

# A quick guide on how to scan documents with your phone

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# Scanning 101

Providing your tax preparer with clear, legible copies of your tax documents or notices is essential. Standard photos often fail to capture all details accurately. To ensure we receive a crisp, readable version, here's a simple way to scan your documents using an iPhone or Android device. These built-in tools quickly create high-quality electronic scans that you can easily upload or email.

**0 1**

**iPhone iOS 17 and later**

**0 2**

**iPhone iOS16 and earlier**

**0 3**

**Android**

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# Prepare for scanning:

Before opening the app, lay the document flat on a table with good lighting. If there are multiple pages it is best to lay them all side by side so that you can move from one page to the next.



HOW TO SCAN  
DOCUMENTS TO PDF  
USING THE NEW  
PREVIEW APP  
(iPhone iOS 17 and  
later)

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# HOW TO SCAN DOCUMENTS TO PDF USING THE NEW PREVIEW APP (iPhone iOS 17 and later)

## 1 OPEN THE PREVIEW APP

- Search for the Preview app and tap to open it.



## 2 START A NEW SCAN

- Tap **Scan Documents**

## 3 SCAN YOUR DOCUMENT

- Hold your iPhone over the first page of the document and keep it steady until the app automatically detects the edges.
- For multiple pages, move your camera to the next page.
- If the scan doesn't capture automatically, tap the **white circle Shutter button**.

## 4 SAVE THE FILE

- Tap checkmark in the upper right corner when you have scanned the final page of the document.



## 5 EMAIL OR UPLOAD YOUR DOCUMENT

- The file is now saved in your Files. You can upload or email it from your phone.
- Reminder: Email should not be used for documents that have SSNs or other personally identifiable information.

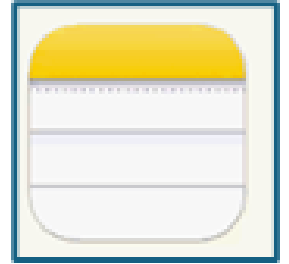
# HOW TO SCAN DOCUMENTS TO PDF USING THE NOTES APP (iPhone iOS16 and earlier)

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# HOW TO SCAN DOCUMENTS TO PDF USING THE NOTES APP (iPhone iOS16 and earlier)

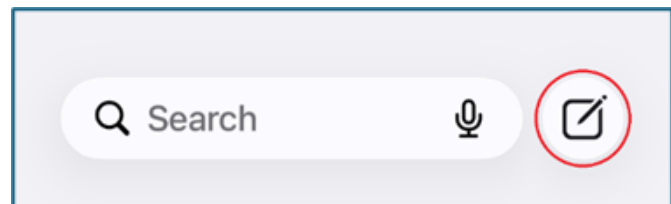
## 1 OPEN THE NOTES APP

- Find the yellow-and-white Notes icon and tap it.



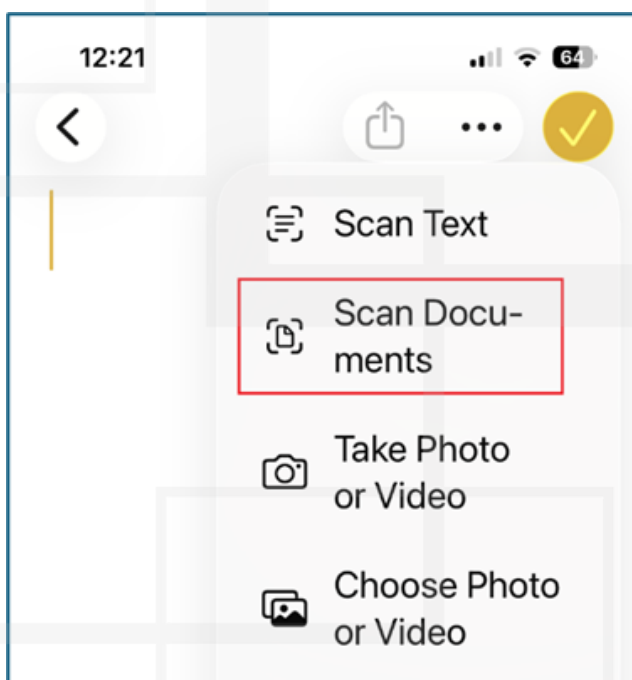
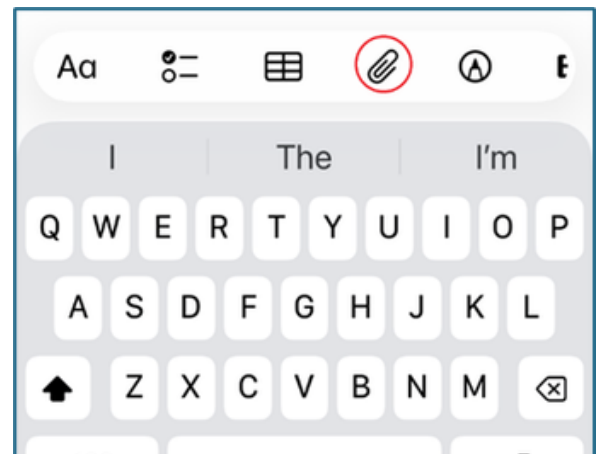
## 2 START A NEW NOTE

- Tap the **square with a pencil** icon in the bottom right of your screen.



## 3 OPEN THE SCANNER

- Tap the **paperclip icon** above the keyboard.
- Then tap **Scan Documents**.



# HOW TO SCAN DOCUMENTS TO PDF USING THE NOTES APP (iPhone iOS16 and earlier)

## 4 SCAN YOUR DOCUMENT

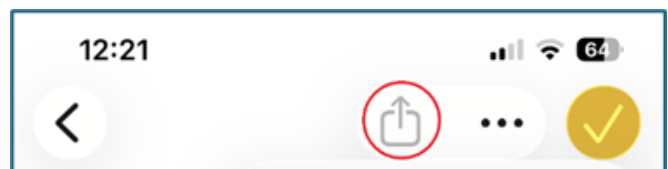
- Hold your iPhone over it and keep it steady.
- The camera will scan automatically.
- If not, tap the **white circle Shutter button** to take the scan.
- You can continue to scan additional pages into the same document by pointing the camera to each additional page until all pages are scanned.

## 5 ADJUST THE SCAN IF NEEDED

- Move the corner dots to fit the page.
- Tap **“Keep Scan.”**
- Repeat for more pages.
- When finished, tap **“Save”** at the bottom of the screen if prompted.

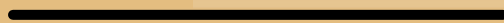
## 6 SEND OR SAVE THE PDF

- Tap the scanned image inside the note.
- Tap the **share** icon at the top of your screen.
- Choose **Mail, Messages, or Save to Files** (all create a PDF automatically).





# HOW TO SCAN DOCUMENTS TO PDF USING THE GOOGLE DRIVE APP (Android)



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# HOW TO SCAN DOCUMENTS TO PDF USING THE GOOGLE DRIVE APP (Android)

**1** OPEN THE GOOGLE DRIVE APP.



**2** TAP THE “+” (ADD) BUTTON.

**3** SELECT SCAN OR TAP THE CAMERA ICON.

**4** POINT YOUR PHONE AT THE DOCUMENT—DRIVE AUTOMATICALLY DETECTS EDGES.

**5** TAP THE SHUTTER TO CAPTURE.

**6** ADJUST CROP, FILTERS, ROTATE, OR CLEAN THE SCAN IF NEEDED.


**7** TAP DONE, NAME THE FILE, AND SAVE AS PDF OR JPG.

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# Get In Touch

If you have any questions  
please reach out to your  
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 **RUSHTON**  
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