Accessing CIIS

- **CIIS is available through your myCDFIFund Organization Account in the Applications Link.**
- **An Account Administrator must first click on the CIIS link under the "New Applications" menu to open the application.**
- **After the CIIS Application is opened, all myCDFIFund Users that have been Enabled to use the Organization Account AND have been granted Access to CIIS by the account administrator may connect to the CIIS Home Page.**

myCDFIFund Help:

1. How to Register as a User with myCDFIFund

A. Go to the Fund's Home Page at www.cdfifund.gov.
B. Click the "New User?" button located beneath the "Password" field at the bottom, left corner of the screen.
C. Carefully read myCDFIFund Statement of Use and click "I Agree" to continue the registration process.
D. Enter your email address and click the "Continue" button.
E. Complete the User Profile information and click the "Continue" button.
F. Complete the Security Question for future account authentication in case you forget your password and click the "Continue" button.
G. Congratulations! You are now a registered myCDFIFund User. Please click the "Continue" button set your password.
H. Enter your New Password twice (in the two spaces provided). Click the "Update" button to set your password and enter the myCDFIFund User Account Home Page.

2. Access Privileges Included in a myCDFIFund User Account:

Users will have access to the following myCDFIFund features through the myCDFIFund User Account Home Page.

- Home Page
  - Announcements
  - Organization Account Access
- Tabs (top, right corner of the page)
  - User Profile
    - Personal Information
    - Change Password
    - Mailing Preferences
  - Reader Information
  - Help

3. How to Register an Organization with myCDFIFund

A. Log in to your myCDFIFund User Account with your e-mail address and password.
B. Select the "Register an Organization" link from the options on the myCDFIFund User Home Page.
C. Carefully read myCDFIFund Statement of Use and click the "Accept" radio button followed by "Start myCDFI Organization Registration" to continue the registration process.
D. On the Start Organization Registration Page, enter your organization's 9-digit Employer Identification Number (EIN) and organizational information and click the "Continue" button. (Note: Your organization's EIN will be found in its IRS Incorporation documents.)

E. If your organization is not already registered, you will you will become the organization's default myCDFIFund Account Administrator. You may give the Account Administrator rights to another User at any time. If your organization is already registered, you will be notified that an account already exists. Please see #4 regarding Access to an Organization that is already Registered with myCDFIFund for additional information.
F. Fill in the Address Information for your organization and click the "Continue" button.
G. Fill in the Organization Profile for your organization and click the "Continue" button.
H. Review Organization Profile information and print for your records. Click the “Login to myCDFI” button to continue to the myCDFIFund Organization Account Home Page.

4. What Functions are Included in a myCDFIFund Organization Account:

Account Administrators and Users with access “Enabled” will have access to the following myCDFIFund functions through the myCDFIFund Organization Account Home Page.

- Organization Home
  - Announcements and Communication
  - View Active Users
  - Quick Links
- Organization Profile
  - View Primary Information
  - View and Update Organization Profile
  - View and Update Affiliates
  - Manage Users Access to your Organization Account (Account Administrators only)
- Applications
  - Start New Applications
  - Open Existing Applications
  - Connect to the Community Investment Impact System (CIIS)
  - View Submitted Applications.
  - Link to Printable Applications
  - Manage Users Access to Applications (Account Administrators only)
- Awards
  - View information on awards and disbursements
  - Note: This tab is only visible to organizations that have actually received an award.
  - Manage Users Access to Awards (Account Administrators only)
- Mapping

5. How to Access a Registered myCDFIFund Organization’s Account

A. Log in to your myCDFIFund User Account using your email address and password.
B. Select an organization from the Organization Access menu on the right column of the screen. The menu will display all Organization Accounts that your User Account can access.
C. Enter the EIN of the organization's account you wish to access and click the “Access Organization” button.
D. If you are the Account Administrator or a User with permitted access, you will be sent to the Organization's myCDFIFund Home Page. If you are a User, you will be restricted to only those areas of the myCDFIFund Account to which the Administrator has given you access.

6. How to Request Access to a Registered myCDFIFund Organization Account

A. Log in to your myCDFIFund User Account with your e-mail address and password.
B. Select the “Request Access to an Organization” link from the options on the myCDFIFund User Home Page.
C. Enter the 9-digit EIN of the organization you wish to access and click “Request Access” button.

D. You will be notified that you have been granted access to this Organization Account in a “Disabled” state. An email will be automatically sent to the Account Administrator with a request for access.
E. The Account Administrator will now have the option of granting you access to the Organization's Account. If access is granted, you will be able to access the organization from the User Account Home Page (see Help Topic 4, Step B).
F. If you do not gain access to the Organization Account, the Account Administrator may have chosen not to grant you access or may no longer be at the organization. For additional assistance contact the Fund’s I.T. Help Desk: 202-622-2455 or ITHelpDesk@cdfi.treas.gov.

7. Assistance Contacting the Organization’s Account Administrator

A. For assistance contacting an organization’s myCDFIFund Account Administrator please contact the Fund’s I.T. Help Desk: 202-622-2455 or ITHelpDesk@cdfi.treas.gov.
B. If the person who was serving as your Account Administrator no longer works for your organization, and you would like to replace them with a different person, send a letter with the following information by fax (202-622-7754), on company letterhead, with the signature of your organization’s Authorized Representative to the attention of Terry Keyfauver, CIO:
    a. Organization name
    b. Organization EIN
    c. Former Account Administrator’s name
    d. New Account Administrator’s name
    e. New Account Administrator’s e-mail address

8. Account Administrators: How to Update Your Organization's Contact Information

A. Log in to myCDFIFund User Account and Organization Account.
B. On the Home Page for your myCDFIFund Organization Account, click the "Organization Profile” and “Primary Information” links on the left column.
C. Click the edit icon to the left of any of Mailing Address, Web Address, or Shipping Address.
D. Update information click the "Update Address" button.
E. Note: If you need to change your organization's name or Employer Identification Number (EIN), you must send the IRS papers documenting these changes by fax to: GMC, CDFI Fund at 202-622-7754.

9. Account Administrators: How to Add Affiliates to Your Account

A. Log in to myCDFIFund User Account and Organization Account.
B. On the Home Page for your myCDFIFund Organization Account, click "Organization Profile,” then “Affiliates” in the left column.
C. Click "Add Affiliates" in the upper, left corner of the Organization Affiliates page.
D. Enter the Affiliate’s EIN in space provided and click the "Continue" button.
E. Answer questions regarding Affiliate and click the "Add Affiliate" button.

10. Account Administrators: How to Enable/Disable User Account Access

A. Log in to myCDFIFund User Account and Organization Account.
B. On the Home Page for your myCDFIFund Organization Account, click "Organization Profile,” then “Users” in the left column.
C. The Manage Users page will display all Users that have been granted access and/or requested access to the Organization Account.
D. To change the User Account Access, select a User by clicking on his/her name. On the User Profile page, select the “Enable Account” or “Disable Account” button to change User access.

E. To add a new User to the Organization Account, click “Add User” in the upper, left corner of the Manage Users Page. Enter the email address of the User and follow Step D above to Enable the Account. (Note: myCDFIFund will only accept email addresses for established User Accounts.)

11. Account Administrators: How to Remove a User’s Restricted Access from an Application

A. Log in to myCDFIFund User Account and Organization Account.
B. On the Home Page for your myCDFIFund Organization Account, click "Organization Profile,” then “Users” in the left column.
C. The Manage Users page will display all Users that have been granted access and/or requested access to the Organization Account.
D. To change the User access to an application, select a User by clicking on his/her name. On the User Profile page, select the “Restricted Access” link to the right of the “Applications” notation.
E. User Access page will display any active applications, including CIIS, and the Users access status. Select the “Edit” icon for an Application to change the User access.
F. Select or deselect the “Read/Modify” radio button to change access and click the “Update User Access” button.

12. Account Administrators: How to Change Account Administrators

A. Log in to myCDFIFund User Account and Organization Account.
B. On the Home Page for your myCDFIFund Organization Account, click "Organization Profile,” then “Users” in the left column.
C. The Manage Users page will display all Users that have been granted access and/or requested access to the Organization Account.
D. To change the User role, select a User by clicking on his/her name. On the User Profile page, select the edit icon to the right of the “User Role” header.
E. Select Account Administrator from the dropdown menu and click the “Update User Role” button. myCDFIFund will require you to Enable the User Account if it is not already enabled.
F. Note: An Organization may have multiple Account Administrators.