

# How to Update Bond Information and Scan and Upload your CTEC Bond Certificate

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August 2019

#### Take a picture and email it using an Android Phone

## 1

Make sure that the photo you're trying to email is saved onto your phone. Open all controls by tapping the white arrow in the bottom left. Tap into your gallery and open the picture.



## 2

Tap the Share icon and choose your desired email. The share icon is two small arrows with one circle between them. After tapping the share icon, you are given a number of options, depending on the digital accounts associated with the phone.

Digital accounts include email and social media accounts.



### Take a picture and email it using an Android Phone

## 3

Select the photos you want to email. After choosing your email option, you will be brought to a screen where you can navigate through the phone's photos. Select images by gently tapping on the image you want to send.

Images not taken with the phone's camera, such as ones that you have downloaded or received via Bluetooth, may be in a folder named DCIM. Unless otherwise set,

images taken directly on your



phone's camera may go directly to a Photos app.

You are able to send multiple images by checking them all off consecutively.

4

Tap the next button after picking your photographs. This will carry the chosen photos into a new window, where they will be attached to an email.



### Take a picture and email it using an Android Phone

# 5

**Compose your email message and send.** By tapping on the fields, enter an email contact and a message if desired. You can also add a subject here.

When typing in the email address field, save time by tapping the ".com" button.



### Take a picture and email it using an iPhone or iPad

# 1

Open your photo app and find the picture(s) you want to email. The photo app is an icon that looks similar to a multicolored flower. Scroll up in down by stroking the screen.



# 2

**Select your photos.** Click "Select" at the upper right hand of your screen, then click the picture(s) you wish to send.

If you don't see the "Select" option, try tapping the photo once. This will pull up all options.



#### Take a picture and email it using an iPhone or iPad

## 3

Click the share symbol and attach to your mail. The share symbol is at the bottom left of the screen and looks like a square with an arrow pointing upwards. After tapping the share option, tap "Email photos".

Some iPhones require you to tap "Next" and then "Mail".



## 4

**Construct your email.** After you click on the mail icon, a new message will appear. Write the body of the email and fill out the subject.

If you are using iOS 8 or higher, move the cursor down to the body of the email, where you'd normally add a memo, information, or other various texts. Hold down in that area, until a magnifying glass pops up. Release your finger from the



screen, and a black menu should show up with options for "select" and "select all". To the right of the black bar, press the arrow pointing to the right. "Quote Level" and "Insert Photo or Video" options should appear after pressing the arrow. Tap "Insert Photo or Video."

#### Take a picture and email it using an iPhone or iPad

## 5

Add contacts. Click on the "To:" field if your cursor is not already on it. Type in who you want to send your message to. Click on the contacts symbol in the right side of the field to add directly from your contacts list. The "contacts" symbol looks like a blue circle with a blue plus sign. Continue to add contacts to "CC/BCC" fields if needed.



## 6

Send your email. Once all pictures are attached, select send at the top right corner of the screen. Edit your email before sending to ensure that you have the correct photos, recipients, and text.



How to Update Bond Information and Scan and Upload your CTEC Bond Certificate

#### Scan to your Windows computer

## 1

Place a document face-down in your scanner. You'll also want to make sure that your scanner is on and connected to your computer before proceeding.



## 2

**Open Start** Click the Windows logo in the bottom-left corner of the screen.



How to Update Bond Information and Scan and Upload your CTEC Bond Certificate

#### Scan to your Windows computer

## 3

**Type** fax and scan into Start. Doing so will search for the Windows Fax and Scan app.



4

**Click Windows Fax and Scan.** It's at the top of the Start window.



How to Update Bond Information and Scan and Upload your CTEC Bond Certificate

#### Scan to your Windows computer

## 5

**Click New Scan**. This option is in the upper-left side of the Fax and Scan window. A new window will open.



# 6

Make sure that your scanner is correct. If you don't see your scanner's name at the top of the window or the wrong scanner is listed, click **Change...** in the upperright side of the window and then select your scanner's name.

New Scan		
Scanner: Samsung	Universal Scan Dr	Cha <u>ng</u> e
Prof <u>i</u> le:	Photo (Default)	~
So <u>u</u> rce:	Flatbed	~
Pap <u>e</u> r size:		
C <u>o</u> lor format:	Color	~
<u>F</u> ile type:	JPG (JPG File)	) ~
Resolution (DPI):	300	

How to Update Bond Information and Scan and Upload your CTEC Bond Certificate

#### Scan to your Windows computer

# 7

**Select a type of document.** Click the "Profile" drop-down box, then select the type of document (e.g., **Photo**) in the dropdown box.

New Scan		
Scanner: Samsung	Universal Scan Dr Cha <u>n</u> ge	
Prof <u>i</u> le:	Photo (Default)	~
So <u>u</u> rce:	Flatbed	~
Pap <u>e</u> r size:		~
C <u>o</u> lor format:	Color	~
<u>F</u> ile type:	JPG (JPG File)	~
Resolution (DPI):	300	

## 8

**Decide on your document's color.** Click the "Color format" drop-down box, then select either **Color** or **Black and White**. Your scanner may also have different options for colors here.

Scanner: Samsu	ng Universal	Scan Dr	Cha <u>ng</u> e
Prof <u>i</u> le:	Photo	(Default)	~
So <u>u</u> rce:	Flatbed		~
Pap <u>e</u> r size:			
C <u>o</u> lor format:	[	Color	~
<u>F</u> ile type:	[	JPG (JPG File)	~
Resolution (DPI)	. Г	300	

How to Update Bond Information and Scan and Upload your CTEC Bond Certificate

#### Scan to your Windows computer

## 9

Select a file type. Click the "File type" drop-down box, then click the file type (e.g., PDF or JPG) that you want to use to store the scanned document on your computer.

When scanning anything other than a photo, it's best to select **PDF**.

New Scan			
Scanner: Samsun	g Univer	sal Scan Dr Cha	<u>ng</u> e
Prof <u>i</u> le:	Pho	oto (Default)	~
So <u>u</u> rce:	Flat	tbed	
Pap <u>e</u> r size:			
C <u>o</u> lor format:		Color	~
<u>F</u> ile type:		JPG (JPG File)	Ý
Resolution (DPI):		300	

# 10

Change any other options on the page. Depending on your scanner, you may have other options (e.g., "Resolution") that you can modify prior to scanning your document.

C <u>o</u> lor format:	Color	~
<u>F</u> ile type:	JPG (JPG File)	~
<u>R</u> esolution (DPI):	300 💌	
<u>B</u> rightness:		0
Contrast:	· · · · · · · · · · · · · · · · · · ·	0

How to Update Bond Information and Scan and Upload your CTEC Bond Certificate

#### Scan to your Windows computer

# 11

**Click Preview.** It's at the bottom of the window. This will bring up a preliminary scan to show you what your scanned document will look like.

If your document appears crooked, uneven, or choppedoff, you can readjust the document in your scanner and then click **Preview** again to see if your adjustment fixed the problem.

~			
0			
	Preview	<u>S</u> can	Cancel



# 12

**Click Scan.** It's at the bottom of the window. Your document will begin scanning into your computer using your selected options and format.

How to Update Bond Information and Scan and Upload your CTEC Bond Certificate

#### Scan to your Windows computer



How to Update Bond Information and Scan and Upload your CTEC Bond Certificate

#### Scan to your MAC computer

## 1

Place a document face-down in your scanner. You'll also want to make sure that your scanner is on and connected to your computer before proceeding.



## 2

#### Open the Apple menu

Click the Apple logo in the top-left corner of the screen. A drop-down menu will appear.



How to Update Bond Information and Scan and Upload your CTEC Bond Certificate

#### Scan to your MAC computer

## 3

**Click System Preferences...**. It's at the top of the drop-down menu.





Click Printers & Scanners. This printer-shaped icon is on the right side of the System Preferences window.



How to Update Bond Information and Scan and Upload your CTEC Bond Certificate

#### Scan to your MAC computer



**Select your scanner.** Click your scanner's (or printer's) name in the left-hand column.



6 Click the Scan tab. It's at the top of the window. Deen Scanner... Cocation: Eric's Macbook Pro Kind: EPSON Artisan 837

Status: Idle

8

window.

How to Update Bond Information and Scan and Upload your CTEC Bond Certificate

#### Scan to your MAC computer





How to Update Bond Information and Scan and Upload your CTEC Bond Certificate

#### Scan to your MAC computer

## 9

Select a file type. Click the "Format" drop-down box, then click a file type (e.g., PDFor JPEG) that you want to use to save your file.

When scanning anything other than a photo, it's best to select **PDF**.

Scan Mode:	Flatbed
Kind:	Color
Resolution:	300 ᅌ dpi
	🗸 Use Custom Size
Size:	0 0
Rotation Angle:	00
Auto Slection:	Detect Separate items
Scan To:	Pictures ᅌ
Name:	Scan
Format:	PDF
	Combine into single document

# 10

**Decide on a color.** Click the "Kind" drop-down box at the top of the page, then select a color option (e.g., **Black and White**).

	Scan Mode:	Flatbed	$\diamond$
	Kind:	Color	
	Resolution:	300 ᅌ dpi	
_	Size:	Use Custom Size	
	Rotation Angle:	00	
	Auto Slection:	Detect Separate items	$\bigcirc$
	Scan To:	Pictures	$\diamond$
	Name:	Scan	
	Format:	PDF	$\diamond$
		Combine into single docum	nent

How to Update Bond Information and Scan and Upload your CTEC Bond Certificate

#### Scan to your MAC computer

## 11

Select a storage location. Click the "Save To" drop-down box, then click a folder in which you want to save your scanned document (e.g., **Desktop**).

Scan Mode:	Flatbed 📀
Kind:	Color
Resolution:	300 ᅌ dpi
	🗸 Use Custom Size
Size:	0 0
Rotation Angle:	0°
Auto Slection:	Detect Separate items
Scan To:	Pictures
Name:	Scan
Format:	PDF 📀
	Combine into single document

# 12

Change other options on the page. Depending on the type of file that you're scanning, you may want to change the "Resolution" value or the "Orientation" value here.

Scan Mode:	Flatbed
Kind:	Color
Resolution:	300 ᅌ dpi
	🗹 Use Custom Size
Size:	0 0
Rotation Angle:	00
Auto Slection:	Detect Separate items
Scan To:	Pictures 📀
Name:	Scan
Format:	PDF 📀
	Combine into sinale document

How to Update Bond Information and Scan and Upload your CTEC Bond Certificate

#### Scan to your MAC computer

	Size:	0 0
	Rotation Angle:	00
13	Auto Slection:	Detect Separate items
<b>Click Scan</b> . It's in the bottom-	Scan To:	Pictures 📀
right corner of the window. Your	Name:	Scan
document will begin scanning into your computer. When it	Format:	PDF       Image: Combine into single document
finishes, you'll be able to find it in your selected save location.	Image Correction:	None
	Hide Details	Overview Scan

### **Update Bond Information and upload your scanned file** (From the Expiring Soon/Expired Message page)



## 2

**Bond Expiring or Expired Splash** 

**Page.** Click the button to "Update Your Bond" on this page to continue to Bond Information page.



### **Update Bond Information and upload your scanned file** (From the Expiring Soon/Expired Message page)

## 3

Update your Bond

Information. Update bond information with any changes to bond number, Bond Company, Effective Date and Expiration Date. You can update your bond 10 days prior to your new bonds effective date. Your bond expiration date must be a future date. The next screen will show you how to browse and find your bond certificate file.

C	<b>IEC</b>	Go California Tax Education Council
Main Menu	A005544 - ZOUH/	NR SROUJI
Logo Slicks Paid Bond Claims	Update Bond Use the form below to your informat	on.
User Login	Bond Company	Bond Number
Account	test	ca784529
Sign Out	Bond Effective Date	Bond Expire Date
	8/1/2019	8/13/2019
	Bond Certificate IMMEDIATE PUNCH LIST ITEMS.docx	
	Choose file	Browse
	Submit Cancel	
Box 2890, Sacramer	nto, CA 95812-2890 • tel: (877) 850-2832 • fax:	877) 851-2832・email: info@ctec.org Privacy Policy・En Español・中文 の ) 避 [2] f

## 4

Browse to and select your scanned Bond Certificate file. Click the browse button and

then navigate to the location you saved your scanned bond certificate file and select the file and then click "open" to continue.

		R	C	Califo	rnia Ta	IX E	ducatio	n Counci
	10055	4 - 7011						
Open	Δ0055/	/ _ /000				×		
	is PC > Downloads >			v ₫ Searc	ch Downloads	م		
· · ·				+ U Scare				
ganize 🔻 New fold	er				800 🔻	. 0		
Dropbox	Name	Date modified	Туре	Size			^	
OneDrive	UCDVSAC201811FSF2-master.zip	1/22/2019 12:13 PM	WinZip File	80,330 KB				
OneDrive	LapsedProviders (2).alsx	1/21/2019 8:03 AM	Microsoft Excel W	20 KB			_	
This PC	FTBComplaints (3).csv	1/18/2019 1:33 AM	Microsoft Excel C	1,028 KB				
3D Objects	MailingList (4).csv	1/16/2019 2:31 AM	Microsoft Excel C	843 KB				
Desktop	FTBComplaints (2).csv	1/15/2019 11:14 PM	Microsoft Excel C	120 KB				
Documents	QEBulkRegistrationResults (9).csv	1/8/2019 1:49 AM	Microsoft Excel C	176 KB				
Downloads	QEBulkRegistrationResults (8).csv	1/8/2019 1:37 AM	Microsoft Excel C	12 KB				
	QEBulkRegistrationResults (7).csv	1/8/2019 1:33 AM 1/8/2019 1:14 AM	Microsoft Excel C	9 KB 7 KB				
Music	QEBulkRegistrationResults (6).csv QEBulkRegistrationResults (5).csv	1/8/2019 1:14 AM	Microsoft Excel C	7 KB				
Pictures	QEBulkRegistrationResults (5).csv	1/8/2019 1:02 AM 1/8/2019 1:00 AM	Microsoft Excel C	27 KB				
Videos	QEBulkRegistrationResults (3).csv	1/8/2019 12:10 AM	Microsoft Excel C	27 KB				
Windows (C:)	QEBulkRegistrationResults (3).csv     GeBulkRegistrationResults (2).csv	1/8/2019 12:00 AM	Microsoft Excel C	41 KB				Browse
🗢 Toshiba Canvio I	QEBulkRegistrationResults (2).csv     GEBulkRegistrationResults (1).csv	1/7/2019 6:45 PM	Microsoft Excel C	40 KB				
MarksEXTdrive (I	2018-2019 CRTPMailingList (16,186).csv	1/4/2019 2:38 PM	Microsoft Excel C	1.218 KB				
MarksEXTdrive (Fr. Y	2018-2019 CRTPMailingList (16_186).xlsx	1/4/2019 2:31 PM	Microsoft Excel W	1,384 KB			~	
File n	ame			~ All F	files (*.*)	~		

### **Update Bond Information and upload your scanned file** (From the Expiring Soon/Expired Message page)

## 5

Review Bond Information and Submit Changes. Review the changes you have made to your bond information and verify the filename is listed in the box next to the browse button for your bond certificate file then click Submit to save changes and upload your bond certificate file.

i Menu	A005544 - ZOUHAIR	SROUJI
Slicks Bond 15	Update Bond Use the form below to your information.	
Login	Bond Company	Bond Number
ount	test	ca784529
Dut	Bond Effective Date	Bond Expire Date
	8/1/2019	8/13/2019
	Bond Certificate	
	IMMEDIATE PUNCH LIST ITEMS.docx	
	QEBulkRegistrationResults (9).csv	Browse

**That's it your all set!** You have updated your bond information and uploaded your scanned bond certificate to the CTEC system.

### **Update Bond Information and upload your scanned file** (From Preparer Account Main Menu page)



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P.O. Box 2890, Sacramento, CA 95812-2890 • tel: (877) 850-2832 • fax: (877) 851-2832 • email: info@ctec.org

NOTE: You must have a scanned copy of your preparer bond in order to complete the registration process. Make sure you scan a copy of your bond certificate BEFORE continuing with the registration process.

Privacy Po

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### **Update Bond Information and upload your scanned file** (From Preparer Account Main Menu page)

## 3

Click the "Update Bond" link from the Preparer Account Main Menu. Click the gray "Update Bond" button on the Preparer Information tab to continue to the bond information page.



### 4

Update your Bond Information. Update bond information with any changes to bond number, Bond Company, Effective Date and Expiration Date. You can update your bond 10 days prior to your new bonds effective date. Your bond expiration date must be a future date. The next screen will show you how to browse and find your bond certificate file.



### **Update Bond Information and upload your scanned file** (From Preparer Account Main Menu page)

## 5

Browse to and select your scanned Bond Certificate file. Click the browse button and then navigate to the location you saved your scanned bond certificate file and select the file and then click "open" to continue.

	<b>U</b> IEU	R	0	alifo	ornia T	av	Edu	ication	Counci
				Junit		чл	Lut	cation	counci
	A0055/	4 - 7011							
Open							×		
→ ~ ↑ ↓ > Th	is PC > Downloads >			v ð S	earch Downloads		P		
Organize - New fold	-				833 -		0		
	Name	Date modified		Size	8		•		
😳 Dropbox	UCDVSAC201811FSF2-master.zip	1/22/2019 12:13 PM	Type WinZip File	80.330 KB					
OneDrive	LapsedProviders (2).xlsx	1/22/2019 12:13 PM	Microsoft Excel W	20 KB					
	FTBComplaints (3).csv	1/18/2019 1:33 AM	Microsoft Excel C	1.028 KB					
This PC	MailingList (4).csv	1/16/2019 2:31 AM	Microsoft Excel C	843 KB					
3D Objects	FTBComplaints (2).csv	1/15/2019 11:14 PM	Microsoft Excel C	120 KB					
Desktop	GEBulkRegistrationResults (9).csv	1/8/2019 1:49 AM	Microsoft Excel C	176 KB					
Documents	QEBulkRegistrationResults (8).csv	1/8/2019 1:37 AM	Microsoft Excel C	12 KB					
🐥 Downloads	G QEBulkRegistrationResults (7).csv	1/8/2019 1:33 AM	Microsoft Excel C	9 KB					
Music	QEBulkRegistrationResults (6).csv	1/8/2019 1:14 AM	Microsoft Excel C	7 KB					
Pictures	QEBulkRegistrationResults (5).csv	1/8/2019 1:02 AM	Microsoft Excel C	7 KB					
Videos	QEBulkRegistrationResults (4).csv	1/8/2019 1:00 AM	Microsoft Excel C	27 KB					
Windows (C:)	QEBulkRegistrationResults (3).csv	1/8/2019 12:10 AM	Microsoft Excel C	7 KB					-
	QEBulkRegistrationResults (2).csv	1/8/2019 12:00 AM	Microsoft Excel C	41 KB					Browse
🗢 Toshiba Canvio I	QEBulkRegistrationResults (1).csv	1/7/2019 6:45 PM	Microsoft Excel C	40 KB					
MarksEXTdrive (I	🚯 2018-2019 CRTPMailingList (16,186).csv	1/4/2019 2:38 PM	Microsoft Excel C	1,218 KB					
- MarksEXTdrive (F: Y	2018-2019 CRTPMailingList (16_186).xlsx	1/4/2019 2:31 PM	Microsoft Excel W	1,384 KB			~		
File n	ame:			~ /	All Files (*.*)		~		
					Open 🔻	Cancel			

## 6

**Review Bond Information and Submit Changes.** Review the changes you have made to your bond information and verify the filename is listed in the box next to the browse button for your bond certificate file then click Submit to save changes and upload your bond certificate file.

enu	A005544 - ZOUHAIR	SROUJI
cks nd	Update Bond Use the form below to your information.	
jin	Bond Company	Bond Number
	test	ca784529
	Bond Effective Date	Bond Expire Date
	8/1/2019	8/13/2019
	Bond Certificate	
	IMMEDIATE PUNCH LIST ITEMS.docx	
	QEBulkRegistrationResults (9).csv	Browse

**That's it your all set!** You have updated your bond information and uploaded your scanned bond certificate to the CTEC system.

### **Update Bond Information and upload your scanned file** (From Registration Preparer Information page)

# 1

Logon to your CTEC Preparer Account. Enter your CTEC User ID and Password and click the logon to your account button.



## 2

**Continue past Splash Page.** Click the button to "Continue to Preparer Account" on this page to continue to Preparer Account Main Menu.



### **Update Bond Information and upload your scanned file** (From Registration Preparer Information page)

## 3

Click the "Click Here to Renew Now" link from the Preparer Account Main Menu. Click the blue registration button on the Preparer Information tab to continue to preparer registration (if available).

EC			S	earch	Go
	Cali	fornia	Tax Ed	ucation	Cound
A005544 - ZOUHAIR	SROUJ	I			
Current Registration Status: Curr	ent thru 10/3	31/2019 – Bo	ond Expiring Sc	on	
Last Registration Cycle/Date: 201	8/2019 (10/2	21/2018)			
Click here to Renew Now!					
Click here to kenew Now!					
Available Education Course Number Course Name	State Hours(5)	Ethics Hours(2)	Tax Update Hours(3)	Tax Law Hours(10)	Completion Date
Course Number					Date
Course Number Course Name 1040-CE-1962	Hours(5)	Hours(2)	Hours(3)	Hours(10)	Date
Course Number Course Name 1040-CE-1962 Intermediate Small Business Concepts 1040-CE-1960 Overview of the Tax Cuts and Jobs Act	<b>Hours(5)</b>	<b>Hours(2)</b>	Hours(3)	Hours(10) 3	Date 12/14/2018
Course Number Course Name 1040-CE-1962 Intermediate Small Business Concepts 1040-CE-1960 Overview of the Tax Cuts and Jobs Act (Session 1a) 1040-CE-1969 Qualified Business Income Deduction	Hours(5) 0 0 0	Hours(2) 0 0	Hours(3) 0	Hours(10) 3 1	12/14/2018

### 4

**Continue Registration Process until you get to the Preparer Information page.** The preparer information page of registration contains the bond information and upload options. Add or Update your bond information as needed. The next page will explain how to browse and upload your bond certificate file.

	TEDDYZ@NETZERO.COM
Business Phone	Residence Phone
951-678-0455	951-678-0455
Bond Information	
	bond certificate below. Bond information will be populated if you are ng is still correct you may skip this section. Bond Number
test	ca784529
Bond Effective Date	Bond Expire Date
8/1/2019	8/13/2019
Bond Certificate	
IMMEDIATE PUNCH LIST ITEMS.docx	
Choose file	Browse
Bond Certificate IMMEDIATE PUNCH LIST ITEMS.docx Choose file CTEC Renewal Notice	
I would like to receive my renewal notice l	
I would like to receive my renewal notice l	y email.
	y email.
CTEC Mailing List	, chase a mailing list from CTEC to promote their material. Check this

### **Update Bond Information and upload your scanned file** (From Registration Preparer Information page)

## 5

Browse to and select your scanned Bond Certificate file. Click the browse button and then navigate to the location you saved your scanned bond certificate file and select the file and then click "open" to continue.



## 6

## Complete all required preparer registration information and

**continue.** Complete all required information and then select the "I Certify..." checkbox, you can then click the button to "Continue" registration. Preparer information and bond information are saved to your account at this time.

	Bond Expire Date
8/1/2019	8/13/2019
Bond Certificate	
IMMEDIATE PUNCH LIST ITEMS.docx	
Choose file	Browse
CTEC Renewal Notice	ewal notice by email.
CTEC Mailing List	
Education providers/Bond Con box if you would like to be exc	npanies purchase a mailing list from CTEC to promote their material. Check this cluded from this list.
CTEC Preparer Newslette	er by Email
Check this box if you DO NOT	want to receive the CTEC Newsletter by email.
	·
Fact of Filing	
-	, personal and/or business tax returns for the past three years with the
I have filed or will be filing my appropriate agencies.	y personal and/or business tax returns for the past three years with the OING IS TRUE AND CORRECT.
appropriate agencies.	

**That's it your all set!** You have updated your bond information and uploaded your scanned bond certificate to the CTEC system. You will still need to complete your registration.