

Ex-Post Reviews - Mark as Complete

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

Once the report has been reviewed, **Mark as Complete** at the top right of the screen:

The screenshot shows the Synaptic Pathways user interface for an Ex-Post Review. At the top, there is a navigation menu with options like Home, Paraplanner Access Centre, and Research. Below the menu, the review details are displayed: Client (Susanna West), Holding (Personal Pension | Fully Insured), Start Date (07/11/2019), and End Date (06/11/2033). A progress bar at the top indicates the current stage, with a 'Mark Status as Complete' button highlighted in blue. On the left, there is a 'Report' section with instructions and a 'Download Report' button. The main content area shows the report title 'Test Review 2 - NOT FINAL' and details for the prepared by (Amy Paulsen) and prepared for (Susanna West) parties, including their addresses and contact information. A 'SUMMARY' section is also visible, indicating the review is as of 30th November 2023.

Update Holding Now

The screenshot shows a dialog box titled 'Ex-Post Completion'. The message inside reads: 'This ex-post review will be marked as complete and the linked holding will get updated with the proposal changes. Do you wish to continue?'. At the bottom of the dialog, there are two buttons: 'Update Holding Now' (highlighted in blue) and 'Cancel'.

The screenshot shows a progress bar for the 'Update Holding Now' process. The progress bar is labeled 'Step 2' and is 25% complete. The progress bar is a blue line on a grey background. To the right of the progress bar, it says '25% Complete'. Above the progress bar, there is a list of steps with corresponding icons: a green checkmark for 'Finalising holding review...', a blue circle for 'Updating holding record...', a grey circle for 'Updating valuation history for holding...', and a grey circle for 'Almost there - polishing up the final details for you...'.

The **Mark as Complete** button will be greyed out once done.

✓ Mark Status as Complete
