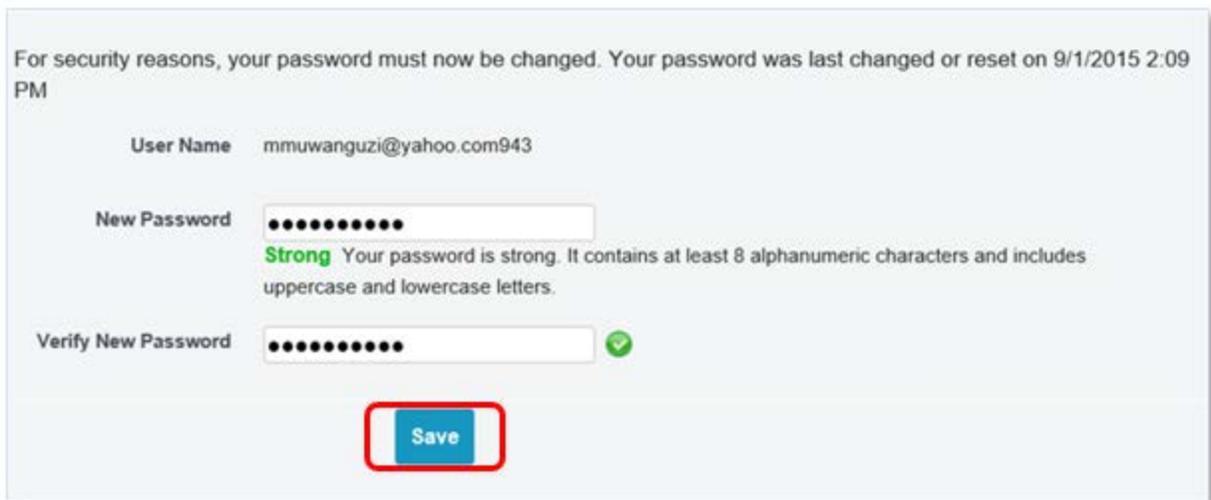


Figure 5. AMIS User Password Change Screen



NOTE: Passwords expire and must be reset every 60 days. Passwords must also adhere to the CDFI Fund's password requirements:

- a. Be at least eight characters.
- b. Contain at least one lower case letter, one upper case letter, one number, and one special character.

9. Once logged in, you will be directed to the AMIS Home page.

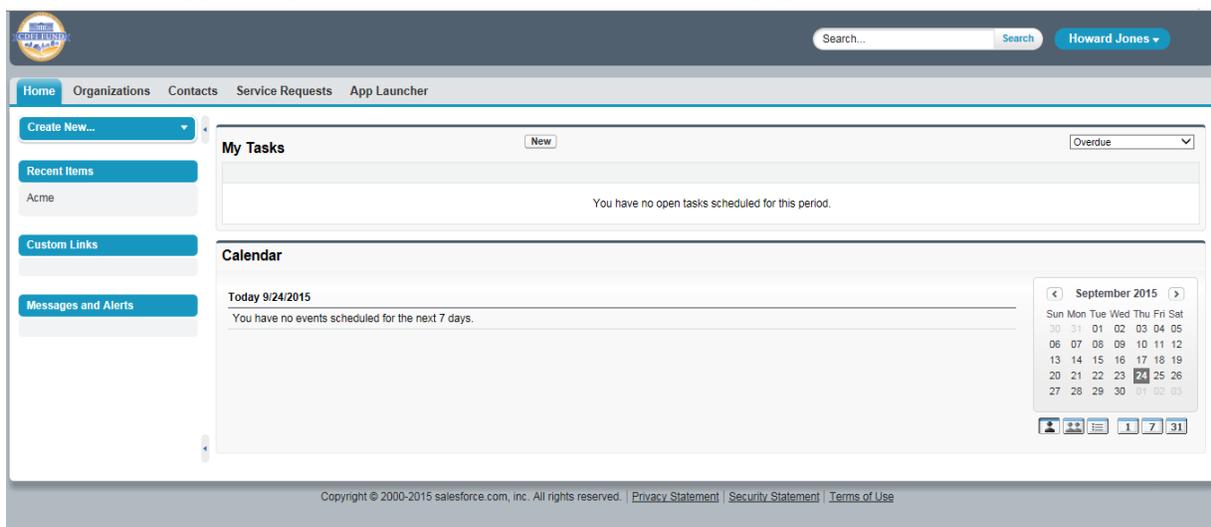


Figure 6. AMIS Home Page



TIP: After you have established a user name and password, you can bookmark the Login page for future logins.



NOTE: As with myCDFIFund, AMIS users may have associations with multiple organizations. You have a unique User Profile (i.e., Admin User, User, or Viewer) for each of the organizations with which you are associated, granting you the appropriate access to each. However, AMIS requires that each user have only one primary organization, meaning that a user can be an Admin User for only one organization. To switch organizations in AMIS, simply click on the **Organizations** tab at the top of the screen. If you need to change your type of User Profile for an organization, contact an administrator for that organization's AMIS account.

For more information about Organizations and User Profiles in AMIS, please see the [AE101: Getting Started – Navigating AMIS](#) training manual under “AMISTRAINING MATERIALS” on the AMIS Landing page at amis.cdfifund.gov.

3 Logging into AMIS – Subsequent Visits

Now that you have set your password and have logged into the system, you're ready to do start doing your work within AMIS. For future work within AMIS, you'll access AMIS directly using your web browser.

1. Navigate to: amis.cdfifund.gov. The AMIS Landing page displays.
2. Click the **LOGIN TO AMIS** link. The AMIS Login page displays.

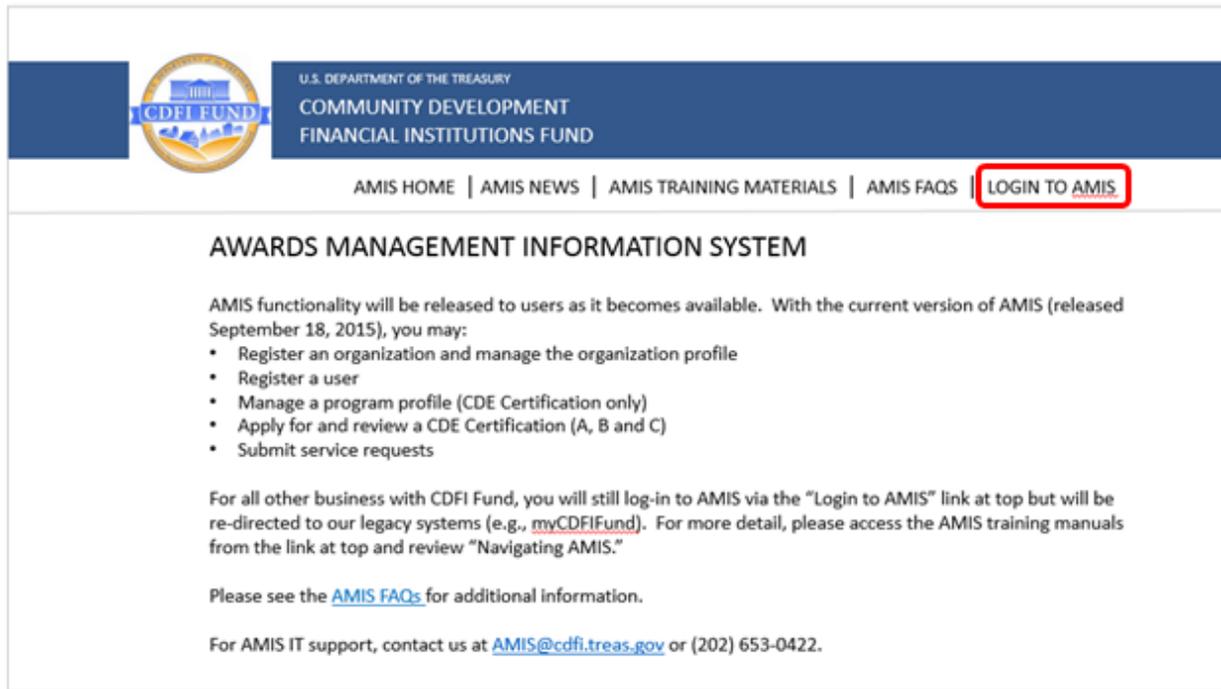


Figure 7. AMIS Landing Page

3. Enter your user name (i.e., email address) and password and click **SIGN IN**.

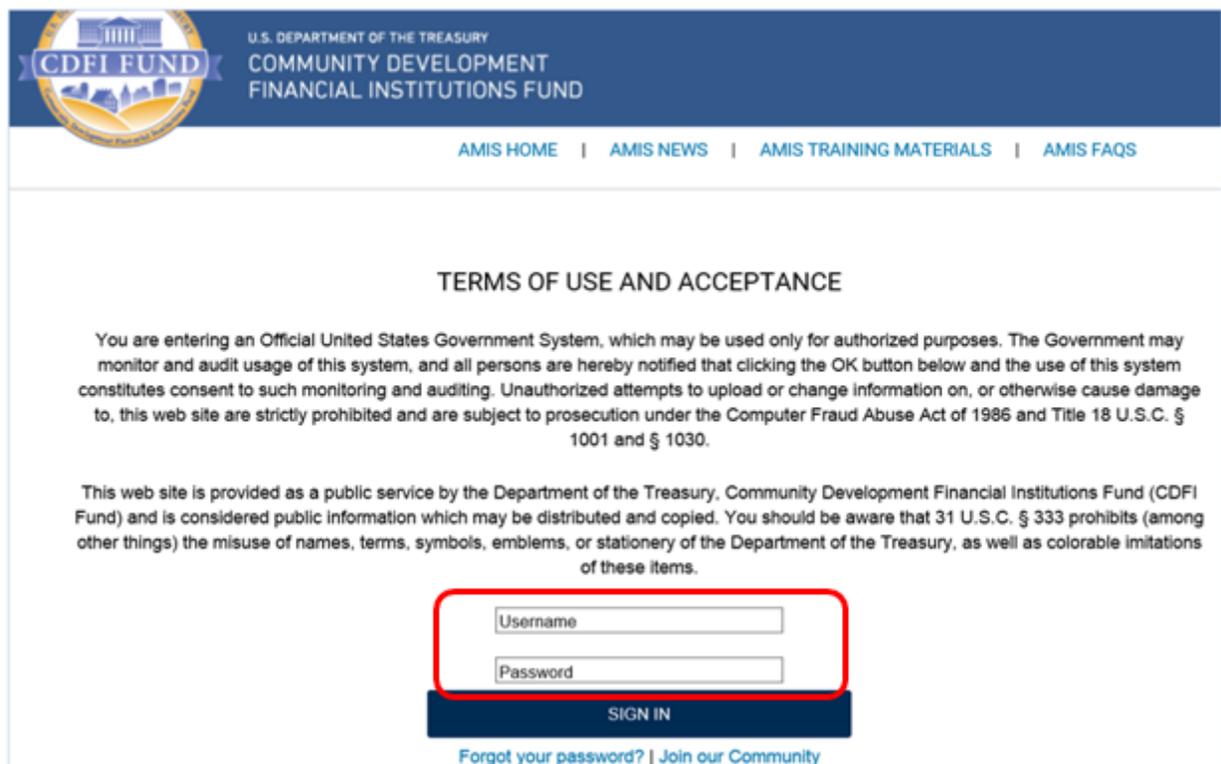


Figure 8. AMIS Login Page

4. You will be directed to the App Launcher page. From the App Launcher, you can either:
 - a) Navigate to AMIS, or
 - b) Navigate to myCDFIFund to perform business with the CDFI Fund that is NOT currently in AMIS [see Section 5 of this Quick-Start Guide].

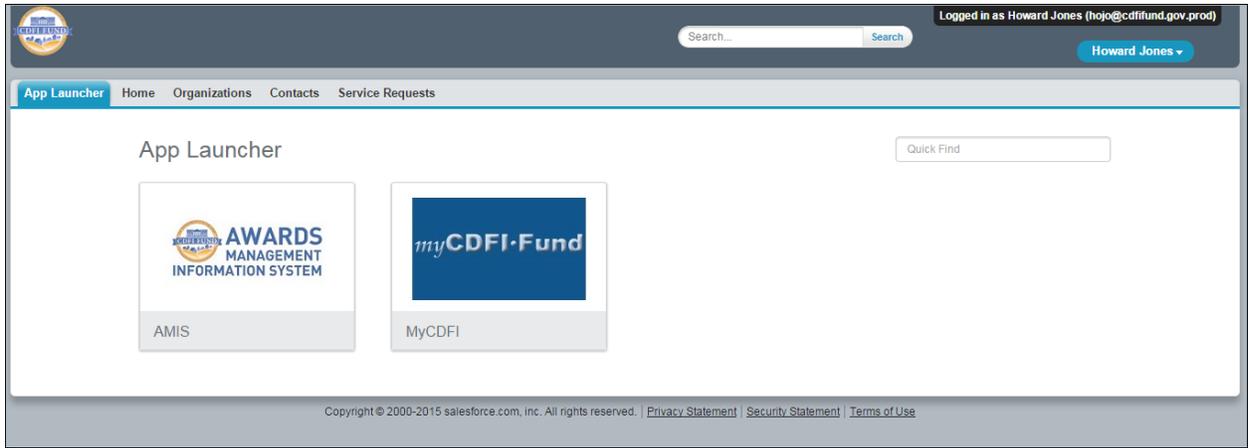


Figure 9. AMIS App Launcher Page

5. Click on the **AMIS** tile within the App Launcher. You will be directed to the AMIS Home page.

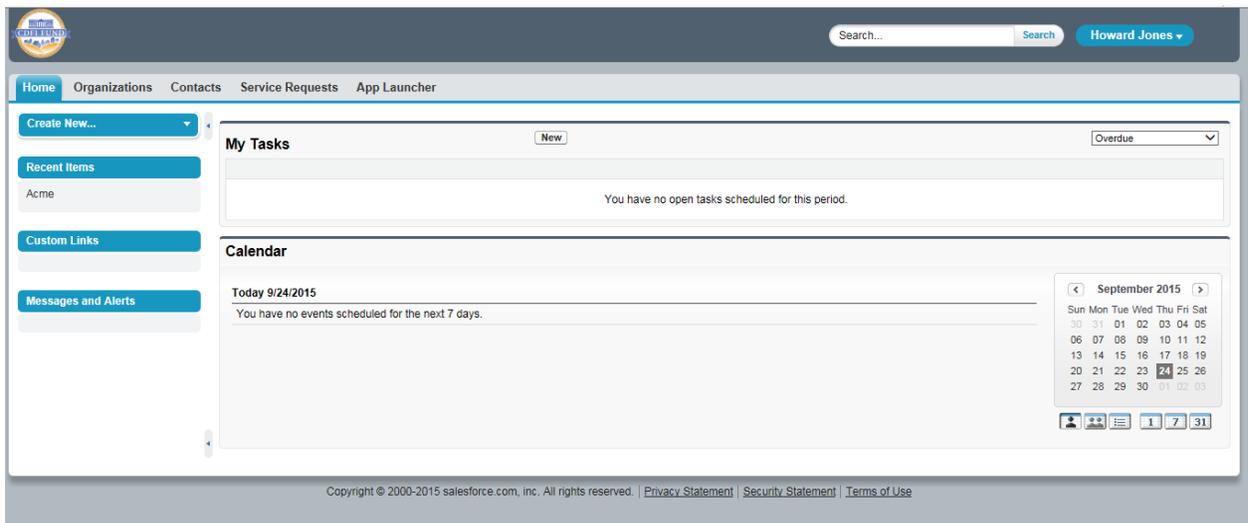


Figure 10. AMIS Home Page

4 Verifying User Profiles

Once you have logged into AMIS, your User Profile may need to be updated to ensure you have the correct profile and permissions assigned to you. For a definition of the available profiles, please see the [AE101: Getting Started – Navigating AMIS](#) training manual. To identify your assigned AMIS User Profile, perform the following steps:

1. From the AMIS Home page, click on the **Organizations** tab, which will list all of the organizations with which you are associated. Your list of organizations will display.

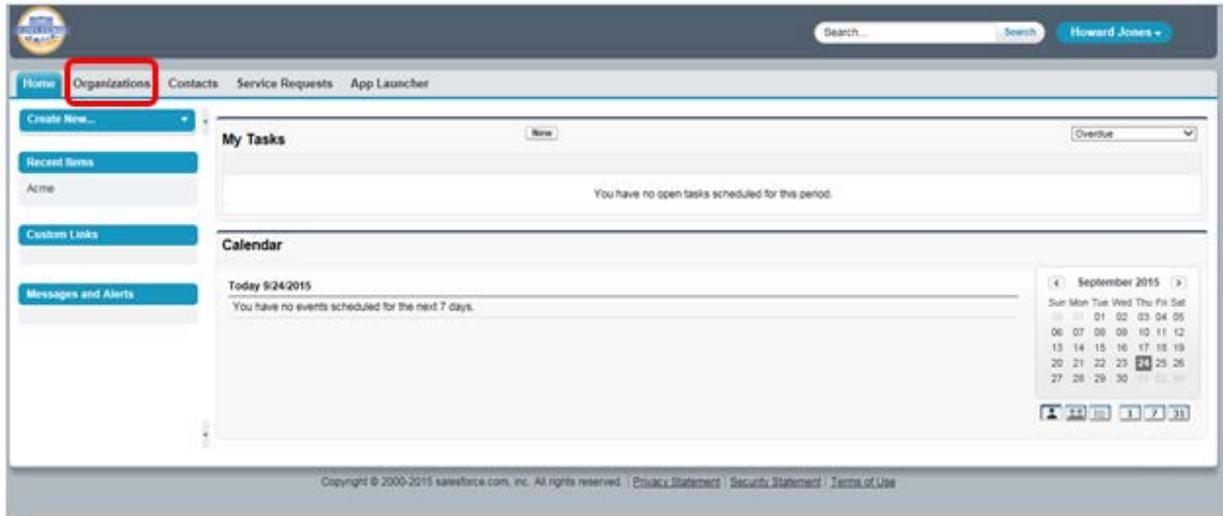


Figure 11. AMIS Home Page

2. Click on the organization for which you'd like to verify your User Profile. The selected organization's Detail page is displayed.

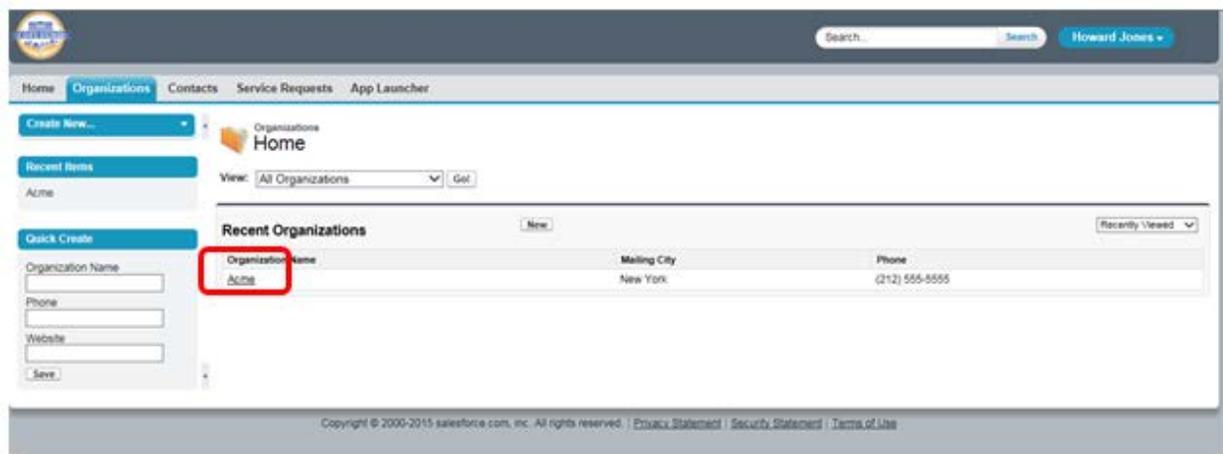


Figure 12. Organizations Home Page

3. Verify the details for your selected organization. If you are an Admin User, you may select the **Edit** button to change any of the information.

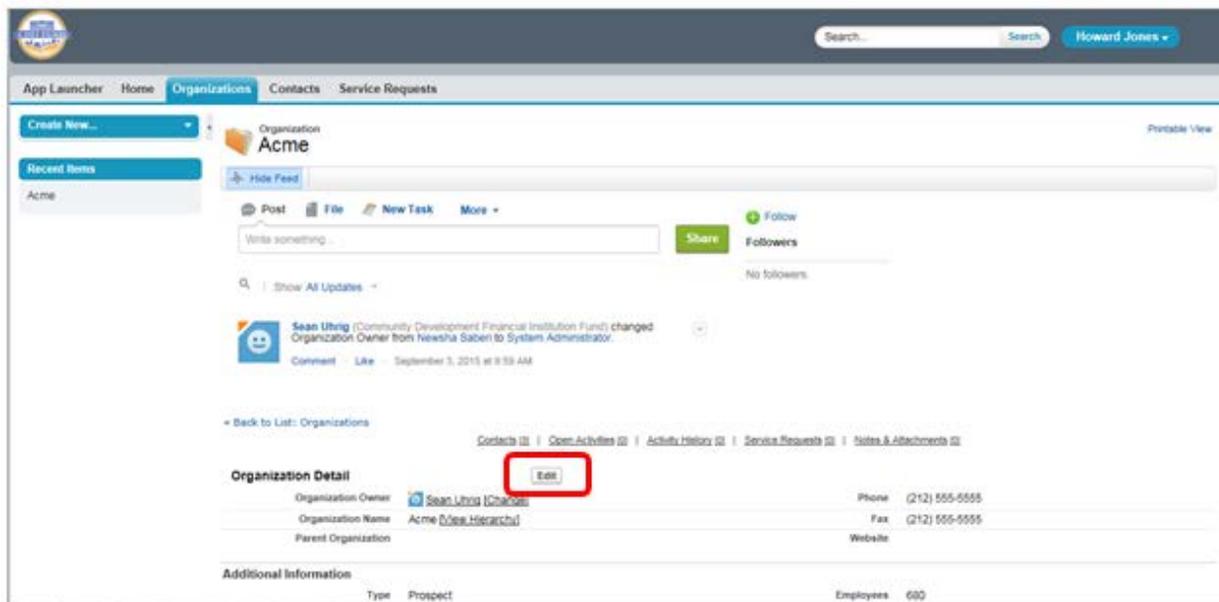


Figure 13. Organization Detail Page

4. Scroll down to the Contacts section of the organization. Within the Contacts section, you will be able to view each contact's AMIS User Profile (Admin User, User, or Viewer).



Figure 14. Contacts Section

5 Using AMIS

As additional AMIS functionality is released, it will be made available through the AMIS Landing page. Detailed training manuals will be available for the updated functionality that is released. You may click on **AMIS TRAINING MATERIALS** on the AMIS Landing page to access the training manuals. For the September 28th release, the following primary functions have been released:

1. Prepare and submit a CDE Certification Application.
 - a. Detailed descriptions can be found in the *AE102: CDE Certification Application Submission* training manual.
2. Initiate a CDFI/NACA program payment (disbursement) request.
 - a. Detailed descriptions can be found in the *AE104: CDFI/NACA Program Payment Request Submission* training manual.
3. Submit a service request.
 - a. Detailed descriptions can be found in the [AE101: Getting Started – Navigating AMIS](#) training manual (found on the AMIS Landing page at amis.cdfifund.gov).
 - b. We are requesting all correspondence with the CDFI Fund (including general inquiries, IT questions, requests for amendments, etc.) be routed through the service request functionality within AMIS. We will still accept phone calls and emails, but we will direct you to enter a service request. By doing so, we will be able to better track your

questions/comments to the CDFI Fund and respond in a more timely and efficient manner.

4. Access myCDFIFund for anything related to NMTC, BEA, BGP, or CDFI Certification.
 - a. As noted in Section 3 of this Quick-Start Guide, after you log in to AMIS, you will see the App Launcher page.

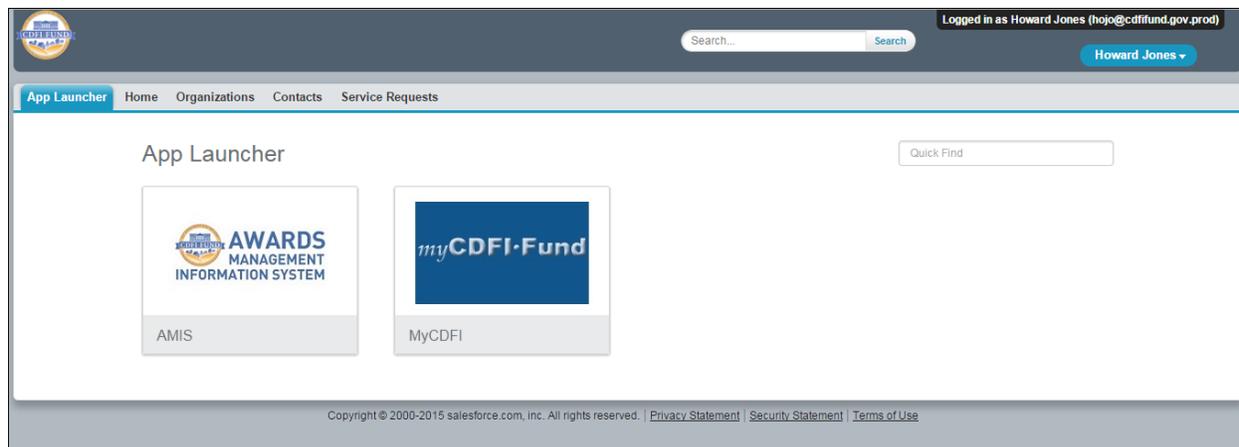


Figure 15. App Launcher Page

- b. If the activity you need to perform with the CDFI Fund is not currently available within AMIS, you will need to use our legacy systems (i.e., myCDFIFund, CIMS3, CIIS) to continue doing business with the CDFI Fund. Clicking on the **myCDFIFund** tile within the App Launcher will direct you to the myCDFIFund Home page. You will be automatically logged into myCDFIFund.