



Banker Functionality Release Notes

Release Date: January 10, 2026

This document provides an overview of new and updated functionality as of this release, known issues, and features that are in progress or planned for future release.

Banker Functionality	
Overview	
This release introduces enhancements to reports and addresses known production bugs.	
New/Updated Functionality	
Report Updates <ul style="list-style-type: none">• An expanded set of credit fields are now displayed in the Credit Information Summary (CIS) Report, including commercial real estate and financial analysis fields.• Additional fields added to Shared Credit Review Report (SCRR) to better display core credit details.• PDF versions of the SCRR¹ and CIS reports, both the Agent and Participant submissions, are now available.	
Fixes <ul style="list-style-type: none">• Duplicate Entity Conflicts<ul style="list-style-type: none">○ Conflicts arise when entities with Internal Entity IDs from prior periods are added to a submission, and then the Copy Credits feature is used, potentially including the same entities.• Page Refresh Issues<ul style="list-style-type: none">○ After performing Copy Credits or an XML upload, the page may not refresh automatically to show the action is processing or has completed. A manual refresh of the browser may be required to update the page.	
Known Issues	
Planned to be addressed in the next patch release, currently scheduled for January 29 th	
<ul style="list-style-type: none">• Address potential exception errors on XML uploads if failed submission occurred on prior upload attempt.	

¹ See Known Issues

Banker Functionality

- Adjustments to Credit Reconciliation logic to better identify new and removed credits between reporting periods.
- PDF version of the Shared Credit Review Report (SCRR) does not generate.