Deactivating a Case

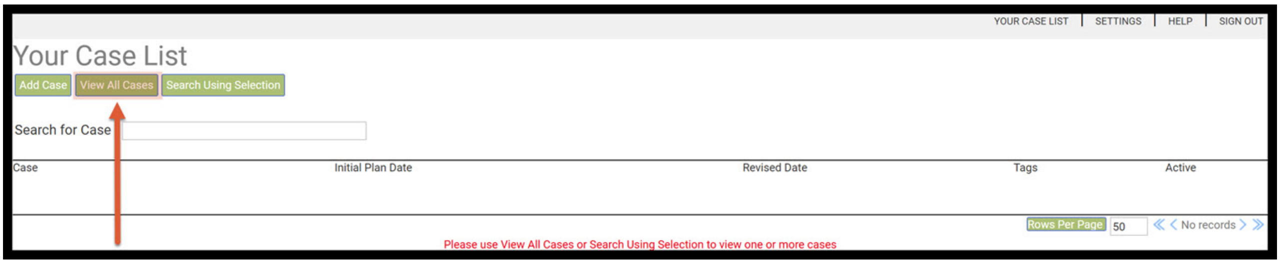
12/06/2024 5:23 pm EST

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.

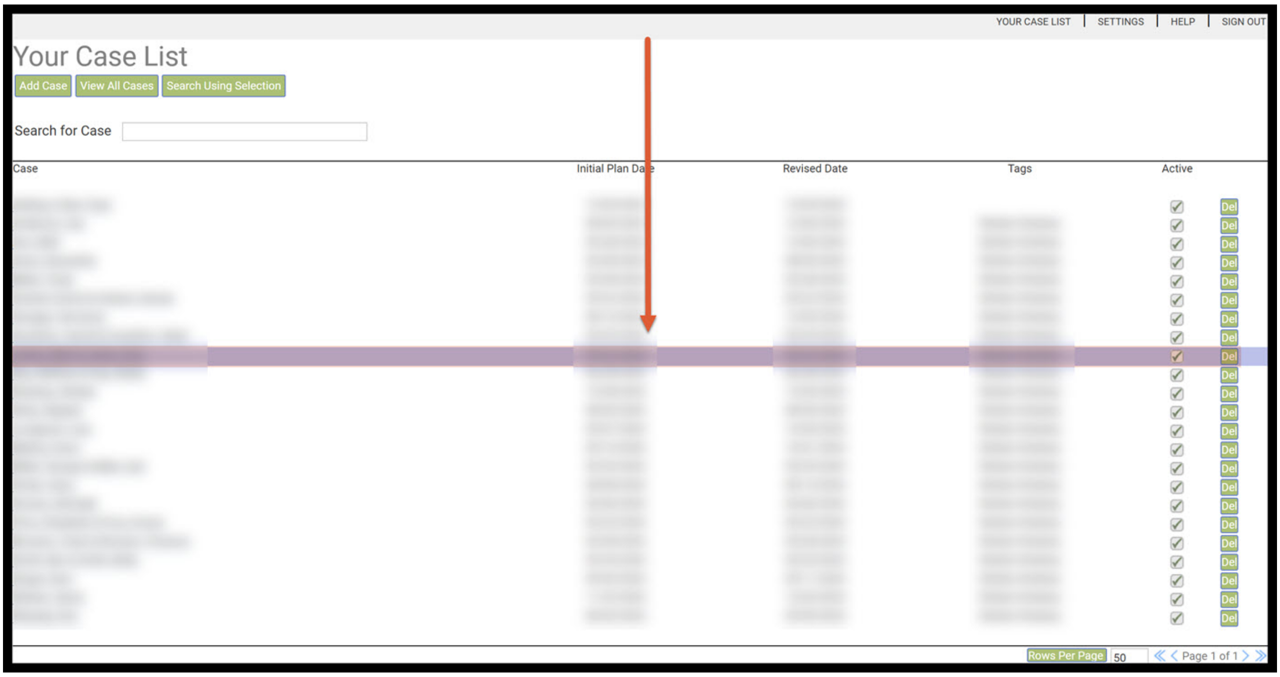
Step 1: Log In: Log into SIPS.

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.

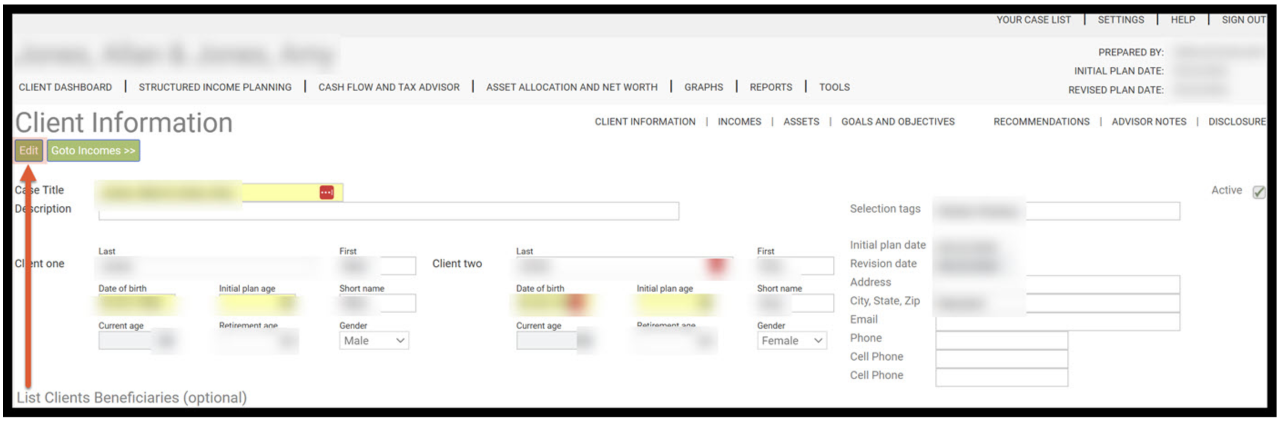
Step 3: View All Cases: Click on the green View All Cases button underneath the Your Case List heading.



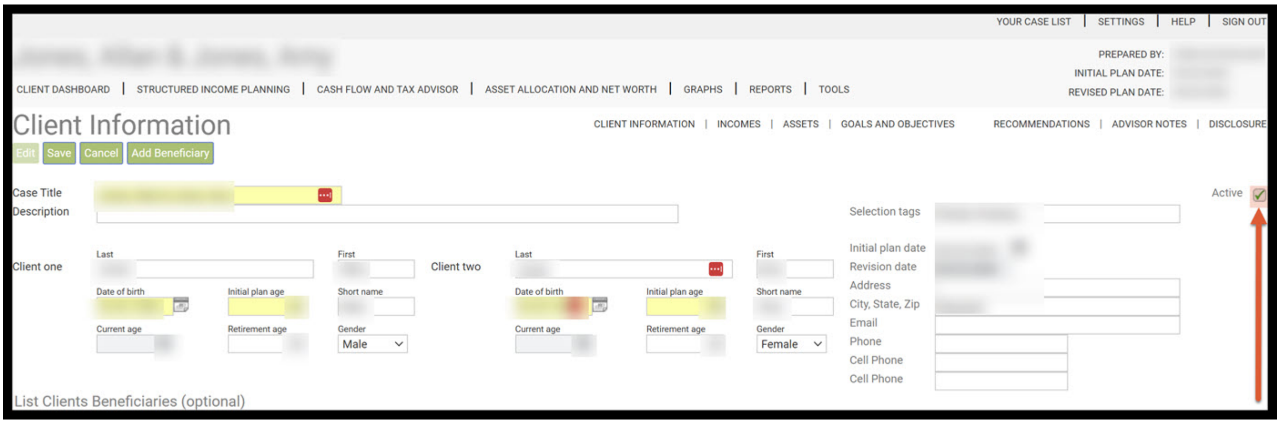
Step 4: Case Selection: Click on the case you would like to open up.



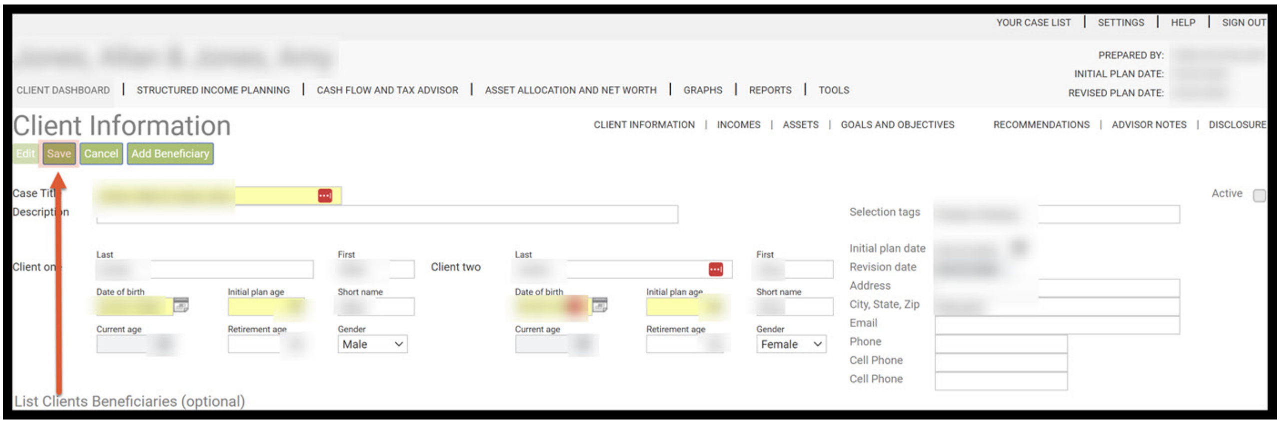
Step 5: Edit: Click on the green Edit button underneath the Client Information heading.



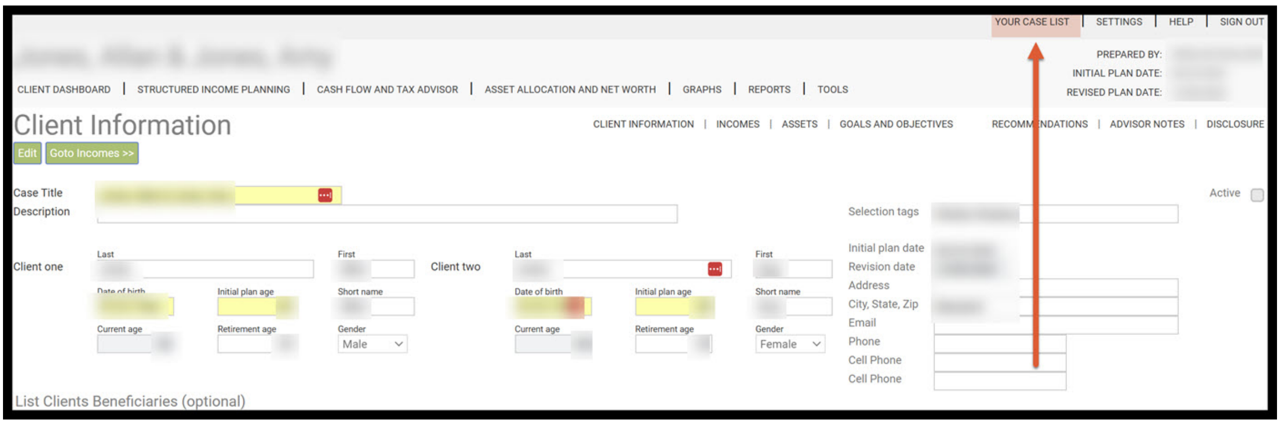
Step 6: Active Text Box: Click on the text box to unclick the checkmark.



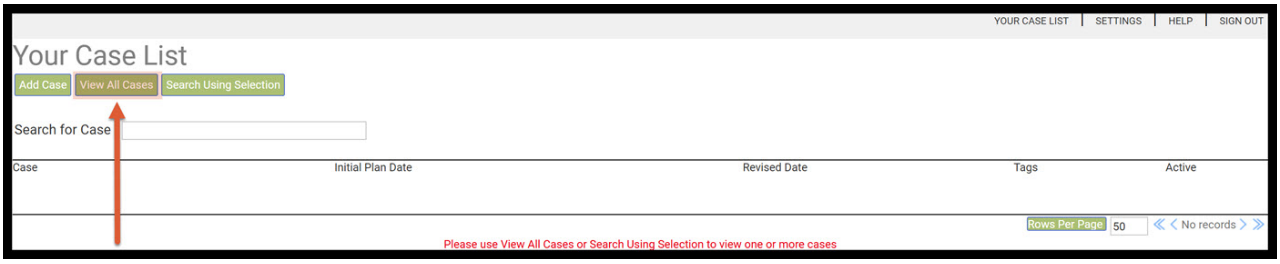
Step 7: Save: Click on the green Save button underneath the Client Information heading.



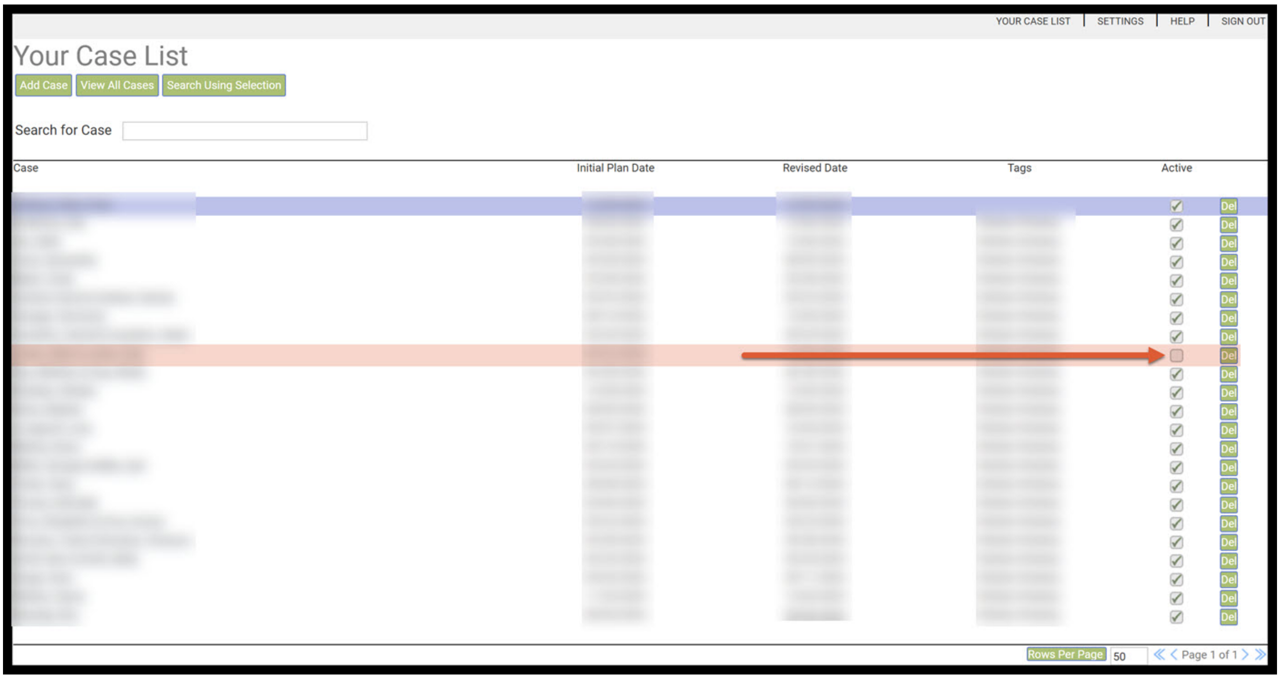
Step 8: Your Case List: Click on the Your Case List heading located on the right-hand side of the screen.



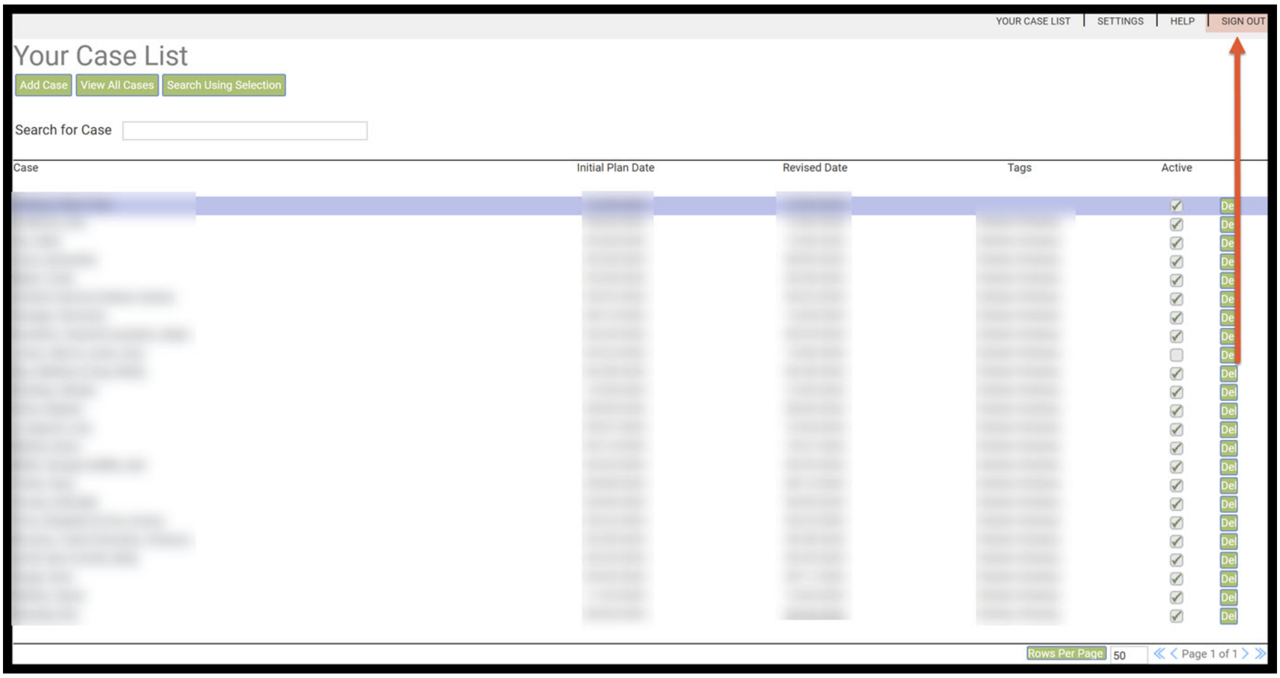
Step 9: View All Cases: Click on the green View All Cases button underneath the Your Case List heading.



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.



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