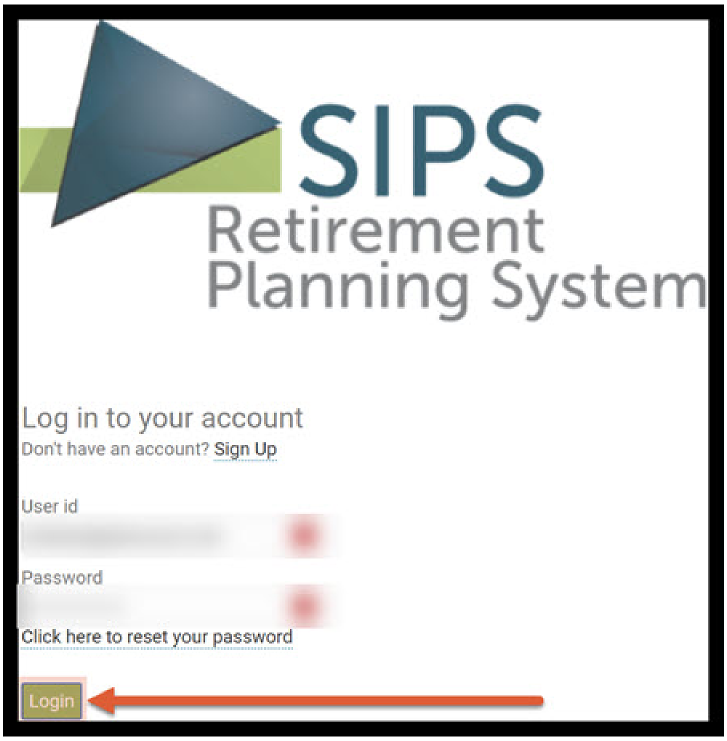
Goals and Objectives

11/06/2024 3:05 pm EST

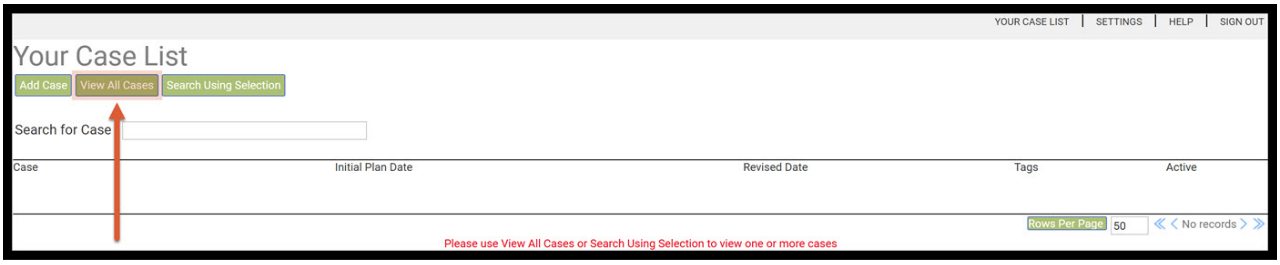
This page in the SIPS program allows you to document the client's goals, objectives, and concerns. The information entered here will appear in the report when you select the 'Goals' page option. Below is a step-by-step guide on filtering information for the goals and objectives.

Step 1: Logging In: Log into SIPS.



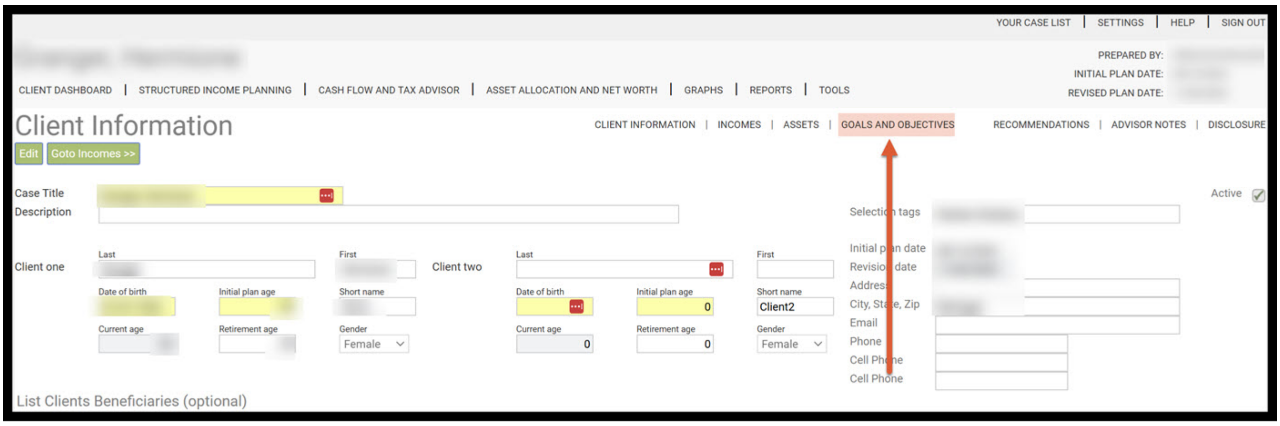
Step 2: Go To Your Case List: Click on either the Goto Your Case List button or click on the Your Case List Heading to take you to your case list.

Step 3: View All Cases: Click on the View All Cases button to see the list of all of your cases.

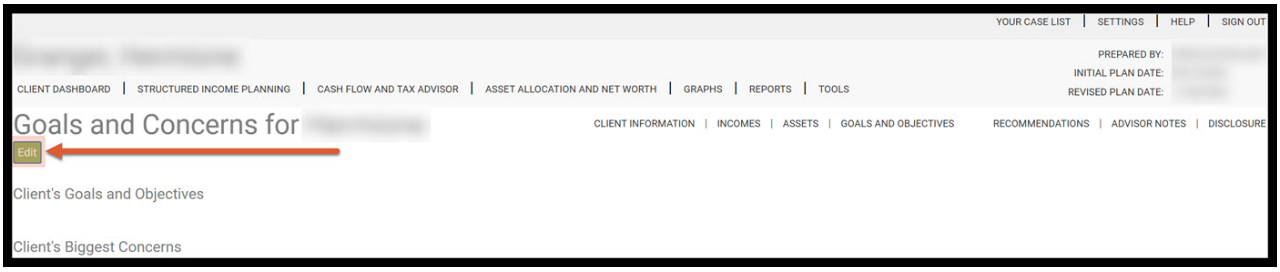


Step 4: Selection: Select which case you would like to open up to do the editing. Double click on the case to open it up to take you to the client information page.

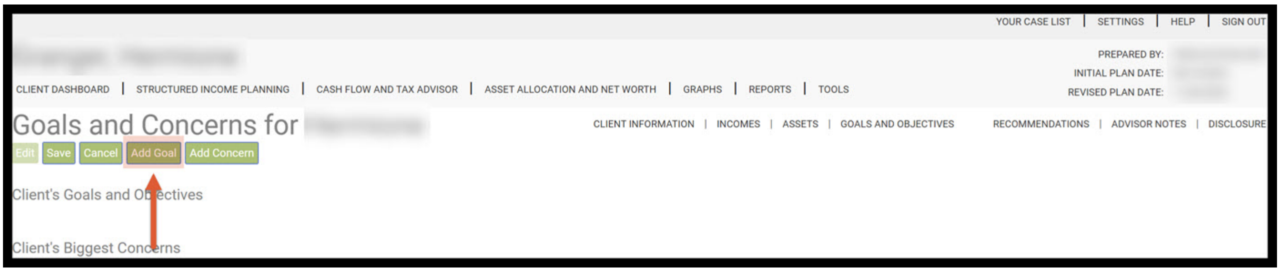
Step 5: Goals and Objectives: Click on the Goals and Objectives subheading, which remains accessible across all client dashboard pages. The client dashboard includes client information, income, assets, goals and objectives, recommendations, advisor notes, and disclosure.



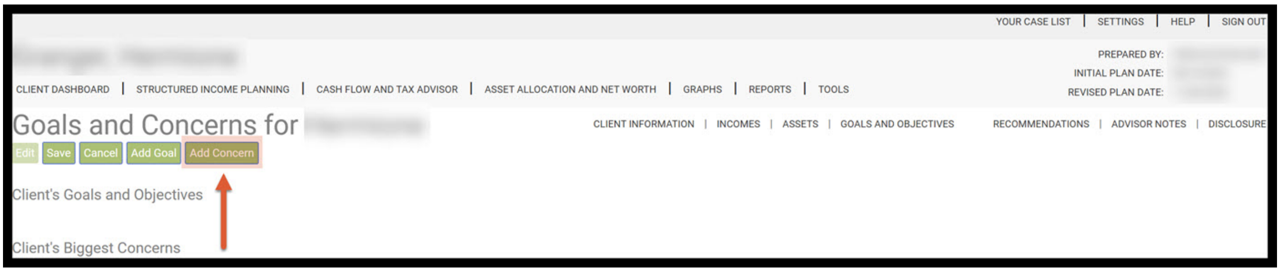
Step 6: Edit: Click on the green edit button underneath the Goals and Concerns for Clients Name heading.



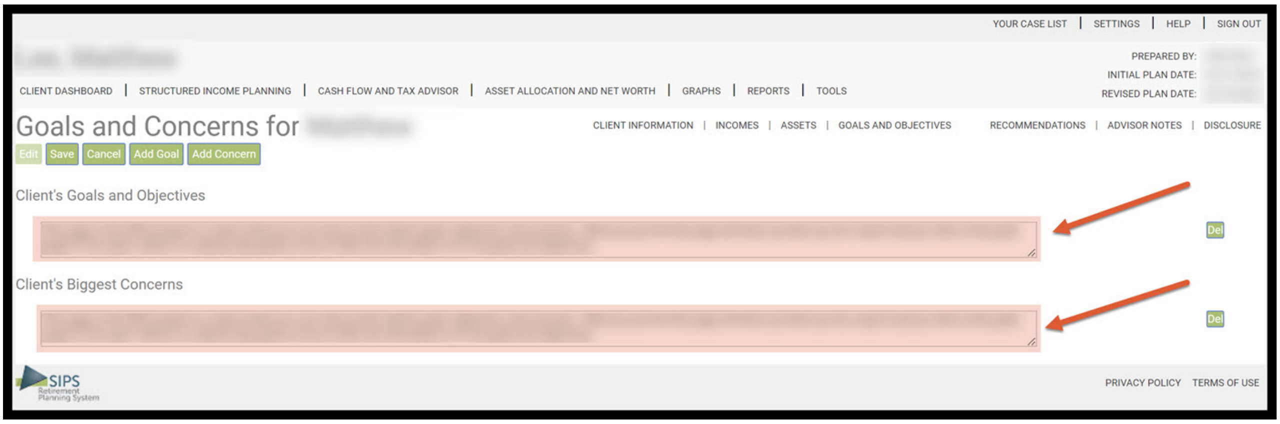
Step 7: Add Goal: To add a goal or objective, click the green 'Add Goal' button. A text box will appear under the Client Goals and Objectives subheading. Click in the text box to begin writing your goal or objective. If the text exceeds the box size, a dropdown arrow will appear, allowing you to scroll through the content. After clicking the green button to proceed to the next step, the text box will resize to fit the entered text. To add additional goals, repeat Step 7. To add a concern, proceed to Step 8.



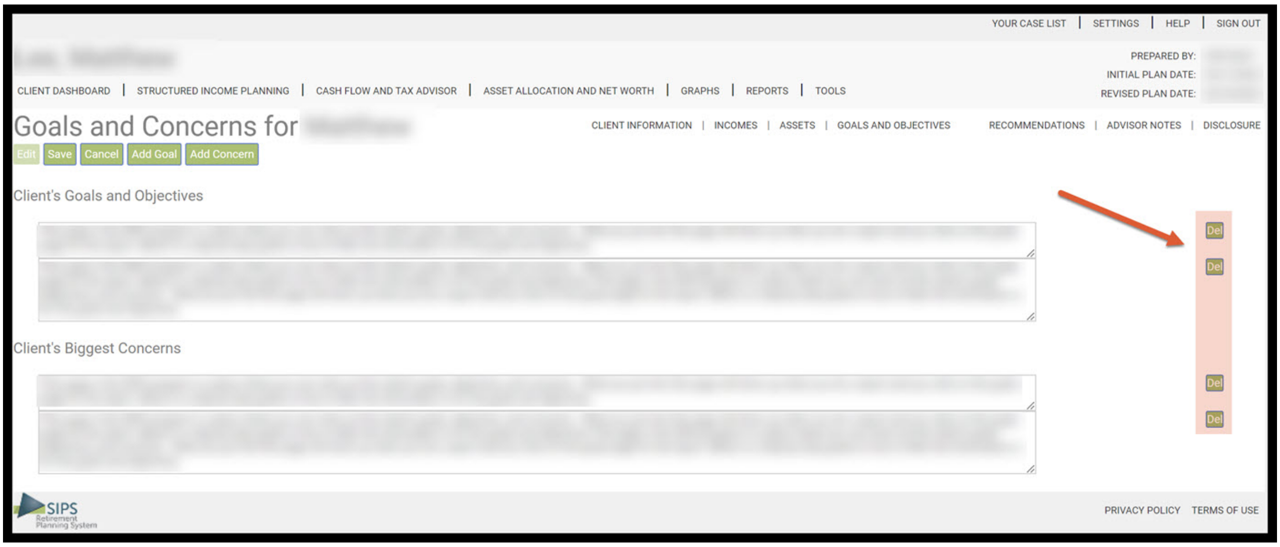
Step 8: Add Concern: To add a concern, click the green 'Add Concern' button. A text box will appear under the Client Biggest Concern subheading. Click in the text box to begin writing the concern. If the text exceeds the box size, a dropdown arrow will appear, allowing you to scroll through the content. After clicking the green button to proceed to the next step, the text box will resize to fit the entered text. To add additional concerns, repeat Step 8.



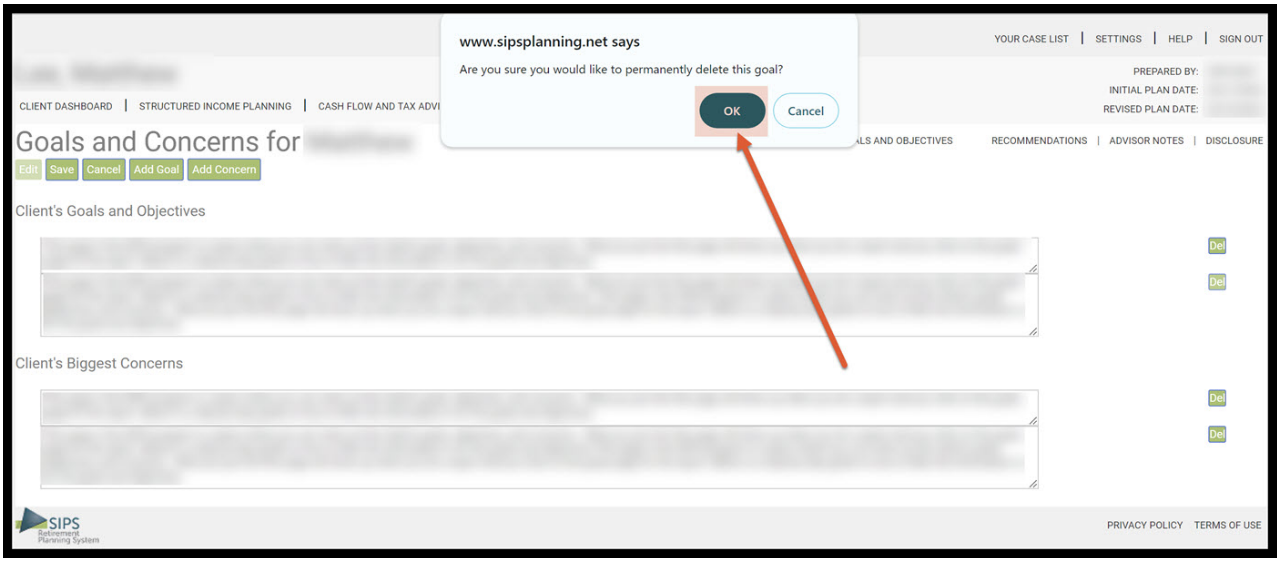
Step 9: Editing: To edit any text click in the textbox and make the edits to the text.



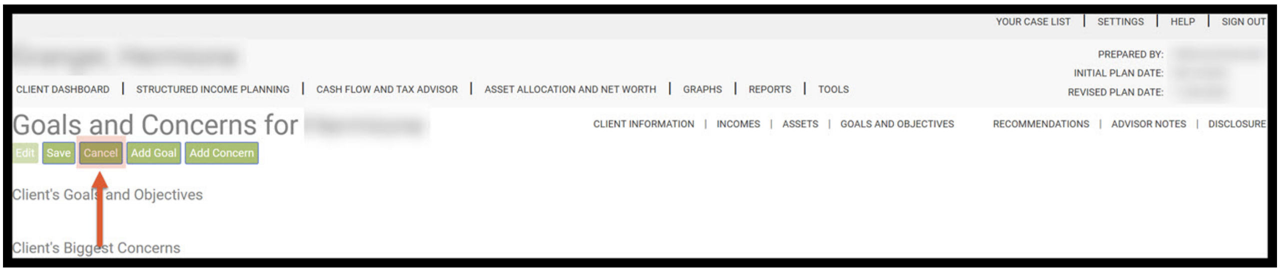
Step 10: Delete: To delete a goal, objective, and/or a concern. Click on the Green Del button on the right-hand side of the screen.



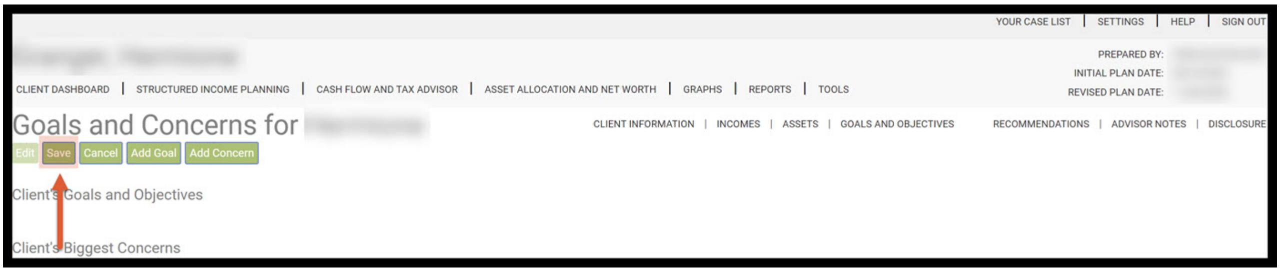
Step 11: Second Step for Deletion: Once you click on the Del button for deletion a message box from SIPS will come up asking, "Are you sure you would like to permanently delete this goal/or concern." Click the Ok button to complete this task.



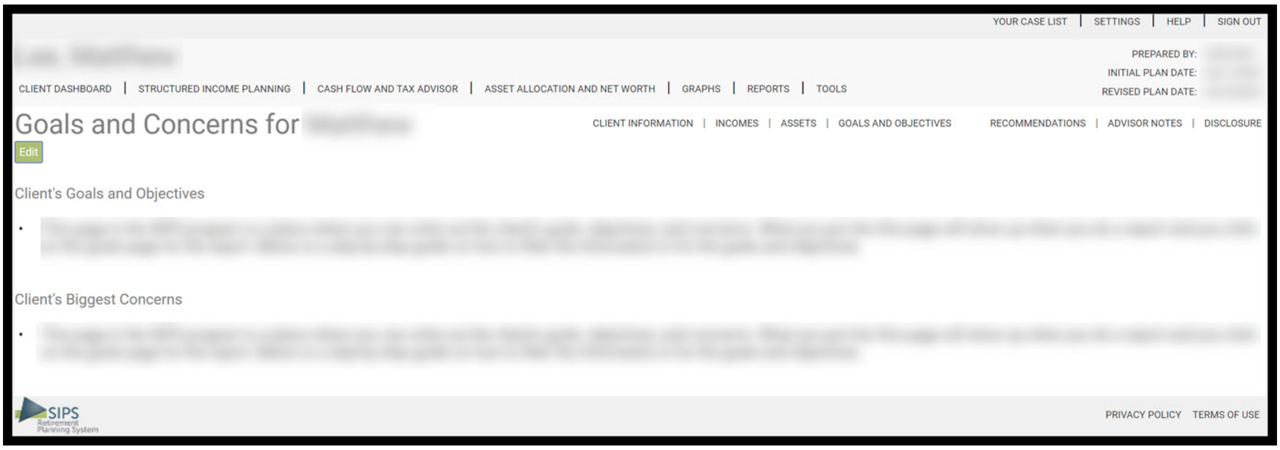
Step 12: Cancel: To cancel out any editing you have made, click on the green cancel button underneath the Goals and Concerns for Clients name subheading.



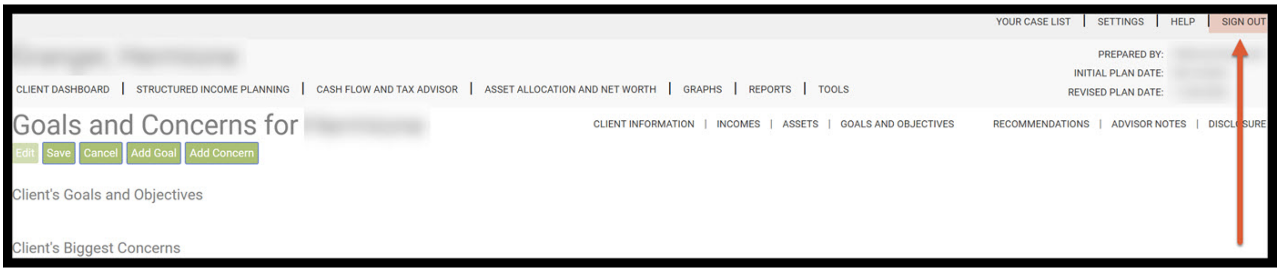
Step 13: Save: Click on the Save button underneath the Goals and Concerns for Clients name subheading.



Step 14: Final Version: Once saved, the documentation entered under each heading will appear as text. This information will also be included on the Goals page when you generate the final report.



Step 15: Logout: To log out of SIPS click on the Sign Out heading that is located in the upper righthand side of the screen.



If you feel you need more support or would like to set up demo time with one of our representatives, please contact us at: +1-888-449-6917 or support@planscout.com.