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Financial Institution Diversity Self-Assessment (FID-SA) User Guide

Intended Audience: FDIC-Regulated Financial Institutions

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Financial Institution Diversity Self-Assessment (FID-SA) Overview

Financial Institution Diversity Self-Assessment, also known as FID-SA, is used to capture and manage the Diversity Self-Assessments received from the FDIC-regulated Financial Institutions. The FDIC may use the information provided by its regulated financial institutions to monitor progress and trends in the financial services industry with regard to diversity and inclusion in employment and contracting activities.

Logging into FID-SA via FDICconnect

FID-SA is a cloud-based solution which means FDIC regulated institutions can access it through the Internet from the FDICconnect Business Center. FDICconnect establishes a secure internet connection for electronic communications and transactions between authorized users.

Users must be designated by their financial institution to access applications from FDICconnect through the institution's FDICconnect Coordinator. In the event your Coordinator is unavailable or you do not know who your Coordinator is, you may contact the **FDICconnect Help Desk by calling 1-877-275-3342** or email FDICconnect@fdic.gov. Your FDICconnect Coordinator will send you a secure link to create a FDICconnect account and also provide you with your username and temporary password. The FID-SA user will log into FDICconnect and enter their username and temporary password, and then they will be prompted to change their password. Next, the FID-SA user will be asked how they would like to register for the two-factor authentication which is your one-time password. Once registered for the two-factor authentication, on an on-going basis you will log into FDICconnect using your username and password and then you will be asked to enter the one-time password (OTP). OTPs are generated each time you log into FDICconnect.

Upon receipt of your login credentials, you will open an internet browser and enter the FDICconnect URL: <https://www.fdicconnect.gov>



Please note if your financial institution needs multiple users to have access to the FID-SA portal please contact your FDICconnect Coordinator.

Once you are on the FDICconnect Business Center page, click **Sign In**.



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After clicking **Sign In**, you will be directed to the first login screen of the two-factor authentication. Read the Security Notice, enter your **FDIC FCX account User Name and Password**, and click **Submit**.

Next is the second login screen of the two-factor authentication for the registered email address. Enter the registered token PIN in the **One-time Password (OTP)** field, your **FDIC account password**, and click **Submit**.



Please note that your OTP is always generated by how you chose to register for the two-factor authentication. Only the institution's designated FCX coordinator can provide tokens to bank staff authorized to access the system. The OTP code received on the token is the OTP. Enter your OTP as soon as you receive it to avoid login interruptions.



If you have questions or experience technical issues while registering for the OTP, contact the FDICconnect registration helpdesk by email at FDICtokenhelp@fdic.gov or by phone at 800-250-9549.

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Under the Business Center Menu, click the **expand box** next to Financial Institution Diversity. Then click the **Financial Institution Diversity Assessment** link.



Read the FDICconnect Financial Institution Diversity Self-Assessment portal agreement; and, if you accept the terms, check the box and click **Next**.



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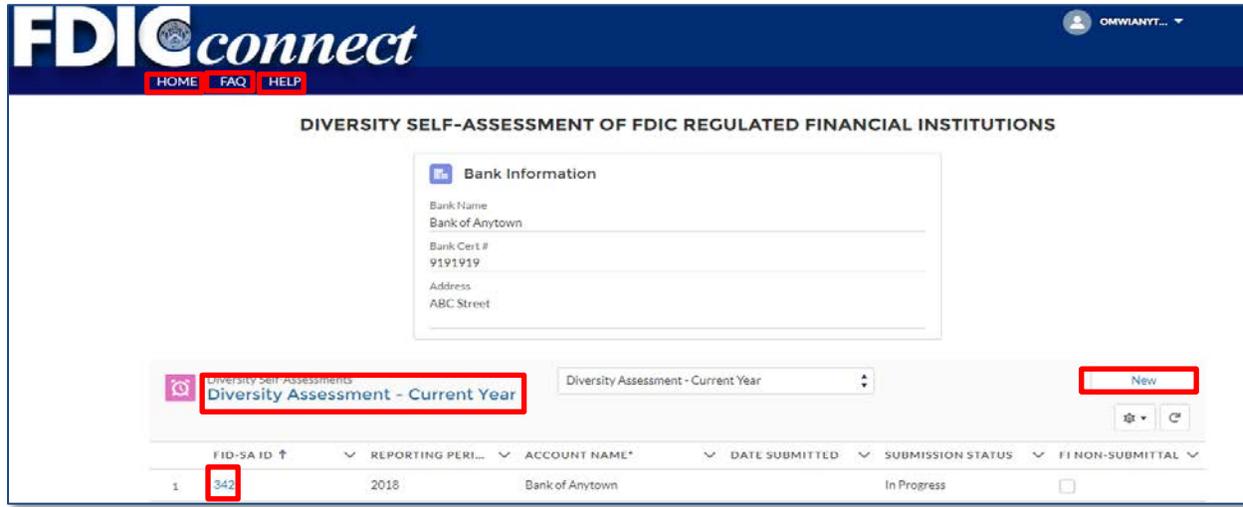
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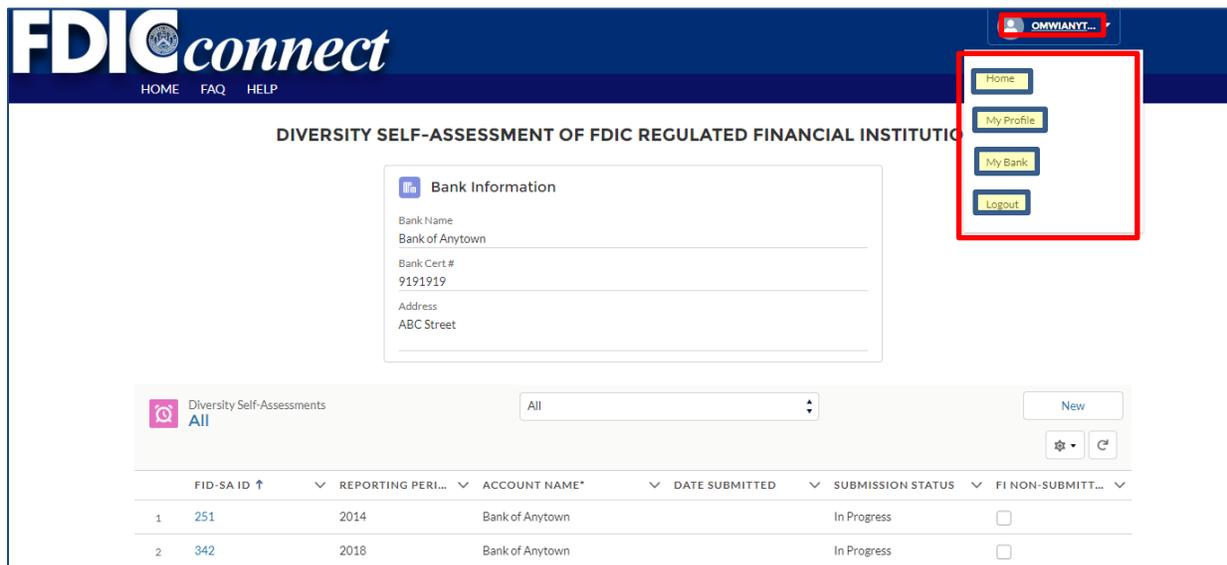
FID-SA Home Page

When first logging in, the FID-SA Home Page will appear. From this page you can view your financial institution's information, view previously completed Diversity Self-Assessments, create a new Diversity Self-Assessment, and access user resources through the FAQ (Frequently Asked Questions) and HELP pages.



Any field in blue can be opened and viewed by a clicking on it

On the top right corner are more viewable options for the Bank User. Click the **drop down arrow** to navigate to areas such as **Home** (takes you to the home page), **My Profile** (bank user information), **My Bank** (bank information), and **Logout** (logging off FID-SA portal).



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Viewing Diversity Self-Assessments

From the Home page, you are able to view diversity self-assessments by clicking the drop down arrow next to “Diversity Self-Assessments - Current Year.” Choose a list view to see a filtered list of Diversity Self-Assessments (All, Current Year, and Previous Years). The default list view is Current Year.

FID-SA ID ↑	REPORTING PERI...	ACCOUNT NAME*	DATE SUBMITTED	SUBMISSION STATUS	FI NON-SUBMITT...
1	251	2014	Bank of Anytown	In Progress	<input type="checkbox"/>
2	342	2018	Bank of Anytown	In Progress	<input type="checkbox"/>

The columns consist of the following: **FID-SA ID** (auto-generated ID number for each assessment), **Reporting Period** (assessment reporting period year), **Account Name** (bank name), **Date Submitted** (assessment submission date), **Submission Status** (displays if Diversity Self-Assessment status is “in progress” or “submitted”), and **FI Non-Submittal** (financial institution has opted out of completing their assessment using FDIC’s instrument if box is checked).

Click on a **FID-SA ID** (highlighted in blue) link to open and view the diversity self-assessment for the corresponding reporting year.

FID-SA ID ↑	REPORTING PERI...	ACCOUNT NAME	DATE SUBMITTED	SUBMISSION STATUS	FI NON-SUBMITT...	
1	251	2014	Bank of Anytown	In Progress	<input type="checkbox"/>	
2	342	2018	Bank of Anytown	In Progress	<input type="checkbox"/>	
3	367	2017	Bank of Anytown	4/11/2019	Submitted	<input checked="" type="checkbox"/>
4	368	2016	Bank of Anytown	In Progress	<input type="checkbox"/>	



Financial institutions have the ability to view older and current assessments.

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Create a New Diversity Self-Assessment

To create a new Diversity Self-Assessment, click the **New** button.

FID-SA ID ↑	REPORTING PERI...	ACCOUNT NAME*	DATE SUBMITTED	SUBMISSION STATUS	FI NON-SUBMITT...	
1	251	2014	Bank of Anytown	In Progress	<input type="checkbox"/>	
2	342	2018	Bank of Anytown	In Progress	<input type="checkbox"/>	
3	367	2017	Bank of Anytown	4/11/2019	Submitted	<input checked="" type="checkbox"/>
4	368	2016	Bank of Anytown	In Progress	<input type="checkbox"/>	
5	369	2015	Bank of Anytown	5/31/2019	Submitted	<input type="checkbox"/>

The New Diversity Self-Assessment window will open. The Reporting Period field will automatically populate to the current year's reporting period or enter the desired reporting period year you are submitting. Confirm the correct reporting period year is displayed.

New Diversity Self-Assessment: New Assessment

Reporting Period
2018

FI Non-Submittal

Additional Info
Financial institutions choosing to opt-out of completing their diversity self-assessment must check the "FI Non-Submittal" box; click "Save"; then click "Submit Form". Financial institutions who wish to submit their own assessment format or other documentation to demonstrate diversity practices, may do so under the "Attachments and History" tab.

Cancel Save & New Save



An error message will appear if a Diversity Self-Assessment record already exists for that reporting period.



Financial institutions will NOT be allowed to create a new assessment for a reporting period older than five years (current year minus five). An attempt to create a new assessment for a reporting period older than five years, will result in an error message displaying *"Diversity Self-Assessment older than 5 years cannot be Created OR Edited"*

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Completing the Diversity Self-Assessment is voluntary. Financial institutions may submit their Diversity Self-Assessment for any reporting year by providing their own format. If you prefer to submit your own assessment for the reporting year, refer to instructions under the section: [Opting out of Completing FDIC's Diversity Self-Assessment](#).

However, if you choose to continue completing the Diversity Self-Assessment, click **Save** and complete all section tabs.

The estimated reporting burden statement appears. After reading the statement, click **Ok**.

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A FID-SA ID is auto-generated and assigned to identify the Diversity Self-Assessment for the Reporting Period year that was created.

Diversity Self-Assessment Sections

The Diversity Self-Assessment contains four sections within the Diversity Self-Assessment tab. Complete each section by first clicking the **Edit** button.

After completing each section click the **Save** button.

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Section I

Section 1 requests financial institution information.

- **Name of Financial Institution and Bank Cert #**– This information is auto-populated.
- **Period Covered by the Assessment** – The financial institution’s assessment information for the prior calendar year. This information is auto-populated.
- **Diversity and Inclusion Officer and/or Supplier Diversity Officer, or their equivalent** – Identification and contact information for the official(s) designated with the responsibility for diversity in employment and/or business activities.
- **Diversity and Inclusion Website** – Financial Institution’s dedicated Diversity and Inclusion web page.
- **A brief description is requested of the following:**
 - **Governance Structure** – The organization that makes overall decisions, oversight and management of the financial institution (e.g., Board of Directors, C-Suite Management, Ownership Structure, or other type of governance structure).
 - **Total Assets** – Total assets identified as: (1) less than \$307 million; (2) between \$307 million to \$1.226 billion; or (3) more than \$1.226 billion.
 - **Community Characteristics** – The residential makeup of the community served by the financial institution; e.g., rural suburban, urban or all that apply.

The screenshot shows a web form titled "SECTION I - FINANCIAL INSTITUTION INFORMATION". At the top, there are tabs for "Section I", "Section II", "Section III", and "Section IV", with "Section I" selected. Below the title bar are "Save" and "Cancel" buttons. The form is organized into three columns:

FID-SA ID	Diversity and Inclusion Officer or Equivalent:	Supplier Diversity Officer or Equivalent:
342	Name: <input type="text" value="Name"/>	Name: <input type="text"/>
Name of Financial Institution Bank of Anytown	Title: <input type="text" value="Title"/>	Title: <input type="text"/>
Bank Cert # 9191919	Email: <input type="text"/>	Email: <input type="text"/>
Period Covered by the Assessment <input type="text" value="2018"/>	Telephone: <input type="text"/>	Telephone: <input type="text"/>
	Fax: <input type="text"/>	Fax: <input type="text"/>



IMPORTANT! Remember to **Save** after completing each Section.

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Section II

Section II is the assessment of the Financial Institution’s Diversity Policies and Practices. This section correlates with the five standards contained in the Policy Statement and allows the institution to evaluate itself against leading diversity practices. Note: a “yes or no” response is only to describe the institution’s diversity program and a “no” response does not negatively reflect on your program. Additional information can be included in the comments; or attached to support or clarify a response.

Section I **Section II** Section III Section IV

SECTION II - ASSESSMENT OF THE FINANCIAL INSTITUTION'S DIVERSITY POLICIES AND PRACTICES

[Save](#) [Cancel](#)

1. Organizational Commitment to Diversity and Inclusion

The leadership of an organization with successful diversity policies and practices demonstrates its commitment to diversity and inclusion. Leadership comes from the governing body, such as a board of directors, as well as senior officials and those managing the organization on a day-to-day basis. These Standards inform how a financial institution promotes diversity and inclusion in both employment and contracting and how it fosters a corporate culture that embraces diversity and inclusion.

Standards	Yes/No	Activities that support Program Success or Program Challenges
In a manner reflective of the individual financial institution's size and other characteristics,		



IMPORTANT! Remember to **Save** after completing each Section.

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Section III

Section III is the Diversity Data. This section requests two parts of the financial institutions data for the assessment period.

- **WORKFORCE PROFILE:** The numbers and percentages of minorities/non-minorities and women/men in its workforce, excluding contract or agreement personnel, and on its Board of Director.
- **PROCUREMENT – SUPPLIER DIVERSITY:** Total dollars and percentages paid to minority-owned and women-owned businesses.
 - **Total spend** – The financial institution’s total dollar amount spent for the procurement of goods and services during the calendar year reported.
 - **Minority-owned** – Companies that designate themselves as minority-owned include businesses with more than 50 percent of the ownership or control of which is held by 1 or more minority individuals; and more than 50 percent of the net profit or loss of which accrues to 1 or more.
 - **Woman-owned** – Companies that designate themselves as women-owned businesses with more than 50 percent of the ownership or control of which is held by 1 or more women; more than 50 percent of the net profit or loss of which accrues to 1 or more women; and a significant percentage of senior management positions of which are held by women.
 - **Minority and woman-owned** – Companies that designate themselves as both minority-owned and woman-owned.

Section I Section II **Section III** Section IV

SECTION III - DIVERSITY DATA

Workforce Profile

1. What are the numbers and percentages of women and minorities in the financial institution's total workforce for the period covered by this assessment?

Total Workforce #	Women #	Men #	Minorities #	Non-Minorities #
<input type="text"/>	<input type="text" value="50"/>	<input type="text" value="50"/>	<input type="text" value="50"/>	<input type="text" value="50"/>

2. What are the numbers and percentages of women and minorities in the financial institution's Executive/Senior Level Officials and Managers job category for the period covered by this assessment?



IMPORTANT! Remember to **Save** after completing each Section.

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Section IV

Section IV is additional information/comments provided by the financial institution in support of its diversity program that it deems important or to clarify responses in Section II.

Section I Section II Section III **Section IV**

SECTION IV - ADDITIONAL INFORMATION

Other information or comments the financial institution deems important regarding its assessment of its diversity policies and practices:

Attachments
Financial institutions who wish to submit the assessment in their own format, or to submit other documentation to demonstrate diversity practices, may do so through the "Attachments" tab located at the top of the page.



IMPORTANT! Remember to **Save** after completing each Section.

Attachments and History Tabs

The **Attachments** and **History** tabs provide additional functionality for the Diversity Self-Assessment.

The **Attachments** tab allows you to upload your own Diversity Self-Assessment, if the FDIC's is not used, when opting out from completing the Diversity Self-Assessment; or to provide additional documentation in support of your diversity and inclusion practices.

Click the **Add Files** button to upload files/documents, taking note of the required file size and formats (highlighted yellow in the screenshot).

DIVERSITY SELF-ASSESSMENT **ATTACHMENTS** HISTORY

IMPORTANT: After uploading supporting documents, PLEASE REFRESH THE PAGE, THEN RETURN TO THE DIVERSITY SELF-ASSESSMENT TAB AND CLICK "SUBMIT FORM" to complete your assessment for the reporting period.

Please note the following acceptable file formats: Adobe Portable Document Format (.pdf), Microsoft Word (.doc and .docx), Powerpoint (.ppt and pptx), Graphic (.png, .jpg, .jpeg, and .gif) files. File size limits may not exceed 25MB.

TITLE	OWNER	LAST MODIFIED	SIZE
test	OMWIAAnytownUser Banker	6/25/2019 1:58 PM	12KB

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IMPORTANT! You cannot submit the completed Diversity Self-Assessment from the Attachments tab. **You must return to the Diversity Self-Assessment tab to click the Submit Form button.** Refer to the [Submitting a Diversity Self-Assessment](#) section for guidance



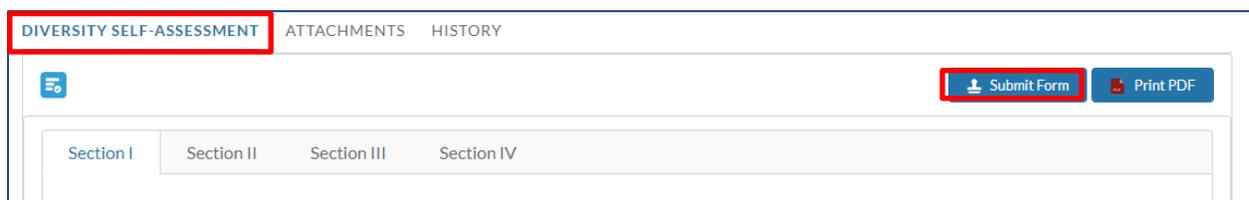
If you upload an attachment to a Diversity Self-Assessment that has **already been submitted**, you **must refresh the page after uploading your document.** The submission status will switch to “In Progress” and you will need to go to the **Diversity Self-Assessment tab and click Submit Form** to re-submit the Self-Assessment with the newly-uploaded file.

The **History tab** displays the history of the Diversity Self-Assessment, such as date submitted, submission status, and identifies the user that submitted the Diversity Self-Assessment. It also identifies the edits made to previously submitted self-assessments through the “original value” (refers to the initial response) and “new value” (refers to an updated response) fields.

DATE	FIELD	USER	ORIGINAL VALUE	NEW VALUE
4/10/2019 2:04 PM	Submission Status	Kyle Martin	Submitted	In Progress
4/10/2019 2:04 PM	Date Submitted	Kyle Martin	2019-04-07	
4/7/2019 12:38 AM	Submission Status	Eidm1-OMWI User1	In Progress	Submitted
4/7/2019 12:38 AM	Date Submitted	Eidm1-OMWI User1		2019-04-07
3/7/2019 2:55 PM	Submission Status	Lynn Argueta	Submitted	In Progress
3/7/2019 2:55 PM	Date Submitted	Lynn Argueta	2019-02-26	

Submitting a Diversity Self-Assessment

Once the Diversity Self-Assessment is complete, click on the **Diversity Self-Assessment tab** and click the **Submit Form** button. A message will appear stating the Diversity Self-Assessment has been successfully submitted and you will receive an acknowledgement email from the FDIC.



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Opting Out of Completing FDIC's Diversity Self-Assessment

Completing the Diversity Self-Assessment is voluntary. Financial institutions may opt-out from submitting their Diversity Self-Assessment for any reporting year; or may prefer to provide their Diversity Self-Assessment in a different format in lieu of completing FDIC's Diversity Self-Assessment. In these instances, you will click on the **New** button from the home page as if you were creating a new Diversity Self-Assessment.

FID-SA ID ↑	REPORTING PERI...	ACCOUNT NAME*	DATE SUBMITTED	SUBMISSION STATUS	FI NON-SUBMITT...
1 251	2014	Bank of Anytown		In Progress	<input type="checkbox"/>
2 342	2018	Bank of Anytown		In Progress	<input type="checkbox"/>
3 367	2017	Bank of Anytown	4/11/2019	Submitted	<input checked="" type="checkbox"/>
4 368	2016	Bank of Anytown		In Progress	<input type="checkbox"/>
5 369	2015	Bank of Anytown	5/31/2019	Submitted	<input type="checkbox"/>

Check the **FI Non-Submittal** box if you choose to opt-out of completing a Diversity Self-Assessment and then click **Save**. Take note of the *Additional Info* highlighted in yellow, which further instructs financial institutions who prefer to submit their own assessment format or other documentation demonstrating diversity practices may do so under the **Attachments** tab. Click on **Attachments** tab to upload the document(s); and refer to the [Attachments and History Tab](#) section in this document for instructions.

New Diversity Self-Assessment: New Assessment

Reporting Period
2018

FI Non-Submittal

Additional Info
Financial institutions choosing to opt-out of completing their diversity self-assessment must check the "FI Non-Submittal" box; click "Save"; then click "Submit Form". Financial institutions who wish to submit their own assessment format or other documentation to demonstrate diversity practices, may do so under the "Attachments and History" tab.

Cancel Save & New **Save**

Once all files have been uploaded, you must click on the **Diversity Self-Assessment** tab to click **Submit Form**.

DIVERSITY SELF-ASSESSMENT OF FDIC REGULATED FINANCIAL INSTITUTIONS

Diversity Self-Assessment ID	Account Name	Reporting Period	Submission Status
373	Bank of Anytown	2013	In Progress

DIVERSITY SELF-ASSESSMENT ATTACHMENTS HISTORY

Submit Form Print PDF

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Print and Save

To print or save a copy of the Diversity Self-Assessment, click the “Print PDF” button.



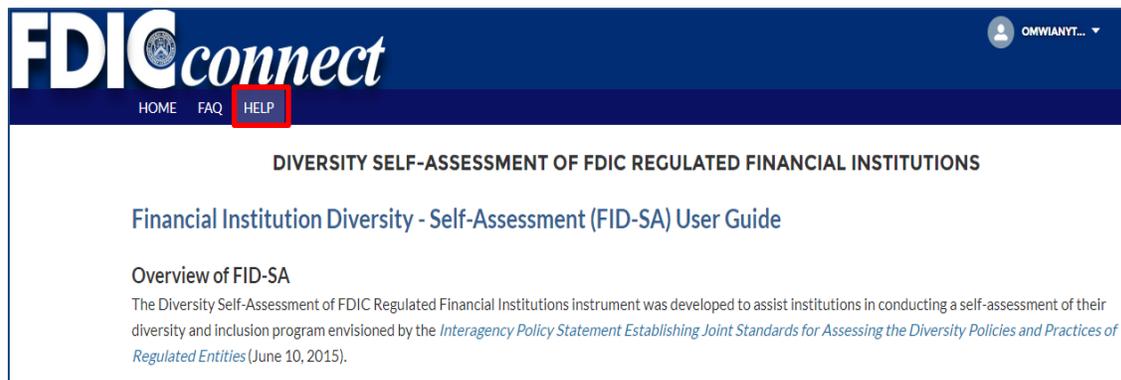
FAQ (Frequently Asked Questions) Tab

The **FAQ tab** contains frequently asked questions and answers about the Diversity Self-Assessment of FDIC’s regulated financial Institutions.



HELP Tab

The **Help tab** provides an overview of the Financial Institution Diversity Program and includes a link to the FID-SA User Guide.



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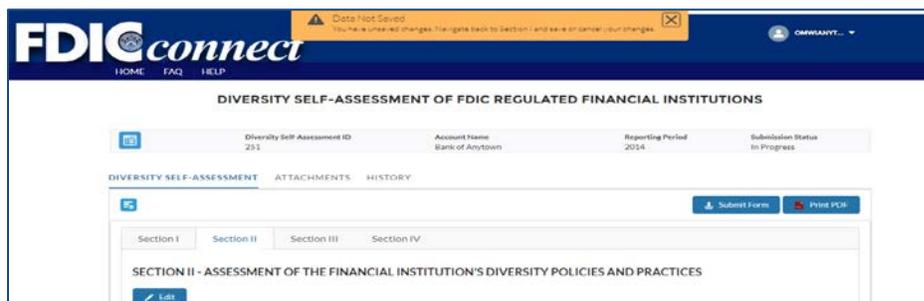
Access Issues, Error Messages and Troubleshooting

This section describes various access issues, error messages, and the troubleshooting steps to aid in correcting them.

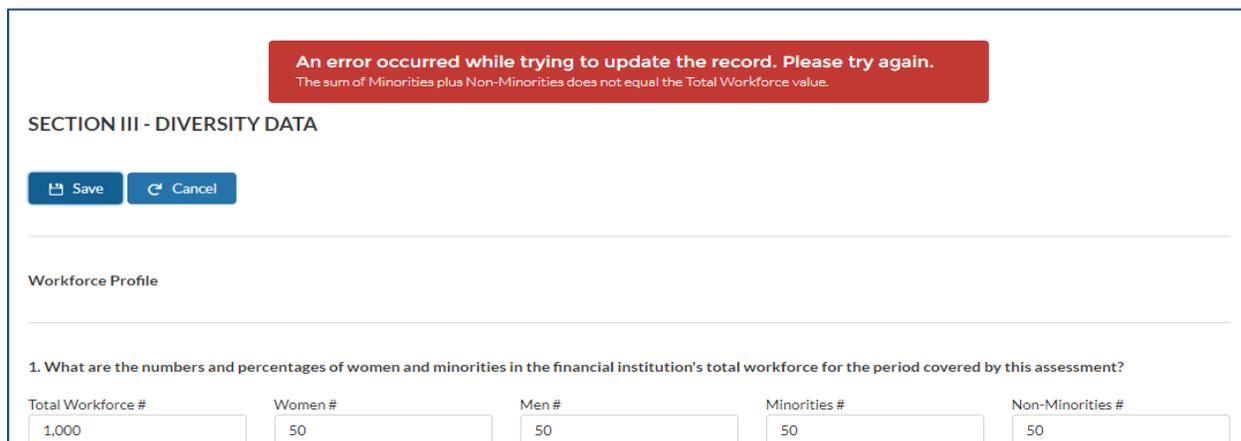
1. Access related issues to FDICconnect are resolved through the financial institution's FDICconnect Coordinator.

If you have a problem with FDICconnect, you should first contact your Institution's Designated Coordinator. In the event your Coordinator is unavailable or you do not know who your Coordinator is, you may contact the FDICconnect Help Desk. You can email us at FDICconnect@fdic.gov or call 1-877-275-3342. In order for us to help you, your email must include your full name, the name and address of your institution, a work phone number, and a full description of your problem.

2. If you navigate to another section without clicking the **Save** button an error message stating "Data Not Saved – You have unsaved changes. Navigate back to Section x and save or cancel your changes". Return to the identified Section to click the **Save** button, and proceed with completing the remaining Sections.



3. If at any time after clicking the **Save** button, you receive an error message, it will state the reason for the error. Follow the instructions contained in the error message to make the correction and then click the **Save** button.



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- An error message will appear if a Diversity Self-Assessment record already exists for that reporting period.

New Diversity Self-Assessment: New Assessment

Review the errors on this page.

We can't save this record because the "OMWI - Default LookUp Fields" process failed. Give your Salesforce admin these details. This error occurred when the flow tried to update records: DUPLICATES_DETECTED: There is an existing Diversity Assessment record for this Reporting Period. You will not be able to create another one for this reporting period.. You can look up ExceptionCode values in the SOAP API Developer Guide. Error ID: 148687186-246163 (1214630036)

Reporting Period

Helpful Tips



Any field in **blue** can be opened and viewed by a clicking on it.



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Please note that your OTP is always generated by how you chose to register for the two-factor authentication. Only the institution's designated FCX coordinator can provide tokens to bank staff authorized to access the system. The OTP code received on the token is the OTP. Enter your OTP as soon as you receive it to avoid login interruptions.



If you have questions or experience technical issues while registering for the OTP, contact the *FDICconnect* registration helpdesk by email at FDICtokenhelp@fdic.gov or by phone at 800-250-9549.



An error message will appear if a Diversity Self-Assessment record already exists for that reporting period.



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Financial institutions have the ability to view older and current assessments.

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Remember to **Save** after completing each Section.



You cannot submit the completed Diversity Self-Assessment from the Attachments tab. **You must return to the Diversity Self-Assessment tab to click the Submit Form button.** Refer to the [Submitting a Diversity Self-Assessment section](#) for guidance.



If you upload an attachment to a Diversity Self-Assessment that has **already been submitted, you must refresh the page after uploading your document.** The submission status will switch to “In Progress” and you will need to go to the **Diversity Self-Assessment tab and click Submit Form** to make sure the document is submitted.