

CALS Business Services

Creating a PDF from a Phone

When submitting information for a payment request that includes confidential information, such as a W9, email an encrypted PDF to calsfs@cals.wisc.edu

To scan a W9 and create a PDF, you can do so using an Android or iPhone.

How to scan and sign documents on your iPhone, iPad, or iPod touch

You can use the Notes app to scan documents and add signatures on your iPhone, iPad, or iPod touch.



Scan a document

1. Open Notes and select a note or create a new one.
2. Tap the Camera button , then tap Scan Documents .
3. Place your document in view of the camera.
4. If your device is in Auto mode, your document will automatically scan. If you need to manually capture a scan, tap the Shutter button or one of the Volume buttons. Then drag the corners to adjust the scan to fit the page, then tap Keep Scan.
5. Tap Save or add additional scans to the document.



Sign a document

1. Open Notes, then tap the document in the note.
2. Tap the Share button , then tap Markup .
3. Tap the Add button , then tap Signature  and add a saved signature or create a new signature. Then you can adjust the size of the signature box and place it wherever you want on the document.
4. Tap Done.

To manually sign your document, follow steps 1-2, then select a tool to use and sign the document with your finger or an Apple Pencil with a compatible iPad.

How to scan documents on your Android

Scan documents with Google Drive

Scan documents like receipts, letters, and billing statements to save them as searchable PDFs on your Google Drive.

Scan a document

1. Open the Google Drive app .
2. In the bottom right, tap Add .
3. Tap Scan .
4. Take a photo of the document you'd like to scan.
 - Adjust scan area: Tap Crop .
 - Take photo again: Tap Re-scan current page .
 - Scan another page: Tap Add .
5. To save the finished document, tap Done .