Goals and Objectives

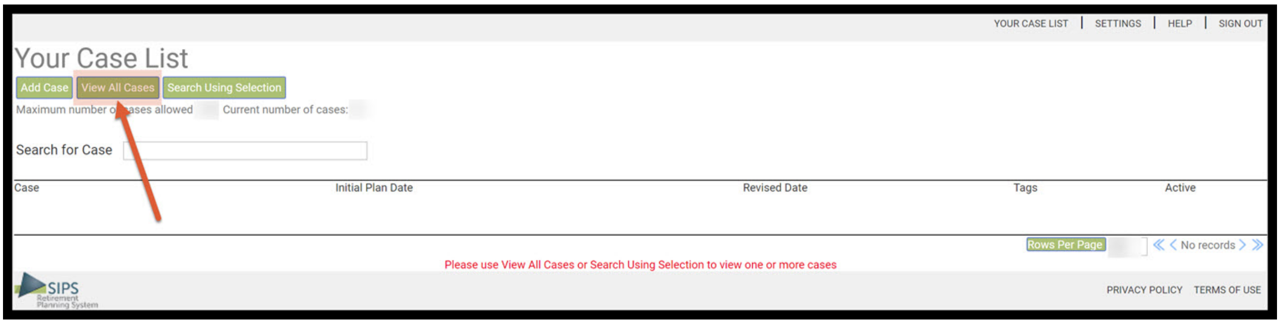
08/23/2024 5:26 pm EDT

This page in the SIPS program is a place where you can write out the client's goals, objectives, and concerns. What you put into this page will show up when you do a report when you click on the goals page option for the report. Below is a step-by-step guide on how to filter the information in for the goals and objectives.

Step 1: Logging In: Log into SIPS.

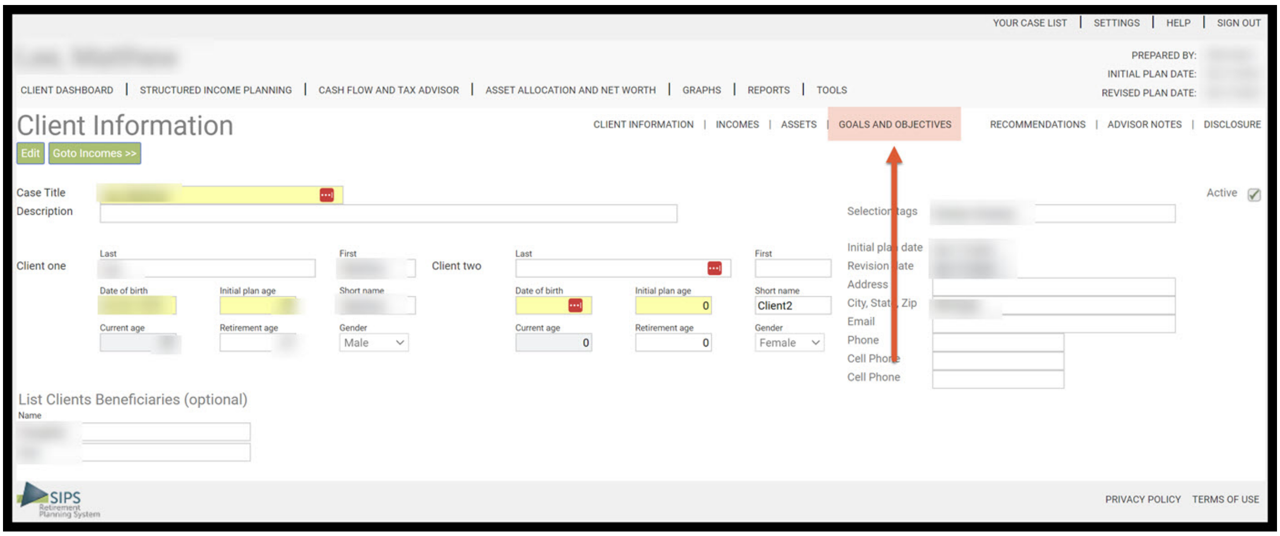
Step 2: Go To Your Case List: Click on either the Goto Your Case List button or click on the Your Case List Heading to take you to your case list.

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

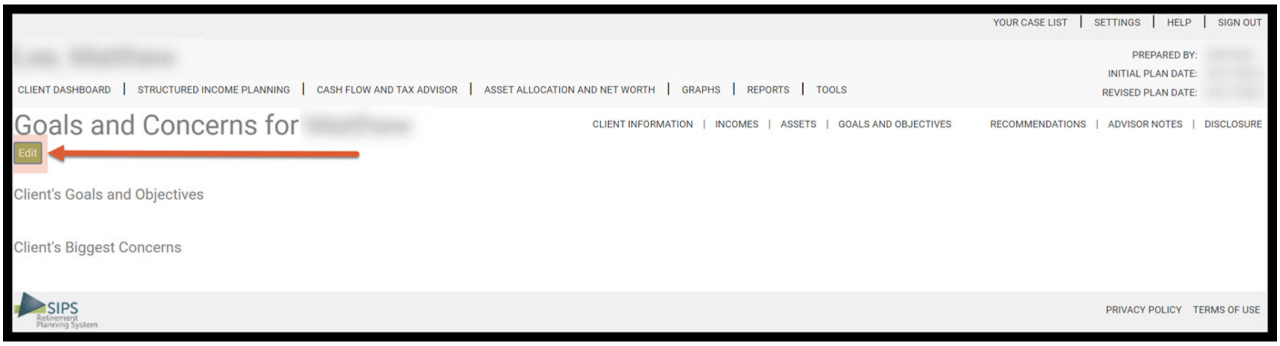


Step 4: Selection: Select which case you would like to open up to do the editing. Double click on the case to open it up to take you to the client information page.

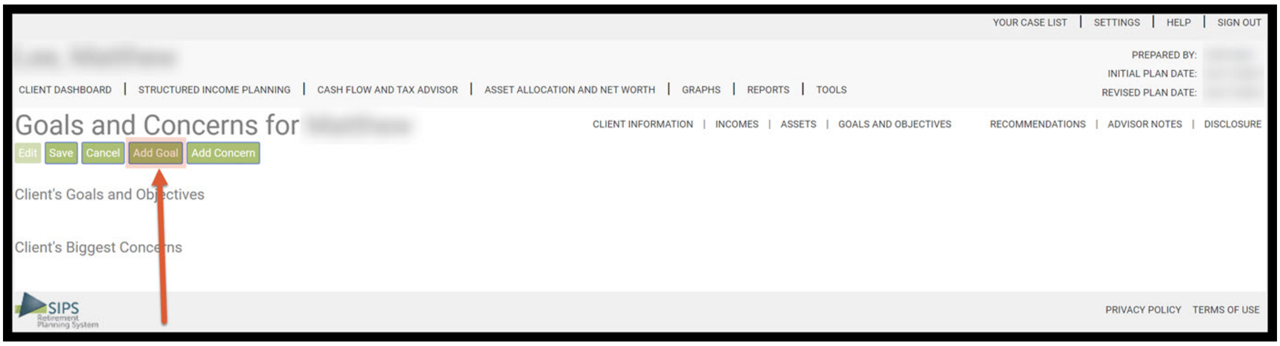
Step 5: Goals and Objectives: Click on the Goals and Objectives subheading. This subheading is stationary throughout all the pages that correlate with the client dashboard. The client dashboard pages are the client information, income, assets, goals and objectives, recommendations, advisor notes, disclosure.



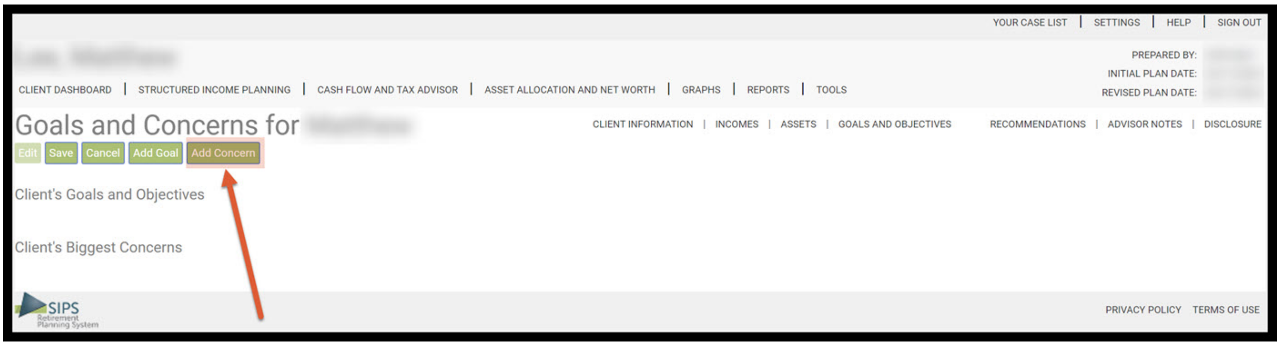
Step 6: Edit: Click on the green edit button underneath the Goals and Concerns for Clients Name heading.



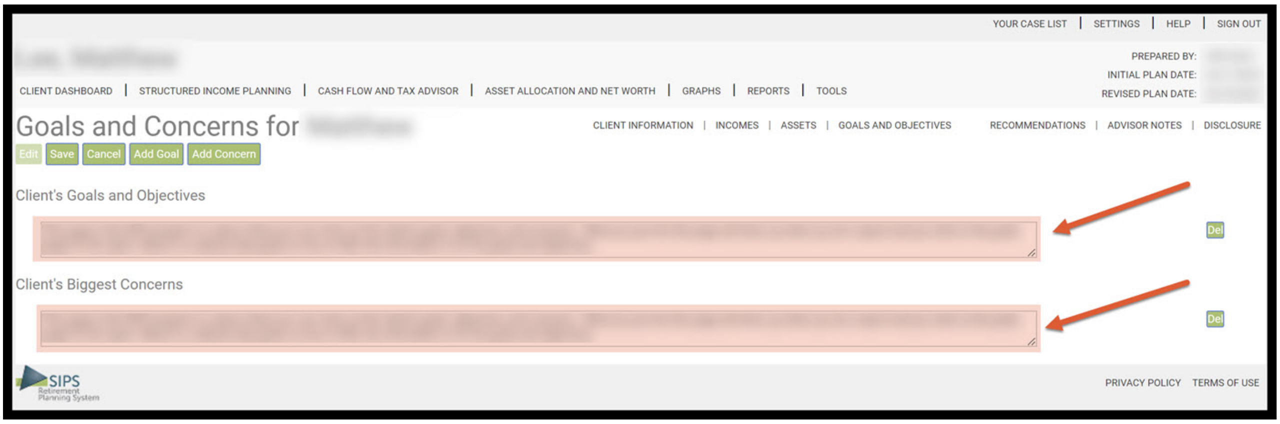
Step 7: Add Goal: To add an objective and/or goal click on the Add Goal green button. A text box will appear underneath the Client Goals and Objectives Subheading. Click in the text box to start writing the goal and/or the objective. If the text is too much for the size of text box, a dropdown arrow will appear in the text box so that you can scroll through the text. After you click a green button to go to the next step, the text box will be resized to fit the text that was written. Once done if you need to add another goal repeat Step 7. If you need to add a concern go to Step 8.



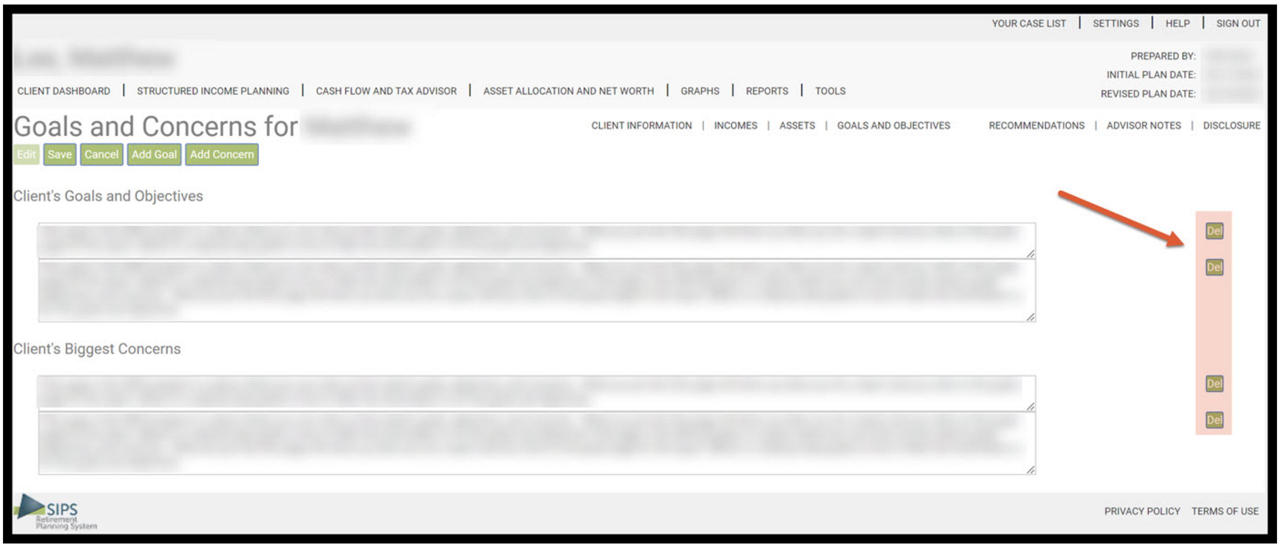
Step 8: Add Concern: To add a concern click on Add Concern green button. A text box will appear underneath the Client Biggest Concern subheading. Click in the text box to start writing the concern. If the text is too much for the size of text box, a dropdown arrow will appear in the text box so that you can scroll through the text. After you click a green button to go to the next step, the text box will be resized to fit the text that was written. Once done if you need to add another concern repeat Step 8.



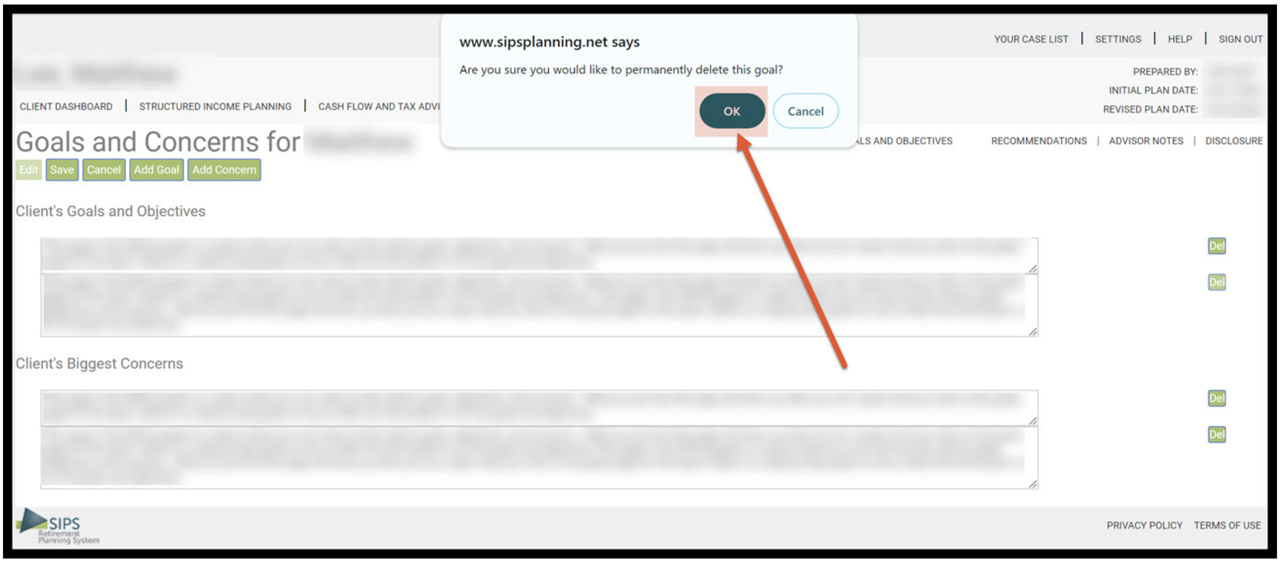
Step 9: Editing: To edit any text click in the textbox and make the edits to the text.



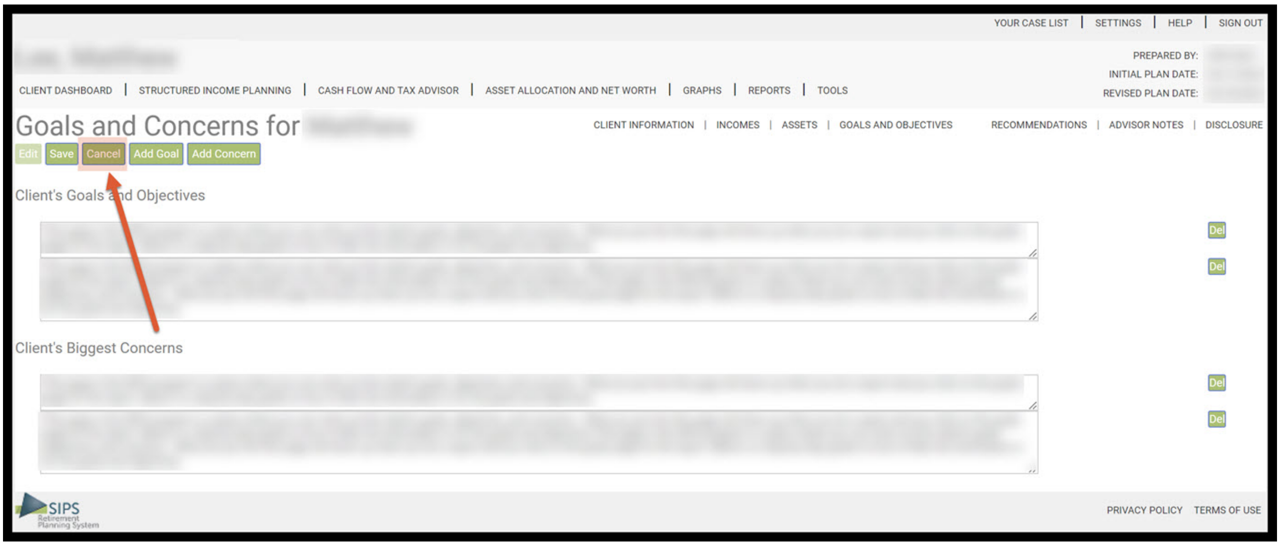
Step 10: Delete: To delete a goal, objective, and/or a concern. Click on the Green Del button on the right-hand side of the screen.



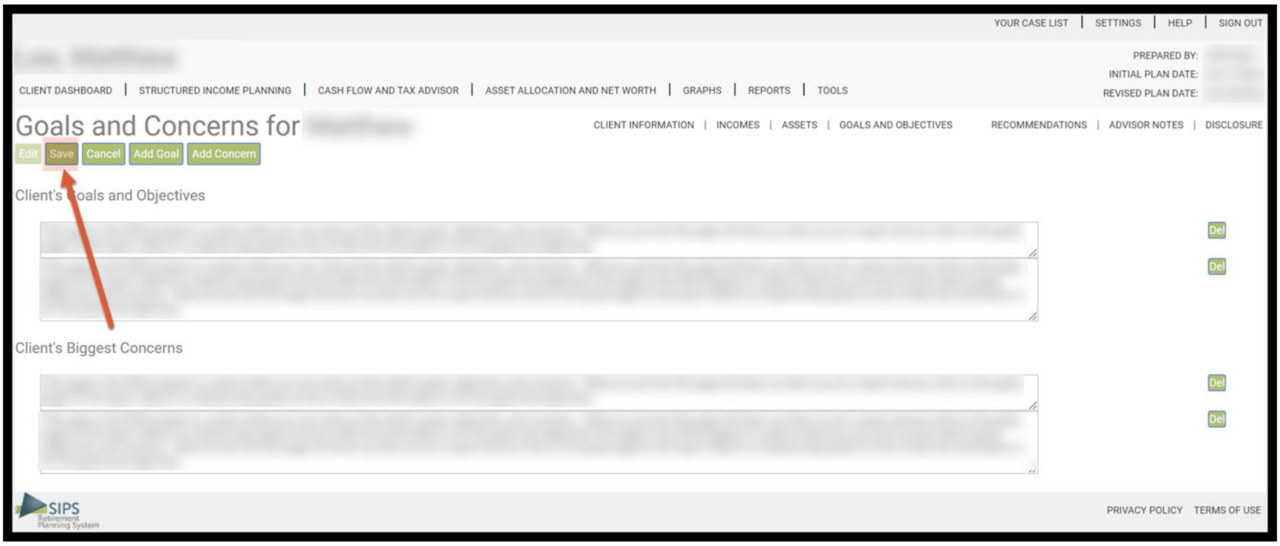
Step 11: Second Step for Deletion: Once you click on the Del button for deletion a message box from SIPS will come up asking, "Are you sure you would like to permanently delete this goal/or concern." Click the Ok button to complete this task.



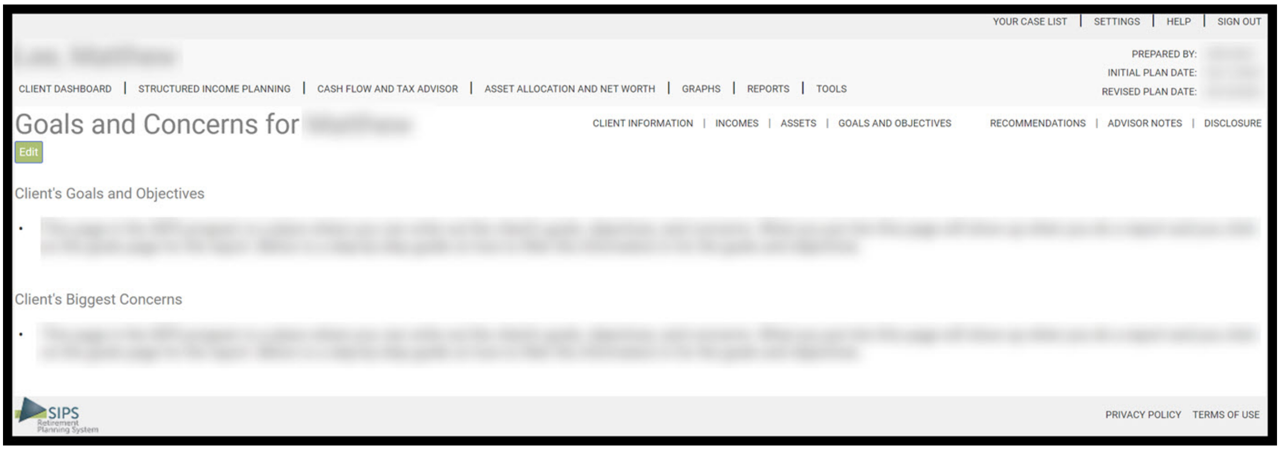
Step 12: Cancel: To cancel out any editing you have made, click on the green cancel button underneath the Goals and Concerns for Clients name subheading.



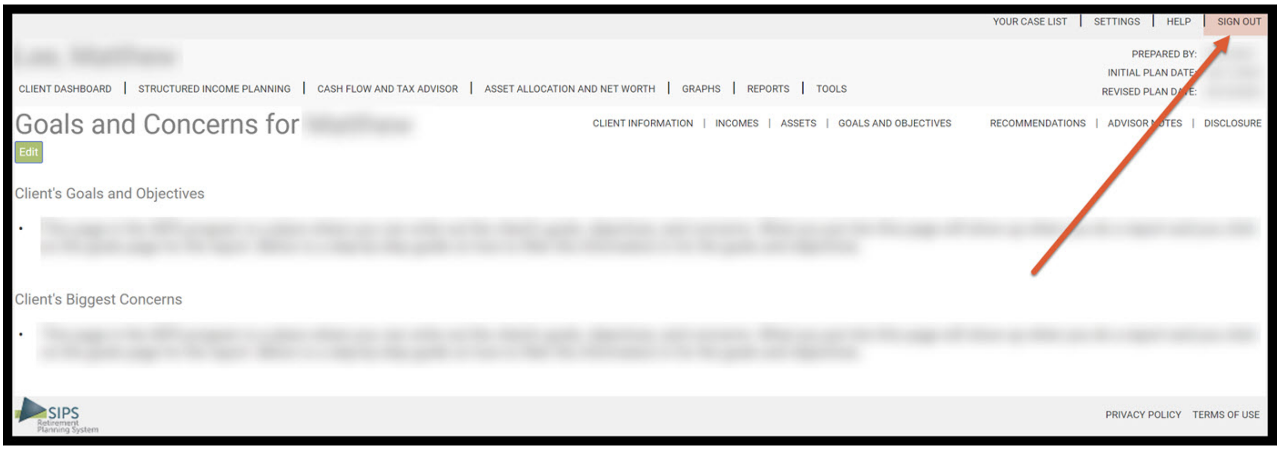
Step 13: Save: Click on the Save button underneath the Goals and Concerns for Clients name subheading.



Step 14: Final version: Once you save the documentation that you made underneath each of the headings will show up as text. This documentation will also be the documentation that will be on the Goals page when you run 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.