

Deactivating a Case

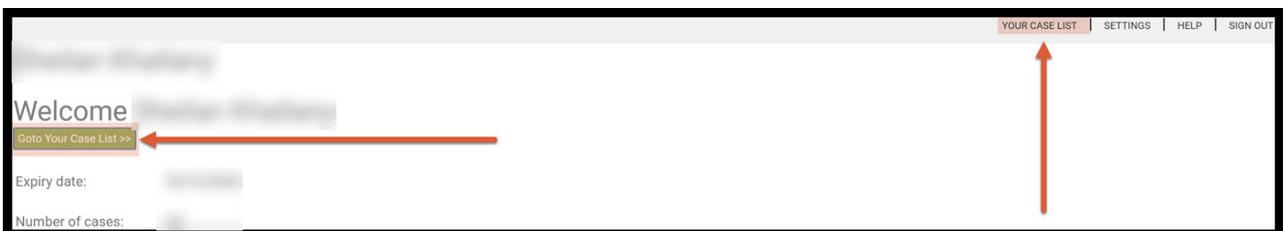
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From the client information page, you have a capability of deactivating a case. Below is the step-by-step guideline for deactivating a case starting from the login page.

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.



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

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

The screenshot shows the 'Client Information' form. At the top right, there are navigation links: 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below these are fields for 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:'. The main navigation bar includes 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', and 'TOOLS'. The 'Client Information' heading is followed by sub-navigation: 'CLIENT INFORMATION', 'INCOMES', 'ASSETS', 'GOALS AND OBJECTIVES', 'RECOMMENDATIONS', 'ADVISOR NOTES', and 'DISCLOSURE'. Below the heading are buttons: 'Edit', 'Save', 'Cancel', and 'Add Beneficiary'. The form contains fields for 'Case Title', 'Description', and 'Selection tags'. There are two client sections, 'Client one' and 'Client two', each with fields for 'Last', 'First', 'Date of birth', 'Initial plan age', 'Short name', 'Current age', 'Retirement age', and 'Gender'. To the right of the client information is a 'Selection tags' section with a list of fields: 'Initial plan date', 'Revision date', 'Address', 'City, State, Zip', 'Email', 'Phone', 'Cell Phone', and 'Cell Phone'. At the bottom left, there is a link: 'List Clients Beneficiaries (optional)'. On the right side, there is an 'Active' checkbox which is checked, with a red arrow pointing to it.

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

This screenshot is identical to the previous one, but the 'Save' button is highlighted in green. The 'Active' checkbox is now unchecked, and a red arrow points to the 'Save' button.

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

This screenshot is identical to the previous ones, but the 'YOUR CASE LIST' link in the top right navigation bar is highlighted in red. A red arrow points to this link. The 'Save' button is no longer highlighted, and the 'Active' checkbox remains unchecked.

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

