

## Scanning Tax Documents with Your Phone

A mobile phone or tablet is like having a mini scanner in your pocket. Here are some tips and tricks to leverage this technology to streamline the gathering of your tax documents.

### Scan a document as PDFs on an iPhone or iPad

1. Open Notes and select a note or create a new one.
2. Tap the paperclip symbol, then tap Scan Documents.
3. Place your document in view of the camera.
4. If your device is in Auto mode, your document will automatically scan. If you need to manually capture a scan, tap the Shutter button or one of the Volume buttons. Then drag the corners to adjust the scan to fit the page, then tap Keep Scan.
5. Tap Save or add additional scans to the document.

### Scan documents as PDFs on an Android, iPhone or iPad using the Google Drive app

1. Install and open the Google Drive app .
2. At the bottom right, tap the plus symbol (+) then tap Scan Document.
3. Point your device's camera at a document.
  - A blue line outlines the document. This indicates where the picture will be cropped.
4. Take a photo of the document that you'd like to scan. If your device is in Auto mode, your document will automatically scan.
5. When finished scanning tap Keep Scan then Save.
6. Create your own file name or select a suggested title.
7. Optional: To select the Drive folder where you'll save the document, tap Location.
8. To save the finished document, tap Upload to Drive.

### Here are some tips for making your paper documents readable and easy-to-process electronic files:

- If the document is already electronic, upload PDF files as-is.
- PDF files (.pdf) are required, do not send multiple images (.jpg, .bmp, .tiff, etc.)
- Do not upload zip files to the portal.
- When scanning documents, place them on a flat, well-lit surface, and smooth out any folds or wrinkles so that the entire page fits in the frame.
- One document per page; even if forms are small, they should be scanned as separate pages.
- Scan at a sufficiently high resolution. This is typically around 300 dpi. Please do not scan at less than 300 dpi. It can be tempting to scan at the highest available resolution, but higher resolution means much larger file sizes, which may cause errors when uploading.
- Excel files (spreadsheets) can be uploaded as-is.
- If there are notes or questions, uploading a Word file is acceptable.

**Security Note:** After you have confirmation your documents are uploaded to the portal, you may want to delete the documents where it was saved (any cloud storage such as Adobe, iCloud, or Google Docs, and the device itself). Whether or not you keep saved tax documents on your phone, always secure ALL your devices with a PIN or passcode.