SES Milestones

Actions you must complete to move to the next milestone

STATE EXAMINATION SYSTEM

Enter Close-Out Information
~
Mark Report Response Complete
~
Close & Lock

Milestones
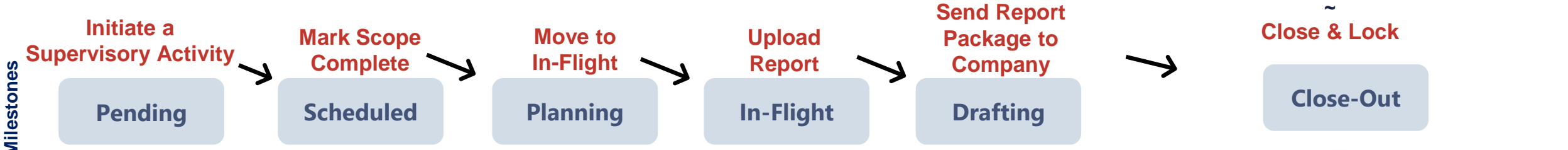
Initiate a Supervisory Activity →	**Mark Scope Complete** →	**Move to In-Flight** →	**Upload Report** →	**Send Report Package to Company** →	**Close-Out**
Pending	**Scheduled**	**Planning**	**In-Flight**	**Drafting**	

STAFF DIRECTOR STAFF USER

- Initiate a Supervisory Activity
- Send Supervisory Activity for Review
- Add SA Participants (optional)

EXAMINER IN CHARGE*

- Define the Scope
- Send Scope for Review (optional)
- Add and/or update SA Participants

EXAMINER IN CHARGE*

- Define the Plan (optional)
- Send the Plan for Review (optional)

EXAMINERS

Add/Remove IRs and LRs

EIC

Send IRs to Company

COMPANY

Respond to IRs or LRs

EXAMINERS

- Add Examiner Observations
- Add/Remove Procedures
- Add/Remove Findings
- Mark Areas for Review Complete
- Add Report Commentary

EIC

- Review Findings
- Schedule Exit Meeting
- Upload Report

EXAMINER IN CHARGE*

Assign the Package Assembler (report marked complete)

EXAMINERS

Add MRAs

EIC

Review / Send MRAs to Company

PACKAGE ASSEMBLER (EIC or Staff User)

Assemble & Send Report Package to Company

EXAMINER IN CHARGE*

- Review & Respond to MRAs
- Close MRAs
- Enter Close-Out Information
- Mark Report Response Complete

ALL PARTICIPANTS

- Add Time & Expenses
- Manage Company Interactions

STAFF USER

Close and Lock the Supervisory Activity

Closed

* Most tasks that the EIC can perform can now also be done by the **Staff User** role.

EIC = Examiner in Charge
IRs = Information Requests
LRs = Loan Requests
MRAs = Matters Requiring Attention