Accessing the Mapping System:

- **The Mapping Program is available through your myCDFIFund Organization Account in the Mapping link.**

myCDFIFund Help:

1. Register a <u>User</u> with myCDFIFund

A. Go to the Fund's Home Page at www.cdfifund.gov.
B. Click the "New User?" button located below the myCDFIFund log on in 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 Question page for future account authentication and click the “Continue” button.
G. Congratulations! You are now a registered myCDFIFund User. Please click the “Continue” button set your password.
H. Select a password and enter the New Password in both spaces provided. Click the “Update” button to set your password and enter the myCDFIFund User Account Home Page.

2. What Functions are Included in a myCDFIFund User Account:

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

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

3. Register an <u>Organization</u> 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 "I Agree" 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 page one of the Organization Profile information for your organization and click the "Continue" button.
G. Fill in the page two of the Organization Profile information 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. Access a Registered myCDFIFund Organization 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.

5. Request Access 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.
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.

6. Assistance Contacting the Organization's Account Administrator

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.

7. 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 (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 (Account Administrators only)
- Awards (Note: This tab is only visible to organizations that have actually received an award.)
  - View information on awards and disbursements
- Mapping

8. Account Administrators: 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. Click the "Update Address" button to update information.
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: 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 the "Organization Profile" and "Affiliates" links on the left column.
C. Click the "Add Affiliates" link 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: 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 the "Organization Profile" and "Users" links on 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 the 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, select the "Add User" link from the upper, right 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: Change Account Administrators

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 "Users" links on 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 the 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 "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.

MyCDFIFund Users: Access Privileges and Responsibilities

THIS DOCUMENT CONTAINS IMPORTANT INFORMATION. PLEASE PRINT THE DOCUMENT OUT, READ IT CAREFULLY, AND SAVE IT FOR YOUR RECORDS.

When any individual first logs into myCDFIFund using his/her e-mail address and an organization's EIN (Employer Identification Number), that individual has the status of a potential ***User*** of that organization's myCDFIFund Account. Any individual that has an e-mail address and a valid EIN of an organization that they are representing may log in to myCDFIFund as a User. ***Users*** of myCDFIFund may do one or more of the following:

1) Register an organization that is previously unregistered with myCDFIFund. If the EIN that a User enters is not currently within the myCDFIFund database, the User will be prompted to register that organization by filling out an Organization Profile. ***Important:*** After a User registers an organization by filling out an Organization Profile, he or she is automatically designated as the ***Account Administrator*** for that organization's myCDFIFund account and all the information therein. Account Administrators have a larger set of access privileges and responsibilities than Users. To designate a different person as an Account Administrator, the default Administrator will need designate the new person and disable their own Administrator status using the appropriate fields under the "Organization Profile" and "Users" links.

2) Access the myCDFIFund Account of an organization that is already registered with myCDFIFund. If the EIN that a User enters is verified within the myCDFIFund database, the User will asked if they wish to contact the organization's Account Administrator to be granted access to the account. If the User chooses "Yes," an email will be automatically sent to the Account Administrator, requesting access to the account for the User (identified by his/her e-mail address). The User is then granted access to one or more sections of the Organization's myCDFIFund account at the discretion of the Account Administrator. ***Important:*** If you receive no reply from the Account Administrator for the Organization you are attempting to access or if the designated Account Administrator no longer works for the organization, contact the ***I.T. Help Desk*** for assistance.

3) Update his/her own User Profile information. Note that submitting fictitious EINs or submitting the EIN of an organization with which you have no affiliation constitutes fraud and is prosecutable according to federal law. Under the "Profile" tab, individual Users will be able to update their own contact data. This is particularly important if an individual User is serving as a Contact person or Authorized Representative for a CDFI Fund Award, Allocation, or Certification Application.

4) Open, complete, and submit applications on behalf of the Organization (with the permission of the Account Administrator). The ability of a User to fill out an Application on-line will also depend upon whether the Application for a particular CDFI Fund Program is available on-line. Please read individual Program Notices of Funding or Allocation Availability (NOFAs or NOAAs) on the CDFI Fund's Website (www.cdfifund.gov) for more detail.

5) Designate, test, save, and edit qualifying geographic areas for the Fund's Programs (with the permission of the Account Administrator). Because several of the CDFI Fund's Programs and/or Award Components required applicants to designate geographic areas that meet certain distress criteria, the CDFI Fund has provided the ***CDFI Fund Information and Mapping System (CIMS)*** under the "Mapping" tab of each organization's myCDFIFund Account. Users that has been granted access to the organization's myCDFIFund account will have the ability to electronically designate, test, save and edit geographic areas to determine:

    a) Whether the organization's lending or investing activities fall within a qualifying geographic area;
    b) Which geographic areas meet the distress criteria of the Fund's Programs; and

c) What economic distress indicators does a particular area exhibit. Saved geographic areas will then be listed on a separate page and will be available for editing or uploading into electronic CDFI Fund Program Applications.

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MyCDFIFund Account Administrators: Access Privileges and Responsibilities

THIS DOCUMENT CONTAINS IMPORTANT INFORMATION. PLEASE PRINT THE DOCUMENT OUT, READ IT CAREFULLY, AND SAVE IT FOR YOUR RECORDS.

When any individual first logs into myCDFIFund using his/her e-mail address and an organization's EIN (Employer Identification Number), that individual has the status of a potential ***User*** of that organization's myCDFIFund Account. After a User registers a previously unregistered organization by filling out an Organization Profile, he or she is automatically designated as the ***Account Administrator*** for that organization's myCDFIFund account and all the information therein.

SERVING AS AN ACCOUNT ADMINISTRATOR IS A CRITICAL RESPONSIBILITY. ALL POTENTIAL USERS OF THE ORGANIZATION'S myCDFIFund ACCOUNT – AND ANY INFORMATION THEREIN – WILL NEED TO CONTACT YOU FIRST. YOU WILL NEED TO BE ACCESSIBLE BY EMAIL AND/OR PHONE ON A REGULAR BASIS. CONSEQUENTLY, YOU WILL NEED TO KEEP ALL OF YOUR INDIVIDUAL CONTACT INFORMATION UP-TO-DATE IN myCDFIFund BY REGULARLY UPDATING THE FIELDS IN YOUR "USER PROFILE" SECTION. IF YOU DO NOT WISH TO SERVE AS THE ACCOUNT ADMINISTRATOR:

You will need to designate a different person as the organization's myCDFIFund Account Administrator and disable your own Administrator status using the appropriate fields under the "Organization Profile" and "Users" links.

IF YOU ARE SERVING AS AN ACCOUNT ADMINISTRATOR BUT ARE LEAVING THE ORGANIZATION:

You will need to designate a new Account Administrator prior to your departure, using the procedures above, in order to ensure that the organization you are representing is able to have uninterrupted access to its myCDFIFund Account and relevant information.

IF YOU ARE SERVING AS AN ACCOUNT ADMINISTRATOR BUT ARE GOING ON LEAVE FOR AN EXTENDED PERIOD OF TIME:

You will need to designate a second person as the organization's back-up myCDFIFund Account Administrator using the appropriate fields under the "Organization Profile" and "Users" links (there may be more than one Account Administrator designated per organization). Having an additional Account Administrator as a back up is always a good practice, as unplanned absences are always a possibility. Note that serving as a myCDFIFund Account Administrator only pertains to administering access to the data within an organization's myCDFIFund Account. ***It does not grant or affect the status of an individual as a Contact person or Authorized Representative for any of the CDFI Fund's Programs.***

To serve as an organizational Contact or Authorized Representative, a User or Account Administrator must either fill out the appropriate fields under the "User Profile" tab, or they must indicate that they wish to serve in this capacity in their Application to a particular CDFI Fund Program. ***Account Administrators*** have the following access and administrative privileges within the myCDFIFund Account that they are administering:

1) Access to all areas of the myCDFIFund Account. Access to all areas of an organization's myCDFIFund Account means that an Account Administrator will have access to all Web pages and the potentially sensitive data contained therein. If an individual is not willing to accept this responsibility, a new Account Administrator may be designated using the procedures above.

2) Open, complete, and submit applications on behalf of the Organization.

3) Designate, test, save, and edit qualifying geographic areas for the Fund's Programs. Because several of the CDFI Fund's Programs and/or Award Components required applicants to designate geographic areas that meet certain distress criteria, the CDFI Fund has provided the ***CDFI Fund Information and Mapping System (CIMS)*** under the "Mapping" tab of each organization's myCDFIFund Account. If an organization is using a consultant or outside party to complete a CDFI Fund on-line Program Application, the individual may be granted User access to the "Mapping" tab by the Account Administrator (see ***myCDFIFund Users: Access Privileges and Responsibilities*** for User login instructions). Account Administrators and Users have the ability to electronically designate, test, save, and edit geographic areas to determine:
    a) Whether the organization's lending or investing activities fall within a qualifying geographic area;
    b) Which geographic areas meet the distress criteria of the Fund's Programs; and
    c) What economic distress indicators does a particular area exhibit. Saved geographic areas will then be listed on a separate page and will be available for editing or uploading into electronic CDFI Fund Program Applications.