Deactivating a Case

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From the client information page, you have a capability of deactivating a case. Below is the step-by-step guideline for deactivating a case starting from the login page.

Step 1: Log In: Log into SIPS.



Step 2: Welcome Page: To navigate to the Your Case List screen, you have two options: click the green Go To Your Case List button under the Welcome heading, or select Your Case List in the upper-right corner. Both options lead to the same Your Case List page.

	YOUR CASE LIST	SETTINGS	HELP	SIGN OUT
Welcome	1			
Goto Your Case List >>				
Expiry date:				
Number of cases:				

Step 3: View All Cases: Click on the green View All Cases button underneath the Your Case List heading.

			YOUR CASE LIST	SETTINGS	HELP	SIGN OUT
Your Cas	e List					
Add Case View All	Cases Search Using Selection					
Search for Case						
Case	Initial Plan Date	Revised Date	Tags		Active	
			Rows Per P	age 50	≪ < No re	ecords > >>
		Please use View All Cases or Search Using Selection to view one or more cases				

Step 4: Case Selection: Click on the case you would like to open up.

			YOUR CASE LIST SE	TTINGS HELP SIGN OUT
Your Case List				
Add Case View All Cases Search Using Selection				
Search for Case				
Case	Initial Plan Da e	Revised Date	Tags	Active
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			Rows Per Page	50 K K Page 1 of 1 > >>

Step 5: Edit: Click on the green Edit button underneath the Client Information heading.

									YOUR CASE LIST SETTINGS HEI	LP SIGN OUT
CLIENT DASHBO	DARD STRUCTU	RED INCOME PLANNING	CASH FLOW AND TAX	ADVISOR AS	SET ALLOCATION AND	NET WORTH GRAPHS	REPORTS TO	OLS	PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:	
Client Edit Goto Ind	Informa	tion			(CLIENT INFORMATION IN	ICOMES ASSETS	GOALS AND OBJECTIVES	RECOMMENDATIONS ADVISOR NOTES	DISCLOSURE
Case Title Description								Selection tags		Active 🖌
CI ent one	Last		First	Client two	Last		First	Initial plan date Revision date		
	Date of birth	Initial plan age	Short name		Date of birth	Initial plan age	Short name	City, State, Zip		
List Oliente	Current age	Retirement ane	Gender Male V		Current age	Datirement and	Gender Female ∨	Email Phone Cell Phone Cell Phone		
LIST CHEITIS	benenciaries	(optional)								

Step 6: Active Text Box: Click on the text box to unclick the checkmark.

									YOUR CASE LIST SETTINGS H	ELP SIGN OUT
CLIENT DASHB	DARD STRUCTURED IN	COME PLANNING	CASH FLOW AND TAX	ADVISOR AS	SET ALLOCATION AND NET	WORTH GRAPHS	REPORTS TOO	LS	PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:	
Client Edit Save	Informatic Cancel Add Beneficiary	n I			CLIEF	IT INFORMATION INC	OMES ASSETS	GOALS AND OBJECTIVES	RECOMMENDATIONS ADVISOR NOTE	S DISCLOSURE
Case Title Description								Selection tags		Active
Client one	Last		First	Client two	Last		First	Initial plan date Revision date		
	Date of birth	Initial plan age	Short name		Date of birth	Initial plan age	Short name	Address City, State, Zip		
List Clients	Current age	Retirement age	Gender Male V		Current age	Retirement age	Gender Female V	Cell Phone Cell Phone		

Step 7: Save: Click on the green Save button underneath the Client Information heading.

										YOUR CASE LIST	SETTINGS H	ELP SIGN OUT
CLIENT DASHBO		NCOME PLANNING	CASH FLOW AND TAX ADVIS	SOR ASSET	ALLOCATION	AND NET WO	DRTH GRAPHS	REPORTS TO	ILS	R	PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:	
Client Edit Save	Cancel Add Benefician	on v				CLIENT I	NFORMATION INC	OMES ASSETS	GOALS AND OBJECTIVES	RECOMMENDATIO	DNS ADVISOR NOTE	S DISCLOSURE
Case Titl Description									Selection tags			Active 📃
Client on	Last		First	lient two	Last			First	Initial plan date Revision date			
	Date of birth	Initial plan age	Short name		Date of birth		Initial plan age	Short name	Address City, State, Zip	_		
	Current age	Retirement ape	Gender Male V		Current age		Retirement age	Gender Female V	Email Phone Cell Phone Cell Phone			
List Clients	Beneficiaries (op	tional)							Cell Phone			

Step 8: Your Case List: Click on the Your Case List heading located on the right-hand side of the screen.

									YOUR CASE LIST	SETTINGS H	ELP SIGN OUT
CLIENT DASHE	BOARD STRUCTUR	ED INCOME PLANNING	CASH FLOW AND TAX	ADVISOR AS	SET ALLOCATION AN	ID NET WORTH GRAPHS	REPORTS TO	DLS	R	PREPARED BY: INITIAL PLAN DATE: EVISED PLAN DATE:	
Client Edit Goto In	Informa	tion				CLIENT INFORMATION IN	COMES ASSETS	GOALS AND OBJECTIVES	RECOMM INDATIC	NS ADVISOR NOT	ES DISCLOSURE
Case Title Description								Selection tags			Active
Client one	Last		First	Client two	Last	•••	First	Initial plan date Revision date			
	Date of hirth	Initial plan age	Short name		Date of birth	Initial plan age	Short name	Address City, State, Zip			
	Current age	Retirement age	Gender Male V		Current age	Retirement age	Gender Female ∽	Email Phone Cell Phone Cell Phone			
List Client	s Beneficiaries (optional)									

Step 9: View All Cases: Click on the green View All Cases button underneath the Your Case List heading.

		YOUR CASE LIST SE	TTINGS HELP	SIGN OUT
Your Cas	e List			
Add Case View All	Cases Search Using Selection			
Search for Case				
Case	Initial Plan Date	Revised Date Tags	Active	
		Rows Per Page	50 《 < No r	records > >>
•		Please use View All Cases or Search Using Selection to view one or more cases		

Step 10: Case: The case you deactivated will not have a check mark in the active text box.

			YOUR CASE LIST	SETTINGS HELP	SIGN OUT
Your Case List					
Add Case View All Cases Search Using Selection					
Search for Case					
Case	Initial Plan Date	Revised Date	Tags	Active	
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Step 11: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.

			YOUR CASE LIST	SETTINGS HELP SIGN OU
Your Case List				†
Add Case View All Cases Search Using Selection				
Search for Case				
Case	Initial Plan Date	Revised Date	Tags	Active
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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