

Deactivating a Case

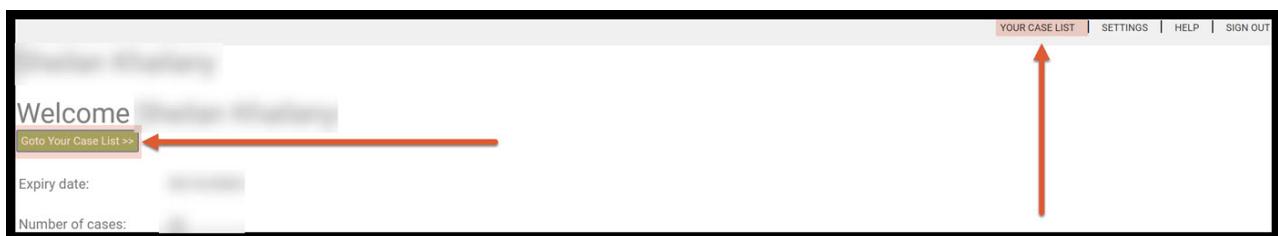
01/08/2026 9:26 am EST

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.

[YOUR CASE LIST](#) | [SETTINGS](#) | [HELP](#) | [SIGN OUT](#)

Your Case List

[Add Case](#)
[View All Cases](#)
[Search Using Selection](#)

Search for Case

Case	Initial Plan Date	Revised Date	Tags	Active

Rows Per Page:

« « No records » »

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

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



Case	Initial Plan Date	Revised Date	Tags	Active
1	2023-01-01		Tag 1, Tag 2	<input checked="" type="checkbox"/> Del

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

Client Information

[Edit](#) [Goto Incomes >>](#)

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES

RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Case Title:

Description:

Client one

Last: <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;" type="text"/>	First: <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;" type="text"/>
Date of birth: <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;" type="text"/>	Initial plan age: <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;" type="text"/>
Current age: <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;" type="text"/>	Retirement age: <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;" type="text"/>
Gender: <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;" type="text"/>	Short name: <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;" type="text"/>

Client two

Last: <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;" type="text"/>	First: <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;" type="text"/>
Date of birth: <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;" type="text"/>	Initial plan age: <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;" type="text"/>
Current age: <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;" type="text"/>	Retirement age: <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;" type="text"/>
Gender: <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;" type="text"/>	Short name: <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-bottom: 5px;" type="text"/>

Selection tags: Active

Initial plan date:

Revision date:

Address:

City, State, Zip:

Email:

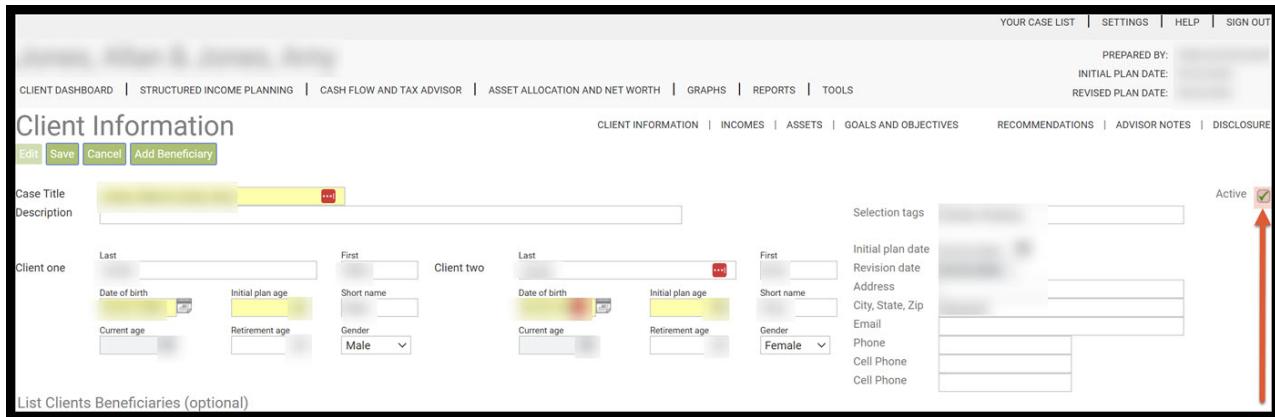
Phone:

Cell Phone:

Cell Phone:

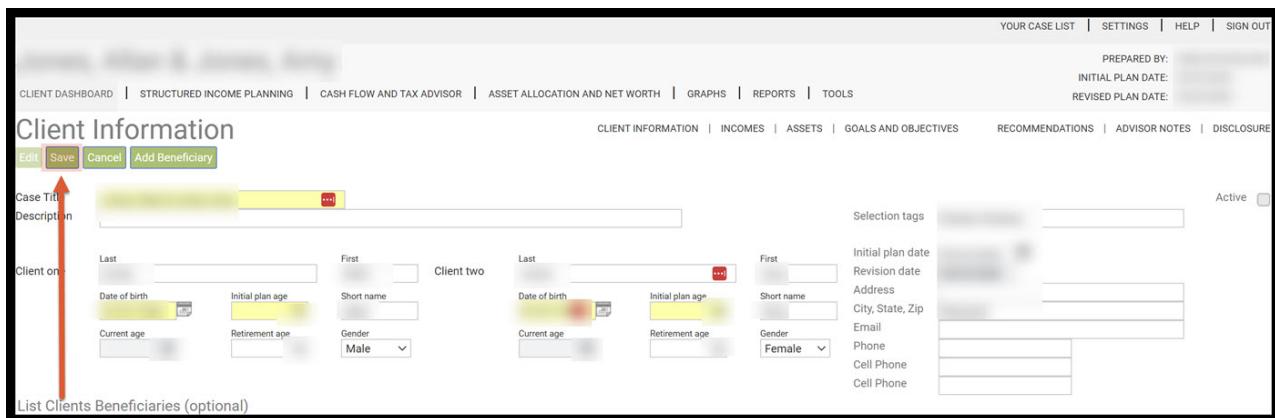
List Clients Beneficiaries (optional)

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



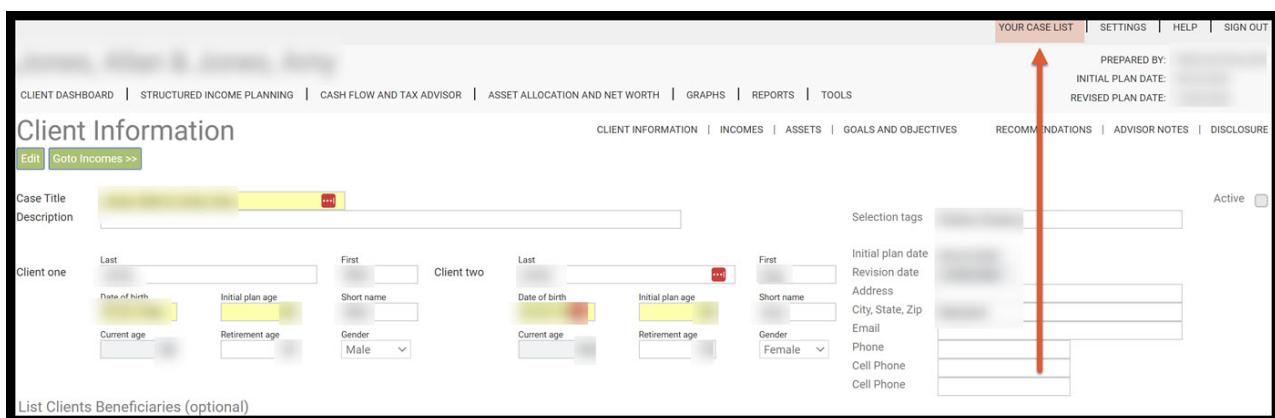
The screenshot shows the 'Client Information' page. At the top right, there are buttons for 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:'. Below these are tabs for 'CLIENT INFORMATION', 'INCOMES', 'ASSETS', 'GOALS AND OBJECTIVES', 'RECOMMENDATIONS', 'ADVISOR NOTES', and 'DISCLOSURE'. The main area is titled 'Client Information' with buttons 'Edit', 'Save', 'Cancel', and 'Add Beneficiary'. It contains fields for 'Case Title' and 'Description', and two client profiles: 'Client one' and 'Client two'. Each profile has fields for 'Last', 'First', 'Short name', 'Gender', 'Date of birth', 'Initial plan age', 'Current age', and 'Retirement age'. On the right, there is a 'Selection tags' section and a 'List Clients Beneficiaries (optional)' button. A red arrow points to the 'Active' checkbox, which is checked with a green checkmark.

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



The screenshot shows the 'Client Information' page after saving. The 'Active' checkbox is now checked with a green checkmark. The rest of the page layout is identical to the previous screenshot, including the tabs at the top and the client profiles below.

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



The screenshot shows the 'Client Information' page again. A red arrow points to the 'YOUR CASE LIST' button at the top right. The rest of the page is identical to the previous screenshots.

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

YOUR CASE LIST
SETTINGS
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Your Case List

[Add Case](#)
[View All Cases](#)
[Search Using Selection](#)

Search for Case

Case	Initial Plan Date	Revised Date	Tags	Active

[Rows Per Page](#)
50
[«](#)
[«](#)
[No records](#)
[»](#)
[»](#)

Please use [View All Cases](#) or [Search Using Selection](#) to view one or more cases

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: support@planscout.com