Troubleshooting: "social security information is blank." Error Message

08/07/2025 2:04 pm EDT

This article addresses the error message that you may receive that says 'social security information is blank' when adding Social Security income on the Structured Income Planning page without prior entry on the Client Dashboard Incomes page.

Below is a hypothetical example of a client that would like to retire at age 67 and you would like to enter in the social security income when you are at the Structured Income Planning page.

To learn more about Add Inc Tax functions within SIPS Essentials see articles:

- Calculating and Applying Tax Rates in SIPS Essentials
- Setting Effective Tax Rates for SIPS Essentials

If you would like to learn more about advanced tax planning in SIPS Advanced see article:

• Understanding the Advanced Tax Planning Page

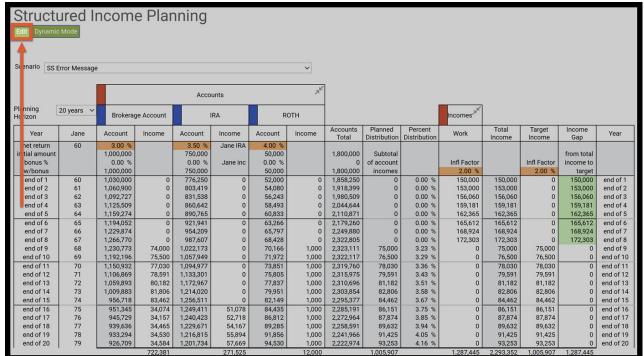
To learn about setting up tax calculations options for income and expesne see articles:

- Tax Calculation Option: Adding Assets into a Structured Income Plan
- Tax Calculation Option: Adding Income and Expenses into a Structured Income Plan

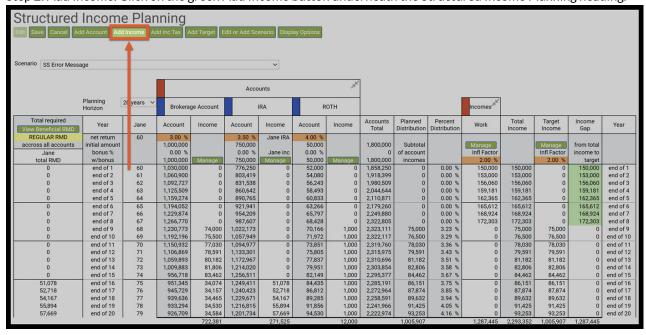
To learn more about forecasting effective tax rates see articles:

• Part One: Forecasting Effective Tax Rates While the Client is working

Step 1: Edit: Click on the green edit button underneath the Structured Income Planning heading.



Step 2: Add Income: Click on the green Add Income button underneath the Structured Income Planning heading.



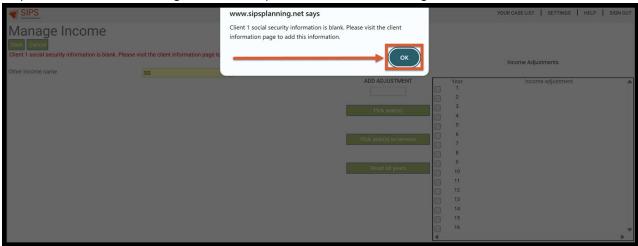
Step 3: Other Income Name: Enter in a title for the column. (SS)



Step 4: This is Social Security Checkbox: Click on the checkbox.



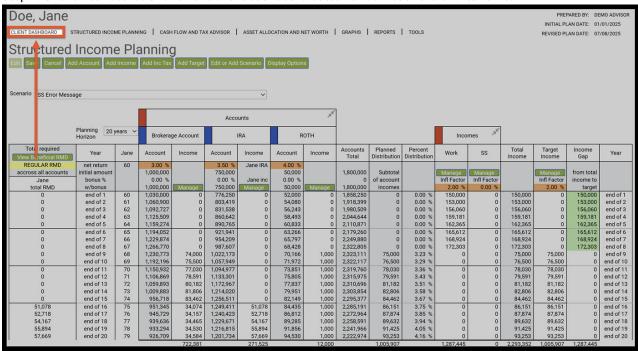
Step 5: Ok for The Error Message: Click the okay button for the error message.



Step 6: Cancel: Click the green cancel button underneath the manage income subheading.



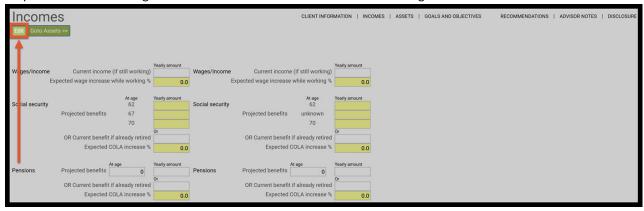
Step 7: Client Dashboard: Click on the client dashboard button underneath the clients name.



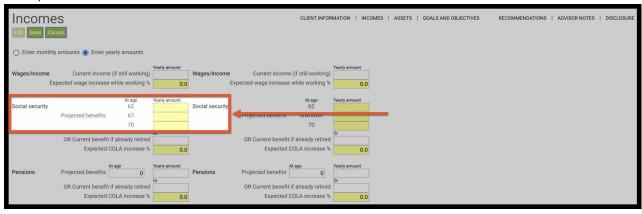
Step 8: GoTo Incomes: Click on the green GoTo Incomes button underneath the Client Information heading.

	Informat	ion			_	CLIENT INFORMATION IN	NCOMES ASSETS	GOALS AND OBJEC	CTIVES RECOMMENDATION	NS ADVISOR NOTES	DISCLOSURE
Case Title Description	Doe, Jane							Selection tags	Demo Advisor		Active 🕜
Client one	Last Doe		First Jane	Client two	Last		First	Initial plan date Revision date	01/01/2025 07/08/2025		
	Date of birth 01/01/1965 Current age 60	Initial plan age 60 Retirement age 67	Short name Jane Gender Female		Date of birth Current age	Initial plan age 0 Retirement age 0	Short name Client2 Gender Female	Address City, State, Zip Email Phone Cell Phone Cell Phone			

Step 9: Edit: Click on the green edit button underneath the Incomes heading.



Step 10: Social Security: Enter in the Social Security Information. (Client will retire at 67, yearly pay \$24,000, 2% COLA)



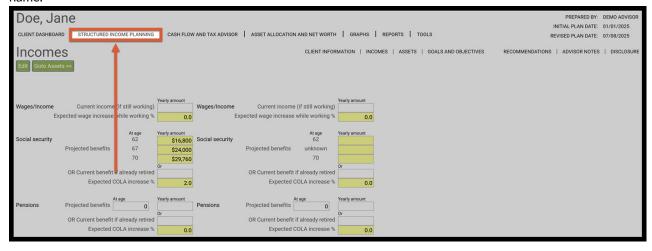
Step 11: Save: Click on the green save button underneath the Incomes heading.

1es Cancel				CLIENT INFOR	MATION INCOME	S ASSETS GOALS AND OBJEC	RECOMMENDATIONS	ADVISOR NOTES DISCLOSURE
athly amounts Enter yearly	amounts							
	still working)		Wages/Income					
/ Projected benefits	62 67	Yearly amount 24,000	Social security	At age 62 Projected benefits unknown	Yearly amount			
OR Current benefit if already retired Expected COLA increase %				OR Current benefit if already retired				
Projected benefits OR Current benefit if all	0 ready retired		Pensions					
	cancel thly amounts (a) Enter yearly e Current income (if - Expected wage increase whi Projected benefits OR Current benefit if al Expected COL Projected benefits At ag OR Current benefit if al	e Current income (if still working) Expected wage increase while working % At age 62 Projected benefits 67 70 OR Current benefit if already retired Expected COLA increase % Projected benefits At age OR Current benefit if already retired Council is a council in a c	thly amounts Enter yearly amounts Current income (if still working) Expected wage increase while working % At age 62 Projected benefits 67 70 OR Current benefit if already retired Expected COLA increase % Projected benefits At age 70 Vearly amount	thly amounts Enter yearly amounts Current income (if still working) Expected wage increase while working At age 62 Projected benefits 67 OR Current benefit if already retired Expected COLA increase Projected benefits OR Current benefit if already retired	thly amounts © Enter yearly amounts e Current income (if still working) Expected wage increase while working) At age 62 Projected benefits 67 70 OR Current benefit if already retired Expected COLA increase % Projected benefits 0 OR Current benefit if already retired	thly amounts © Enter yearly amounts e Current income (if still working) Expected wage increase while working % At age Frojected benefits OR Current benefit if already retired Expected benefits OR Current benefit if already retired OR Current benefit if already retired	e Current income (if still working) Expected wage increase while working % At age 62 Projected benefits 67 OR Current benefit if already retired Expected OCLA increase % OR Current benefit if already retired OR Current b	thly amounts © Enter yearly amounts e Current income (if still working) Expected wage increase while working % O.0 At age 62 Projected benefits 67 OR Current benefit if already retired Expected COLA increase % Projected benefits OR Current benefit if already retired OR Current benefit if already retired OR Current benefit if already retired OR Current benefit if already retired OR Current benefit if already retired OR Current benefit if already retired OR Current benefit if already retired OR Current benefit if already retired OR Current benefit if already retired OR Current benefit if already retired OR Current benefit if already retired OR Current benefit if already retired OR Current benefit if already retired OR Current benefit if already retired OR Current benefit if already retired OR Current benefit if already retired OR Current benefit if already retired OR Current benefit if already retired OR Current benefit if already retired OR Current benefit if already retired

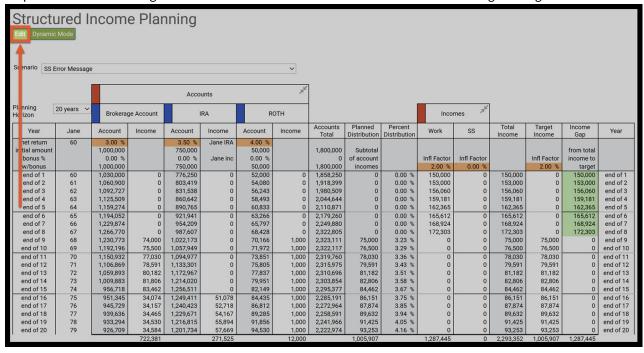
Step 12: Social Security Numbers: SIPS will have automatically filtered in the all the years social security number.



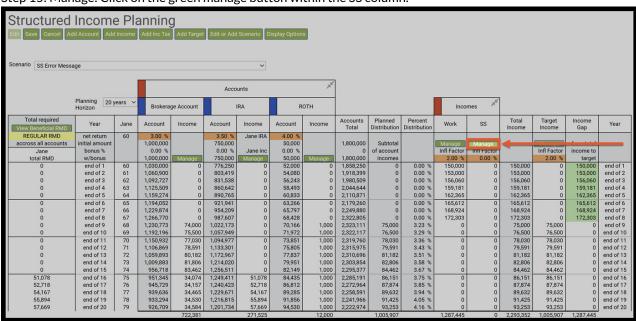
Step 13: Structured Income Planning: Click on the Structured Income Planning button underneath the Clients name.



Step 14: Edit: Click on the green Edit button underneath the Structured Income Planning heading.



Step 15: Manage: Click on the green manage button within the SS column.



Step 16: This is Social Security Checkbox: Unclick the This is Social Security Checkbox.



Step 17: This is Social Security Checkbox: Click on the This is Social Security Checkbox. The information that was put in on the incomes page in the client dashboard should automatically be filtered in after you click on the checkbox.



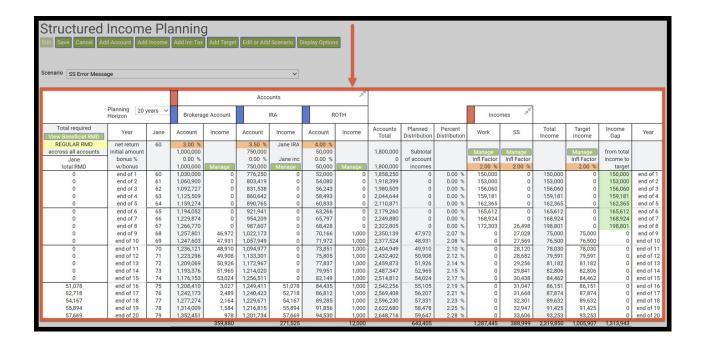
Step 18: Tax Calculation Option: SIPS should have automatically changed the tax calculation option to Social Security (Line 6a of the tax form).



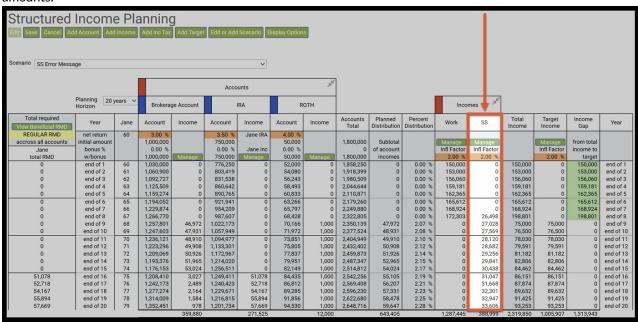
Step 19: Save: Click on the green save button underneath the Manage Income heading.



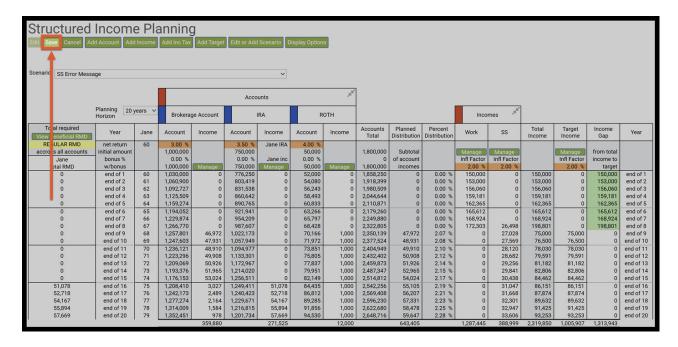
Step 20: Structured Income Planning Page: You will automatically be taken back to the Structured Income Planning Page.



Step 21: SS Column: A new column will have automatically be within the plan, the SS column displaying the correct amounts.



Step 22: Save: Click on the green Save button underneath the Structured Income Planning heading.



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.