

Updated Resources for the Colorado Release

Introduction

This is a summary of the resources that were updated because of the enhancements made to SES in the Colorado release (February 26, 2023).

- Agency Resources
- Company Resources
- Other Resources

Agency Resources

- New topics for this release:
 - <u>Invitations to Join a Supervisory Activity</u> (and subtopics)
 - o <u>Bulk Working Loan Requests</u>
 - o Working Procedures
 - o <u>External Supervisory Documents on a Company Record</u> (and subtopics)
 - Retracting the Report of Examination
 - o <u>SA Records Created by CSBS Support Staff</u> (and subtopics)
- Adding an Information Request to the Library
- Adding a Procedure to the Library
- Adding a Reference to the Library
 - All Library topics updated to capture new functionality where your filters and columns are saved when you return to the Library page.

Company Resources

• Adding Information Request Responses: Updated to capture new process for responding to information requests where your filters and columns are saved when you return to the list of information requests.

Other Resources

- <u>SES Email Notifications</u>: Updated to include notification sent to staff users from the lead agency when a finding is deleted. Also, the agency Complaints POC and Complaints Supervisors receive a notification when preliminary review of a complaint is completed.
- <u>SES Agency System Roles & Consumer Complaints Roles</u>: Updated Excel spreadsheet of detailed role permissions.

Updated: 2/26/2023