COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

UNITED STATES DEPARTMENT OF THE TREASURY

CDFI Fund ▪ 601 Thirteenth Street, NW ▪ Suite 200, South ▪ Washington, DC 20005 ▪ (202) 622-8662

Award Program

2010 Application

General Instructions for myCDFIFund and CDFI Partner Registration

Table of Contents

Overview

All Applicants and CDFI Partners must register User and Organization accounts in myCDFIFund, the CDFI Fund's Internet-based interface. All Applicants must submit their Application materials (Part I only) through this interface. CDFIs that are the recipient of CDFI Support Activities from BEA Applicants must register as CDFI Partners via their myCDFIFund account.

CDFI Partner Registration Materials consist of: (1) BEA-qualifying Distressed Community Map(s), and (2) a BEA Signature Page. Each BEA Applicant seeking an award for providing CDFI Support to a CDFI Partner will identify the CDFI Partner by listing its full legal name on Worksheet 2: Report of Transactions and on Certification 3: Certification of Integrally Involved CDFI Partners. CDFI Fund staff will verify the CDFI Partner is registered via myCDFIFund.

The instructions in this document describe the process for creating a myCDFIFund account, submitting a BEA Signature Page and for registering as a CDFI Partner. Please see the BEA Program application (on the BEA Program page of the Fund's website) for instructions on submitting a complete BEA Program application.

Step 1: Accessing myCDFIFund

✓ Go to the Fund's website at http://www.cdfifund.gov. Log in to myCDFIFund with your user name and password.

  - If you have not registered as a user with myCDFI, then you must first complete the registration process. To register, click on **I do not already have a user account with myCDFI**. The user registration wizard will guide you through the process.

  - If you are having problems accessing your user account, please contact the Fund's IT Help Desk.

✓ Select your organization from the drop down list, then click **Access Organization.**

  - If you do not see your organization listed in the drop down list, you must request access from the Account Administrator. Select **Request Access to an Organization** under **Options.** Requesting access to an organization will send a notification e-mail to the Account Administrator informing them of your intent to access this organization's account. If your organization is not registered with myCDFI, then after selecting **Request Access to an Organization,** the system will prompt you to register the organization. The organization registration wizard will guide you through the process.

✓ You will be requested to enter the EIN of the organization that you are trying to access. If you are having problems accessing your organization's account, please contact the Fund's IT Help Desk.

✓ You are now logged into myCDFIFund.

Step 2: Accessing the BEA Signature Page

✓ From the Organization home page, click on **Applications** under the navigation bar on the left side of the screen.

✓ Under **New Applications**, click on **BEA Signature Page**.

✓ The application will open to the BEA Signature Page Instructions page. This screen has overall instructions to the Signature Page data entry. The navigation bar at the top right (the "top navigation bar") provide access to the Organization sections of myCDFIFund. The navigation bar on the left side of the screen (the "left navigation bar") is used for navigating within the Signature Page data entry screens.

✓ Click **Organizational Profile** on the top navigation bar. Check that the organization profile information recorded in myCDFI Fund is correct – especially organization address, EIN, and DUNS.

  - This information is used for the Signature Page: please make sure that it is complete and up to date.

  - You must contact the Fund to update the Organization Name, EIN or DUNS.

✓ When you have ensured that all of your organizational information is correct, click on **Application** (on the left navigation bar) then **BEA Signature Page** (which will now appear under Open Applications on the center of the screen). **Click on Organization Information**. Complete the requested information and then click on the **Update Signature Page Information** at the bottom of the screen.

✓ At this point, you could continue filling out the Signature Page or designate the Distressed Communities.

✓ Do **not** submit the Signature Page until the Application materials or Distressed Community map(s) have been attached, as applicable. You must designate and attach your Application materials or Distressed Community map(s) prior to submitting the BEA Signature Page.

Step 3: Creating BEA Distressed Community Maps (CDFI Partners only)

✓ From the **Organization Homepage**, click on **Mapping** on the left navigation bar to access CIMS – the Fund's mapping system. From here, you will create and save your Distressed Community maps and the corresponding worksheets.

✓ To the right of BEA Distressed Communities, click on New (to create new Distressed Communities) or Open or Edit to access previously created Distressed Communities.

✓ For more information on how to designate a Distressed Community in CIMS, please see "**View the Tutorial to help you get started and better understand the myCDFI Mapping System**" on the Mapping homepage.

Step 4: Attaching Distressed Community Maps to the Signature Page (CDFI Partners only)

- ✓ After creating the Distressed Community map, click **Save As** to go to the page that you will allow you to name the Distressed Community map and attach it to the BEA Signature Page.

- ✓ Name the Distressed Community map and select the associated application (i.e., the **BEA Signature Page**). Click **Save Selected Geographic Area.** The Distressed Community map has now been saved in your organization's myCDFIFund account and has been attached to your **BEA Signature Page**.

- ✓ If you need to edit previously linked Distressed Communities, a list of the maps/worksheets associated with the BEA Signature Page is available under **Options**, **View maps associated with Applications for your organization**.

  - From the Mapping Homepage: click **Open** under the file menu.

  - You should see a list of the saved maps in your organization's myCDFI account, including the one that you just saved. Under **Options**, at the bottom of the page, click on the link **View maps associated with Applications for your organization**. This link will take you to the page the lists all of the maps that you have attached to your CDFI Partner registration.

  - Select **BEA Signature Page** from the Application and click **Show Maps**. A list of all maps associated with the registration selected will appear on the screen.

  - If you have been granted access to this application, or are an administrator on this organization's myCDFI account, and the application has not yet been submitted or today's date is not past the application due date, then you will have access to remove the map from the application by clicking "Remove" next to the map. If the application has been submitted or the application due date has passed, then you will not be able to remove a map from the application. You are still able to open the map from this page, but will be forced to save the map under a different name if you attempt to change it. Once a map has been associated with an application and the due date has passed, or the application has been submitted, the maps will be locked to this organization's application and you will no longer be able to save another map with the same name.

Step 5: Completing Entering Data in the Signature Page Application

- ✓ Click on each link on the left navigation bar, enter the information requested, and then click on **Update Signature Page Information** at the bottom of each screen.

  - Formatting requirements and hints are located under each question. Required fields are indicated with a red triangle.

  - Be sure to click the **Update Signature Page Information** at the bottom of the page to save and record your responses. As you complete each screen and click on the Update Signature Page Information, the red triangles will disappear.

- ✓ Check for Completeness of Required Entries and Reviewing the Information:

- On the left navigation bar, click on **Submit and Print**, then on **Submit, Preview and Print Signature Page**.

- If all entries have been validated, the page will display **Submission Status – Complete**.

- If all entries have not successfully validated, the page will display **Submission Status: Not Complete**.

  - The system will display a list of sections found to have no data entered in required fields. You will need to return to the appropriate section on the left navigation bar to complete the missing fields.
  - Any missing item identified with "MyCDFI" must be updated in the Organization Profile section of myCDFIFund.
  - When you have finished entering the missing data, return to the **Submit and Print** page to check the status until you see **Submission Status – Complete**.

✓ On the **Submission Status – Complete** screen, click **Preview Signature Page** immediately below the page title. The completed signature page document will display.

  - Make any necessary edits, by clicking on **Return to Signature Page Input** at the top of the screen, and then the appropriate link on the left navigation bar. You can return to the **Submission Status – Complete** screen by clicking on the **Submit and Print** button on the left navigation bar.

  - Once you are satisfied with the Signature Page, click the **Print** button at the bottom of the page to print a copy.

  - Return to the **Submission Status: Complete** page by clicking **Return to Signature Page Input** at the top of the page.

✓ After you have printed a copy of the completed Signature Page, from the **Submission Status – Complete** page, click the **Submit Final Signature Page** button. The final Signature Page document will display.

✓ Return to myCDFI via the link at the top of the page. The submitted Signature Page should now be listed under Submitted Applications.

Frequently Asked Questions

Do I print and send my Distressed Community maps to my Bank Partners for them to include in their BEA applications?
No. Fund reviewers will first identify a BEA Applicant's CDFI Partners and then log into their myCDFIFund accounts to verify the Distressed Community maps on-line. Therefore, it is very important that your CDFI name be correct in each of your bank partner's Report of Transactions and CDFI Partner Certification.

How do I know if I need to register?
If an applicant is seeking a BEA Program award for making a qualifying loan, deposit, or technical assistance in your CDFI, then your organization must register as a CDFI Partner. **A CDFI that is the recipient of Equity Investments (grants, equity, or equity like loans) does not have to register as a CDFI Partner.**

Do I have to create new maps, or can I use my existing BEA Distressed Community maps and worksheets?
If you have previously saved your qualified BEA Distressed Community maps and worksheets, you may use them for this application.

Can I associate more than one Distressed Community map with my BEA Signature Page?
Yes, you may associate as many Distressed Community map as are relevant.

Can I associate my target market maps that I created for my CDFI Certification application or maps I previously created for my FA/Core application?
No. The CDFI Program uses different threshold criteria for identifying targeted communities. You must use the maps associated with the BEA Program.

Why is there no place for a signature on the myCDFI Fund Signature Page?
CDFI Partners do not need to sign the Signature Page. For Applicants, the CDFI Fund only requires a signed SF-424 for the FY 2010 funding round. There is no need for a signature on the Signature Page since signing, scanning, and attaching the SF-424 to the Application suffices.