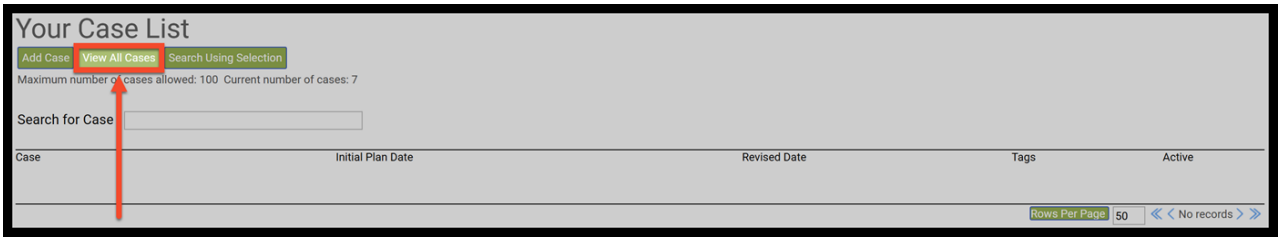
Deactivating a Case

09/23/2026 1:45 pm EDT

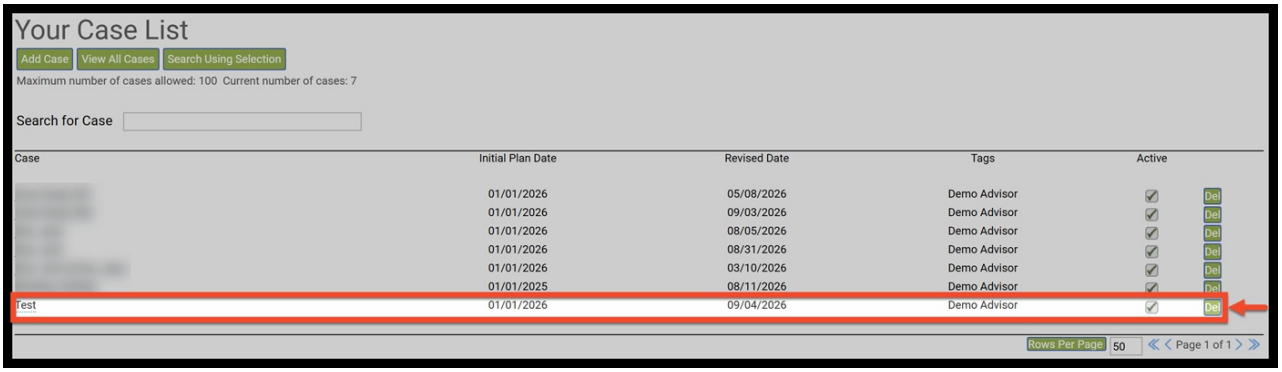
When you create a case, SIPS will automatically set it to be an active case. If a case is no longer active, you can turn off its active status without permanently deleting it. All cases by default are set to active. All cases, whether they are active or inactive count towards the maximum number of cases allowed. Below is a hypothetical example of how to make a case not active. This article walks through the steps to deactivate a sample case, from opening it up to confirming that it no longer shows as active. We will start on the Your Case List landing page.

Related Articles: *Understanding Your Case Capacity*, *Permanently Deleting A Case*, *Adding A New Case*, *Step-By-Step Guide for Building A Structured Income Plan*

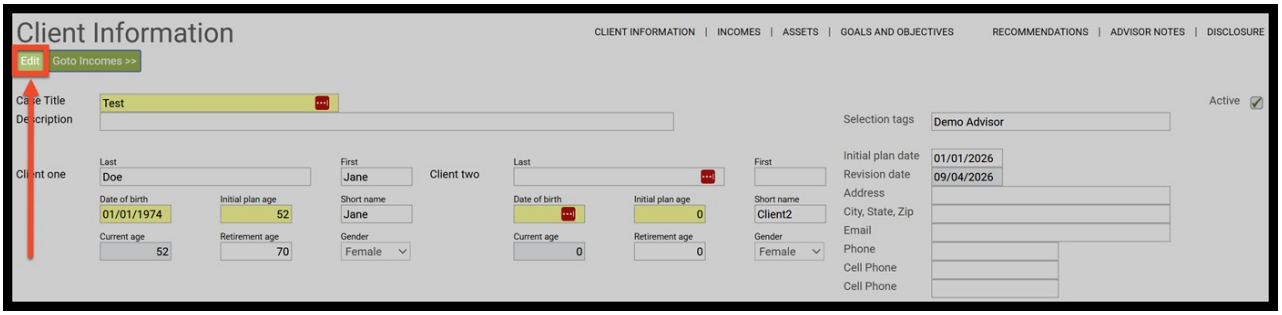
Step 1: View All Cases: Click on the green View All Cases button located underneath the Your Case List heading.



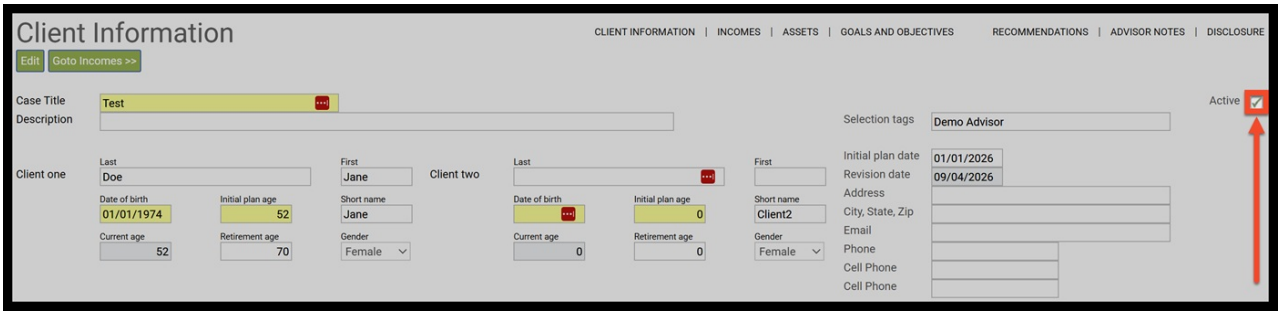
Step 2: Case Selection: Click on the case you want to deactivate.



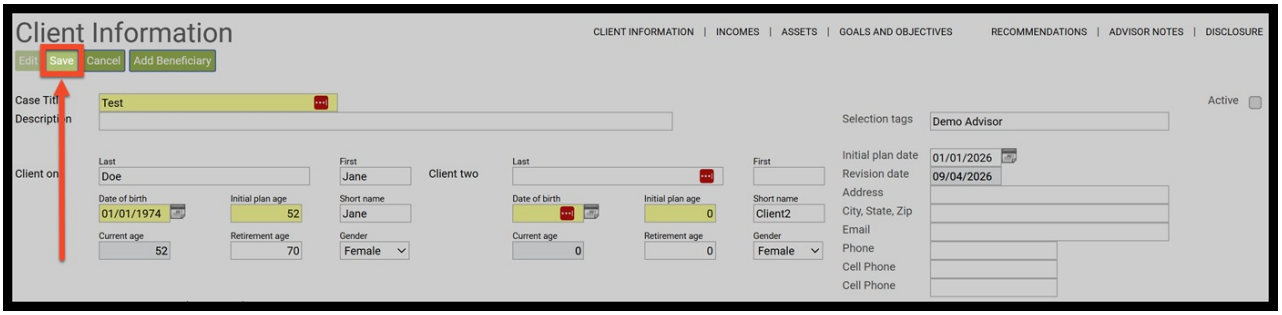
Step 3: Edit: SIPS will automatically take you to the Client Information landing page. Click on the green Edit button underneath the Client Information heading.



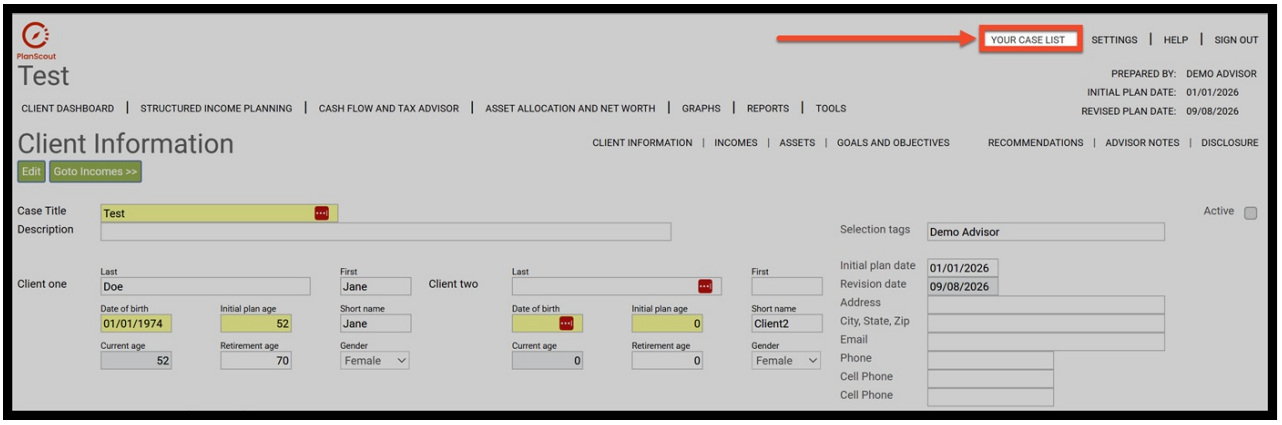
Step 4: Active Text Box: Click the checkbox to remove the checkmark.



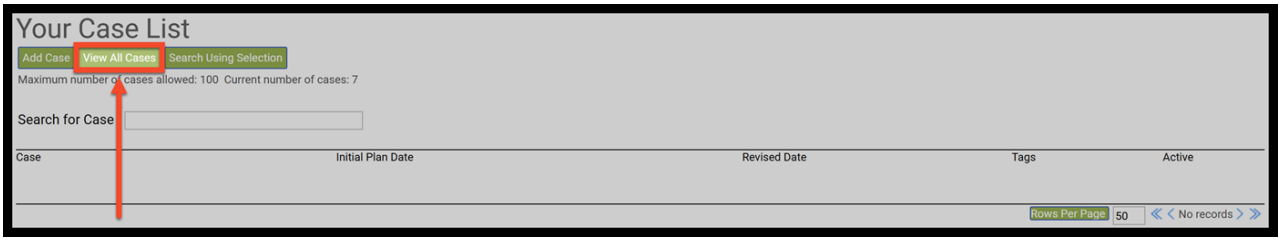
Step 5: Save: Click on the green Save button underneath the Client Information heading.



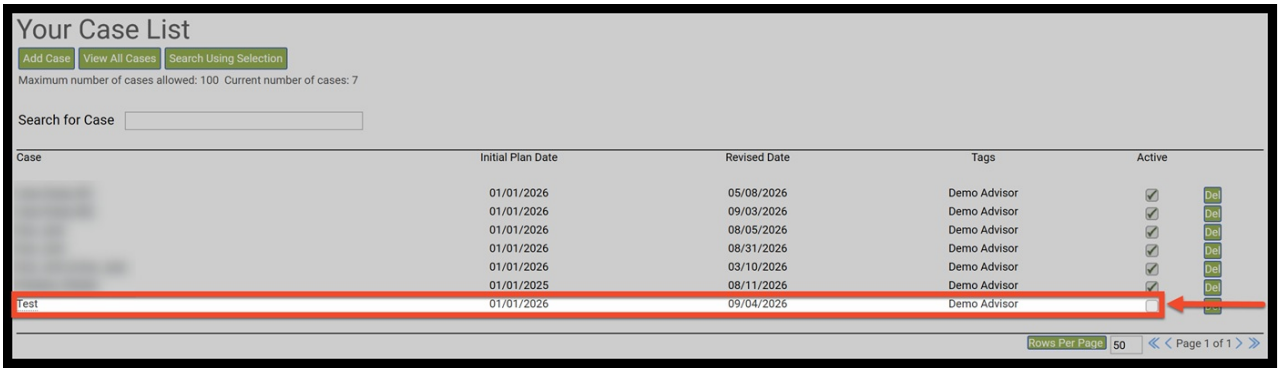
Step 6: Your Case List: Click on the Your Case List heading located on the right-hand side of the screen.



Step 7: View All Cases: Click on the green View All Cases button underneath the Your Case List heading.



Step 8: Your Case List: SIPS will automatically take you back to the Your Case List landing page. The case you deactivated will not have a check mark in the active text box.



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