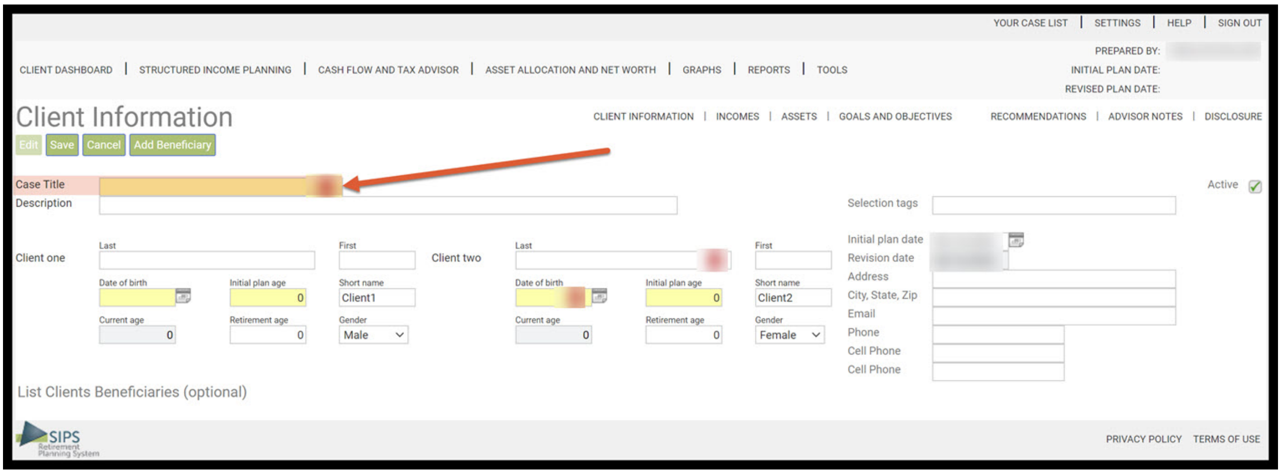
Client Information

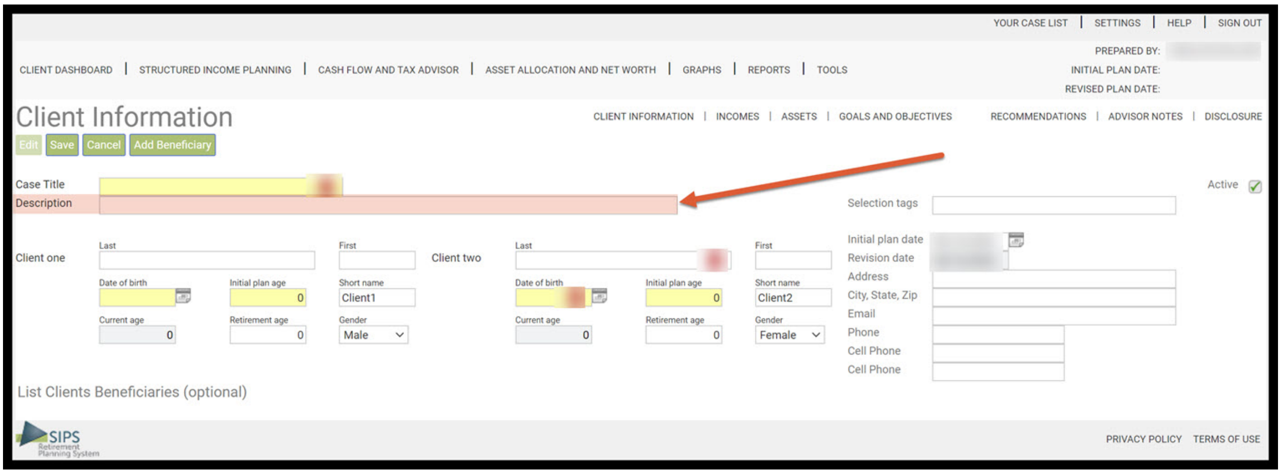
09/16/2024 11:08 am EDT

Below is a step-by-step guide to entering in the demographic information for the client information section of SIPS.

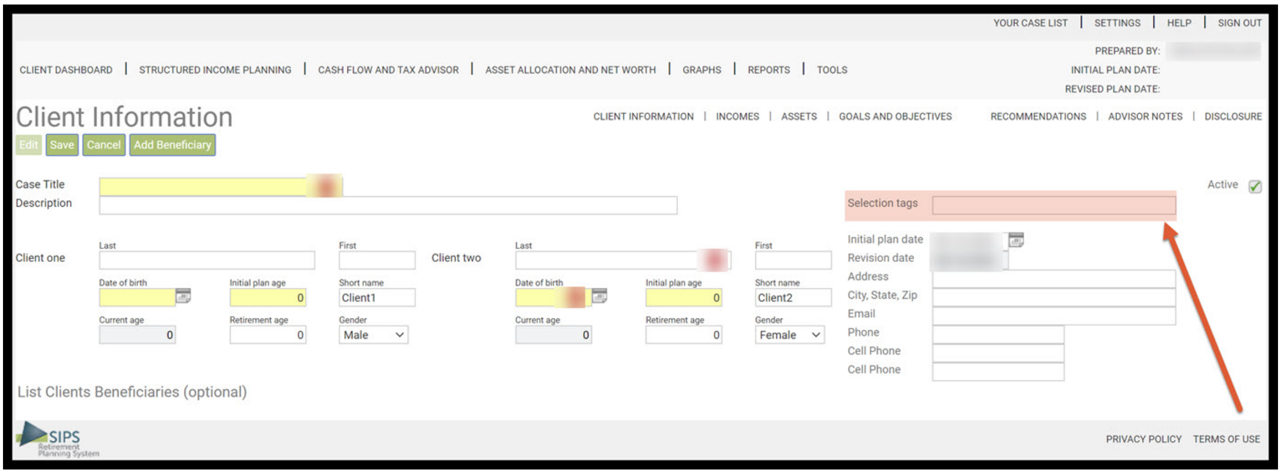
Step 1: Case Title: This text box is used for the naming system for the title of your case. Enter in what you would like your case title to be for the client. Once done, press the tab button to move to the next text box.



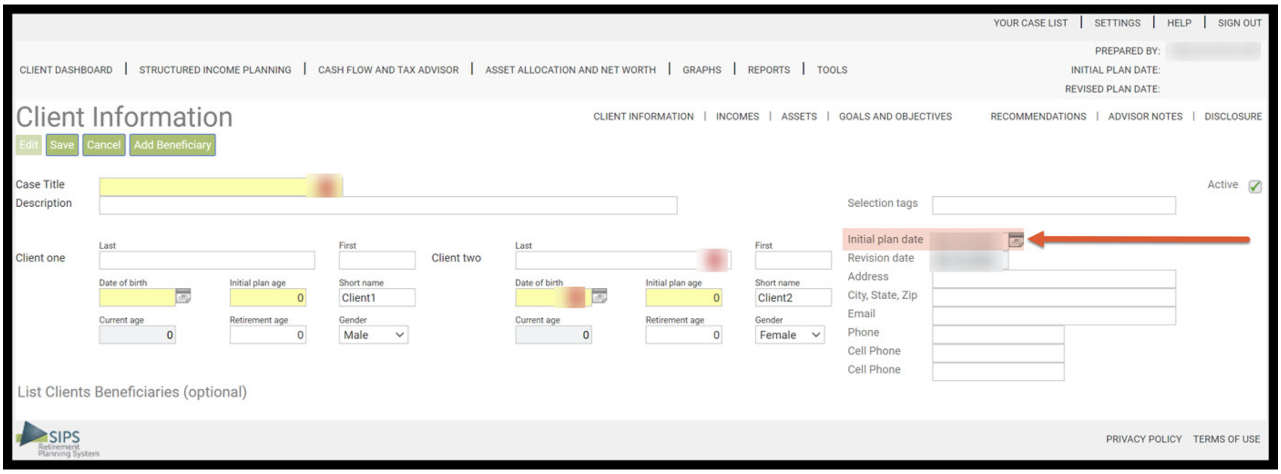
Step 2: Description: This text box correlates with what text you would like to have shown in report in the final steps. This text box is not mandatory to fill in when creating a case in SIPS. Once done, press the tab button to move to the next text box.



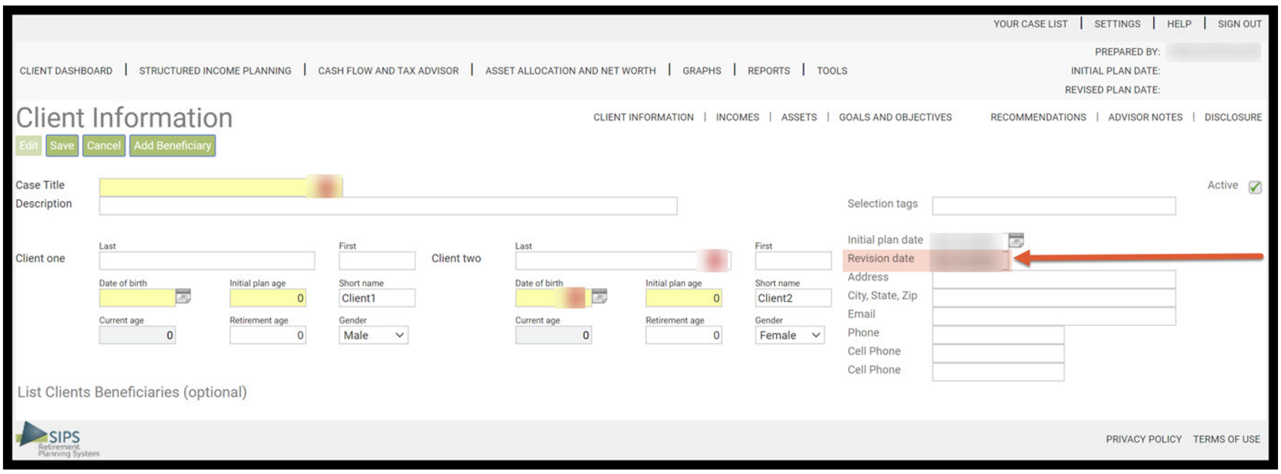
Step 3: Selection Tags: This text box correlates with which person has ownership of the case in SIPS. When viewing all the cases under the Your Case List page, the selection tags title will show up. This text box is not mandatory to fill in when creating a case in SIPS. Enter in the naming system you would like to put in. Once done, press the tab button to move to the next text box.



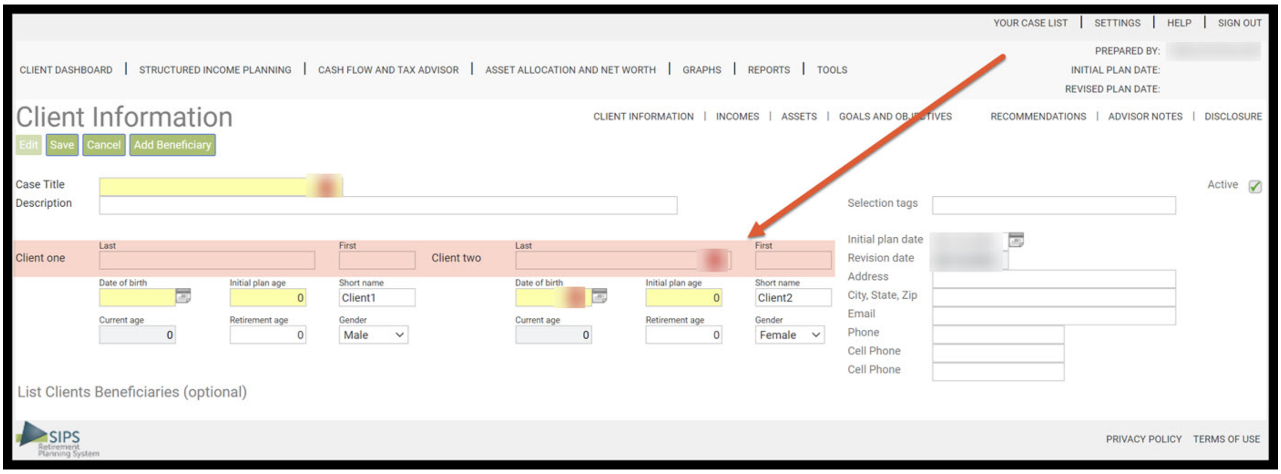
Step 4: Initial Plan Date: This text box has the day's date automatically filtered in when you start to create a case. If you would like to edit the initial plan date you can click on the calendar icon next to the box and click on the date that you would like the initial plan date to reflect. The initial plan date is correlated the with the clients age of birth. Each time there is an edit to this data it will change the clients yearly age and it will be reflected in the initial plan age for the client. Once done, press the tab button to move to the next text box.



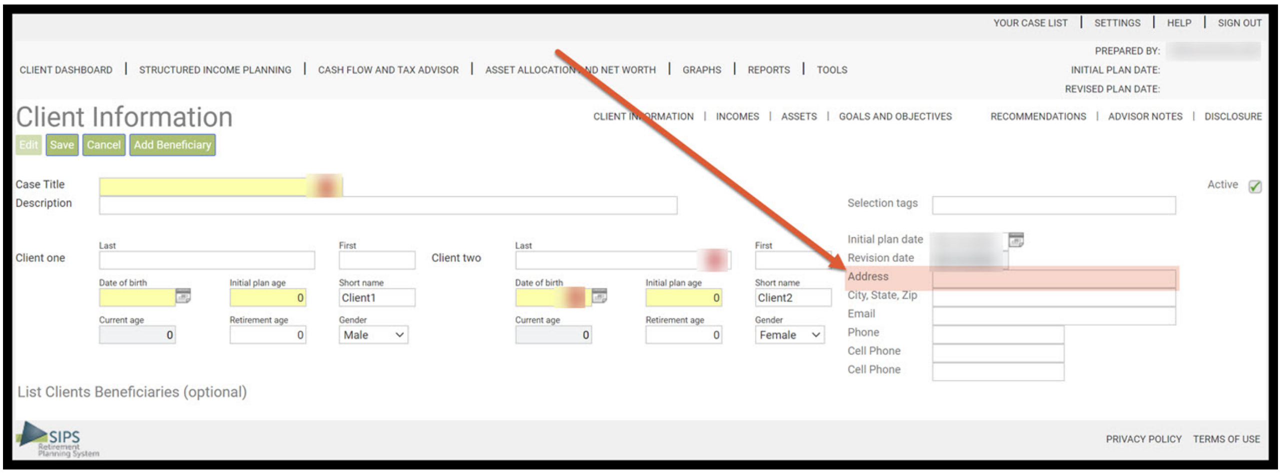
NOTE: The revision date is grayed out since this is data you cannot change. It will always reflect the day's date that a SIPS user has come in an edited a change to plan.



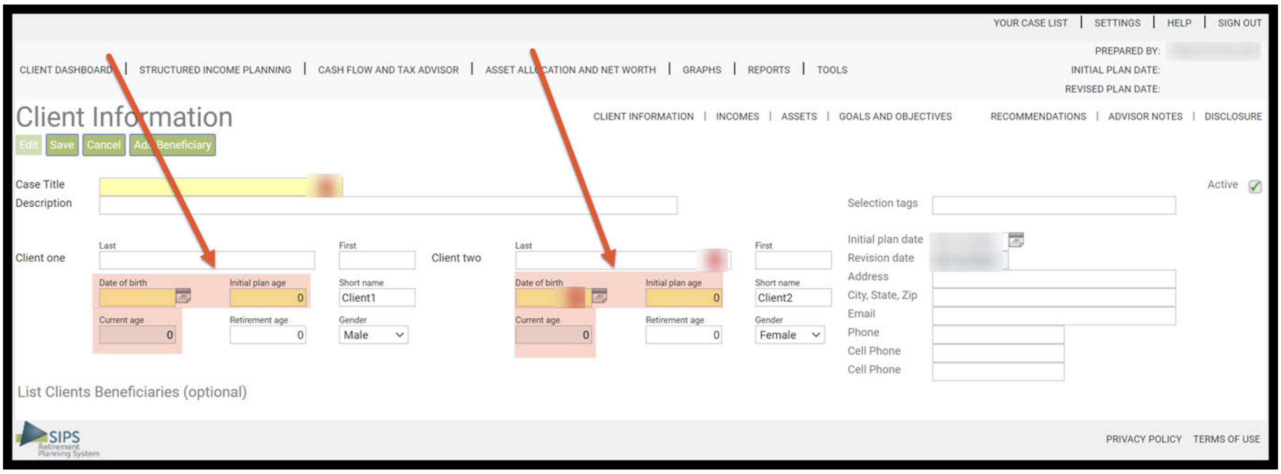
Step 5: Clients Name: Enter in the Clients last name and First name.   If the Case has only one person use the Client One section to filter in their names.   Once done, press the tab button to move to the next text box.



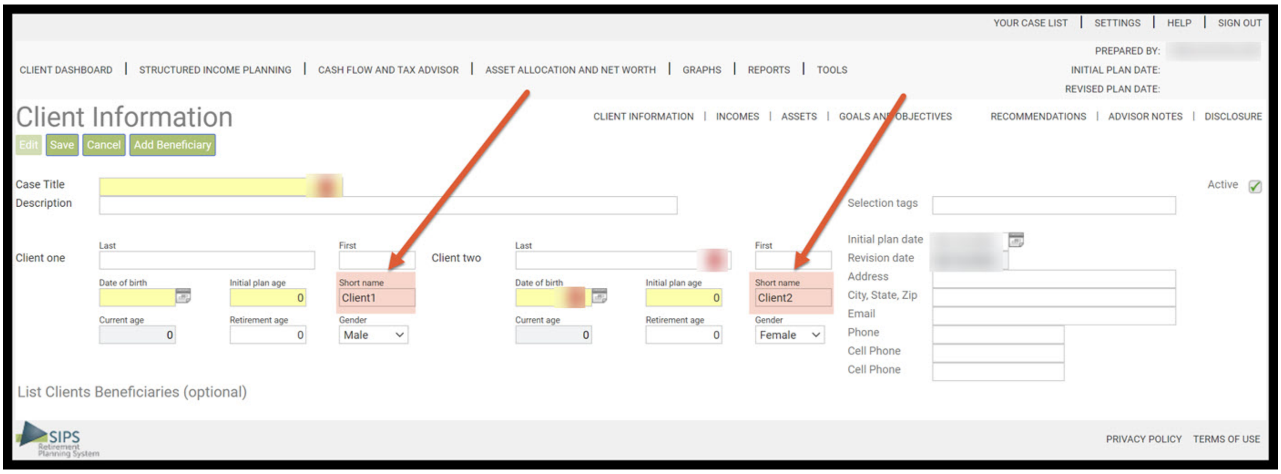
Step 6: Address: If you have the client's address enter in this information.   This information is not mandatory data for creating a structured income plan.   Once done, press the tab button to move to the next text box.



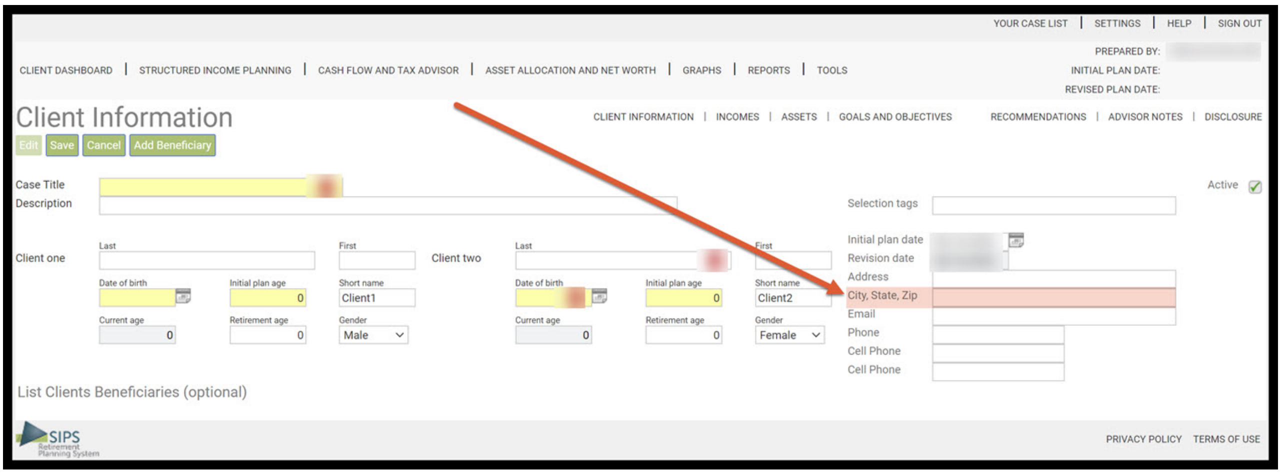
Step 7: Date of Birth, Initial Plan Age, and Current Age: Enter in the date of birth for the client.   The format SIPS uses is: MM/DD/YYYY.   If you do not have this you can enter in the client's age.   If you do not have either of this information when looking at the structured income plan there will be no age under the client's information.   If you know what year the client is born but not the exact month and date, you can put in the year and select January 01 and SIPS will do an estimation of the age.   If you know the clients age but not the exact birth date, SIPS will do an estimation for the birth date.   Once you put in the date of birth the current age box will be filtered in after you save the data.   The only way to edit the current age is by editing the date of birth text box.   Once done, press the tab button to move to the next text box.



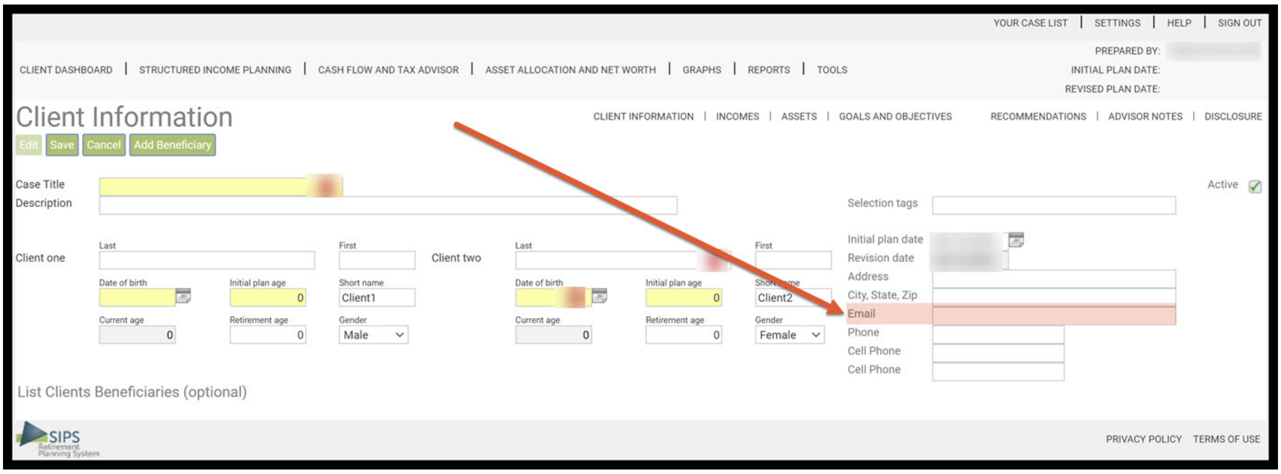
Step 8: Short Name: This text box is the name you would like the case to go by. The short name is also linked to the identification of the case. Once done, press the tab button to move to the next text box.



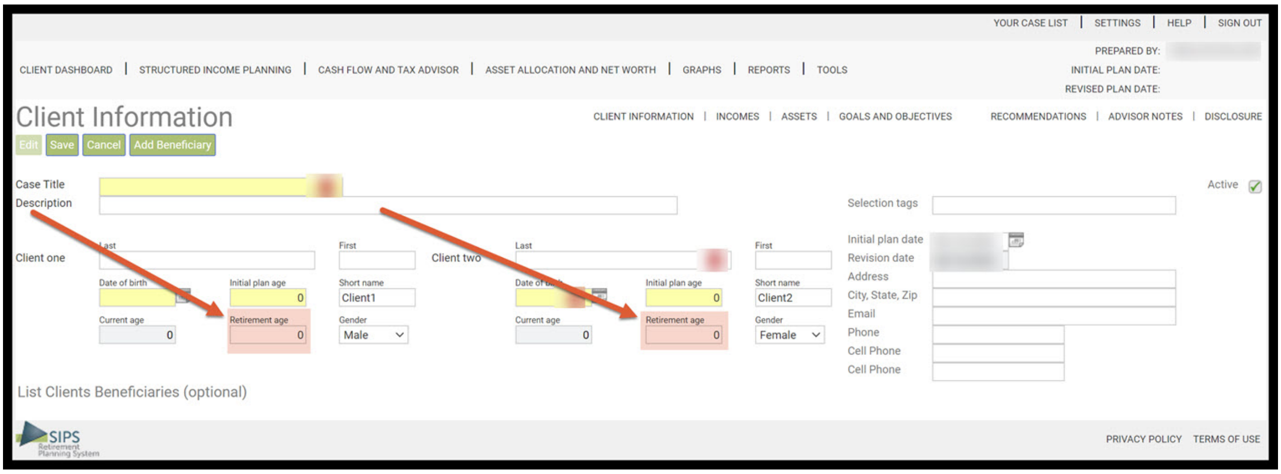
Step 9: City, State, Zip: Enter in this demographic information. The only item that is the most important is the state. SIPS has features in the program that will factor out the state taxes of where the client lives. Once done, press the tab button to move to the next text box.



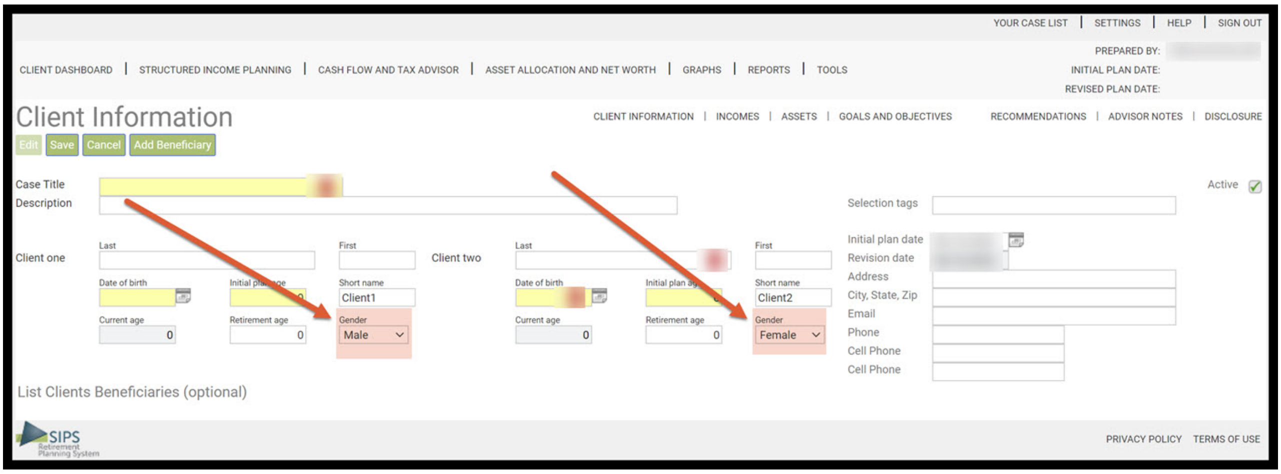
Step 10: Email: Filter in the email information. This information is not mandatory for the structured income plan so it is optional for filing in. Once done, press the tab button to move to the next text box.



Step 11: Retirement Age: Filter in the desired retirement age. This text box is mandatory for filling in. This text box correlates in the structured income plan when the social security will start to be distributed. If a retirement age is not entered SIPS will not allow you to move to the Assets page for filtering in the data. Once done, press the tab button to move to the next box.

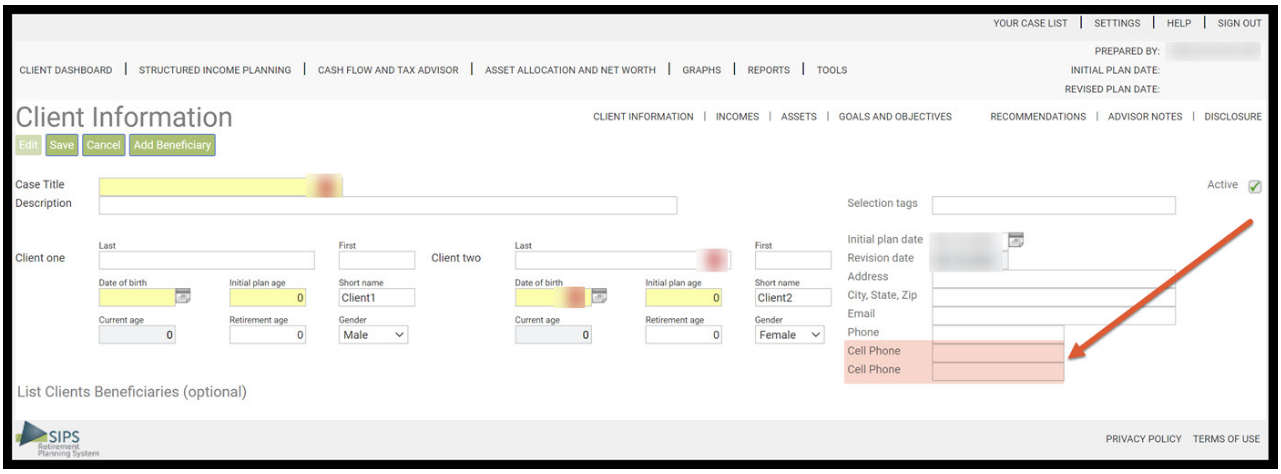


Step 12: Gender: Using the down carrot arrow, select a gender for the client. As default, client one is selected as male and client two is selected as female. For tax purposes in SIPS it is best to claim a gender so that the tax estimations are correct. Once done, press the tab button to move to the next box.

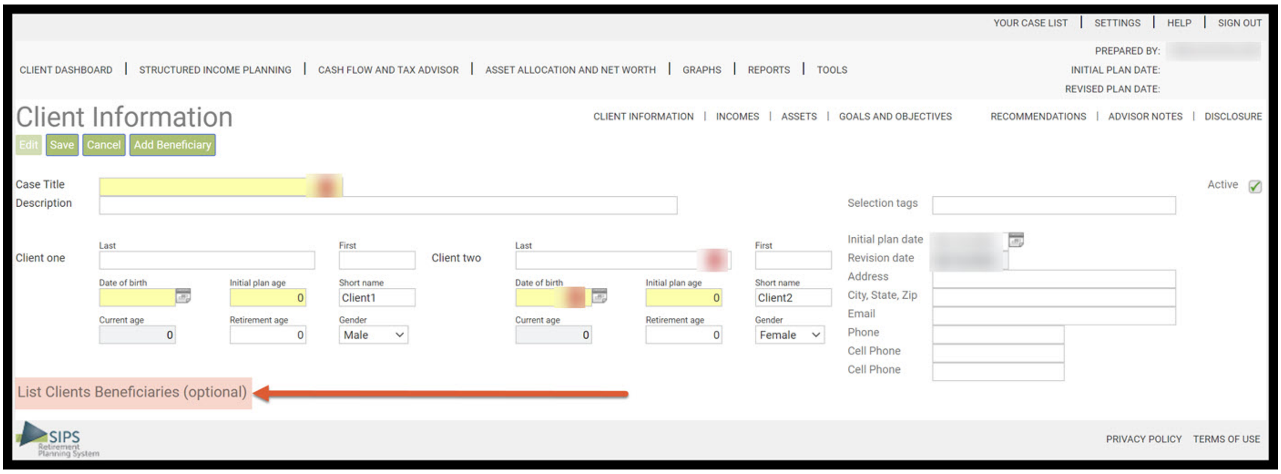


Step 13: Phone: This text box is not mandatory. Filter in the phone number or this text box can be left back. Once done, press the tab button to move to the next box.

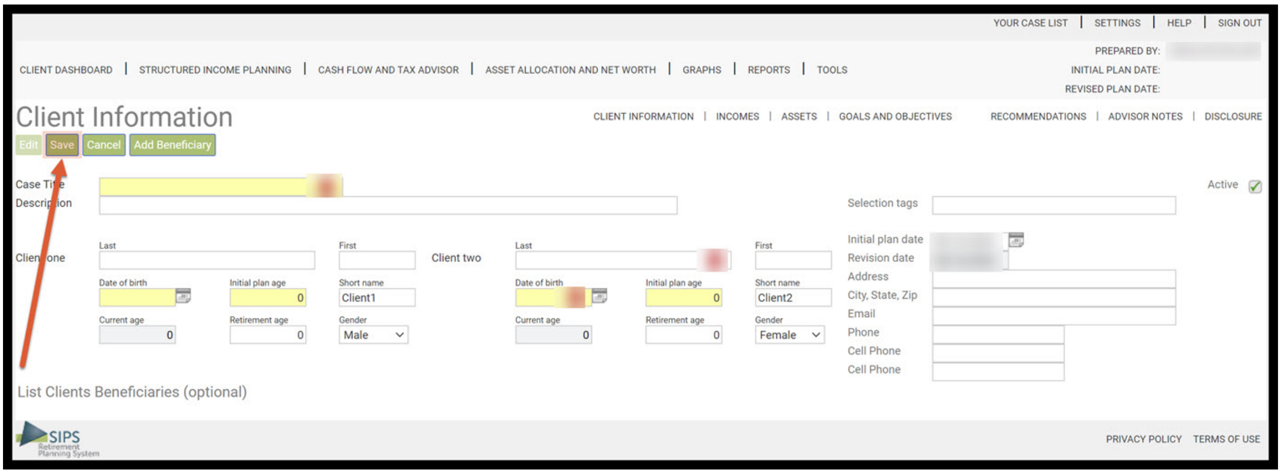
Step 14: Cell Phone: This text box is not mandatory. Filter in the cell phone number or this text box can be left back. Once done you can click on the add beneficiaries button if the client has beneficiaries.



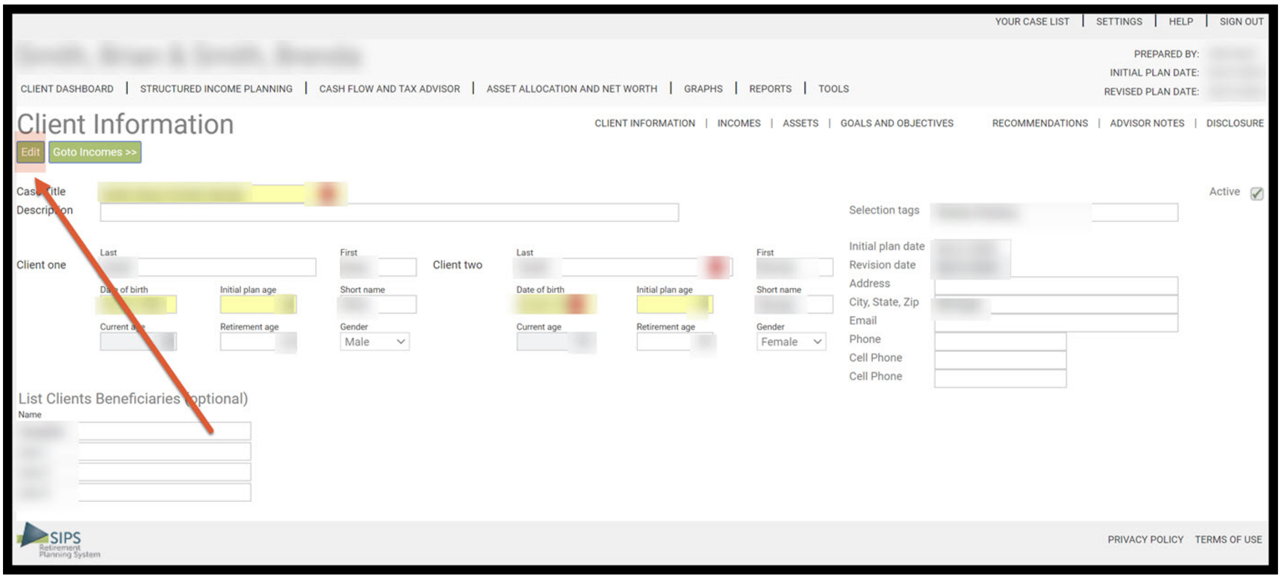
Step 15: Add Beneficiary: Filter in the clients beneficiary information. This step is optional.



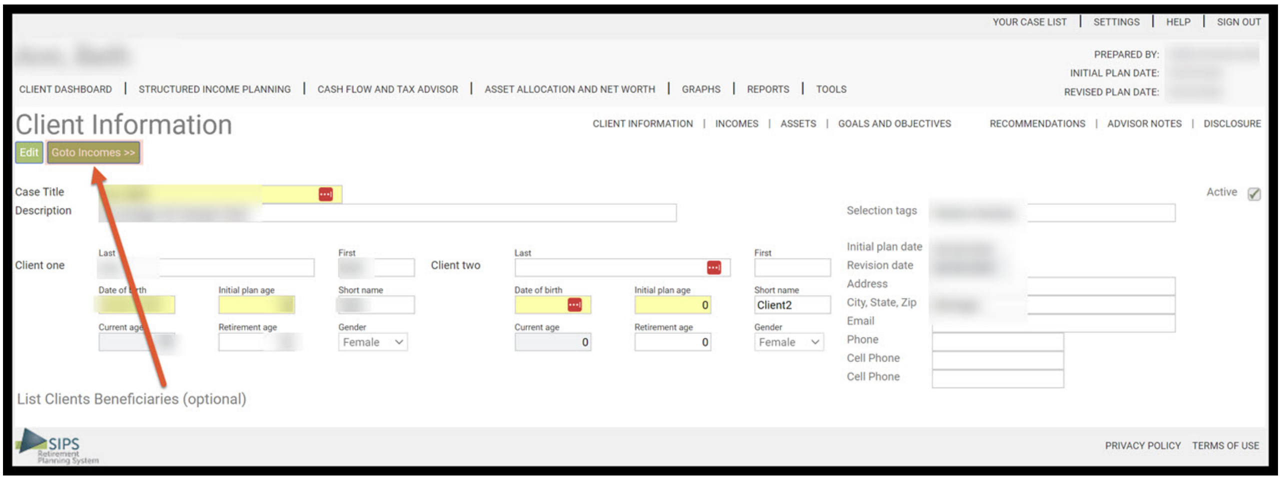
Step 16: Save: Once done, click on the Save button. This will save the information you have just entered and change the navigation buttons underneath the Client Information heading.



Step 17: Edit: If you need to make corrections to the data, click on the green Edit button underneath the Client Information heading. Once done with the editing repeat step 16.



Step 18: GoTo Incomes: Click on the GoTo Incomes button to take you to the Incomes page.



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