



SES Release Notes Release Name: Michigan Release Date: September 13, 2025

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

The State Examination System (SES) Michigan Release includes several new features and enhancements. These release notes pertain to the Examination and Investigation Supervisory Activities (referred to herein as “SA”). The Michigan release introduces two new tabs: Agent Locations Request for money services businesses (MSB) workflow and Communications Tab for all Supervisory Activities. This release also includes enhancements to mortgage exams, procedures, information requests (IRs), and the homepage, along with several additional improvements across the system to further enhance the user experience.

I. Agency Users

New Supervisory Activity Tabs:

- **Communications Tab:** Agencies and companies can now exchange messages with the company with attachments within an SA until it is closed and locked, reducing reliance on external email.
- **Agent Locations Tab:** Agencies can upload, add, and send agent locations to companies; companies can provide responses to agent location requests.

Mortgage SAs:

- **Moratorium End Date:** When a policy user creates a shell SA for a Mortgage One Company One Exam (OCOE) and sets a target start date (onsite start date for multistate exams), the system now auto-populates the Moratorium End Date on the SA Summary tab. The Moratorium End Date is 12 months from the target start date but can change based on the results of the exam.
- **Access Request:** Agencies requesting detail-level access to closed/locked Mortgage OCOE SAs will now be auto-approved once the Closed milestone is met, provided the company is licensed with the agency and the SA business type is mortgage origination, servicing, or both. If these conditions are not met, a warning message will be displayed.
- **Standard Procedures:**
 - Updated and new mortgage exam standard procedures that will accompany the standard IRs and complete the Residential Mortgage Work Programs. When users create SAs using the work programs for Mortgage Origination or Mortgage Servicing business types and select IRs, the system will automatically add the standard procedures associated to the selected standard IRs.
 - Users can add/manage mortgage-specific procedures in the library and configure them to be added to a SA based on IR association.

Homepage and SA Customizations:

- **SA ID Search:** Users can now search for SAs directly from the homepage.
- **Customized view:** Mortgage users can see a new “Mortgage OCOE” section listing all Mortgage OCOE SAs along with their moratorium end dates and MSB users will see all MTRA Work Program SAs.
- **SA Initiation:** When initiating SA on a company, users can now view all on-going and past exams conducted by other agencies on the company which can be joined,

accepted and leveraged. Users will also be alerted when attempting to initiate an SA on a company participating in a Mortgage OCOE.

- **SA Section:** Added a new column in the Supervisory Activity section to display the scope type for all SAs.
- **Shell SAs:** A new section to display Shell SAs created by policy users.

Information Requests (IR):

- **Supplemental IR:** Examiners in Charge (EICs), lead agency staff, and team leads can now create supplemental IRs requesting for additional information via a parent IR that is in “Sent to Company” status and send it to the company.
- **IR Management:** Users can edit IRs in “Ready to Send” status, cancel them before company responds and edit custom IRs text for typos even after sending.
- **IR comments & documentation:** Users can now auto-send IRs comments and multiple document uploads.
- **Due dates:** EIC and Staff Users from the lead agency can set due dates and send automated reminders to specific participating agencies to add their IRs.
- **IR Request #:** Agency users will now see the IR Request (#) number alongside procedures for MSB SAs on all IRs/Procedures association grids.
- **Favorite IRs:** Users can now mark IRs of interest via a favorite icon/star icon on the IR Details grid and filter views accordingly.
- **Advance filtering:** Users can filter IRs by the agency that added the IRs on IR Detail Tab and IR response grid.

Procedures:

- **Offline workbook template:** Template will now include “Last Modified By” column for easy tracking. And “Examiner Observations”, “Existing Observations” and “New Observations” columns can now support 24,000 characters.
- **Highlights and comments:** Users can now highlight procedure observations and add/manage comments in review mode on the procedure tab and filter by reviewed/highlighted status before the SA close-out milestone.

Work Program:

- **Export:** Agency, policy and global support users can export each individual work program.
- **IR Associations:** Agency users can now view all Core IRs linked to a selected work program when defining the scope of an SA.

Report of Examination:

- Agency users can now send report responses for peer review to agency participants on the Supervisory Activity.

- Peer review workflow will now default to Parallel for all multi-state SAs unless sequential workflow is manually selected.
- EIC will be notified upon completion of report peer review, and a new report version is uploaded.

Other Enhancements:

- **EIC Reassignment:** Agency users can now reassign the EIC on an Acceptance SA while the workflow is *In Progress* and before an acceptance decision is made.
- **Acceptance Review:** Reviewers with accept/reject permissions can now return an SA to the Acceptance EIC with comments.
- **MTRA Work Program:** Agency users can now view *Regulations and Statutes* in the Findings section of the MTRA Work Program export.

II. Company Users

- **Communications Tab:** Users can view and create communication posts via Communications Tab and send it to the agency.
- **Agent Locations Tab:** When the agency sends an agent location request to the company, company user can respond to them and send it back to the agency.
- **Homepage:** Users can search for an SA ID directly from the homepage.