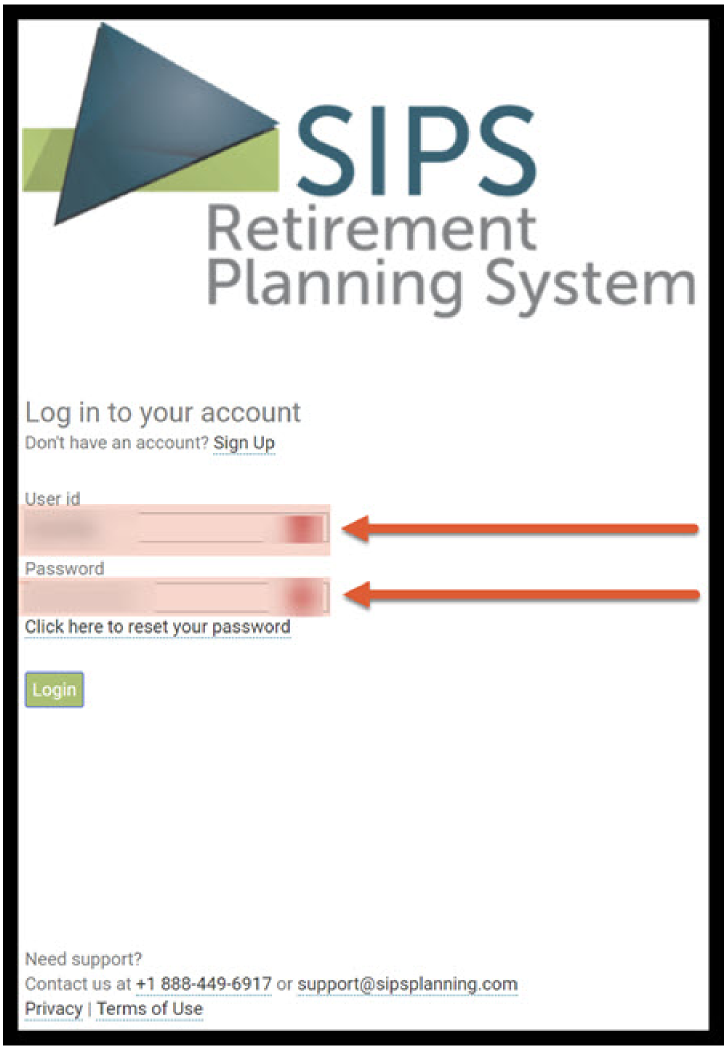
Accessing A Case

09/16/2024 11:00 am EDT

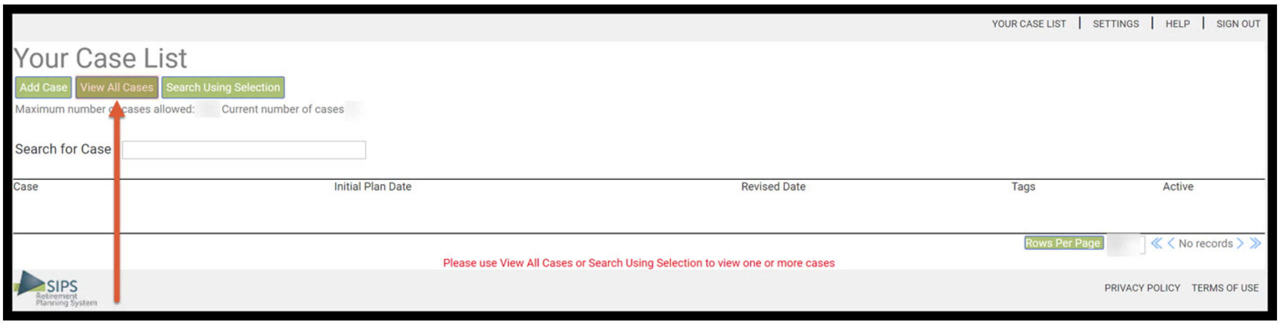
To find the list to access all of your cases you will need to log into sipsplanning.net, click on the GoTo Your Case List button and then you will be directed to the main dashboard for Your Case List Page.

Step 1: Logging In: Log into SIPS.

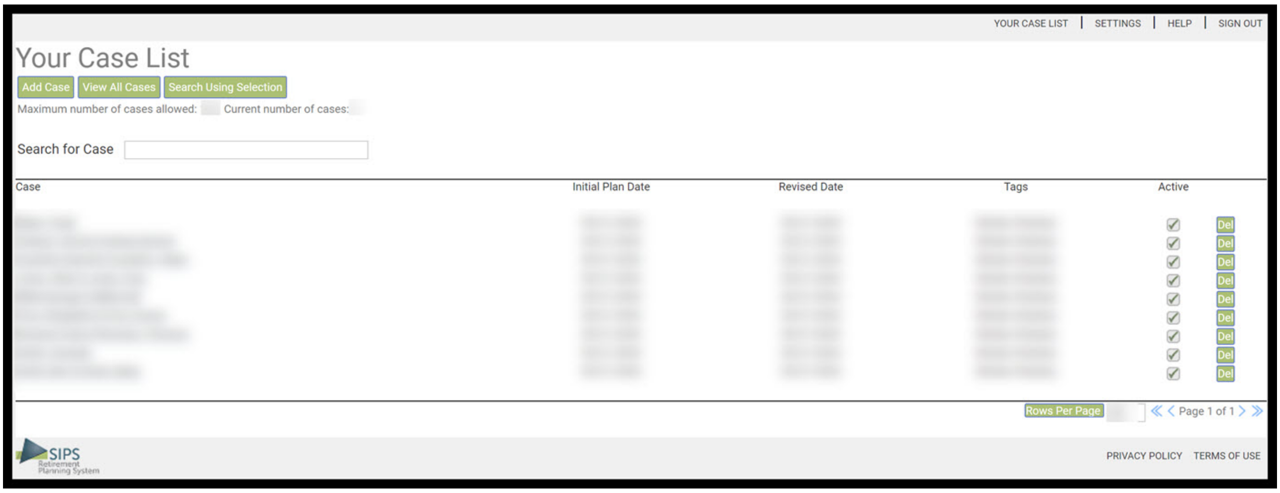


Step 2: GoTo Your Case List: You can either do this by clicking on the green GoTo Your Case List button or clicking on the Your Case List Subheading located in the upper righthand side of your screen.

Step 3: View All Cases: On Your Case List/Main Dashboard page you can access all of your cases or create a new case. This page the list is intentionally left blank to promote privacy when looking at main dashboard screen. To view all of your cases you need to click on the View All Cases button.

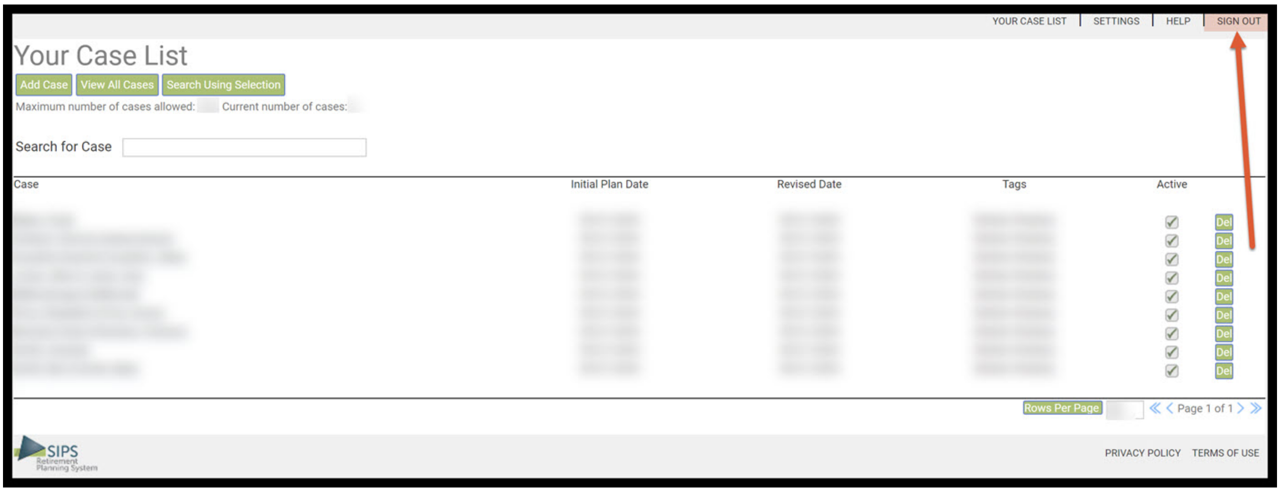


Step 4: Viewing All Cases: After clicking on the View All Cases Button your list of cases will come up.



Step 5: Case Selection: Double click on which file you were looking for to open up. From there you will be taken to the Client Information page.

Step 6: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand 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