California Tax Education Council

How to Update Bond Information and Scan and Upload your CTEC Bond Certificate
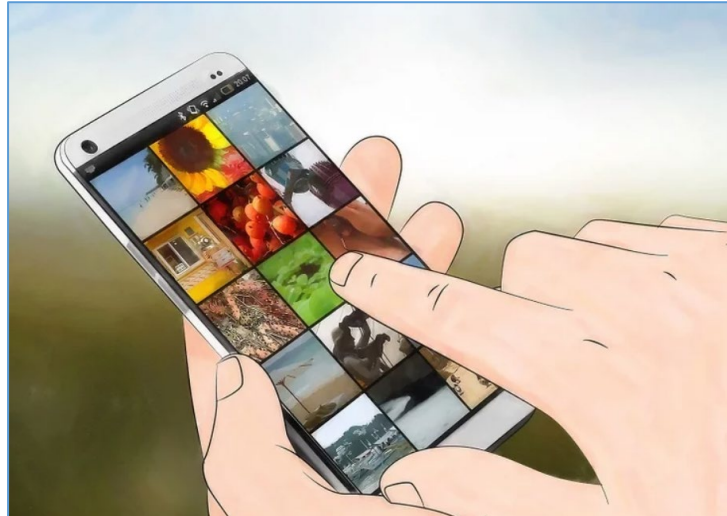
August 2019

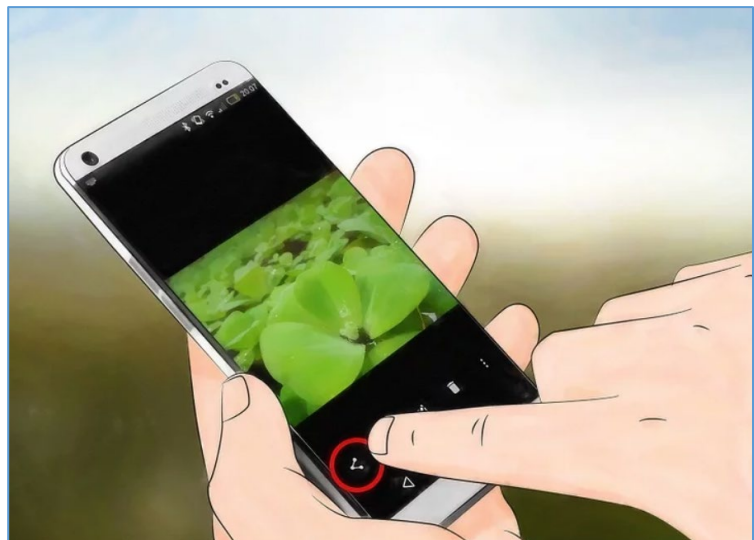# Take a picture and email it using an Android Phone

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.
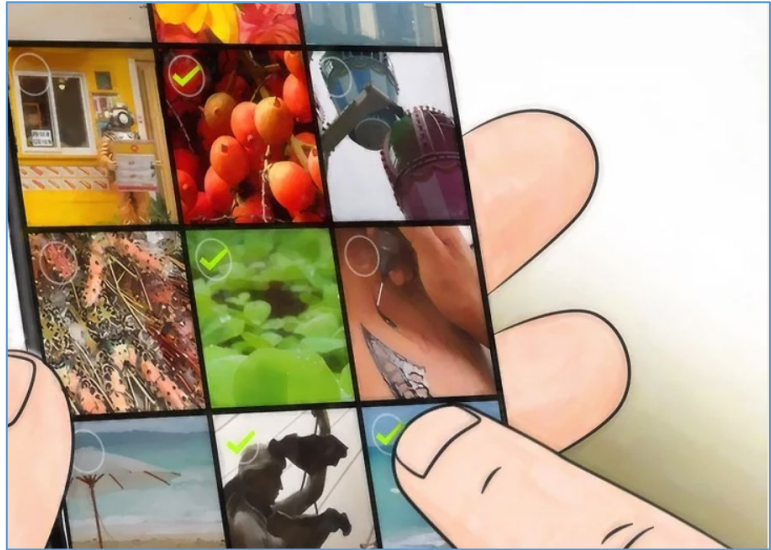
4

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.
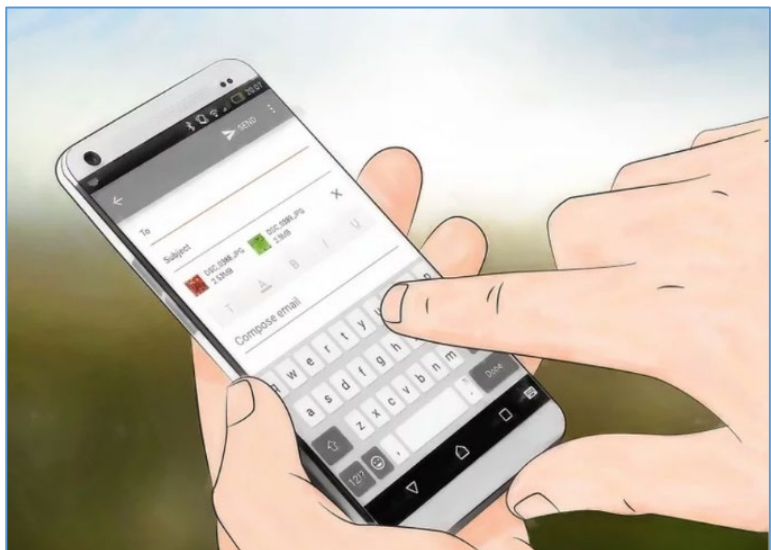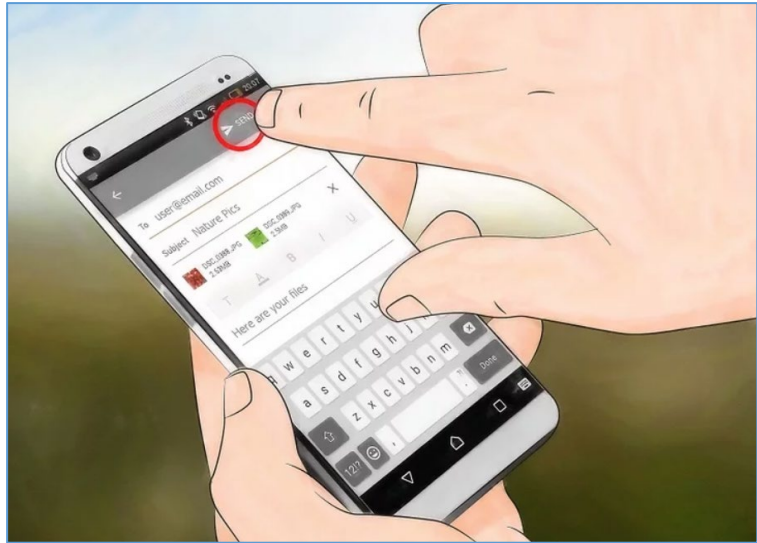
Take a picture and email it using an Android Phone

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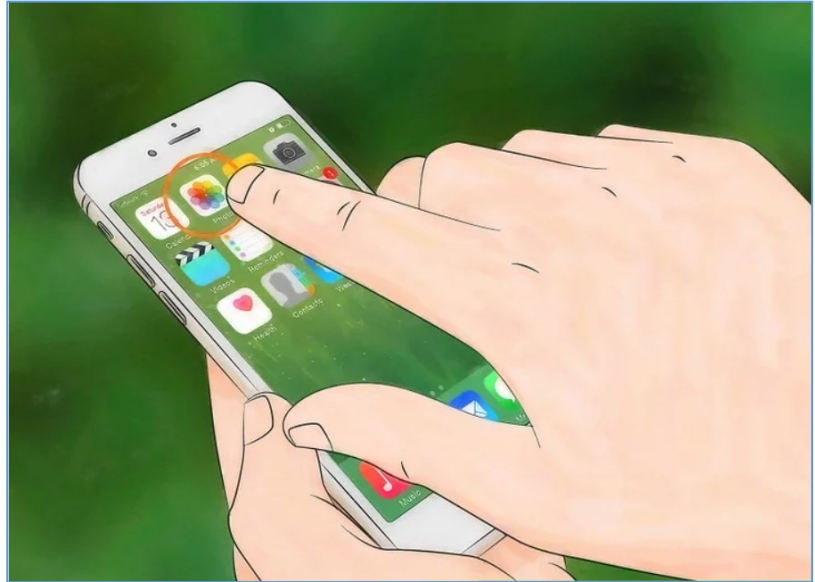
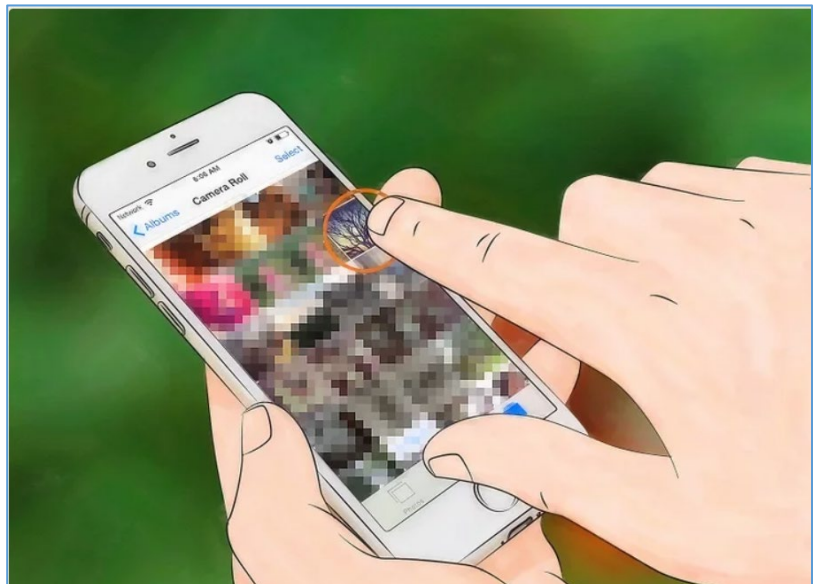# Take a picture and email it using an iPhone or iPad

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 multi-colored 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."
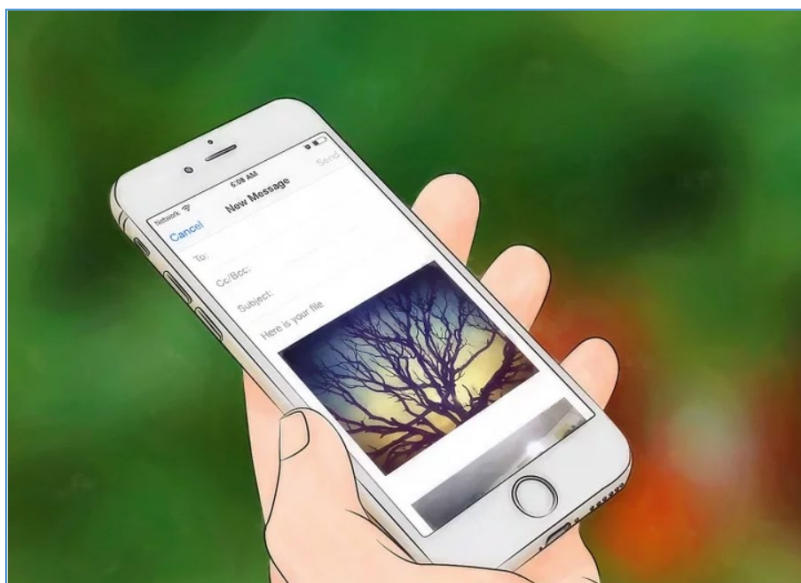
Take a picture and email it using an iPhone or iPad

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.
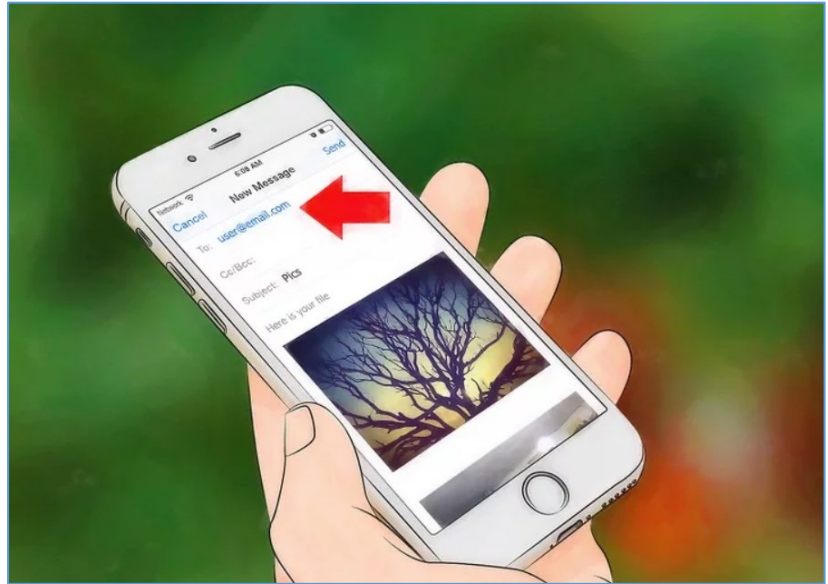
6

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.
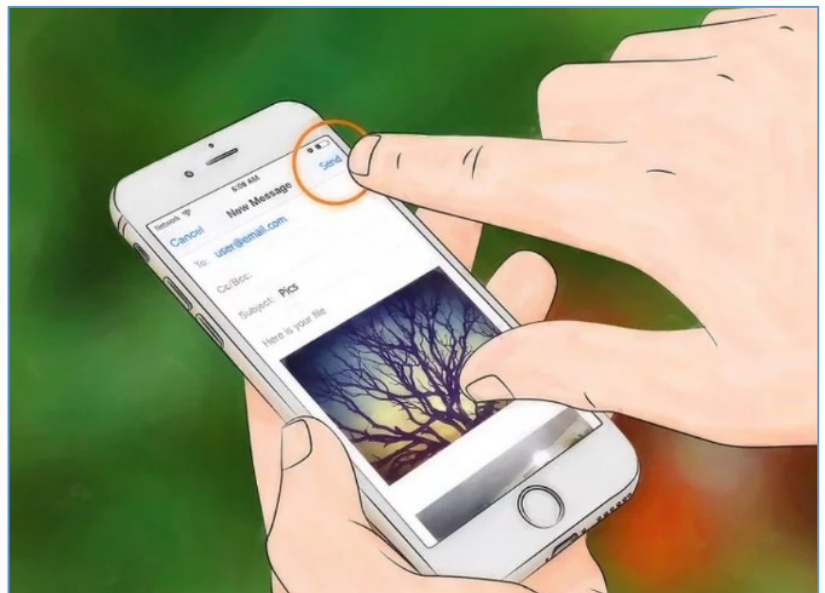
Scan to your Windows computer

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.
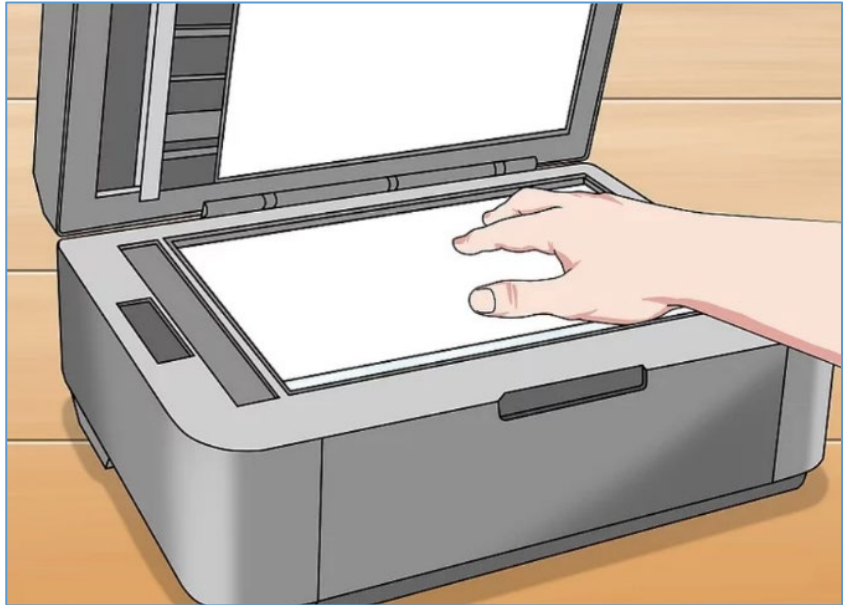
2

Open Start
Click the Windows logo in the bottom-left corner of the screen.
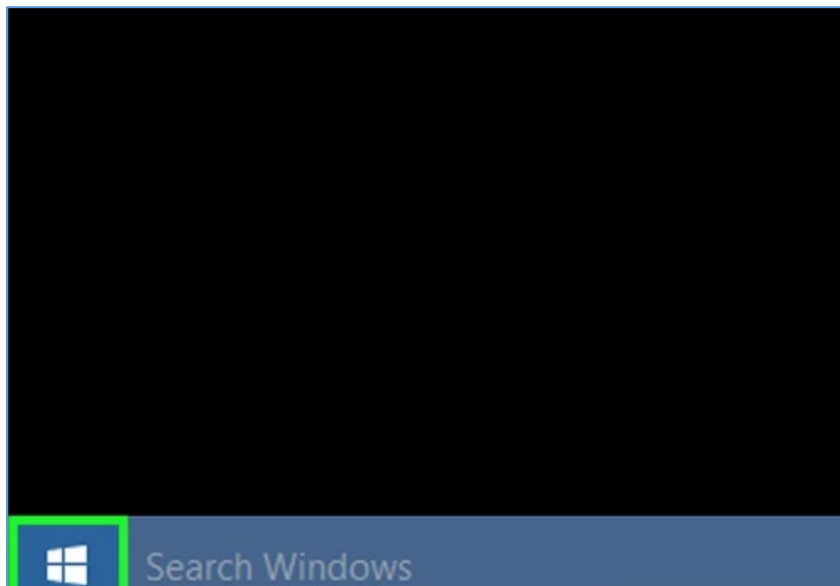
Scan to your Windows computer

3

Type `fax and scan` **into Start.** Doing so will search for the Windows Fax and Scan app.
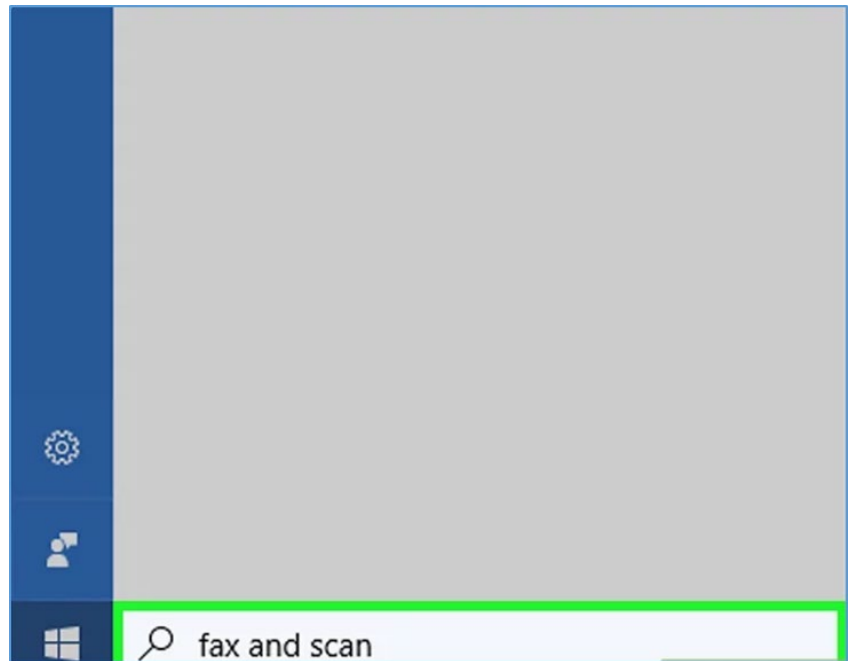
4

Click Windows Fax and Scan. It's at the top of the Start window.
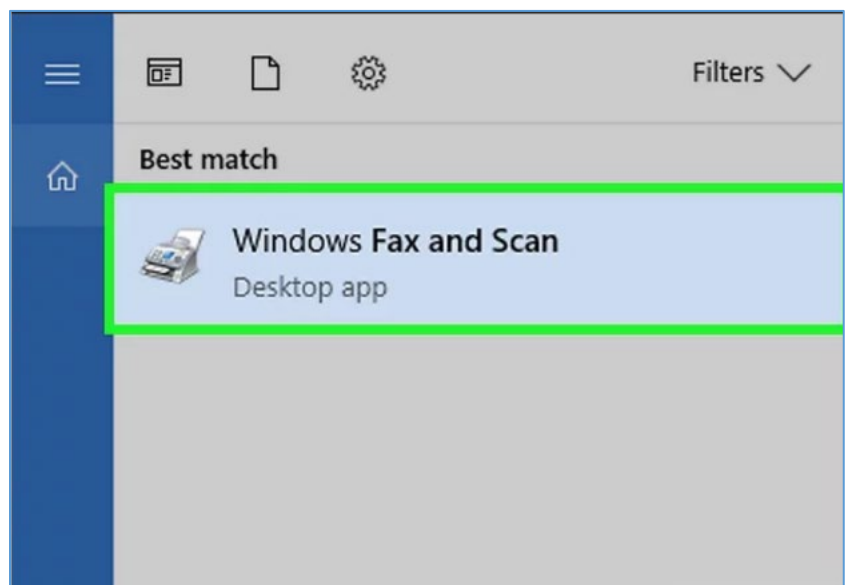
Scan to your Windows computer

5

Click New Scan . This option is in the upper-left side of the Fax and Scan window. A new window will open.
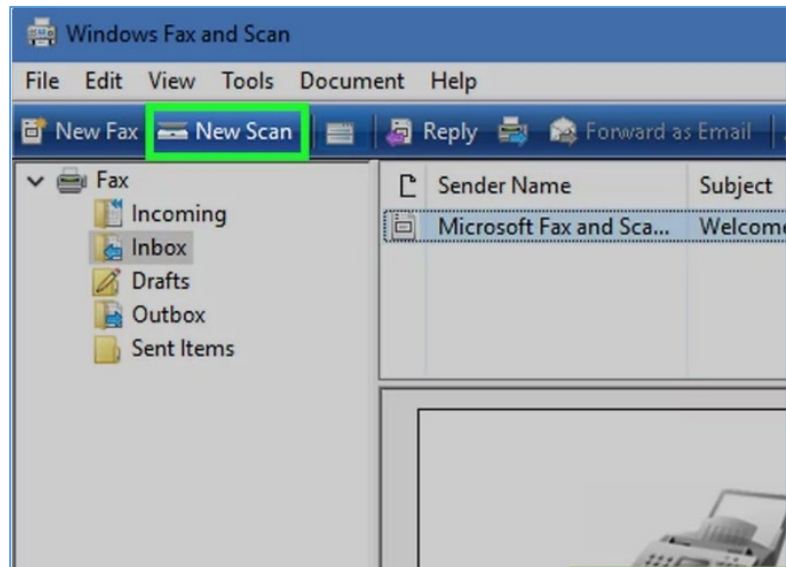
6

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 upper-right side of the window and then select your scanner's name.
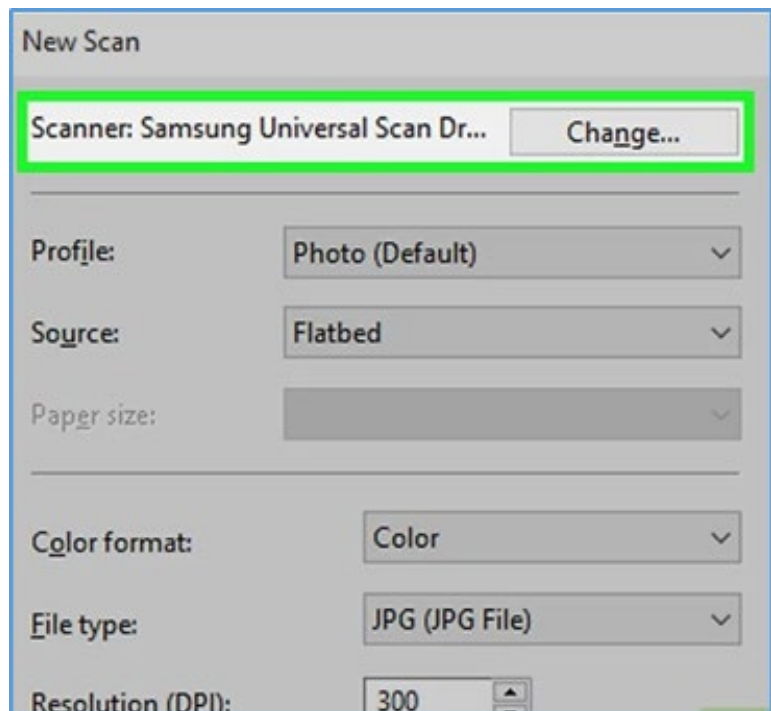
Scan to your Windows computer

7

Select a type of document. Click the "Profile" drop-down box, then select the type of document (e.g., **Photo**) in the drop-down box.
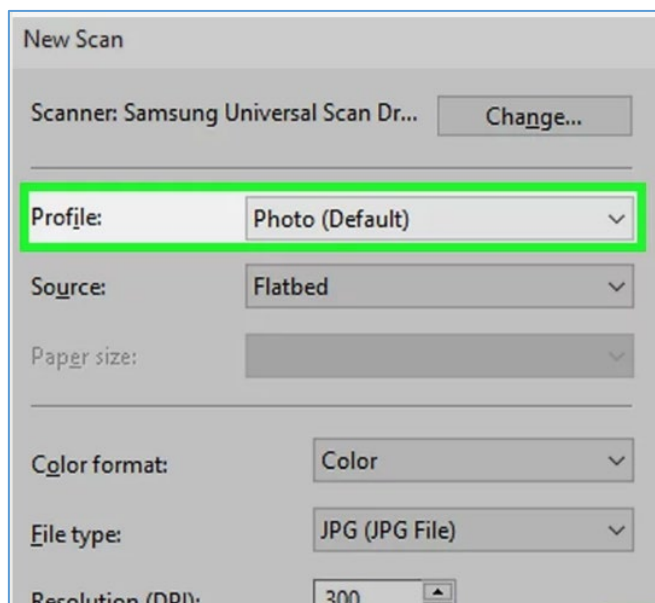
8

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.
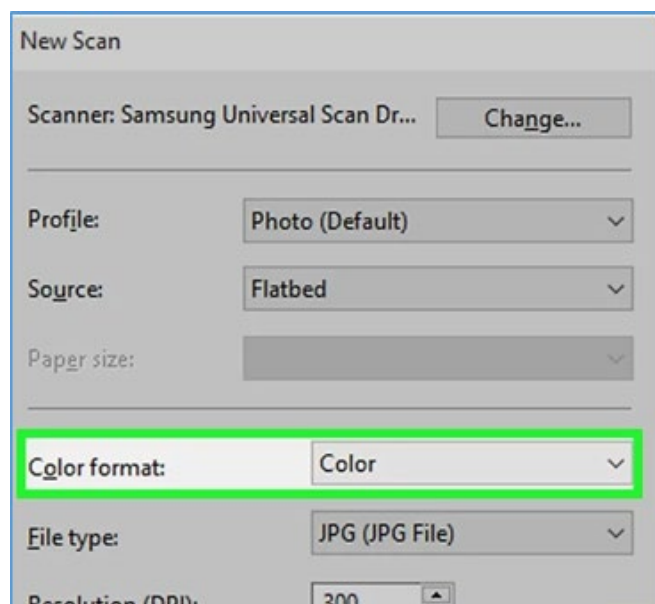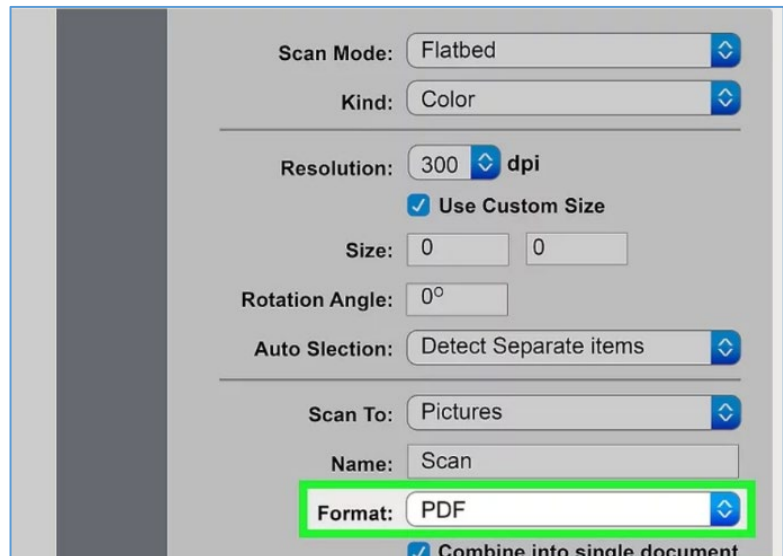
Scan to your Windows computer

9

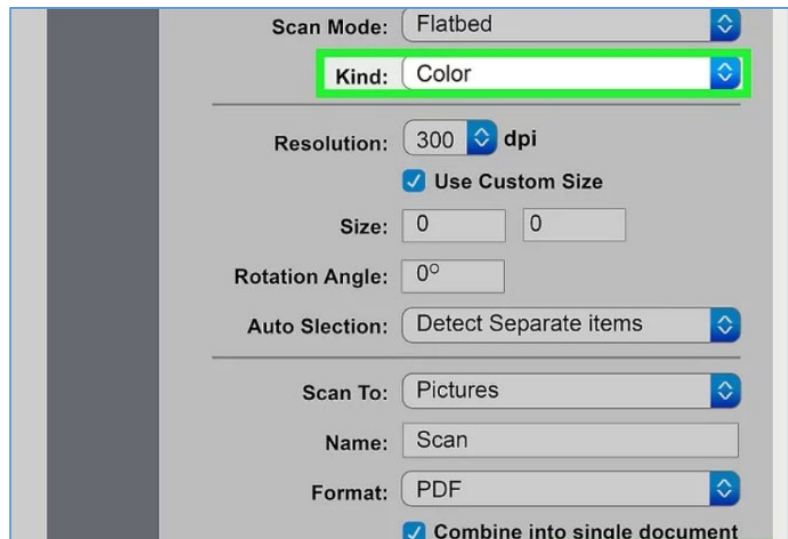**Select a file type.** Click the "File type" drop-down box, then click the file type (e.g., **PDF** or **JPG**) that you want to use to store the scanned document on your computer.

When scanning anything other than a photo, it's best to select **PDF**.
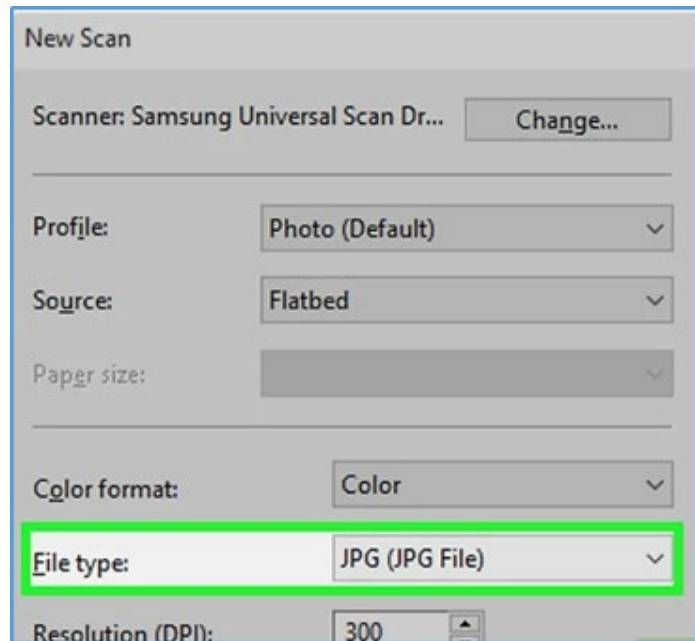
10

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.
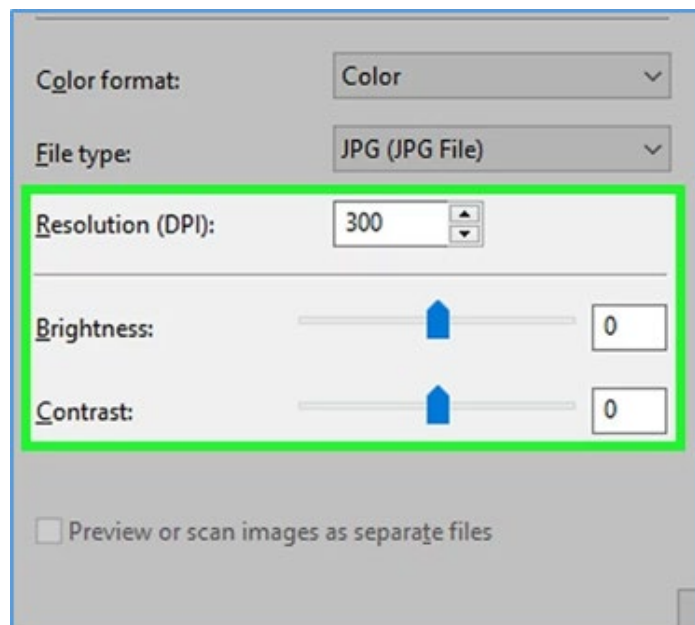
Scan to your Windows computer

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 chopped-off, you can readjust the document in your scanner and then click **Preview** again to see if your adjustment fixed the problem.
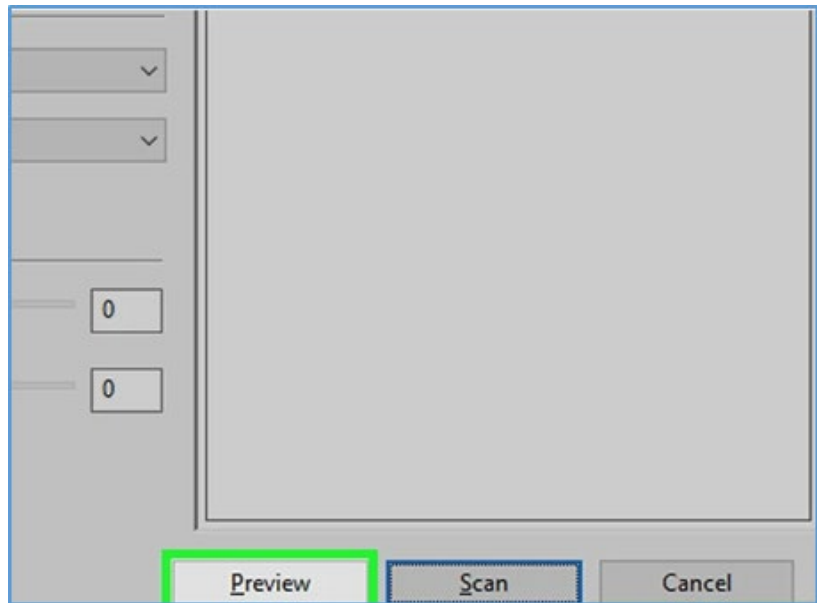
12

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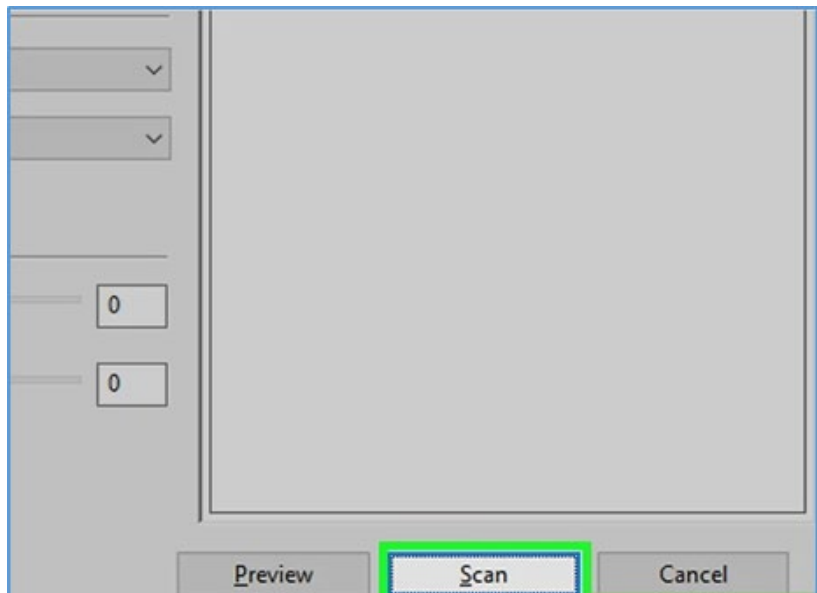
Scan to your Windows computer

13

Find your scanned document. To do so:

Open **Start**

Open **File Explorer**

Click **Documents** on the left side of the window.

Double-click the **Scanned Documents** folder.
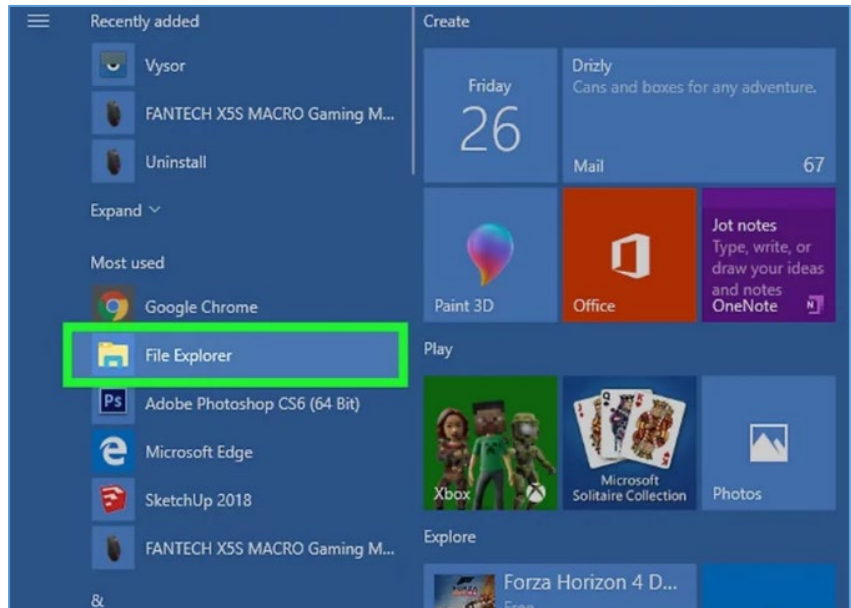
Scan to your MAC computer

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.
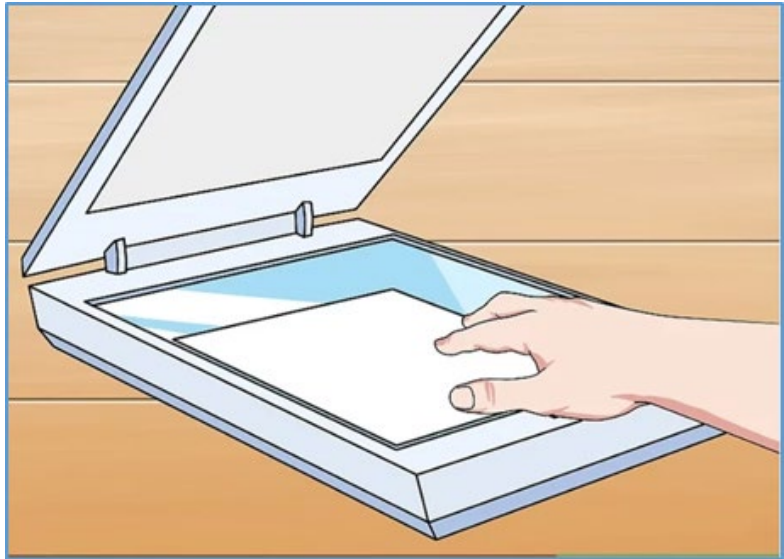
2

Open the Apple menu
Click the Apple logo in the top-left corner of the screen. A drop-down menu will appear.
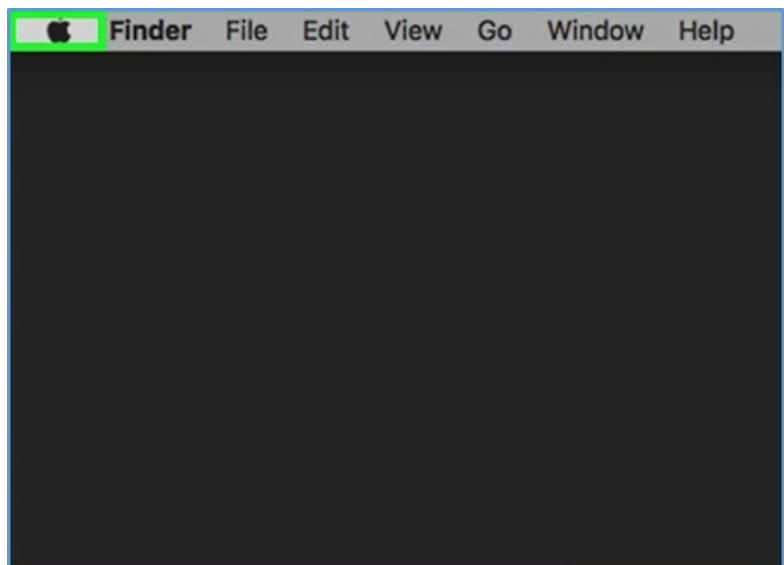
Scan to your MAC computer

3

Click System Preferences... . It's at the top of the drop-down menu.
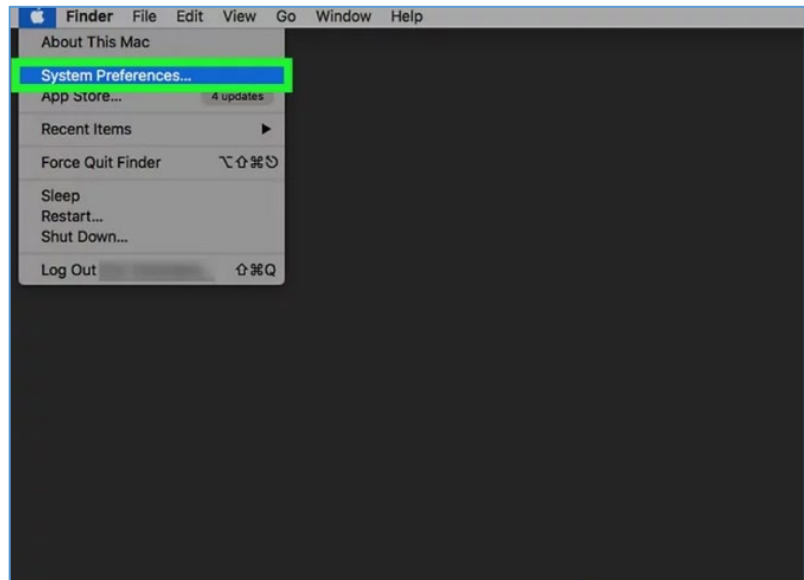
4

Click Printers & Scanners . This printer-shaped icon is on the right side of the System Preferences window.
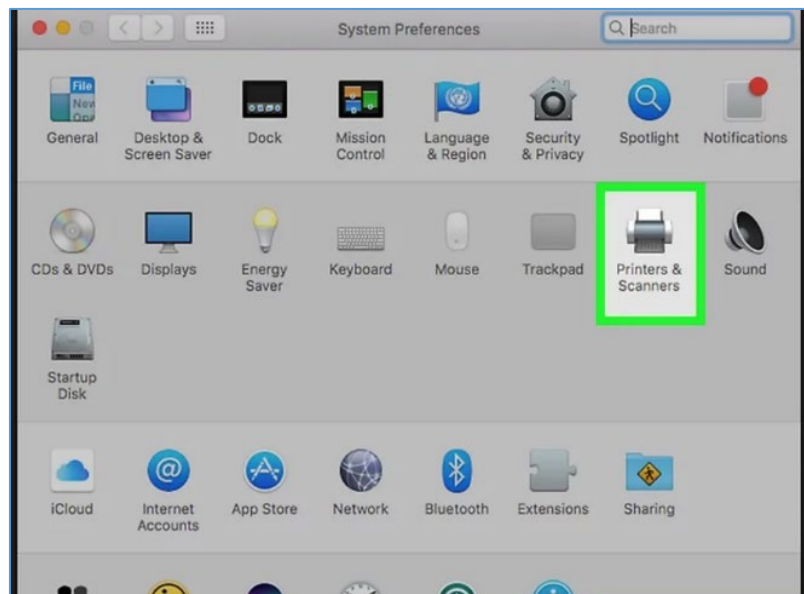
Scan to your MAC computer

5

Select your scanner. Click your scanner's (or printer's) name in the left-hand column.
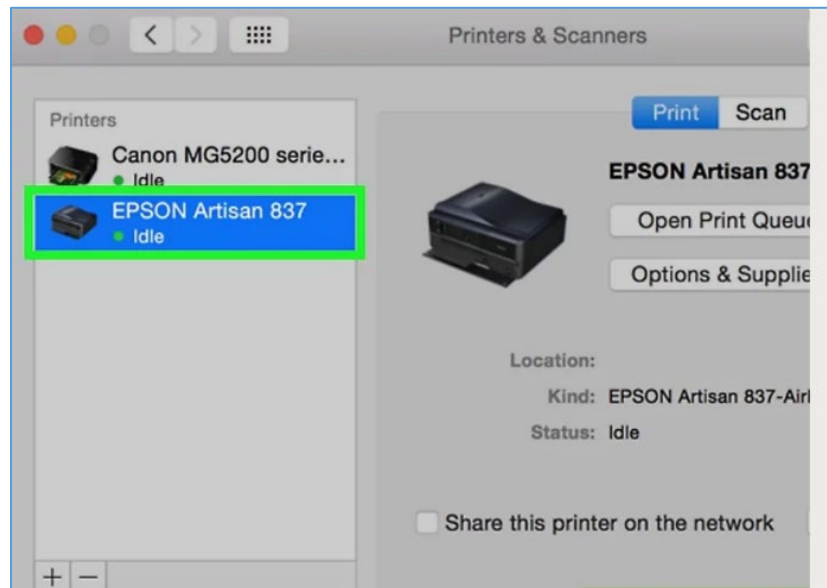
6

Click the Scan **tab.** It's at the top of the window.
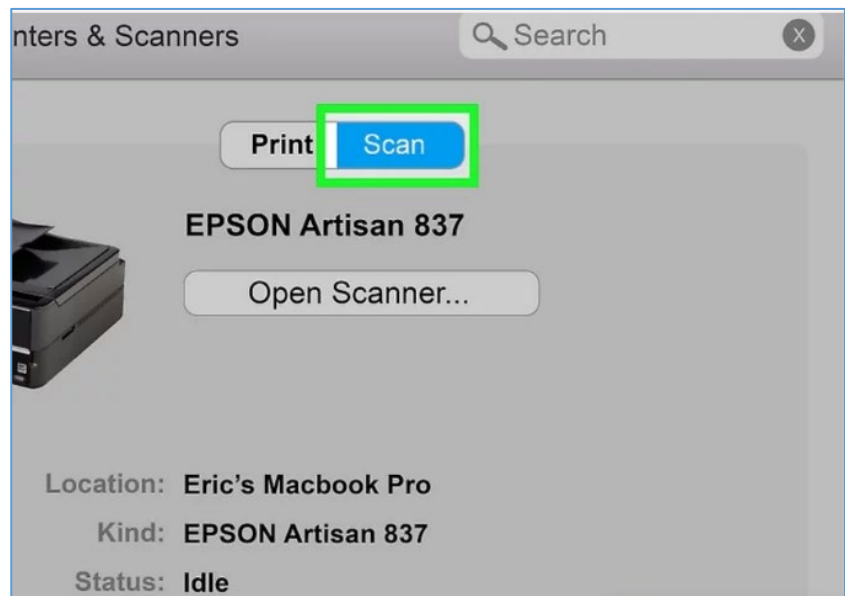
Scan to your MAC computer

7

Click `Open Scanner...`. You'll find this near the top of the **Scan** tab window.
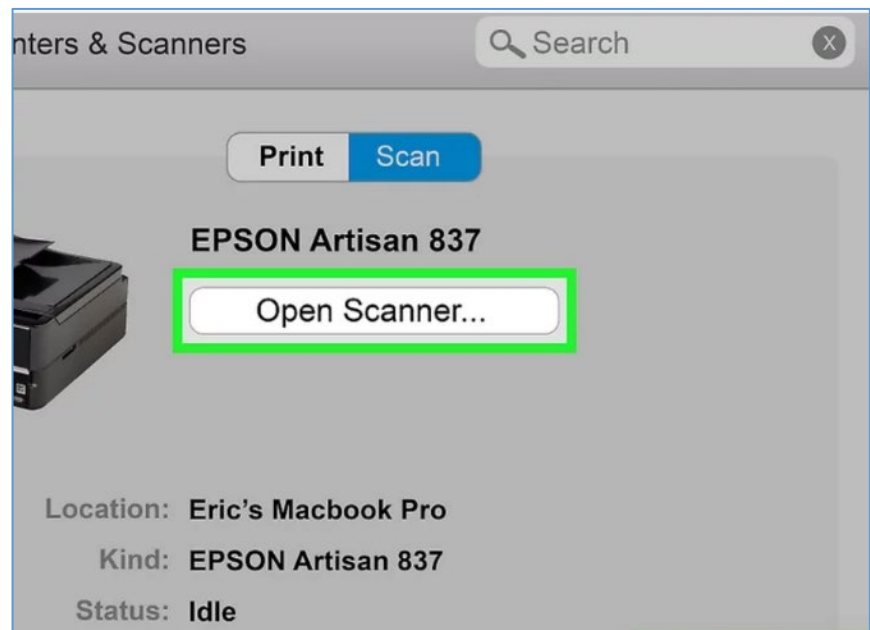
8

Click `Show Details`. It's in the lower-right side of the window.
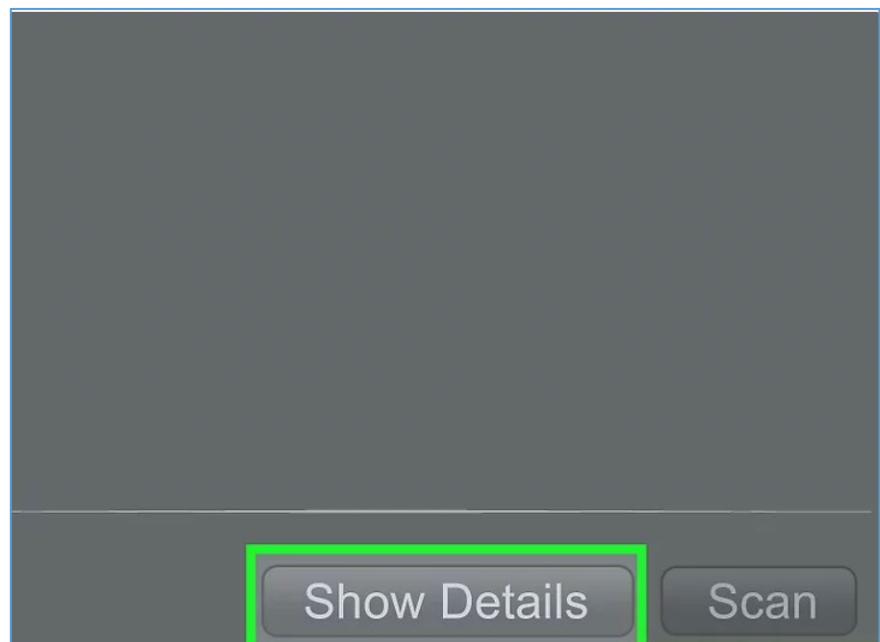
Scan to your MAC computer

9

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

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

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 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**).
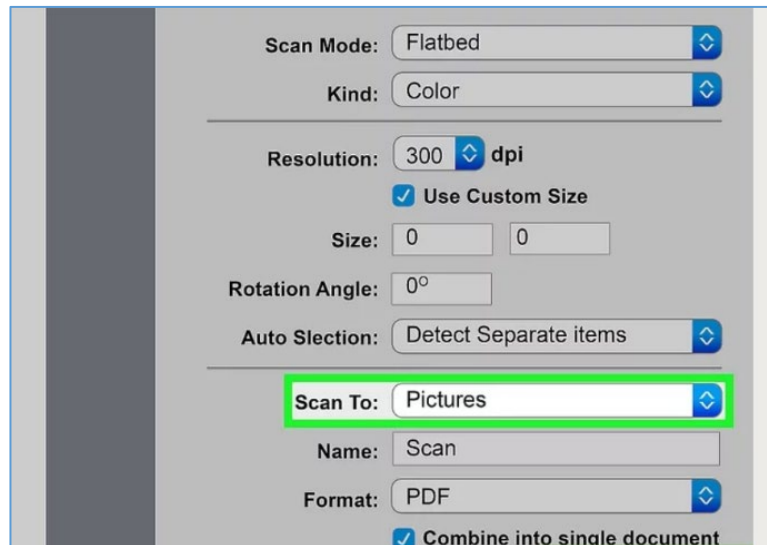
12

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.
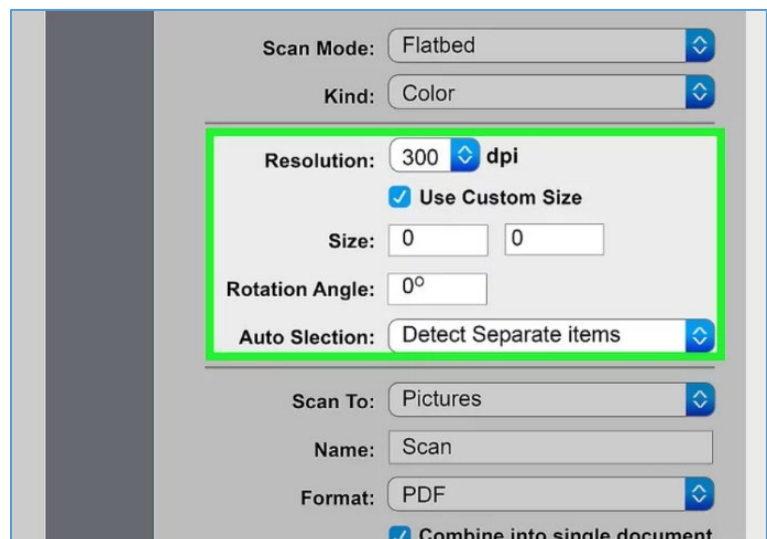
Scan to your MAC computer

13

Click Scan **.** It's in the bottom-right corner of the window. Your document will begin scanning into your computer. When it finishes, you'll be able to find it in your selected save location.

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

1

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

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.

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.

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.

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)

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 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
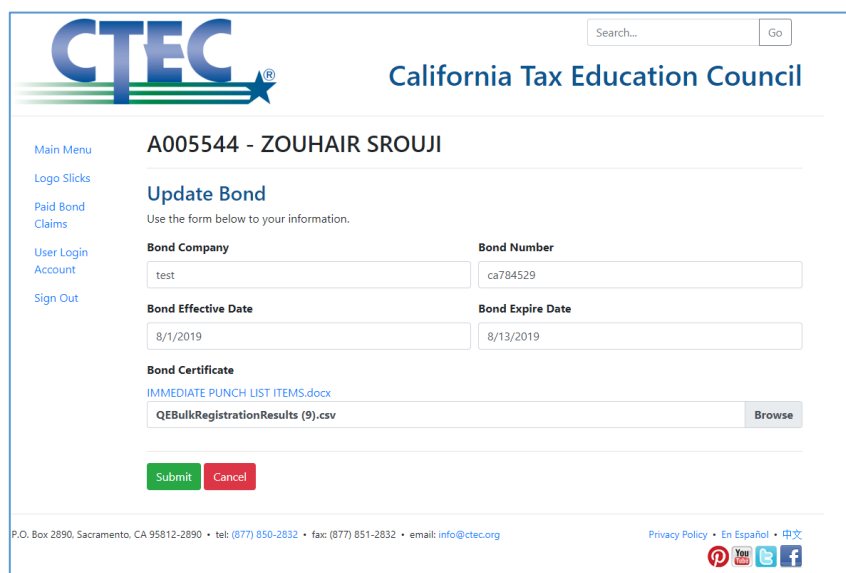*(From Preparer Account Main Menu page)*

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.
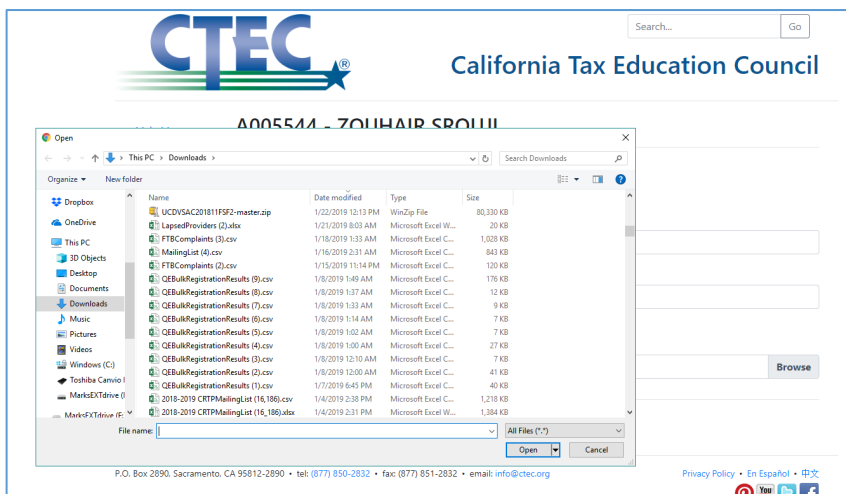
6

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.

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

27

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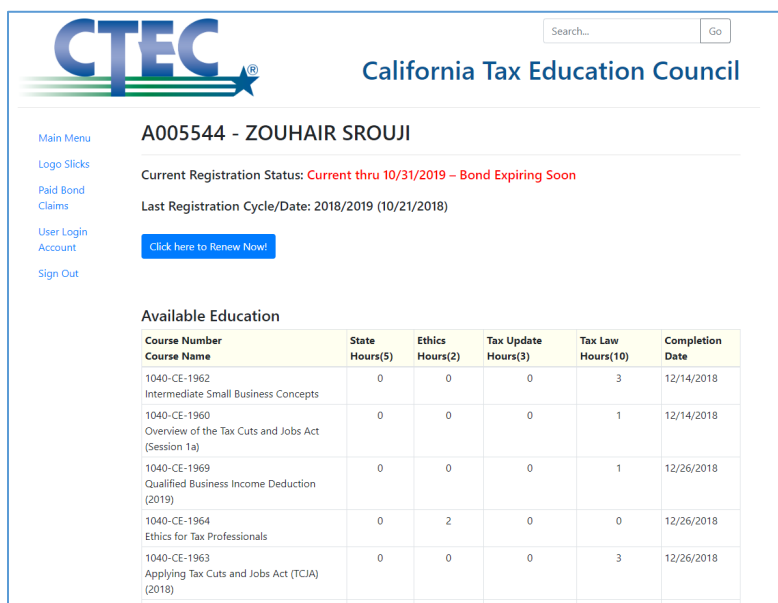
Update Bond Information and upload your scanned file
(From Registration Preparer Information page)

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).

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.

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.

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.*