



STATE
EXAMINATION
SYSTEM

SES Release Notes

Release Name: Massachusetts

Release Date: June 1, 2026

The purpose of these release notes is to provide a summary of SES functionality and system enhancements in the Massachusetts Release.

Overview

The State Examination System (SES) Massachusetts Release includes several new features and enhancements. These release notes pertain to the examination and investigation Supervisory Activities (referred to herein as “SA”). The Massachusetts Release focuses on Third-Party controls, user experience enhancements for the company enrollment process, multistate workflow improvements, and 508 compliance upgrades. It also includes additional system-wide enhancements to further improve the overall user experience.

I. Agency Users

Information Request:

- **Send IR:** In a multistate exam, the EIC can decide if team leads from participating agencies can send subsequent information requests (IRs) on an SA. The EIC will be notified when IRs are sent out to the company.
- **N/A on Response Grid:** IR responses for which the company adds a “N/A” will be shown in all grids and areas where a company response section exists.
- **Bulk Mark Quick Look Complete:** Similar to the Procedures tab, the same functionality is now available for IRs in SAs and Complaints. Users can bulk mark IRs as “Quick Look Complete,” reducing the number of clicks required.

Loan Request:

- **Edit Loan Request Text:** Similar to IRs, users can now modify the text for a loan request without needing to retract a request sent previously.

Bulk Download Loan Request: The existing bulk download feature now includes two new subcategories, allowing users to download Loan Request documents uploaded either by themselves or by their agency. Additionally, users will be able to download those loan request files for those loan requests assigned to them.

Mortgage One Company, One Exam (OCOE):

- **Manual Approval for certain agencies:** some agencies are opting out of the automatic access feature. This means that SAs designated as a Mortgage OCOE in which those agencies participate will revert to the manual access request approval process: all participating agencies on the Mortgage OCOE will have to manually approve all access requests.
- **Moratorium End Date Update:** EIC, Staff Director and Staff User from Lead agency can now update the Moratorium End Date after the SA has been closed and locked.

Notifications:

- **Mute Setting:** Users can now mute system notifications and update their notification preferences at any time.
- **Email Notifications in SES:** Users can now view their email notifications from the past 60 days directly within the SES homepage. This is especially useful for those agency users who choose to mute email notifications for themselves.

Communications Tab:

- **Email Style Redesign:** Users will see a redesigned Communication tab where communications are displayed in an email-style layout, with all communications listed on the left side and the corresponding details shown on the right side. Similar to Microsoft Outlook, users will be able to see unread communications and mark items as unread. The communications on the homepage will also now show just those communications that are unread.
- **Agency to Agency Communication:** Users will now be able to communicate with other agencies on a multistate SA directly within SES.

Close Out Tab:

- **Force Close SA:** Users can now close and lock an SA without waiting for the Closeout milestone. Users will be prompted to provide a comment explaining the reason for the early closure. This means that in instances in which IRs are not transmitted, the company lead is not assigned or a report is not transmitted to the company an exam can still be closed. These instances can happen if a company surrenders their license when an exam is initiated or during an examination. Previously, agencies had to cancel these SAs resulting in inaccurate cancelled numbers. Now, agencies will be able to correctly mark these SAs as closed with additional information on the exam record.
- **Next Exam Due By Section:** Before an SA is closed and locked, EICs can now update the Next Exam Due By dates for all agencies. This section includes *Next Exam Due By Date*, *Statutory Requirement Date* and *Risk-Based Date*. Any updates made will automatically be reflected in the Exam Scheduling Wizard, where users can also modify these dates. Additionally, after the exam is closed & locked, these dates can be updated on the company's record or from Exam Scheduling.
- **Closeout Form Reopen and Update:** Users can now reopen and update the Closeout Form after an SA has been closed & locked, all fields can be modified, except the Documents section.

UX and 508 Compliance Improvements:

- **User Research:** A new section has been added to the homepage that allows users to opt in to participate in UX research within SES and provide comments or suggestions to help improve the user experience.
- **508 Compliance:** Some backend changes have been made to make portions of SES 508 compliant to ensure adherence to the Justice Departments' accessibility

standards. Improvements will continue to be made in SES and this work will continue until a compliant standard is met.

Other Enhancements:

- **Research & Analytics Tab:** A new tab has been added to SES that links to the Research & Analytics platform (Strategy), currently accessible via NMLS. Agency users will not have access to this tab starting June 1; this tab will be socialized and available to agency users later.
- **Areas For Review (AFR) Skill Level:** Users can now select an expertise level for each AFR on their profile. Available options include Expert, Intermediate, and Low. If the user is part of an SA, their selected skill level will also be displayed on the participants tab after Scope completion.
- **Homepage Customization:** As part of our ongoing efforts to further customize the homepage, users can now view all Acceptance SAs for which they are the EIC.
- **Plan Assignment:** Previously, users were unable to mark a plan as complete unless all AFRs on an SA were assigned to participants. With this release, users can now save or mark a plan as complete without requiring AFR assignment.
- **Summary Tab Comments Visibility:** The Comments section on the Summary tab of an SA is now accessible to users from other agencies, in addition to SA participants. Users can now view comments directly from the Summary tab of the SA.
- **Multiple Quick Add Findings:** Based on requests from various agencies, users can now add multiple findings to a procedure when using the Quick Add Findings functionality. Users are no longer limited to adding a single finding to a procedure.
- **Select All Findings for Review:** EICs can now select all findings and mark them as reviewed in a single action.

II. Company Users

Third-Party Users:

- **Confidentiality Agreements:** In the previous release, companies were required to complete a confidentiality agreement with the TPU before initiating an SA. With this release, companies must now upload the confidentiality agreement when adding a Third-Party User.
- **Third-Party User Approval on SA:** Company Leads can now submit requests to add Third party users to an SA, which must be reviewed and approved by the EIC and all Team Leads on multistate SAs before TPUs can be added as participants.

Information Request:

- **Attachment Indicator:** Company users can now view an indicator for attachments sent by agencies across all IR grids within SAs.
- **Multiple IR Responses:** To improve ease of use for company users, they will be able to respond to multiple IRs and upload multiple documents simultaneously in a single action.

Documents:

- **Agency Documents Tab:** A new tab has been added to display all agency documents (i.e., all documents sent from the agency to the company). Documents are organized by their respective categories, such as IRs, loan requests, etc.
- **Bulk Download All SA Documents:** Users can now bulk download all SA documents, including documents sent to the company from the agency and documents uploaded by the company and shared with the agency.

Enhanced User Experience

- **Company Enrollment:** As part of the Massachusetts Release, significant improvements were made to the user experience based on feedback collected during the 2026 NMLS Conference. The goal was to make the Company Enrollment process as user-friendly as possible. Updates were made to several screens, including:
 - Homepage
 - Verify Your Company screen
 - Assign Contacts screen
 - Review Enrollment screen
 - Enrollment Complete screen

- **User Research:** A new section has been added to the homepage that allows users to opt in to participate in UX research within SES and provide comments or suggestions to help improve the user experience.

Other Enhancements:

- **Secondary Company Lead:** Company SA contacts and Company Leads can now assign a secondary Company Lead on a SA before closure, granting them the same permissions, tasks, and notifications as the primary Company Lead.
- **Validate Active Users:** Account Admins, SA Contacts, and Complaint Contacts will now be required to validate active company and third-party users for their company every 90 days to help maintain an up-to-date active user list. If the task is not completed by the 90-day deadline, users will not be able to transmit certain items to an agency, for example the Report of Exam, until the task is complete.
- **Email-style Redesign:** Users will see a redesigned Communication tab where communications are displayed in an email-style layout, with all communications listed on the left side and the corresponding details shown on the right side.
- **Email Notifications in SES:** Users can now view their email notifications from the past 60 days directly within SES from the homepage.

III. Policy and Global Support Users (i.e., CSBS support staff)

Reports

A new tab will be available for agency users called “Shared Reports.” Initially, this tab will be blank for agency users. If agencies have any report requests, agencies should email: sesreportrequests@csbs.org. In the email, agencies should include the data points requested and who within their agency can view the report. A global support user will create a dashboard and exportable report that will update live for the requested users. The requested user will receive a notification from RUG or the SES Report Requests inbox when the report is available for them.

Summary Tab Comments Visibility: The Comments section on the Summary tab of an SA is now accessible to users from other agencies, global support users, and policy users, in addition to SA participants. Users can now view comments directly from the Summary tab of the SA.