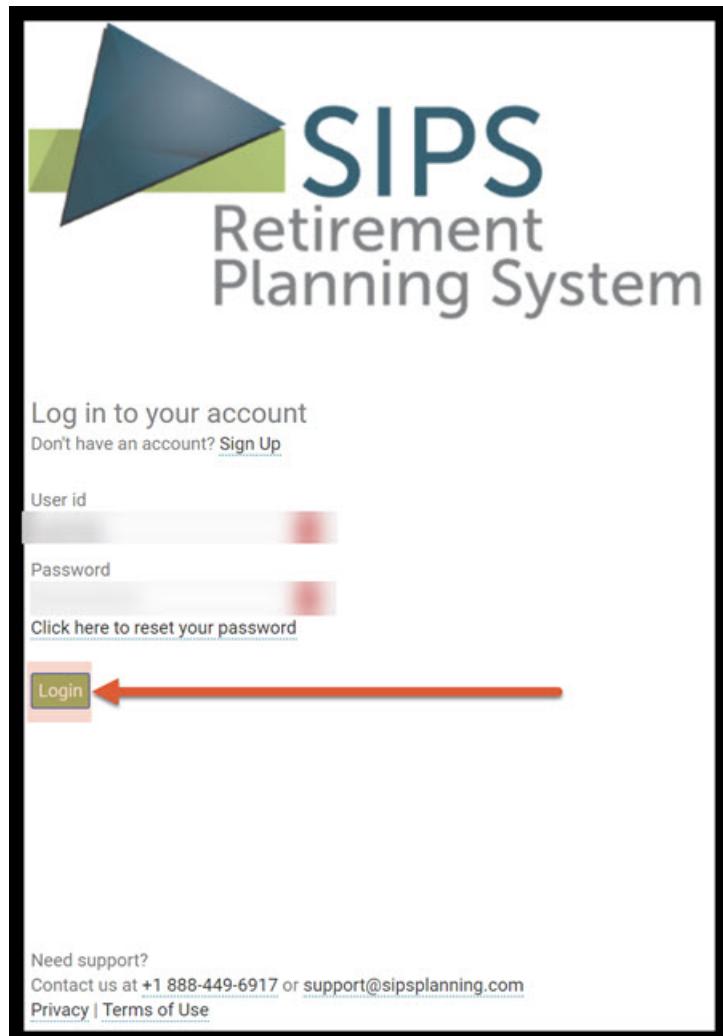


Searching for a Case

01/08/2026 9:25 am EST

There are 2 different ways to search for a specific case in SIPS. One way is clicking on search using selection button underneath the main dashboard on the Your Case List page. This will redirect you to the text box Search for Case. The other way is to automatically filter in the text data into the Search for Case text box. The search features only recognize text, so the way to search for a case is either typing in the name you used for the selection tags, case names, or grammatical parts of the case name. Below are the step-by-step instructions.

Step 1: Logging In: Log into SIPS.



Step 2: Go To 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.



Option 1: Search Using Selection:

Step 3: Search using Selection: Click on Search Using Selection and start typing the text into Search for Case text box. Double click when done writing in the text box.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Your Case List

Add Case View All Cases Search Using Selection

Maximum number of cases allowed: Current number of cases:

Search for Case

Case	Initial Plan Date	Revised Date	Tags	Active

Please use View All Cases or Search Using Selection to view one or more cases

Rows Per Page 25 << No records >>

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Option 2: Search for Case:

Step 4: Search for Case: Click inside the text box next to the Search for Case subheading. Once done typing double click to bring the case up.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Your Case List

Add Case View All Cases Search Using Selection

Maximum number of cases allowed: Current number of cases:

Search for Case

Case	Initial Plan Date	Revised Date	Tags	Active

Please use View All Cases or Search Using Selection to view one or more cases

Rows Per Page 25 << No records >>

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Step 5: Selection: Double click on the case you are looking for.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Your Case List

Add Case View All Cases Search Using Selection

Maximum number of cases allowed: Current number of cases:

Search for Case

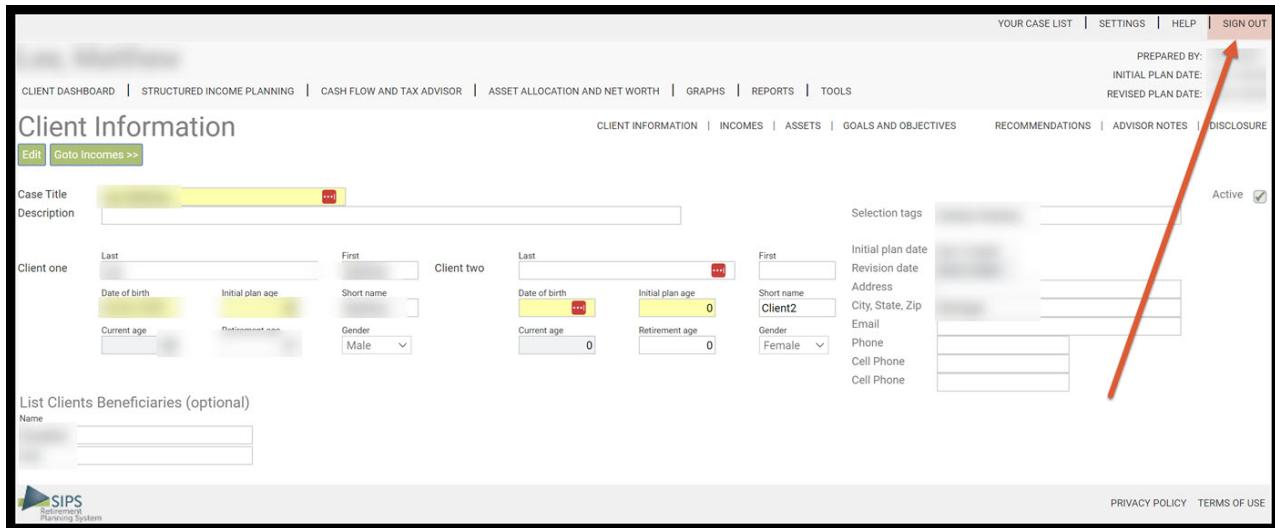
Case	Initial Plan Date	Revised Date	Tags	Active
			<input checked="" type="checkbox"/> <input type="button" value="Del"/>	
			<input checked="" type="checkbox"/> <input type="button" value="Del"/>	
			<input checked="" type="checkbox"/> <input type="button" value="Del"/>	

Please use View All Cases or Search Using Selection to view one or more cases

Rows Per Page 25 << Page 1 of 1 >>

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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.



The screenshot shows the 'Client Information' page of the SIPS system. At the top, there are navigation links: 'CLIENT DASHBOARD', 'STRUCTURED INCOME PLANNING', 'CASH FLOW AND TAX ADVISOR', 'ASSET ALLOCATION AND NET WORTH', 'GRAPHS', 'REPORTS', 'TOOLS', 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. The 'SIGN OUT' button is highlighted with a red arrow. The main area is titled 'Client Information' and contains fields for 'Case Title' (with a yellow background), 'Description', 'Client one' (with two sub-sections for 'Last', 'First', 'Short name', 'Date of birth', 'Initial plan age', 'Current age', and 'Retirement age'), 'Client two' (with similar fields), and 'Selection tags' (with a checked 'Active' checkbox). Below these are sections for 'List Clients Beneficiaries (optional)' and 'Name'. The SIPS logo is in the bottom left, and 'PRIVACY POLICY' and 'TERMS OF USE' links are in the bottom right.

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

