

COMMUNITY DEVELOPMENT  
FINANCIAL INSTITUTIONS FUND

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# **AMIS TRAINING MANUAL**

**AE103: ACR CDFI Annual Certification Report  
(for CDFI/NACA Program Applicants)**

*February 2016*

## Table of Contents

1	Introduction .....	4
2	Purpose .....	4
3	Create a New CDFI Annual Certification Report .....	4
3.1	Complete the Development Services Related List .....	9
3.2	Complete the Financial Data Related List .....	11
3.3	Complete the Financial Products Portfolio Breakdown Related List .....	15
3.4	Complete the Related Attachments Related List .....	17
3.5	Submit CDFI Annual Certification Report .....	20

## Table of Figures

Figure 1.	Organization Detail Page – Certifications .....	5
Figure 2.	Organization Detail Page – Certifications .....	5
Figure 3.	Certification Detail Page - CDFI Annual Certification Report .....	6
Figure 4.	CDFI Annual Certification Report Edit Page .....	7
Figure 5.	CDFI Annual Certification Report Edit Page .....	7
Figure 5.	CDFI Annual Certification Report Edit Page (Continued) .....	8
Figure 6.	CDFI Annual Certification Report Edit Page – Error: Invalid Data Message .....	8
Figure 7.	CDFI Annual Certification Report Detail Page – Data Saved Confirmation .....	9
Figure 8.	CDFI Annual Certification Report Detail Page - Related Lists .....	9
Figure 9.	CDFI Annual Certification Report Detail Page – Data Saved Confirmation .....	10
Figure 10.	CDFI Annual Certification Report Detail Page - Development Services Related List .....	10
Figure 11.	New Development Services Edit Page .....	11
Figure 12.	Development Services Detail Page .....	11
Figure 13.	CDFI Annual Certification Report Detail Page .....	12
Figure 14.	CDFI Annual Certification Report Detail Page – Financial Data Related List .....	12
Figure 15.	Select Financial Data Record Type .....	13
Figure 16.	Financial Data Edit Page .....	13
Figure 17.	Financial Data Edit Page .....	14
Figure 18.	Financial Data Detail Page .....	15
Figure 19.	CDFI Annual Certification Report Products Portfolio .....	15
Figure 20.	CDFI Annual Certification Report Detail Page - Financial Products Portfolio Breakdown Related List .....	16
Figure 21.	Financial Products Portfolio Breakdown Edit Page .....	16
Figure 22.	Financial Products Portfolio Breakdown Detail Page .....	17
Figure 23.	CDFI Annual Certification Report Detail Page .....	17
Figure 24.	CDFI Annual Certification Report Detail Page - Related Attachments Related List .....	18
Figure 25.	Attach File Page .....	18
Figure 26.	Legal Entity Documentation Changes Example .....	19
Figure 27.	Attach File Page .....	19
Figure 28.	CDFI Annual Certification Report Detail Page .....	20
Figure 29.	CDFI Annual Certification Report Detail Page .....	20
Figure 30.	Submitted Report Verification Message #1 .....	21
Figure 31.	Submitted Report Verification Message #2 .....	21
Figure 32.	CDFI Annual Certification Report Detail Page .....	22

Figure 33. Certification Detail Page ..... 22

## 1 Introduction

The CDFI Annual Certification Report will be used by the CDFI Fund staff to manage the CDFI Certification process. Every certified CDFI must complete the CDFI Annual Certification Report within 90 days after the close of their fiscal year.

Important to note:

- If the Organization's legal entity documentation has changed, applicants are required to attach the new Legal Entity documents to confirm the changes before submitting the report.
- Required data fields are typically indicated with a red bar (" | "). However, not all required fields are indicated as such; other fields may be required based on validation rules.
- 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 identified as initially identified errors are corrected.
- The Development Services **Related List** must have at least one development service entry.
- The Financial Data **Related List** must have ONLY one financial data record.
- The Financial Product Portfolio Breakdown **Related List** must have at least one financial data portfolio entry.

## 2 Purpose

The purpose of this manual is to provide guidance to applicants so they may successfully submit a CDFI Annual Certification Report each year in AMIS.



*AE101: Getting Started – Navigating AMIS (for External Users)* is a pre-requisite for this training manual.

## 3 Create a New CDFI Annual Certification Report

To create and submit a CDFI Certification Report:

1. After logging into AMIS, you will see the AMIS Organization Detail page. From the Organization Detail page, click the **Certification** related list. The link will direct you to the **Certification** section found toward the bottom of the page. Another option is to scroll down to the **Certification** section on the Organization Detail page.



Organization  
AMIS Test2

« Back to List: Organizations

Org Related Attachments [4] | Financial Data [4] | Contacts [2] | **Certifications [1]** | Program Profiles [5+] | Affiliates [0] | SF424s [2]

**Organization Detail** Edit

Organization Name	AMIS Test2 <a href="#">[View Hierarchy]</a>	Phone	<a href="#">(301) 567-8700</a>
Parent Relationship		Website	
		EIN/TIN	12-8989013
		DUNS	

**Organization Type**

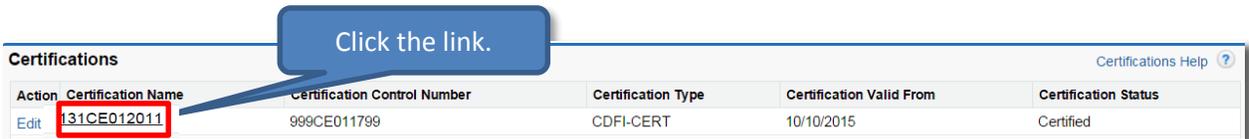
Financial Institution Type	Venture Capital	Date of Incorporation	1/1/1987
Organization Structure		Initial Activities Start Date	1/1/2012
		Total Asset Size	\$2,000,000.00
		Fiscal Year End Day	
		Fiscal Year End Month	

**Certification Information**

CDFI Certification Status	CDFI Certified	CDE Certification Status	Not Certified
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Figure 1. Organization Detail Page – Certifications

- From the Certifications section, click the **Certification Name** link. The organization’s certification control number will display (XXXCEXXXXXX) as the Certification Name.



Certifications Certifications Help ?

Action	Certification Name	Certification Control Number	Certification Type	Certification Valid From	Certification Status
<a href="#">Edit</a>	<a href="#">131CE012011</a>	999CE011799	CDFI-CERT	10/10/2015	Certified

Figure 2. Organization Detail Page – Certifications

- Click the **CDFI Annual Certification Report** related list. Select the **New CDFI Annual Certification Report** button to complete the required information.

Certification  
CDFI  
« Back to Organization: AMIS Test2

[CDFI Annual Certification Report \(0\)](#)

### Certification Detail

Certification Name	CDFI	Record Type	CDFI
Organization	<a href="#">AMIS Test2</a>	Owner	<a href="#">Lavanva K</a>
Certification Type		Certification Control Number	
Certification Valid From		Service Area Description	
Certification Application Date		Service Area Geography	
Certification Status			
Certification Application			
Establishment Date			

### CDFI Annual Certification Due Dates

Fiscal Year End Month	Initial Report Deadline
Fiscal Year End Day	1st Late Report Deadline
Fiscal Year	2nd Late Report Deadline

### Latest Report Revision Information

Cure Period Start Date	Report Revision
Cure Period End Date	Revision
Created By: Lavanva K 2/24/2016 5:24 PM	

**CDFI Annual Certification Report** [New CDFI Annual Certification Report](#)

No records to display

Select the "New CDFI Annual Certification Report" button to complete annual reports.

Figure 3. Certification Detail Page - CDFI Annual Certification Report

4. At a minimum, the CDFI must complete the required information on the page. Required data fields are indicated with a red bar (" | ").
5. Complete the required information on the page.

The screenshot shows the 'New CDFI Annual Certification Report' form. It includes sections for Organization Information, Line of Business, Credit Union Membership, and Full-Time Equivalent (FTE) Staff Time. A blue callout box with the text 'Click the help "?" icons to display the full question next to each field.' is positioned over the form, with red arrows pointing to the help icons next to several fields.

Figure 4. CDFI Annual Certification Report Edit Page

The screenshot shows the 'Legal Entity', 'Primary Mission', 'Financing Entity', and 'Development Services' sections of the form. Each section contains attestation fields and explanatory text boxes. A blue callout box with the text 'Based upon the responses in the Legal Entity section, additional documentation may be required.' is positioned over the form, with a blue arrow pointing to the Primary Mission attestation field.

Figure 5. CDFI Annual Certification Report Edit Page

The screenshot shows a multi-section form for editing a CDFI Annual Certification Report. The sections are: Development Services, Target Market, Accountability, Non-Governmental Entity, and Other Eligibility Information Changes. Each section contains various attestation and change fields, many with dropdown menus set to "--None--". At the bottom of the form are three buttons: "Save", "Save & New", and "Cancel". A blue callout bubble points to the "Save" button with the text: "Select the Save button to the save the records data."

Figure 6. CDFI Annual Certification Report Edit Page (Continued)

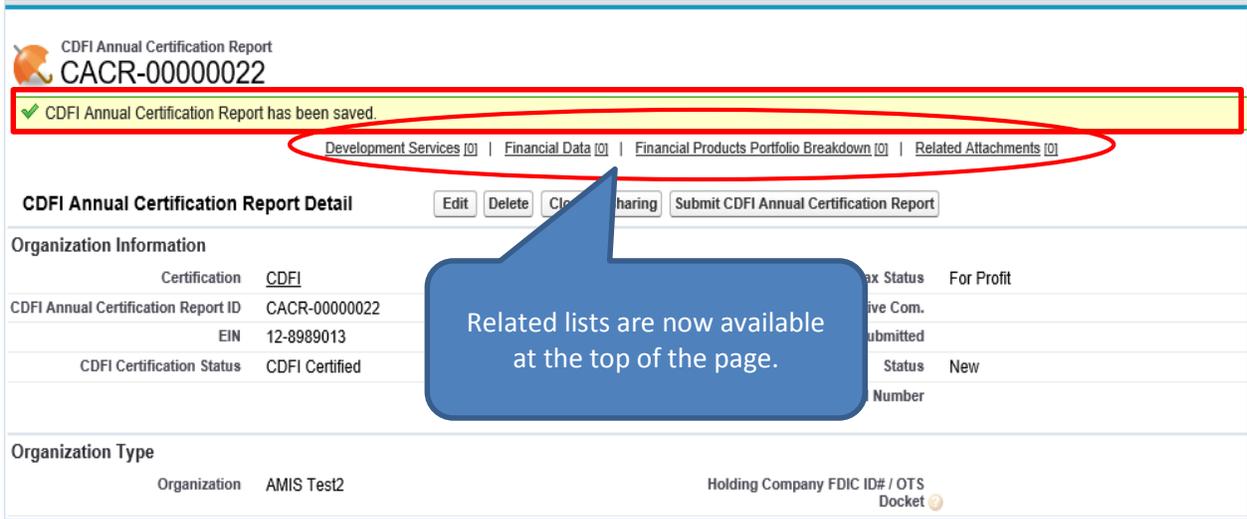
6. Select the **Save** button to save the data.
  - a. An error message will appear if save is selected without completing all the required information.
  - b. Correct the errors and select the Save button to save the record.

The screenshot shows the "New CDFI Annual Certification Report" edit page. At the top, there is a red error message: "Error: Invalid Data. Review all error messages below to correct your data." Below this, the "Organization Information" section shows "Certification" as "CDFI" and "Tax Status" as "--None--" with a red error message: "Error: You must enter a value". The "Line of Business" section shows "Primary Line of Business" as "Business Finance" and "Secondary Line of Business" as "Residential Real Estate Finance". The "Credit Union Membership" section has empty fields for "Total CU Members" and "Total TM CU Members". The "Full-Time Equivalent (FTE) Staff Time" section shows "Percent Financial Staff Time" as 53 and "Total Staff Time" as 10.00. A red box highlights the "Save" button at the top, and a blue callout bubble points to it with the text: "Correct the invalid data and select the Save button."

Figure 7. CDFI Annual Certification Report Edit Page – Error: Invalid Data Message

7. You will be directed to the CDFI Annual Certification Report Detail page with a message stating the report has been saved. Also, **Related Lists** links are now displayed at the top of the page. Click on each related list link to complete the additional information required.

 **Note:** In order to complete all the required information needed for the CDFI Annual Certification Report, applicants must complete all of the required information on the detail page as well as all of the required information within each related list circled below.



CDFI Annual Certification Report  
CACR-00000022

✓ CDFI Annual Certification Report has been saved.

[Development Services \(0\)](#) | [Financial Data \(0\)](#) | [Financial Products Portfolio Breakdown \(0\)](#) | [Related Attachments \(0\)](#)

**CDFI Annual Certification Report Detail** [Edit](#) [Delete](#) [Close](#) [Sharing](#) [Submit CDFI Annual Certification Report](#)

**Organization Information**

Certification	CDFI	Tax Status	For Profit
CDFI Annual Certification Report ID	CACR-00000022	Entity Type	Non-Profit
EIN	12-8989013	Submitted	
CDFI Certification Status	CDFI Certified	Status	New
		Number	

**Organization Type**

Organization	AMIS Test2	Holding Company FDIC ID# / OTS Docket	
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Related lists are now available at the top of the page.

Figure 8. CDFI Annual Certification Report Detail Page – Data Saved Confirmation

8. Select the buttons to complete new related list records.



**Development Services** [New Development Services](#)  
No records to display

**Financial Data** [New Financial Data-1](#)  
No records to display

**Financial Products Portfolio Breakdown** [New Financial Products Portfolio Breakdown](#)  
No records to display

**Related Attachments** [Add Related Attachments](#)  
No records to display

Click on each and complete all required information.

Figure 9. CDFI Annual Certification Report Detail Page - Related Lists

### 3.1 Complete the Development Services Related List

1. From the CDFI Annual Certification Report Detail page, click the **Developmental Services** related list link.



Figure 10. CDFI Annual Certification Report Detail Page – Data Saved Confirmation

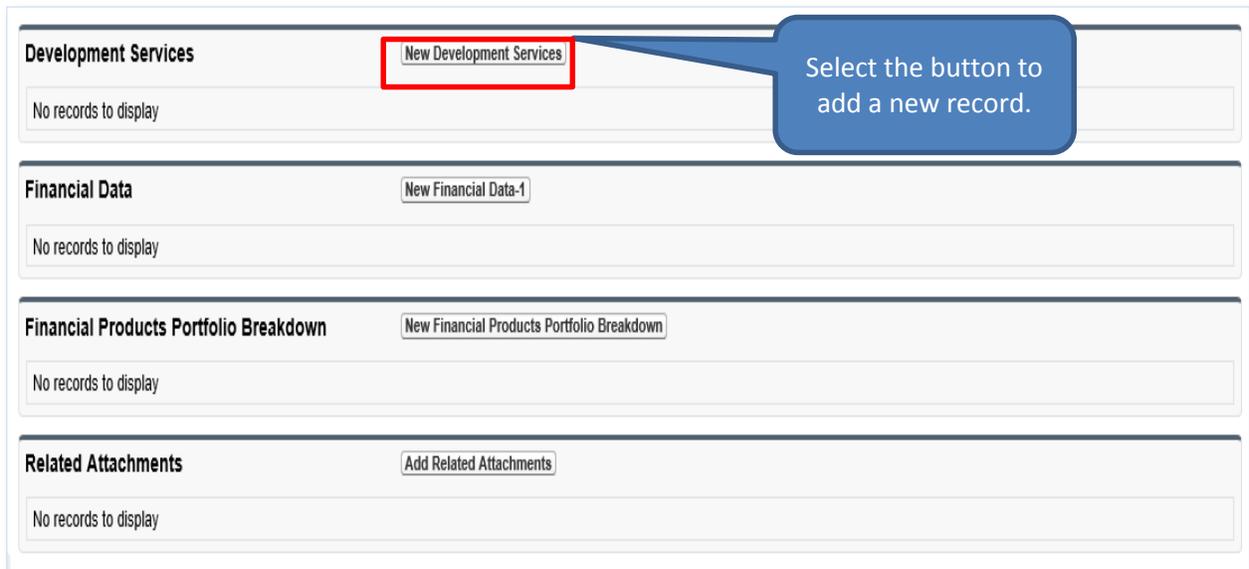


Figure 11. CDFI Annual Certification Report Detail Page - Development Services Related List

2. Select the Developmental Services button.
3. Complete the required information on the page and select the Save button. At least one Development Service must be entered in order to submit the report.

Development Services Edit  
DS-00000003

Development Services Edit [Save] [Save & New] [Cancel]

Information ! = Required Information

CDFI Annual Certification Report	CACR-00000003
Development Services ID	DS-00000003
Development Services	Business Technical Assistance
Financial Product	Business Financing
Total Clients Served	4000
Target Market Clients Served	755
Other Development Services	505

[Save] [Save & New] [Cancel]

Figure 12. New Development Services Edit Page

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

Development Services  
DS-00000019

✓ Development Services has been saved.

Development Services Detail [Edit] [Delete] [Clone]

CDFI Annual Certification Report	<a href="#">CACR-00000022</a>
Development Services ID	DS-00000019
Development Services	Business Technical Assistance
Financial Product	Commerical Real Estate Financing
Total Clients Served	800
Target Market Clients Served	747
Other Development Services	?

Figure 13. Development Services Detail Page

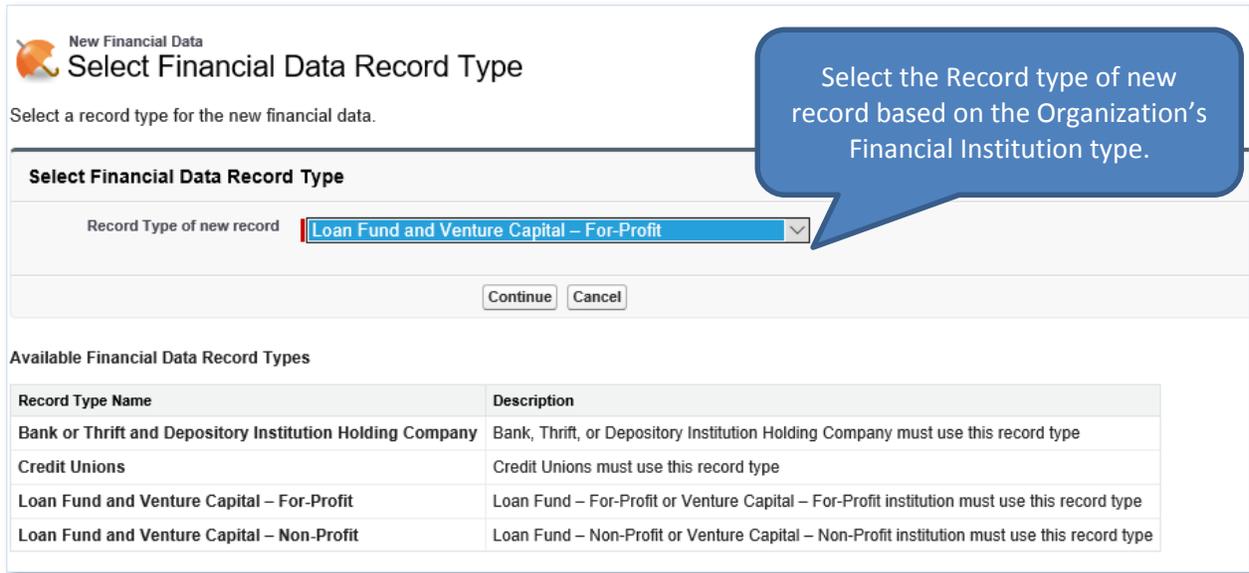
### 3.2 Complete the Financial Data Related List

1. From the CDFI Annual Certification Report Detail page click the **Financial Data** related list link.

Figure 14. CDFI Annual Certification Report Detail Page

Figure 15. CDFI Annual Certification Report Detail Page – Financial Data Related List

2. Select the **New Financial Data** button
3. Select the appropriate financial data **Record Type of new record** from the drop down menu, based on the Organization’s entity type.
4. Select the **Continue** button.



New Financial Data  
**Select Financial Data Record Type**

Select a record type for the new financial data.

**Select Financial Data Record Type**

Record Type of new record: **Loan Fund and Venture Capital – For-Profit**

**Available Financial Data Record Types**

Record Type Name	Description
Bank or Thrift and Depository Institution Holding Company	Bank, Thrift, or Depository Institution Holding Company must use this record type
Credit Unions	Credit Unions must use this record type
Loan Fund and Venture Capital – For-Profit	Loan Fund – For-Profit or Venture Capital – For-Profit institution must use this record type
Loan Fund and Venture Capital – Non-Profit	Loan Fund – Non-Profit or Venture Capital – Non-Profit institution must use this record type

Figure 16. Select Financial Data Record Type

Financial Data Edit  
**New Financial Data**

**Information**

CDFI Annual Certification Report: CACR-00000007

Values from audited financial statement: --None--

**Assets**

Average Assets: 20,000,000

Allowance Loan and Lease Losses Reserve: 8,000,000

Total Assets: 12,000,000

**Liabilities**

Current Liabilities: 2,000,000

Total Liabilities: 10,000,000

**Net Assets, Net Worth, or Equity Information**

Total Net Worth: 18,000,000

Figure 17. Financial Data Edit Page

5. Complete the required information on the page. Users must submit **only one** Financial Data Record.
6. Select the **Save** button to save the financial data.

The screenshot displays a web form titled "Financial Data Edit Page" with three main sections: Expenses, Capital Category, and Loan and Investment Portfolio Values. Each section contains several input fields with numerical values. A blue callout box with a pointer to the "Save" button contains the text: "Complete the financials and select the Save button." The "Save" button is highlighted with a red rectangle.

Expenses	
Interest Expense	99.00
Provision for Loan Losses	9.00
Operating Expenses	9.00
Total Expenses	9.00

Capital Category	
Financing Debt	9.00
Grants	9.00
Equity Investments	9.00
Deposits	9.00
Secondary Capital, Uninsured	9.00
Net Assets or Retained Earnings	9.00
Total Capital	99.00

Loan and Investment Portfolio Values	
Total Outstanding Investment Portfolio	9.00
Total Outstanding Loan Portfolio	9.00
Total Charge-Offs	99.00
Total Recoveries	9.00
Total Value of Non-performing Assets	9.00

Buttons: Save, Save & New, Cancel

Figure 18. Financial Data Edit Page

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

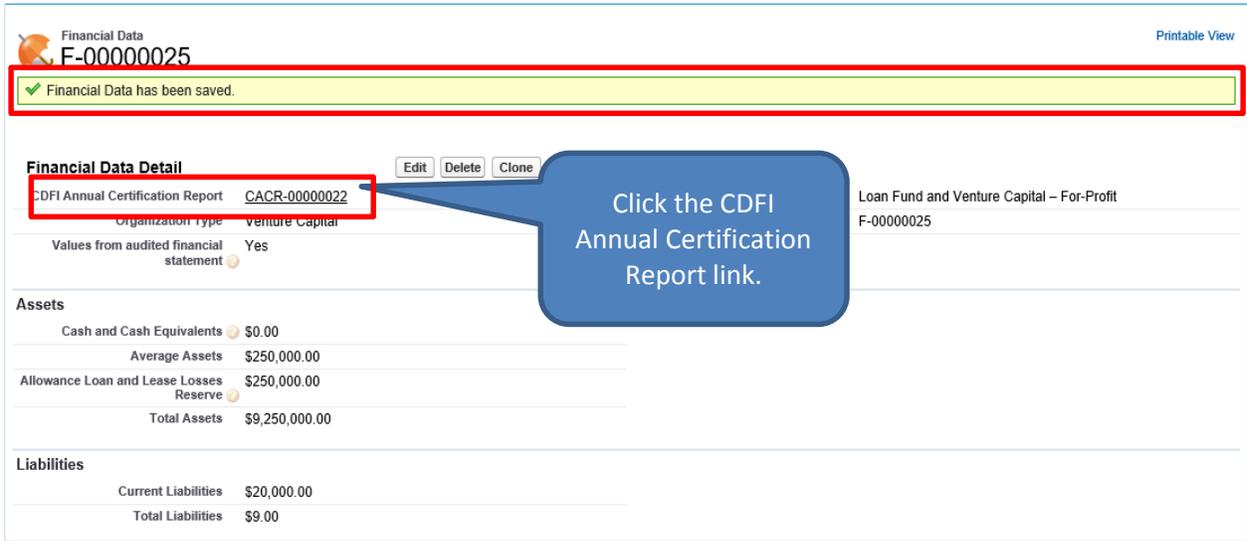


Figure 19. Financial Data Detail Page

### 3.3 Complete the Financial Products Portfolio Breakdown Related List

1. From the CDFI Certification Report Detail Page, click the **Financial Products Portfolio Breakdown** related list link.

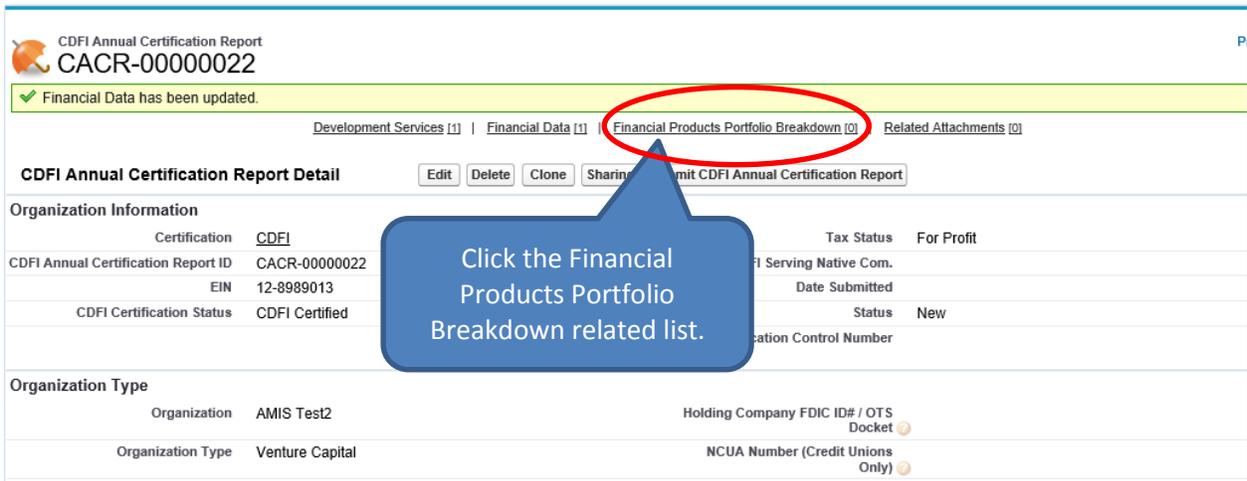


Figure 20. CDFI Annual Certification Report Products Portfolio

2. Select the **Financial Products Portfolio Breakdown** button.

The screenshot shows three main sections: **Development Services**, **Financial Data**, and **Financial Products Portfolio Breakdown**. The **Development Services** table has columns for Action, Development Services ID, Development Services, Financial Product, Total Clients Served, and Target Market Clients Served. The **Financial Data** table has columns for Action, Financials ID, Organization Type, Values from audited financial statement, and Assets. The **Financial Products Portfolio Breakdown** section has a 'New Financial Products Portfolio Breakdown' button highlighted with a red box and a callout box that says: "Select the new Financial Products Portfolio Breakdown button to add a new record."

Figure 21. CDFI Annual Certification Report Detail Page - Financial Products Portfolio Breakdown Related List

3. Complete the required information on the page and select the **Save** button. At least one Financial Portfolio Breakdown must be entered in order to submit the report.

The screenshot shows the **Financial Products Portfolio Breakdown Edit** page. It includes a header with the title and a sub-header. Below the header are buttons for **Save**, **Save & New**, and **Cancel**. The **Information** section contains several fields: **CDFI Annual Certification Report** (text input), **Financial Product** (dropdown menu), **Type** (dropdown menu), **Subtype** (dropdown menu, circled in red), and **If Other, Describe** (text area). Below these are four numeric input fields: **Total Loan Portfolio #**, **Total Loan Portfolio \$**, **Target Market #**, and **Target Market \$**. At the bottom are buttons for **Save**, **Save & New**, and **Cancel**. A callout box points to the **Subtype** dropdown and says: "Subtype may be required depending on the Type selected."

Figure 22. Financial Products Portfolio Breakdown Edit Page

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

**Financial Products Portfolio Breakdown**  
FP-00000019

✓ Financial Products Portfolio Breakdown has been saved.

**Financial Products Portfolio Breakdown Detail**

[Edit](#) [Delete](#) [Clone](#)

CDFI Annual Certification Report	<a href="#">CACR-00000022</a>
Financial Product Portfolio Breakdown ID	FP-00000019
Financial Product	Equity Investments
Type	Business Loans
Subtype	
If Other, Describe	
Total Loan Portfolio #	100
Total Loan Portfolio \$	\$450,000.00
Target Market #	100
Target Market \$	\$250,000.00
Created By	Johnny Test, 2/24/2016 8:02 PM

[Edit](#) [Delete](#) [Clone](#)

Figure 23. Financial Products Portfolio Breakdown Detail Page

### 3.4 Complete the Related Attachments Related List

1. From the CDFI Certification Report Detail Page, click the **Related Attachments** related list link.

CDFI Annual Certification Report  
CACR-00000022

[Development Services](#) [1] | [Financial Data](#) [2] | [Financial Products Portfolio Breakdown](#) [3] | [Related Attachments](#) [0]

**CDFI Annual Certification Report Detail**

[Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Submit CDFI Annual Certification Report](#)

<b>Organization Information</b>		Tax Status	For Profit
Certification	CDFI	CDFI Serving Native Com.	
CDFI Annual Certification Report ID	CACR-00000022	Date Submitted	
EIN	12-8989013	Status	New
CDFI Certification Status	CDFI Certified	Certification Control Number	

<b>Organization Type</b>		Organization	AMIS Test2	Holding Company FDIC ID# / OTS Docket	
Organization Type	Venture Capital	NCUA Number (Credit Unions Only)			

Figure 24. CDFI Annual Certification Report Detail Page

2. Select the Add Related Attachments button to add related attachment records.

The screenshot displays the 'Related Attachments' section of the CDFI Annual Certification Report Detail Page. The 'Add Related Attachments' button is highlighted with a red box and a blue callout bubble that says 'Select the button to add a new record.' The page also shows sections for Development Services, Financial Data, and Financial Products Portfolio Breakdown.

Action	Development Services ID	Development Services	Financial Product	Total Clients Served	Target Market Clients Served
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">DS-00000019</a>	Business Technical Assistance	Commerical Real Estate Financing	800	747

Action	Financials ID	Organization Type	Values from audited financial statement	Total Revenue	Total Expenses	Total Assets
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">F-00000020</a>	Venture Capital	Yes	\$9.00	\$9.00	\$9,250,000.00
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">F-00000025</a>	Venture Capital	Yes	\$659,000.00	\$9.00	\$9,250,000.00

Action	Financial Product Portfolio Breakdown ID	Financial Product	Type	Subtype	Total Loan Portfolio \$	Total Loan Portfolio #	Target Market #	Target Market \$
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">FP-00000019</a>	Equity Investments	Business Loans		\$450,000.00	100	100	\$250,000.00

**Related Attachments**  
No records to display

Figure 25. CDFI Annual Certification Report Detail Page - Related Attachments Related List

3. Select the **Browse** button to upload an attachment.
4. Select the **Type** of attachment from the drop down menu.
  - a. The types of attachment include **Legal Entity Documentation changes** and **Other**.
  - b. Enter a brief description of the attachment in the description field.

The screenshot shows the 'Attach File' page. A red circle highlights the 'Type' dropdown menu, which has 'Legal Entity Documentation changes' selected. A blue callout bubble points to the selected option with the text 'Select the Type of Attachment.' The page includes a 'Browse...' button and an 'Attach File' button.

Figure 26. Attach File Page

- c. If you answered No to the Legal Entity section questions on the CDFI Annual Certification Report Edit Page, shown in Figure 26. Legal Entity Documentation Changes Example, the Legal Entity Documentation changes Attach File and Type is required.

Figure 27. Legal Entity Documentation Changes Example



**Note:** If Legal documentation changes have been made to the Organization Entity, this information was stated when completing the CDFI Annual Certification Report Edit Page as shown above in Figure 26. Legal Entity Documentation Changes Example. If the questions listed in this section are “No”, the applicant must provide the details and attach documentation under the Legal Entity Documentation changes Type in the Attach File section.

Figure 28. Attach File Page

- 5. Select the appropriate Type and select the **Attach File** button to attach the document.
- 6. You will be forwarded to the CDFI Annual Certification Report Detail page.
  - a. Multiple attachments can be added, if needed, by repeating the steps in this section.

CDFI Annual Certification Report  
CACR-00000022

[Development Services \[1\]](#) | [Financial Data \[2\]](#) | [Financial Products Portfolio Breakdown \[1\]](#) | [Related Attachments \[2\]](#)

**CDFI Annual Certification Report Detail**               

**Organization Information**

Certification	CDFI	Tax Status	For Profit
CDFI Annual Certification Report ID	CACR-00000022	Certified CDFI Serving Native Com.	
EIN	12-8989013	Date Submitted	
CDFI Certification Status	CDFI Certified	Status	New
		Certification Control Number	

**Organization Type**

Organization	AMIS Test2	Holding Company FDIC ID# / OTS Docket	
Organization Type	Venture Capital	NCUA Number (Credit Unions Only)	

Figure 29. CDFI Annual Certification Report Detail Page

### 3.5 Submit CDFI Annual Certification Report

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

CDFI Annual Certification Report  
CACR-00000022

[Development Services \[1\]](#) | [Financial Data \[2\]](#) | [Financial Products Portfolio Breakdown \[1\]](#) | [Related Attachments \[2\]](#)

**CDFI Annual Certification Report Detail**               

**Organization Information**

Certification	CDFI	Tax Status	For Profit
CDFI Annual Certification Report ID	CACR-00000022	Certified CDFI Serving Native Com.	
EIN	12-8989013	Date Submitted	
CDFI Certification Status	CDFI Certified	Status	New
		Certification Control Number	

**Organization Type**

Organization	AMIS Test2	Holding Company FDIC ID# / OTS Docket	
Organization Type	Venture Capital	NCUA Number (Credit Unions Only)	

Figure 30. CDFI Annual Certification Report Detail Page

1. From the CDFI Annual Certification Report Detail page select the **Submit CDFI Annual Certification Report** button.
2. You will receive a pop up box message stating the Application has been received. Select the **Ok** button.

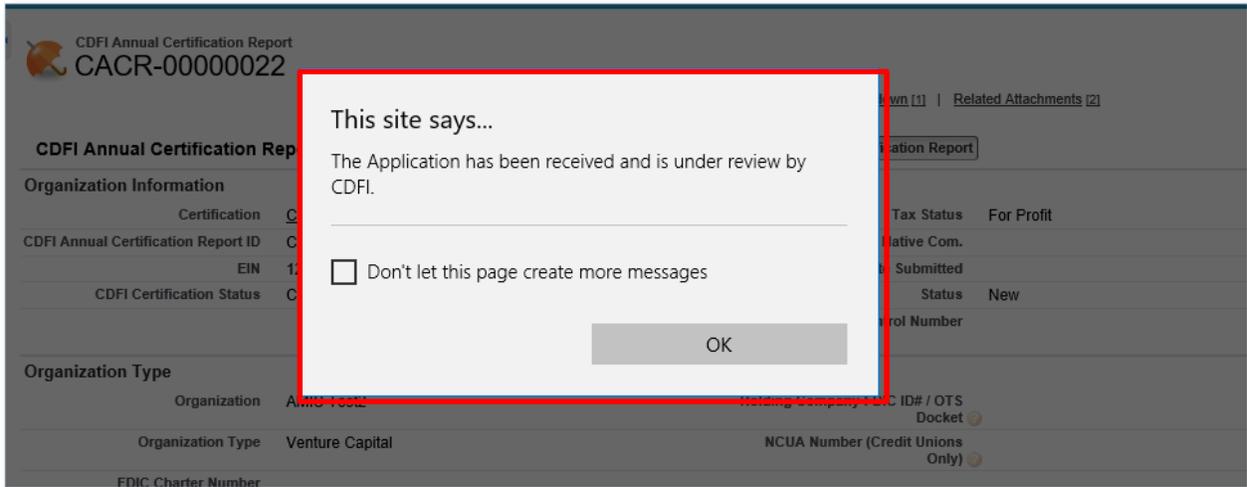


Figure 31. Submitted Report Verification Message #1

3. You will then receive an additional message stating that, once submitted, the data cannot be updated and asking you to confirm submission. Select the **Ok** button.

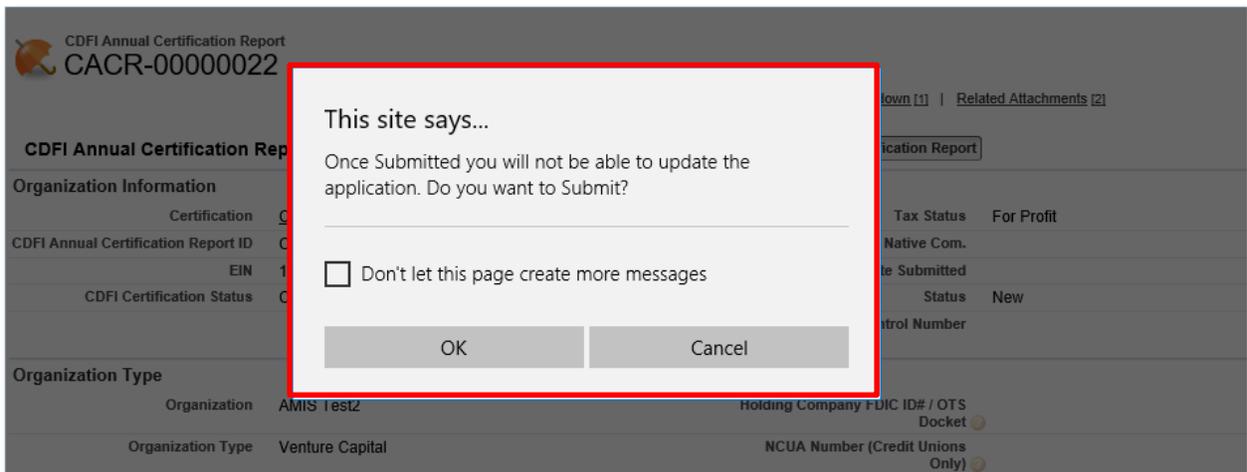


Figure 32. Submitted Report Verification Message #2

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

Figure 33. CDFI Annual Certification Report Detail Page

- To view the CDFI Annual Certification Report and report status, click the CDFI Annual Certification Report related list link and view the records and statuses in that section.

Action	CDFI Annual Certification Report ID	Report Year	Date Submitted	Status	Owner Alias	Owner First Name	Owner Last Name
<a href="#">Edit</a>   <a href="#">Del</a>	CACR-00000022		2/24/2016	Submitted	itest	Johnny	Test

Figure 34. Certification Detail Page