

Deactivating a Case

01/08/2026 9:26 am EST

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.

This screenshot shows the 'Client Information' form. At the top right, there are links for '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-headings: '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', 'Client one' (Last, First, Date of birth, Initial plan age, Short name, Current age, Retirement age, Gender), 'Client two' (Last, First, Date of birth, Initial plan age, Short name, Current age, Retirement age, Gender), 'Selection tags', and a list of contact information (Initial plan date, Revision date, Address, City, State, Zip, Email, Phone, Cell Phone). An 'Active' checkbox is checked, and a red arrow points to it.

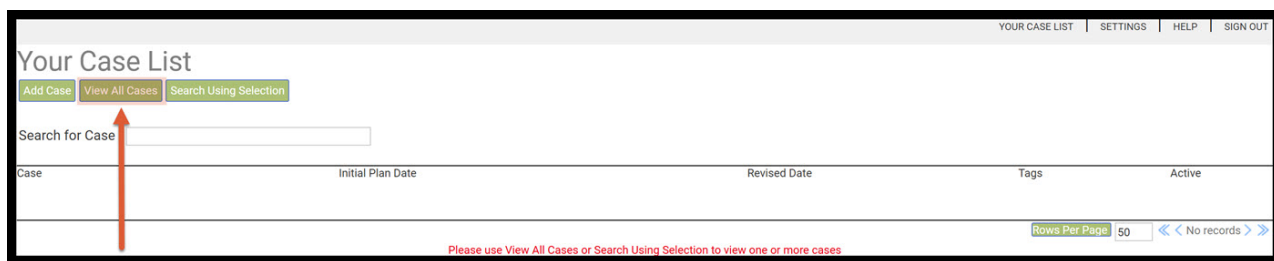
Step 7: Save: Click on the green Save button underneath the Client Information heading.

This screenshot shows the 'Client Information' form. The 'Save' button is highlighted with a red arrow. The 'Active' checkbox is now unchecked.

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

This screenshot shows the 'Client Information' form. The 'YOUR CASE LIST' heading in the top right corner is highlighted with a red arrow.

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



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



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.

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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: support@planscout.com