Downloading the Report for Your Clients

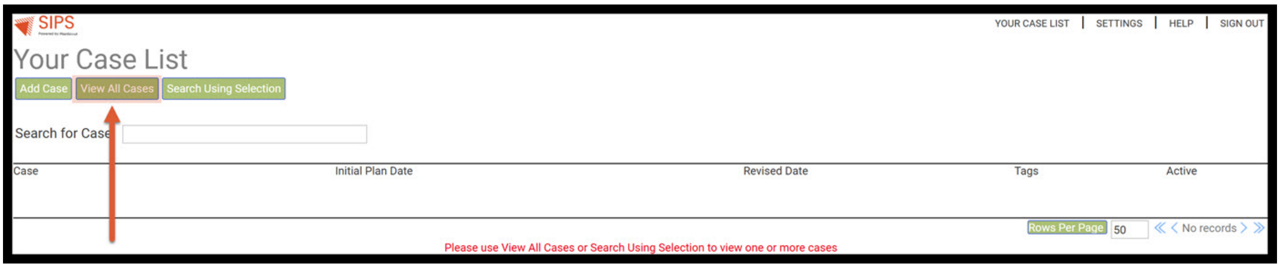
01/09/2026 11:40 am EST

Within the SIPS program, you can generate a report to provide to your clients outlining the structured income plan. Below is the step-by-step guideline for downloading the report.

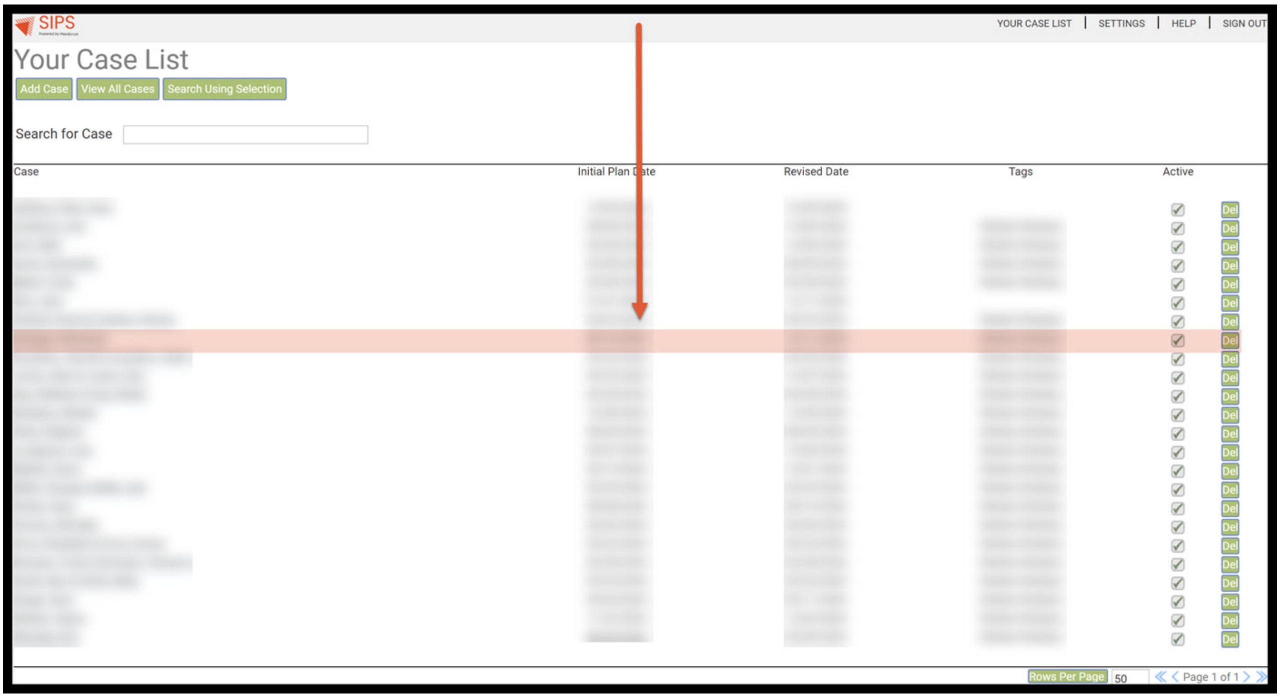
Step 1: Logging In: Log into SIPS.

Step 2: Your Case List: Click on the Your Case List button located on the upper right-hand side of your screen.

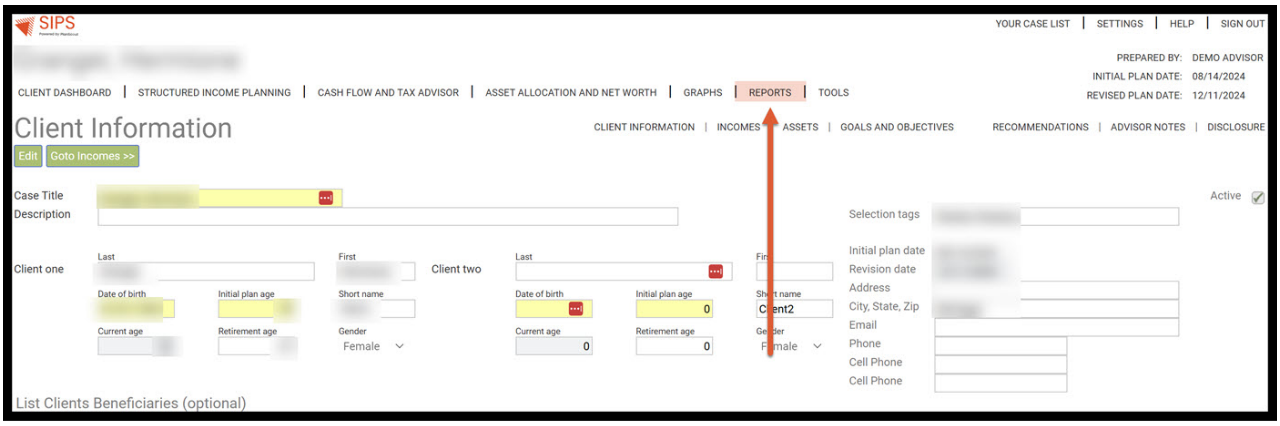
Step 3: View All Cases: Click on the green View All Cases button underneath the Your Case List heading.



Step 4: Case Selection: Select a Case.

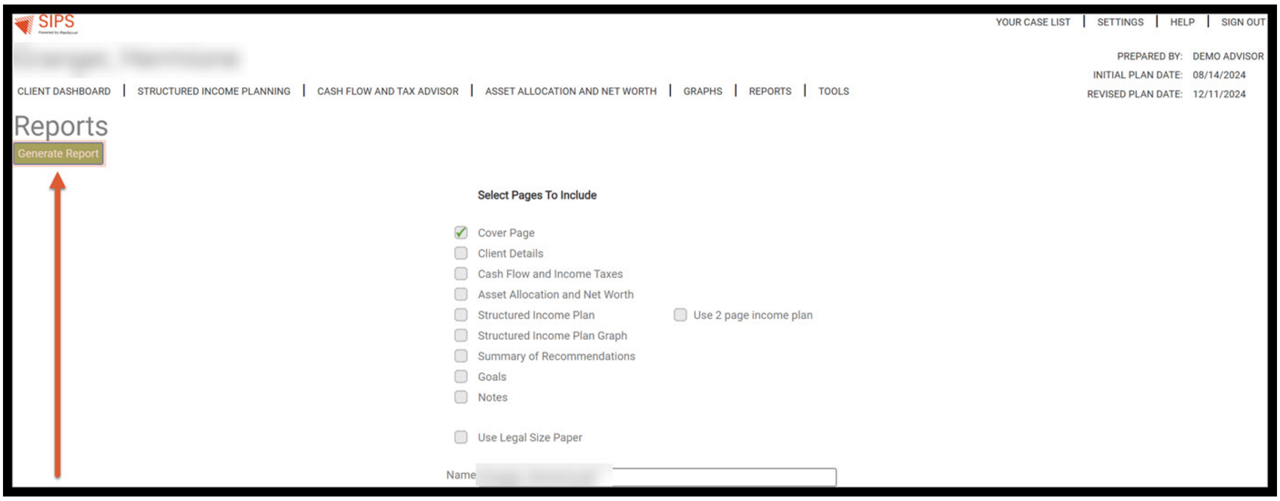


Step 5: Reports: Click on the Reports button located in the middle of the screen.

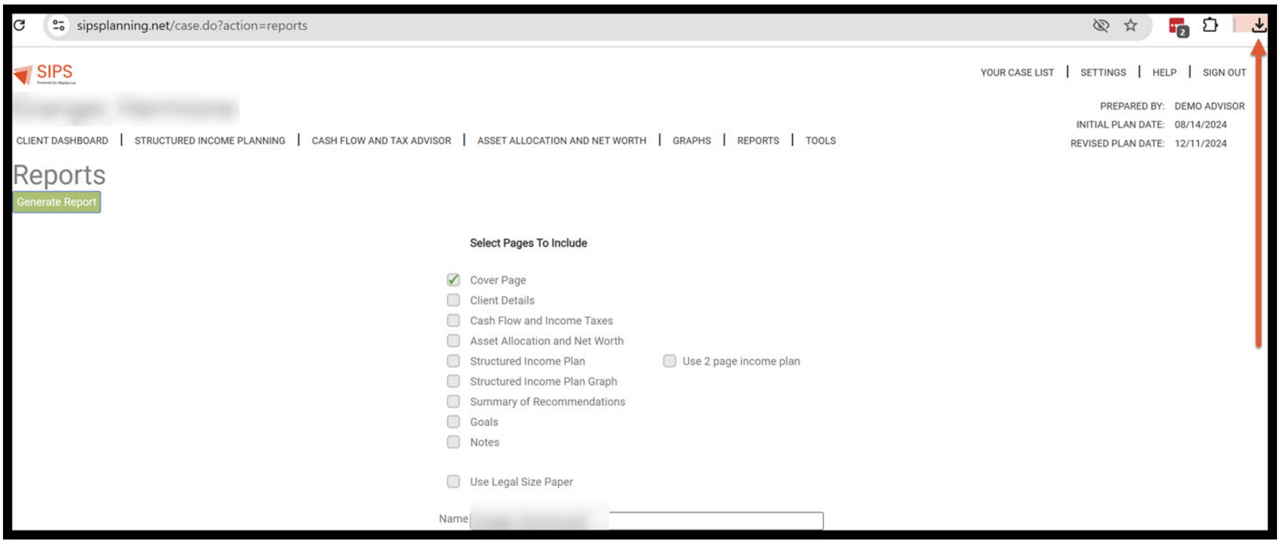


Step 6: Select Pages to Include: Click on the different checkboxes for the pages you would like to include in the report.

Step 7: Generate Report: Click on the green Generate Report button underneath the Reports heading.



Step 8: Download the PDF: Download the PDF.



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.