

Ex-Post Reviews - Client Check-In

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This article is a continuation of [Ex-Post Reviews - Report Content](#)

The **Client Check-In** screen allows you to add commentary to evidence that the clients attitude to risk, knowledge & experience and personal circumstances have been assessed.

The screenshot shows the 'Client Check-In' screen in the Synaptic Pathways system. The page title is 'Test Review 2'. The main navigation bar includes 'Review', 'Client Check-In', and 'Report'. A 'Mark Status as Complete' button is visible in the top right. The left sidebar contains a 'What's Shown Here...' section with instructions: 'Add commentary for each section to evidence that the clients attitude to risk, knowledge & experience and personal circumstances have been assessed.'

The main content area is divided into five sections, each with a declaration form:

- Attitude to Risk:** Declaration of Attitude to Risk. Provide details to evidence that the illustration(s) are suitable given the clients current overall attitude to risk.
- Knowledge & Experience:** Declaration of Knowledge & Experience. Provide details to evidence that the illustration(s) are suitable given the clients current knowledge and experience.
- Personal Circumstances:** Declaration of Personal Circumstances. Provide details to evidence that the illustration(s) are suitable given the clients personal circumstances.
- Tolerance for Loss:** Declaration of Tolerance for Loss. Provide details to evidence that the illustration(s) are suitable given the clients tolerance for loss.
- Capacity for Loss:** Declaration of Capacity for Loss. Provide details to evidence that the illustration(s) are suitable given the clients capacity for loss.

Each form includes a text area and a rich text editor toolbar with options for font style, size, bold, italic, underline, link, unlink, list, and image.

At the bottom of the screen, there are two buttons: 'Back to Ex-post review' and 'Continue to Report'.

Once complete, **Continue to Report**

For further information on Ex-Post Reviews, see article [Ex-Post Reviews - Report](#)