

How To: Scan Documents District 9 & 10

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UNDER NO CIRCUMSTANCES should scanned documents, files, images be allowed to remain on the Google Drive of the Chromebook account from which the scanning is performed!

All scanned files should be moved to the **[Site Name] > [Scanned] > [Date] > [Taxpayer]** folder before scanning is started for another taxpayer and before the volunteer performing scanning ends their shift.

Step 1 – Create TSO Scans folder (*one time setup*) on the Chromebook

Initially, the scan files will be saved as PDF and in the **My Files > Downloads > TSO Scan** folder on the Chromebook. You will need to create the TSO Scan folder on the Chromebook:

1. Click on the **Files** icon on the shelf if it is pinned there. Otherwise, click on the **Launcher** at the far left of the shelf and click on the **Files** icon.
2. On the left, the **My files** folder will open
 - a. **Open** the Downloads folder
3. On the right, right-click on the opened **Download** folder
 - a. Select **New Folder**
 - b. Enter **TSO Scan** as the new folder name and press **Enter**
 - c. **Close** the Files screen

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Step 2 – Prepare taxpayer’s documents to be scanned

1. *Organizing the documents.*
 - a. For the ease of use by the Preparers and quality review, all taxpayer documents should be scanned in the same sequence. The suggested sequence is in Appendix A. Your site may use a different sequence.
 - b. Place the documents in the sequence you are to use.

2. *Making documents scan ready*
 - a. This means making the documents ready to go through the scanner.

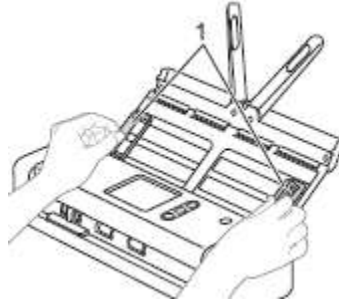
 - b. Prepping the documents requires:
 - i. **ALL** staples are removed
 - ii. **All** paper clips are removed
 - iii. **ALL** pages are unfolded
 - iv. **ALL** pages are oriented in the same direction (i.e. right side up, tops of documents in the same direction)
 - v. **Double-sided** documents are identified and flagged to ensure both sides are scanned in their proper sequence
 - vi. Documents that are **larger than “letter”** size are identified and flagged to ensure they are scanned separately
 - vii. **ALL** duplicates are removed from the set of documents to be scanned
 - viii. **ALL** items to be scanned are counted and during QR, that count is compared to the number of images in the completed scan file

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Step 3 – Prepare the scanner

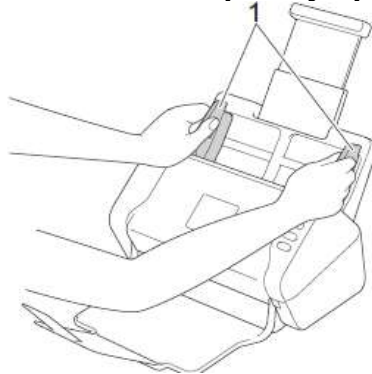
- Open the top cover
- Open the document feeder “wings”
- Adjust the document feeder “wings” for the **paper size** e.g. LTR (letter)
- Open the document feeder **supports**
 - **Model 1700** –top of black feeder; gently pull up the two supports to create a “V”

Model 1700 completely open



- **Model 2700** – top of black feeder; gently pull up the paper support
- Open the output tray – **Model 2700 only**
 - Gently lift the white panel toward you
 - Gently lift the small white panel toward you

Model 2700 completely opened



- Press the power button – wait for scanner to fully power on
- Verify the **blue WiFi light** (in upper right corner of the touch screen) **is on** – if it is not, STOP and resolve any issues so the scanner is using WiFi to connect to the network. Technical support may be needed.

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Open the scanning application

1. Click on the **iPrint&Scan icon** on the shelf to open the scanning app
 2. Click on the **SCAN** (circle) icon
 3. Verify the scanning settings are correct for the documents you are scanning:
 - a. **Document Size** – default is “**Letter**”.
 - i. If your document is not letter size, click on the Document Size band and chose the correct size
 - b. **Scan Type** – default is “**Color**”; **Do Not** change
 - c. **2-sided** – default is “**OFF**”;
 - i. **Model 1700** - if your document is 2 sided, click on the 2-sided band and select the correct orientation
 1. Flip on long edge = portrait-oriented document(s)
 2. Flip on short edge = landscape-oriented document(s)
 - ii. **Model 2700** – the model 2700 will scan both sides at the same time. **ALWAYS** select the correct 2-sided option.
 1. *Scanning 2-sided will result in some blank pages and the fine print on the back of some forms. However, 2-sided, when automatic, is more efficient.*
- 2. Tip: Flip on long edge is normal/most common**
- a. Flip on long edge = portrait-oriented document(s)
 - b. Flip on short edge = landscape-oriented document(s)

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Step 4 – Scan the documents

An effort should be made to keep all documents in a **single electronic file**. Keeping everything in a single file will make it much easier for the Preparer to enter data and the Reviewer to conduct the quality review.

1. Check that all the **previous taxpayer's** scanned files in the **My Files > Downloads > TSO Scan** folder of the Chromebook have been moved from the Chromebook to the **[Site Name] > [Scanned] > [Date]** folder.
2. Check that the scanner is set to save the file to the TSO Scan folder you created in **Step 1 #3** above.
3. The naming convention for scan files is:
 - a. Last Name-last 4 digits of taxpayer's SSN-a 2 digit sequence number
 - b. For example "Andersen-1234-01" for the first file; "Andersen-1234-02" for the second file.
4. **Model 1700** only - Verify the scanner document **feed mode** is correct for the documents you are scanning. On the scanner, there is a slide button to select the document feed mode. Only one mode can be used at a time.

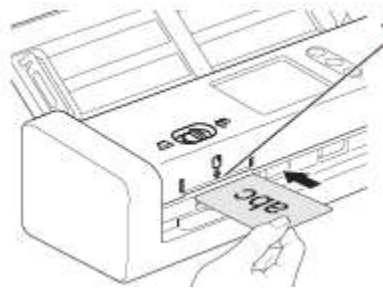
Feed selector on scanner



- a. **ADF** (Automatic Document Feeder) mode
 - i. Slide the Feed Selector to the left for the ADF mode
 - ii. **For 1-sided** scans, a **maximum of 20** documents should be loaded **face-down and head first**.
 - iii. When documents are correctly inserted, "**ADF Ready**" will be displayed at the top of the touch screen.
- b. **Card Slot** mode
 - i. Slide the Feed Selector to the right for the Card Slot mode
 - ii. For 1-sided scans, a single card is loaded **face-up**
 - iii. The document will be pulled a short ways into the scanner and "**Card Slot Ready**" will be displayed at the top of the touchscreen
 - iv. **DO NOT pull the card out** of the card slot. If you need to remove it e.g. it went in crooked, click on the "**X**" button on the scanner and it will be released.

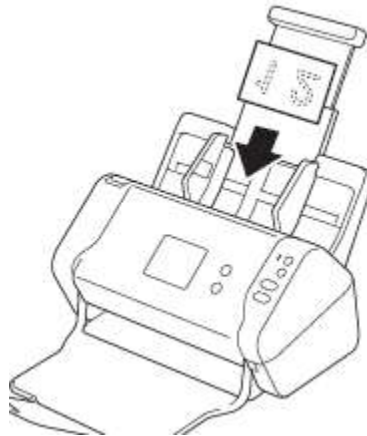
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Model 1700 – Card slot



5. **Model 2700** only – all documents, including cards, go through the ADF(Automatic document Feeder)
 - a. **ADF** – maximum of 50 documents should be load **face-down and head first**
 - b. **Card** – move the paper guides in to fit the size of the card; **load face-down and narrow edge first**

Loading cards in the Model 2700



6. With **document(s) loaded**, in iPrint&Scan app, click on the green **SCAN** bar.
 - a. The scanner will process each page and leave it on a stack in front of the scanner
 - b. **Model 1700 only** - If you are doing 2-sided scanning, turn the stack over and load it back into the feed tray. Follow the iPrint&Scan app prompts
 - c. If you wish to scan more pages, load the pages and click **SCAN**, otherwise, click **DONE**
 - d. The **Scanned Image page** will open showing you the results of the scan.

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Step 5 – Quality Review and editing the scanned images

It is important to quality review the scan images **BEFORE** the taxpayer leaves with their documents. The visual inspection of the scanned images must be conducted by the volunteer who performed the scanning.

Each of the taxpayer's documents **MUST** be visually compared to their corresponding scanned image. The purpose of this comparison is to insure (a) that all documents have been scanned and (b) that all images are fully legible.

The document-to-image comparison should be performed while viewing the images at 100% magnification on the Chromebook screen. Any documents missed in the initial scanning step or any original images deemed illegible, must be re-scanned and saved to the TSO Scans folder using the naming convention in **Step 4 # 3**.

- 1) **Editing an image. MUST be done BEFORE saving** the image file!
 - a) **Rotating images. MUST** be done because the preparer may not be able to later.
- 2) From the Scanned Image page, **select the image** you want to edit and click on the **pencil icon** in the upper right.
 - a) You have two options:
 - i) **Straighten** – allows you to rotate the image and straighten crooked images
 - (1) Click on the straighten icon near the bottom left.
 - (2) Slide the blue dot to the left or right to straighten an image.
 - (3) You can also rotate the entire image so it is oriented correctly
 - (a) Click on the rotate icon at the far bottom left
 - (i) Each click on the rotate icon will rotate the image to the right 90 degrees.
 - (4) Click on **Done** to exit Straighten function
 - ii) **Crop** – allows you to crop/cut out extraneous white space
 - (1) Click on the crop icon near the bottom right.
 - (2) Click and drag 1 of the corners to crop the image
 - (3) Click on **Done** to exit Crop function
- 3) In **single image view**,
 - a) to view the **next/previous image**, click the screen on the right/ left of the image and drag right/left
 - b) To **view a larger view**, click on the image. Click on the image to return to regular single image view
- 4) In **table view**, to view **more images**, click on the screen and drag up/down

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Step 6 – Save the scanned image file

1. Save the scan on to the Chromebook:
 - a. **DO NOT click the green SAVE bar!**
 - b. Click on the **3 connected dot** (Share) icon in lower right, just above the green SAVE bar



- c. The “Share Type” dialog box will open, select **Share as PDF**
- d. The “Share as PDF Via” dialog box will open, select **Save to Files**
- e. Select the **TSO Scan** folder in your **My Files > Downloads** folder and **rename** the PDF document in the “PDF” field at the bottom of the screen.
 - i. Lastname-last 4 digits of SSN-xx ;where “xx” starts with 01 and increments by 1 e.g. Andersen-1234-01
 - ii. Click on **SAVE**

TIPS before saving:

- 1) When renaming the file, you don't need to include “.PDF”.
- 2) use the Grid/List view icon in upper right to view existing files
- 3) use the More Options icon in the upper right to create a new folder

2. Click on the **small white back arrow** in the upper left to return to the initial scan screen.
3. On the Chromebook, click on the Files icon and navigate to the **My Files > Downloads > TSO Scan folder** to see and open the scan file you just made.

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Step 7 – Move the scanned file(s)

Once all the documents have been scanned AND are legible images in a file, the taxpayer's scanned file(s) must be "moved" from the Chromebook to **[Site Name] > [Scanned] > [Date] > [Taxpayer]** folder a location accessible by the Site VRC so the return can be assigned to a Preparer.

1. From the **My Files > Downloads > TSO Scan** folder, **Select ALL** the taxpayer's scan files
2. **Copy** the selected taxpayer's scan files
3. Navigate to the taxpayer's folder in the **[Site Name] > [Scanned] > [Date] > [Taxpayer]** folder
 - a. **Paste** the files in the taxpayer's folder.
4. **Verify** all the taxpayer's scan files have been pasted into the taxpayer's folder
5. **NOTE – once the volunteer is comfortable** with "moving" scanned files, the **Cut & Paste** method can be used.
6. **Delete** the taxpayer's scan files on the Chromebook in **My Files > Downloads > TSO Scan** folder on the Chromebook **BEFORE** starting to scan the next taxpayer's AND at the end of the volunteer's shift

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Miscellaneous iPrint&Scan app Functions

- On the scanned Image page, there are a few functions that may be performed prior to saving the scan file.
 - Clicking on the three horizontal bar icon located to the right of the pencil (Edit) icon at the top right hand corner gives you the option of viewing individual pages or thumbnails of all scanned pages
 - When viewing individual pages, you get to the next or previous page by dragging from the right edge of the image screen to the left edge or vice versa
 - Clicking the pencil icon enables a couple of simple editing functions: straighten and crop
 - Advancing from page to page is done by dragging as previously described
 - When you are finished editing, click the DONE box in the upper right hand corner to save your changes
- On the Home page, clicking the **Machine Settings** icon brings up an information page for the scanner.
 - Important - **Do not make any changes**

Troubleshooting

Model 1700 (only)

- Make sure that the Feed Selector is in the proper position for the document(s) you want to scan
- Make sure that documents are loaded into only one of the two feeders at a time
- If you mistakenly insert a document into the card slot that you do not want to scan, press the “X” (Stop) button on top of the scanner and the document will be ejected. **DO NOT try to pull it out.**

Models 1700 & 2700

- If you cannot scan or the iPrint&Scan app is unresponsive, the most likely reason is that the Chromebook and the scanner are no longer communicating
 - Verify the scanner’s power is ON
 - Verify the scanner’s Wi-Fi is connected (the scanner’s Wireless Status light is blue in upper right of touch screen)
 - Verify the Chromebook is connected to the same SSID/Network as the scanner e.g. “**TA [SSID]**” SSID = site id.
- If all else fails, reboot the router, scanner and Chromebook

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Appendix A

Scanning Sequence for Virtual Site Intake Process

IMPORTANT – write the taxpayer’s last name and last 4 digits of their SSN at the top of every worksheet used.

	Document or Form	Description
1	Form 14446 with taxpayer(s) signature(s)	Virtual VITA/TCE Taxpayer Consent form
2	Taxpayer and spouse Social Security cards or ITIN letter	
3	Photo ID for taxpayer and spouse	
4	Dependent(s) Social Security card(s) or ITIN letter(s)	
5	Prior year tax return – applicable pages	
6	Intake Booklet pages 1 and 2	
7	Intake/Interview worksheet	Intake /Interview worksheet
8	Scratch Pad/notes	Scratch Pad or handwritten notes
9	IRS Notice CP01A	IRS Identity Theft PIN letter
10	W-2s	Wages form
11	1099-G	State/Local refund form
12	1099-INT, 1099-DIV, 1099-OID	Interest, dividend and OID forms
13	1099-Rs	retirement and pension income
14	COVID Retirement Distribution worksheet	
15	RRB-1099-R	rail road pensions
16	SSA-1099-R	Social Security benefits
17	1099-G	Unemployment benefits
18	1099-MISC	Miscellaneous income
19	1099-NEC	Non-employee compensation
20	Self-employed worksheet	Self-employment
21	Self-employed COVID worksheet	
22	1099-K-1	
23	1099-B (capital gains)	Brokerage statement
24	W-2G, 1099-C, jury duty etc.	Other income, gambling winnings
25	Educator expenses, HSA forms, alimony paid, IRA deduction, student loan interest	
26	Itemized Deduction worksheet	
27	Medical Expenses worksheet	
28	1098	Mortgage statement
29	Info for Child Care Credit;	Provider statement; name, address, EIN and amount paid for each child
30	Education Credits Worksheet	

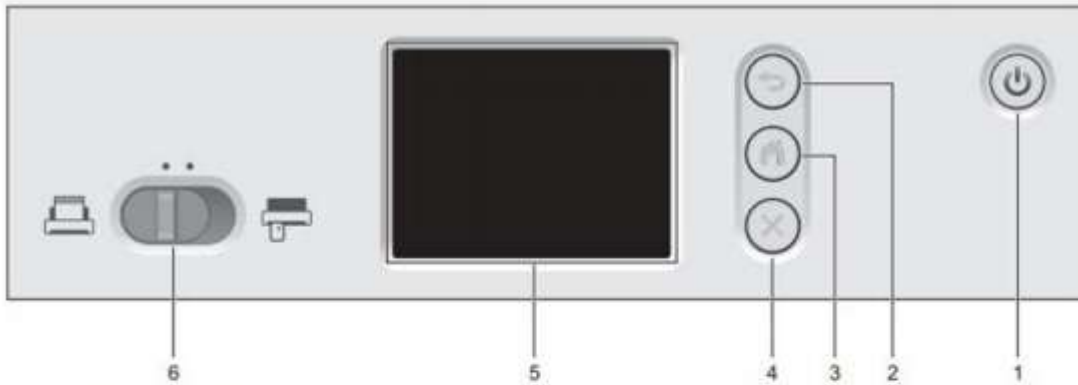
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	Document or Form	Description
31	Student account statement	
32	1098-T	Tuition Statement
33	Estimated Tax Payments PAID worksheet	Paid for TY 2020
34	1095-A	Health Insurance Statement
35	Intake Booklet pages 6-8	Consent forms
36	Intake Booklet pages 3-4	Custom questions/demographic info
37	Direct deposit information	Taxpayer's check
38	Other documents or information relevant to preparation of the return	

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Appendix B

Model 1700 scanner controls & touch screen



- 1. (Power On/Off) (with LED)**
Press (Power On/Off) to turn on the machine.
Press and hold (Power On/Off) to turn off the machine. The touchscreen displays [Shutting Down] and stays on for a few seconds before turning off.
- 2. (Back)**
Press to go back to the previous screen or menu.
- 3. (Home Button)**
Press to return to the Home Screen and Ready Mode.
- 4. (Stop)**
Press to stop or cancel your current action and return to Ready Mode.
- 5. Touchscreen LCD**
Access the menus and options by pressing the touchscreen.
- 6. Feed Selector (ADF Mode) (Plastic Card Mode)**
Slide to select the scanner feed mode.

Model 2700 scanner controls & touch screen

The model 2700 controls and touch screen are same as the model 1700 but may be in a different place.