How To Scan and email your tax documents on your mobile device

How to download the free Genius scan app, scan your documents, and upload them

Step1: On your phone, navigate to the app store. (The demonstration will be using an iPhone however the same steps will apply if you are using an android.)
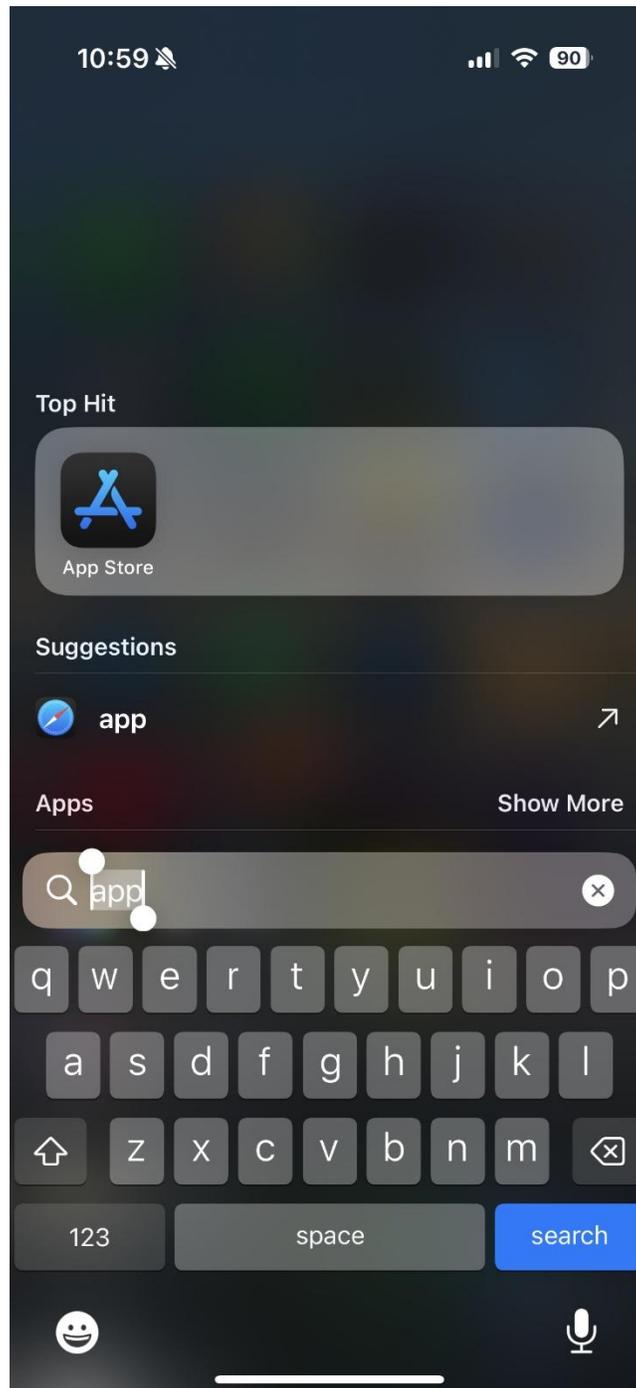
Step 2: Click search in the bottom right corner, then type "genius scan" into the search bar at the top and select the app as seen below.
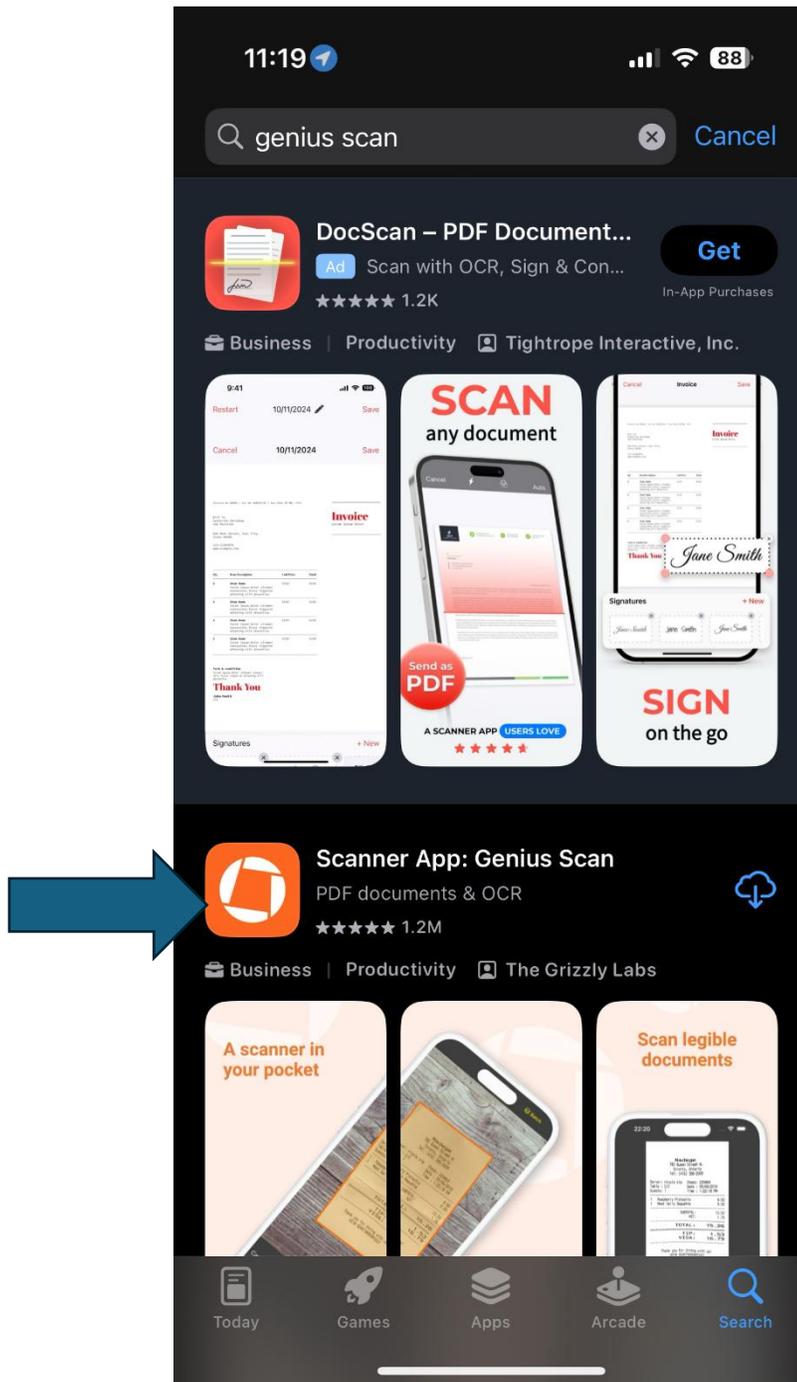
Step 3: Download the app by clicking here. If the app has not been previously downloaded there will be a button here that says "Get". Download the app then click "open".
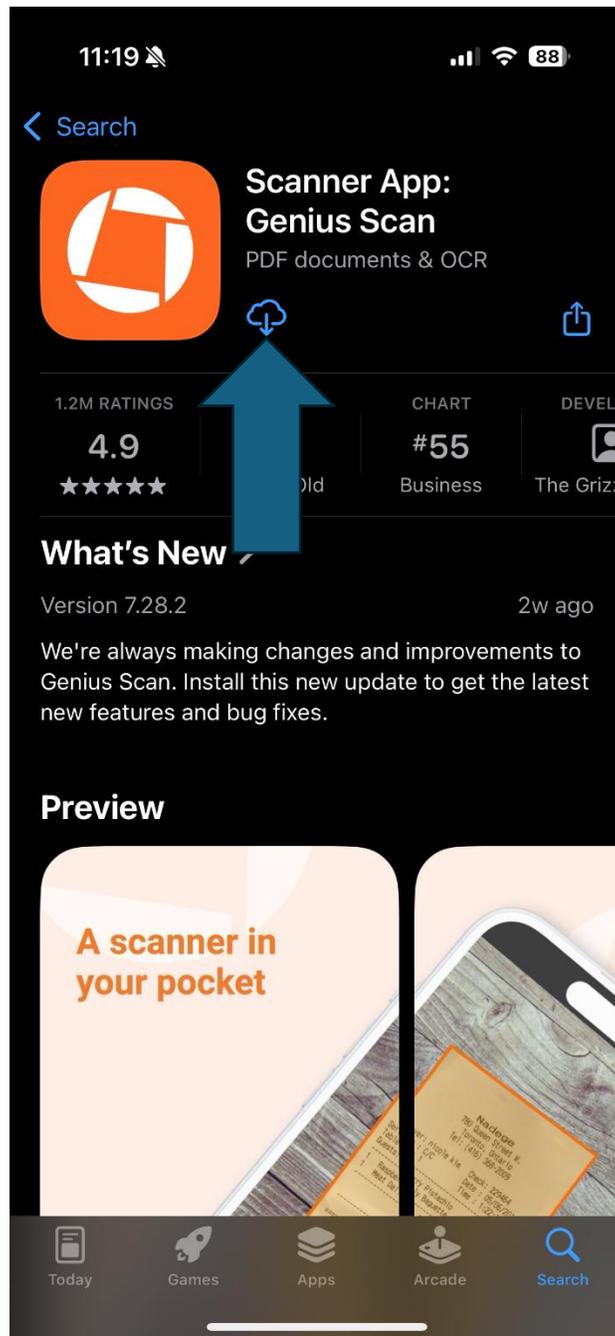
Step 4: After opening the app, you will be brought to the screen seen below. Once you have your documents ready to scan press the "+" symbol in the bottom left corner. Then click Allow to allow the app to access your camera.
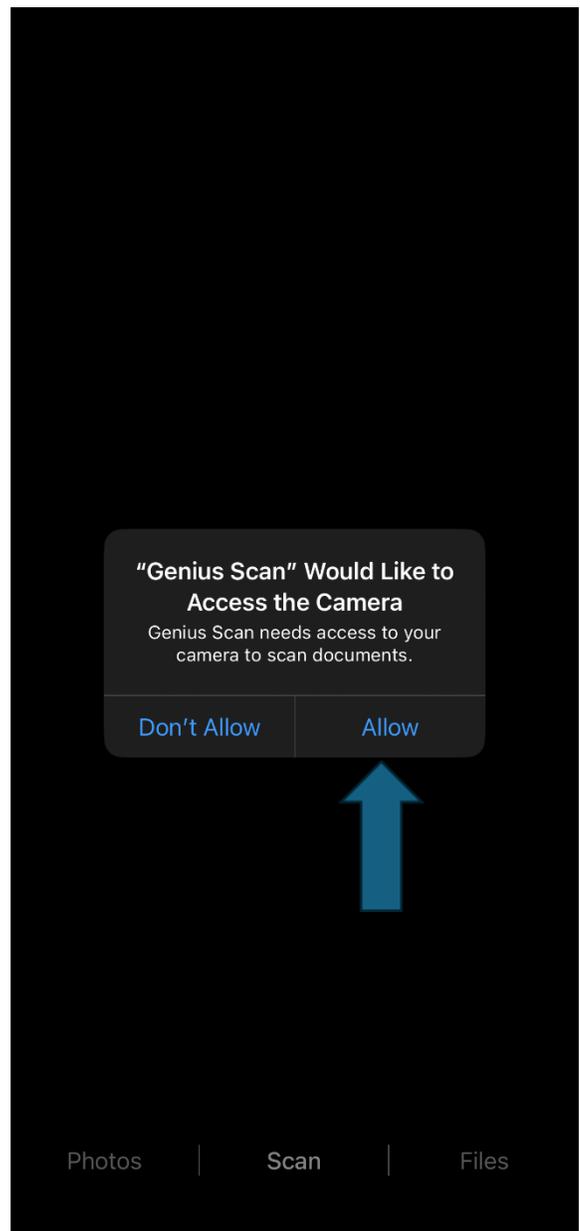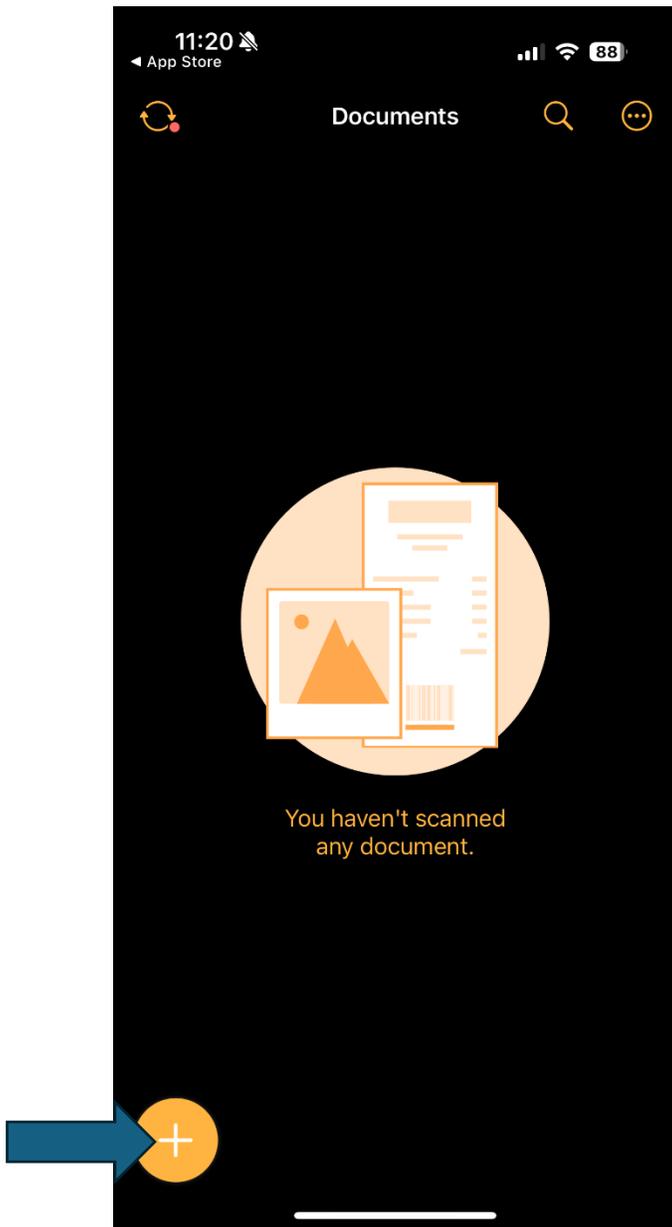
Step 5: Hover your phone over the documents you are scanning ensuring that all four corners of the paper are visible. This works best on a contrasting surface. If scanning multiple pages, ensure the screen says "Batch" in the top right as seen below
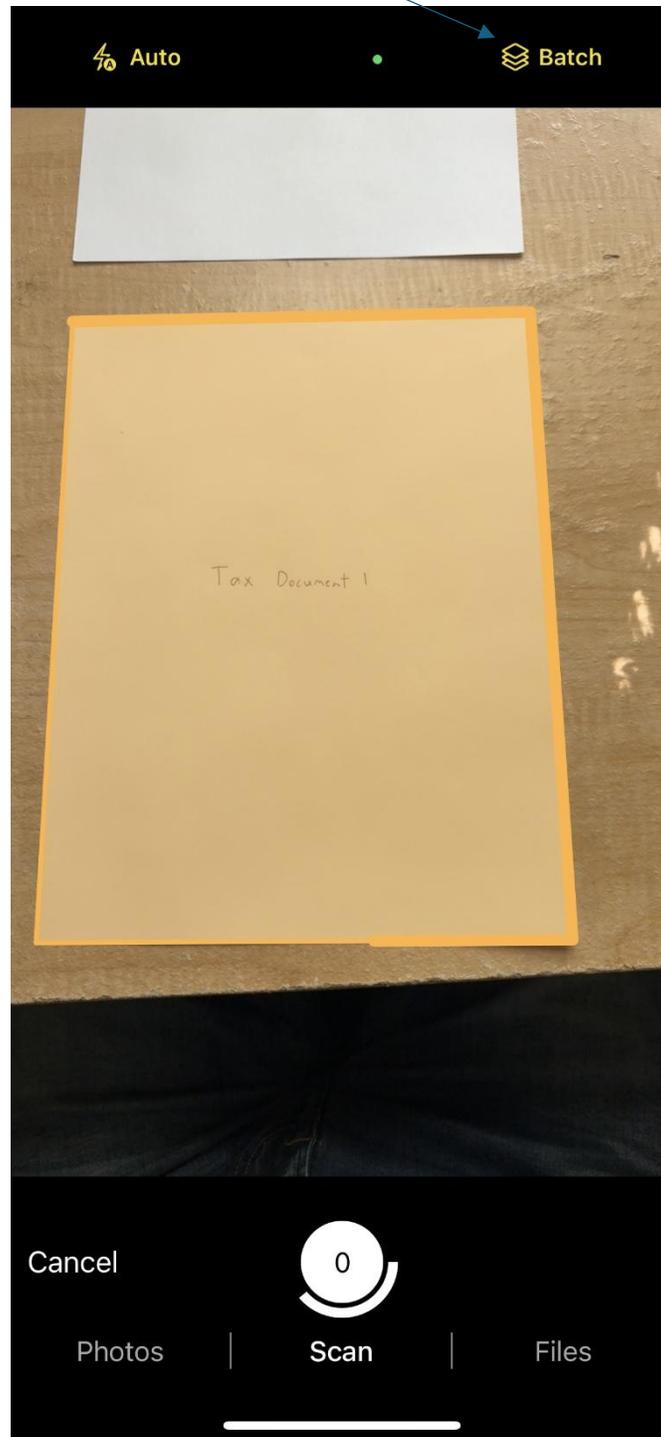
The page you are scanning will highlight orange as seen above and it will automatically scan.

Step 6: After scanning the first page, quickly pan to the next or flip the document to scan the next. After all pages have been scanned tap the button labeled "done" in the bottom right.
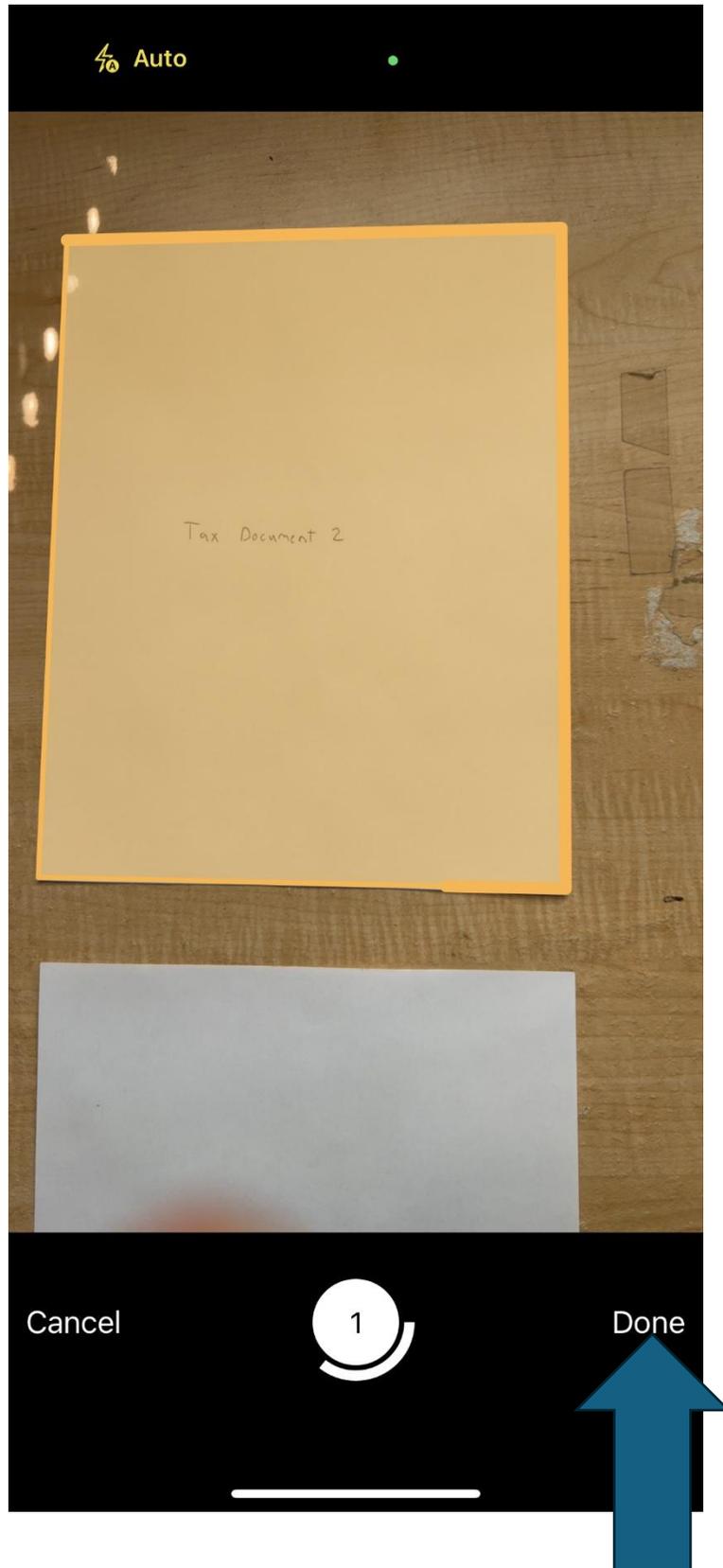
Step 7: Next you will be brought to this screen where you can swipe through the pages to make sure all were scanned clearly and correctly. Rename your file appropriately by tapping on the pencil icon at the top as seen below.
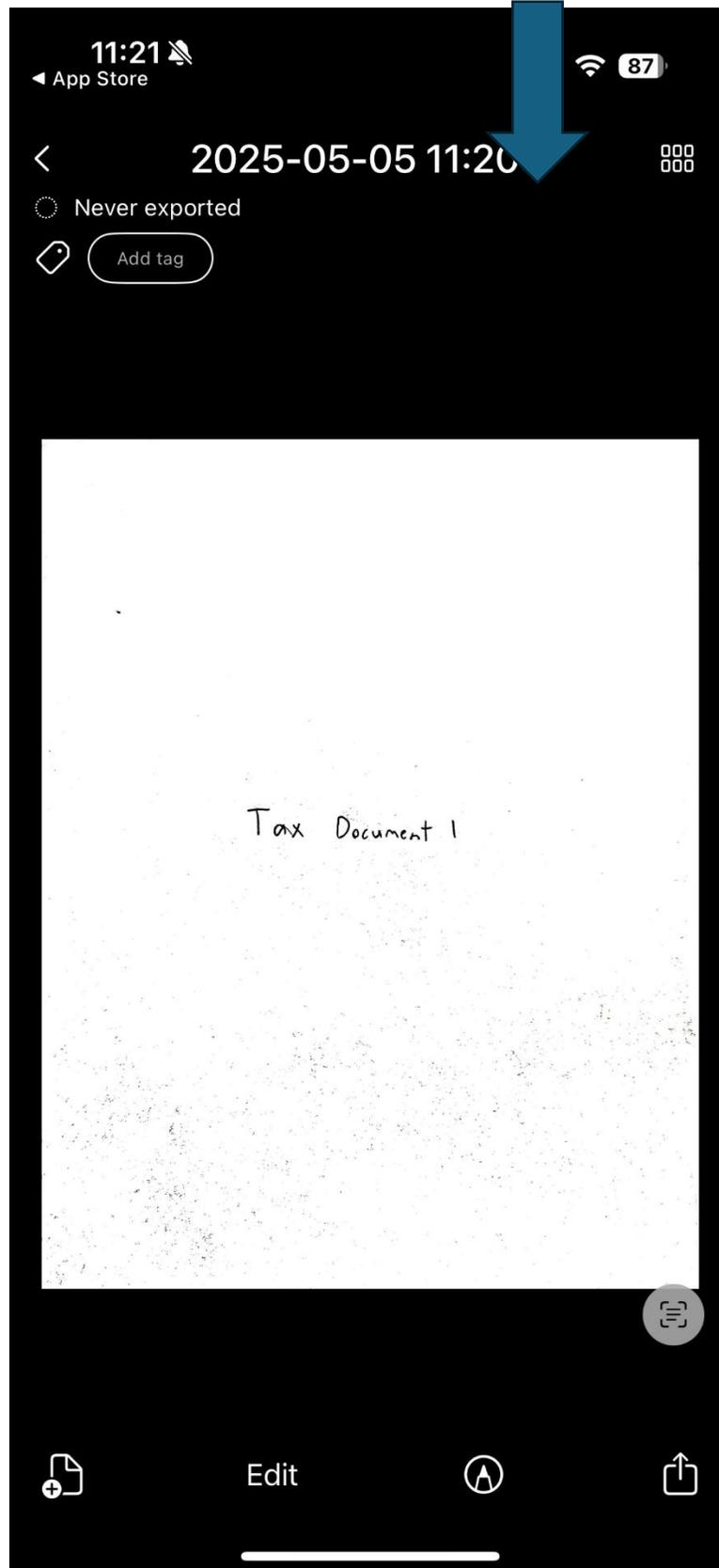
Step 8: Type the file name for your documents in the provided box then hit save.
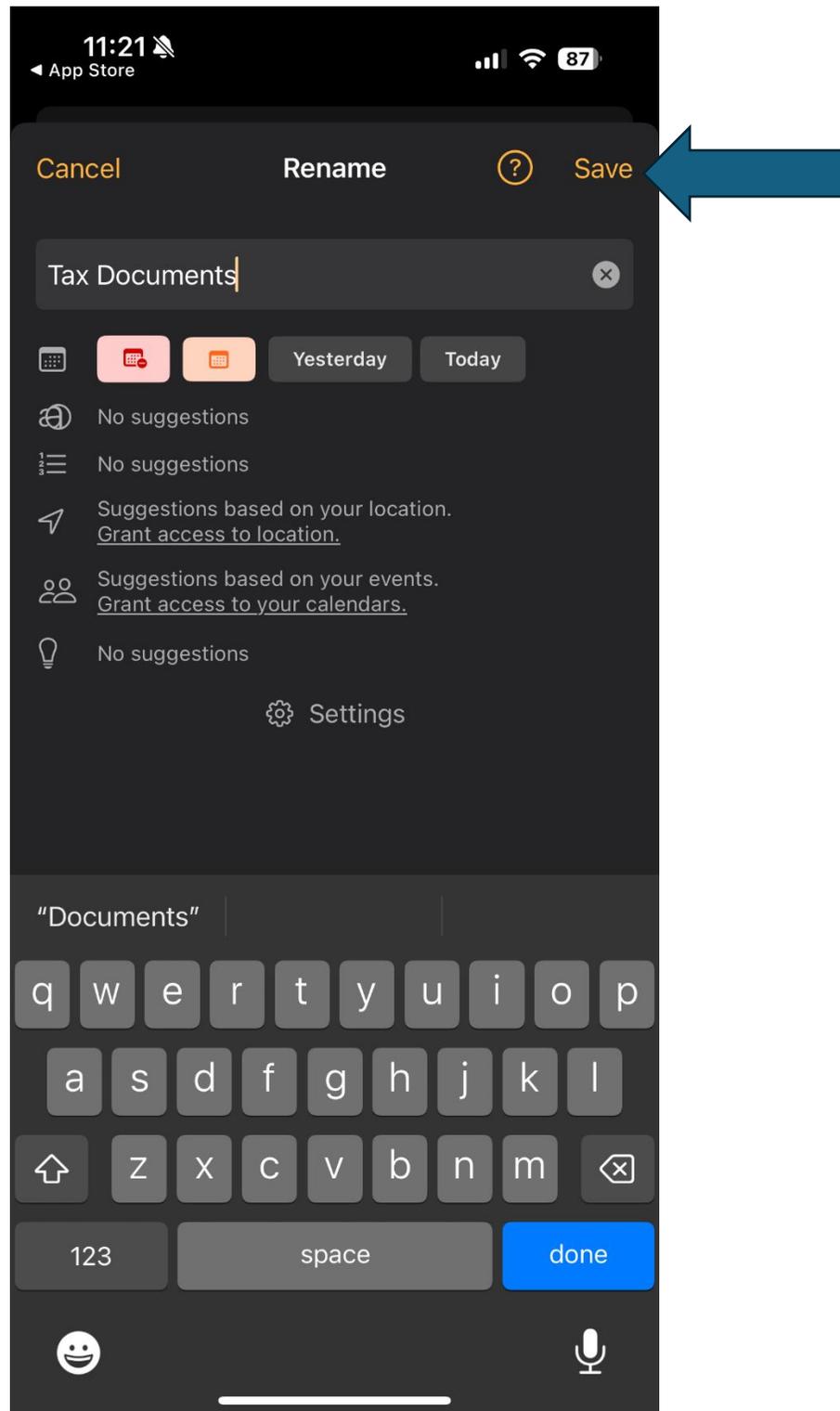
Step 9: To share this document, click the "share" button in the bottom right.
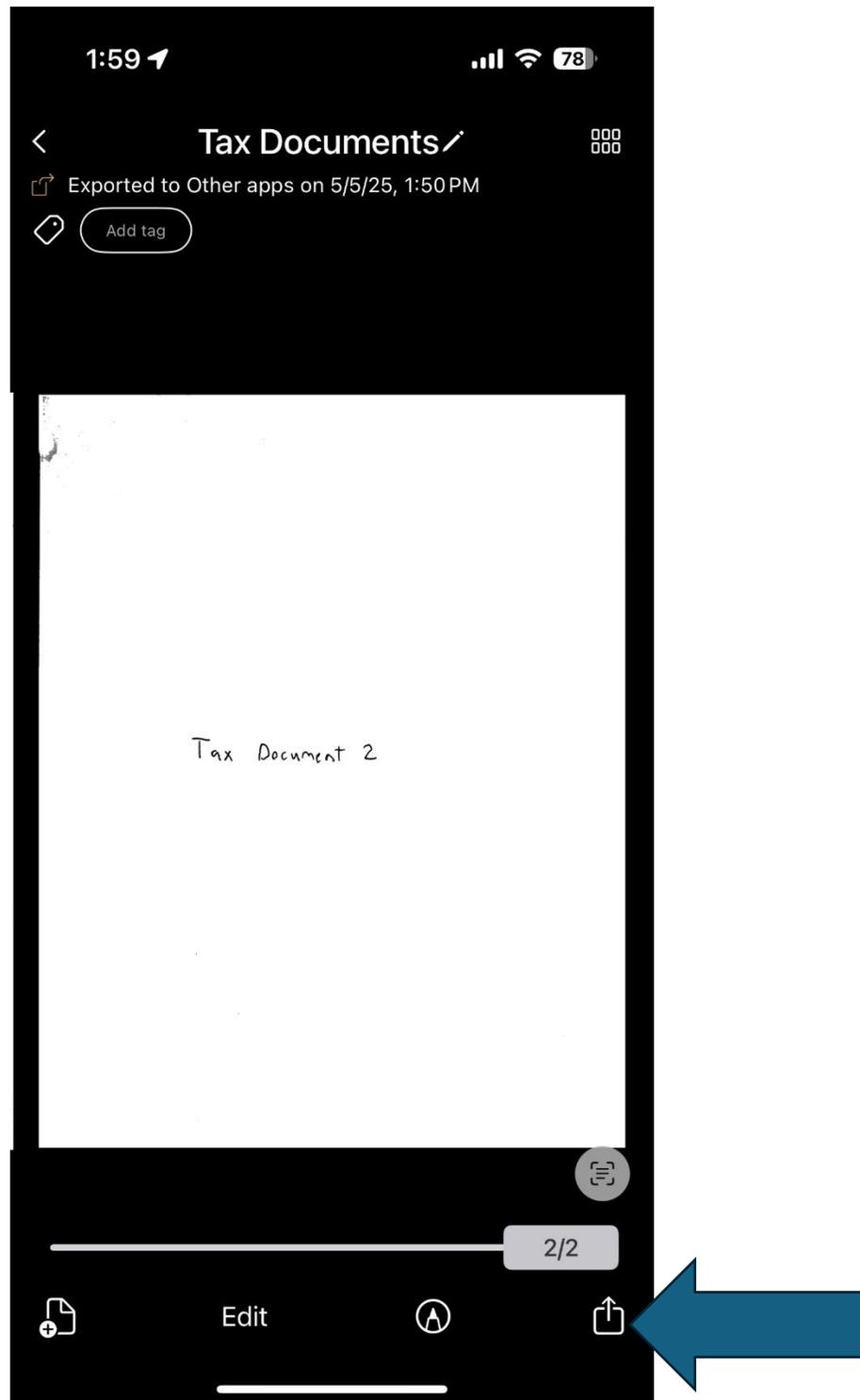
Step 10: If you are logged in and use the native apple "Mail" app select the "Email" option below. If you use another email app such as Gmail, Outlook, etc.... select the option labeled "other apps".
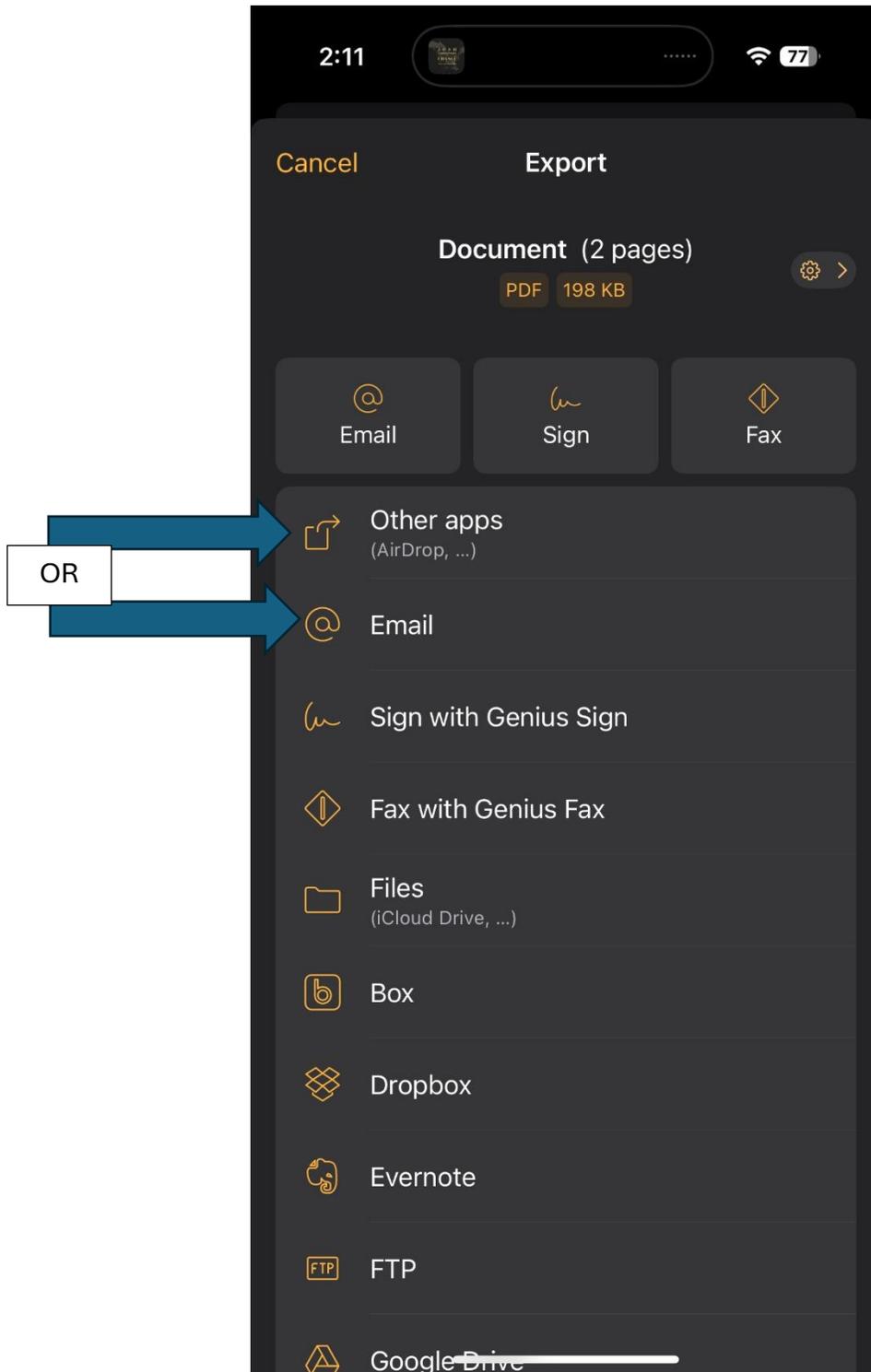
- To upload this document to your portal the best option is to email the file to yourself, download it onto your computer and follow the other Instructional PDFs on the website to upload them.

- **If sending signed electronic filing authorization forms email to FORMS@JAJOHNSON.COM**

- If you wish to email the file to us Type "CPA@JAJOHNSON.COM" Into the box as seen below. Then click the send button in the top right corner.
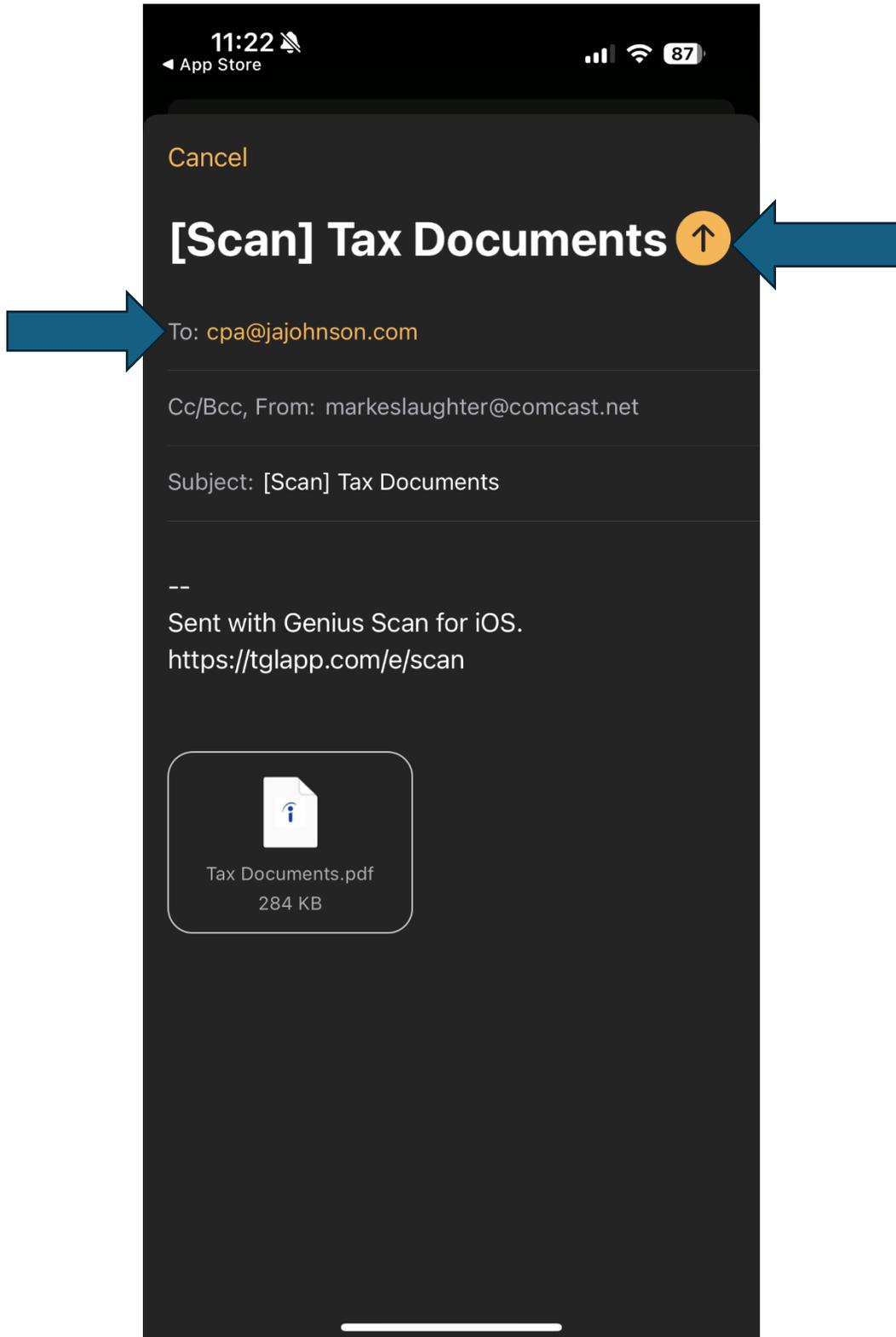
- To use another email app such as Gmail, Outlook, etc.... after selecting the option labeled "other apps" You should see a screen like the one below.
- Scroll through the list of apps until you see your corresponding email application.
- If you do not see your application scroll all the way to the end to an icon labeled "more" Click on the three dots, then you should see all available apps on your device.
- Select your app and complete the email as needed.