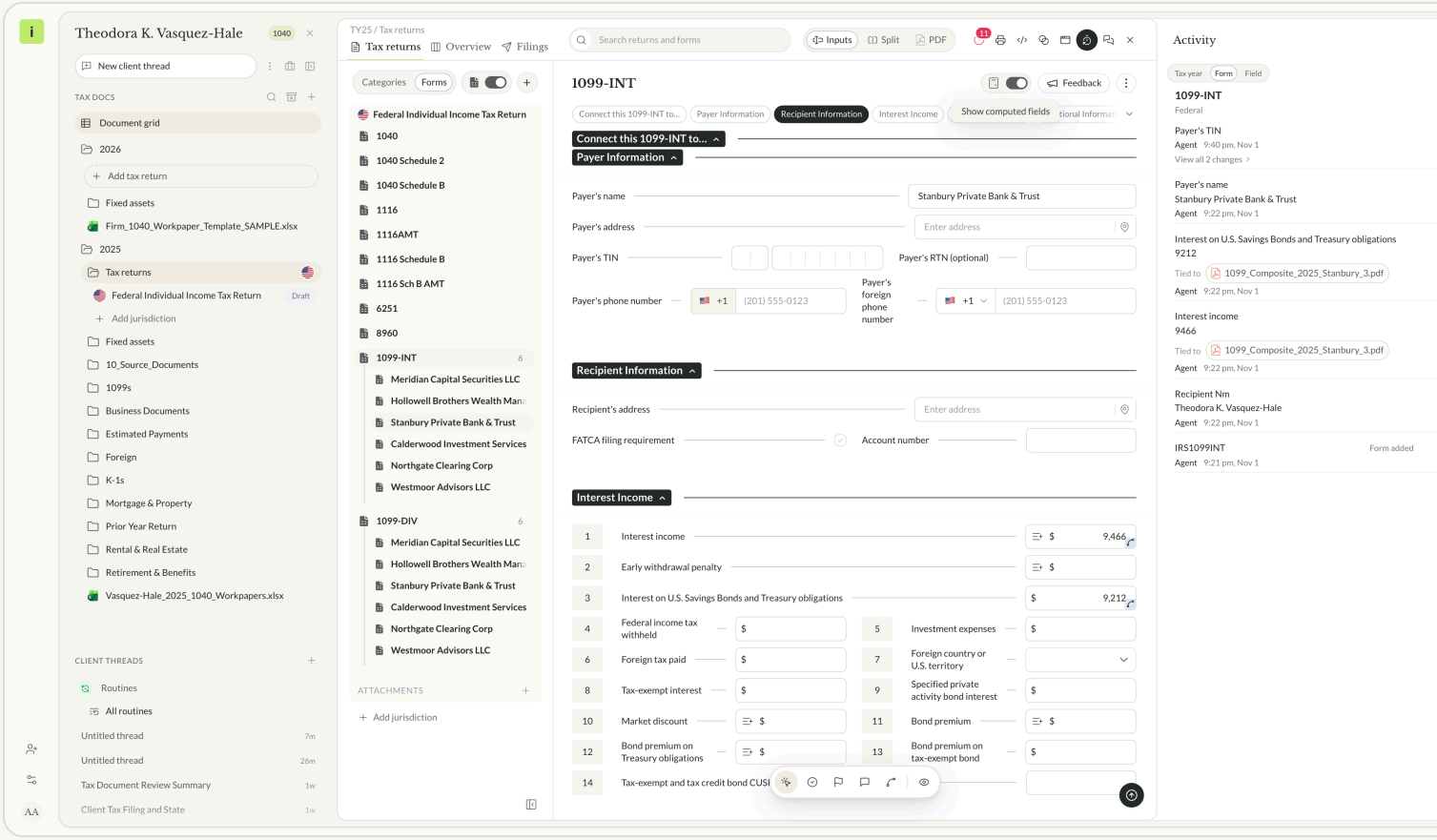
instead

WHITE PAPER

Who changed this number?
Activity in Instead

November 2026

instead.com



CONTENTS

01	Summary	3
02	The question every reviewer asks	4
03	Where to find Activity	5
04	Who made each change	6
05	The source document behind a field	7
06	Trust the number or change it	8
07	A return, a form or one field	9
08	Ways to use Activity by practice area	10
09	What Activity does not do	11
10	Start your trial	12

INTRODUCTION

How Activity in Instead shows who made each change and the source document behind a field.

This paper shows how Activity in Instead works. Where to open it, who each change shows, how a tied field opens its source document, and how reviewers can use it. It is written for firm owners, tax partners and the reviewers who sign off on the work.

01

Summary

Who changed this number? Reviewers ask it on every return. Activity in Instead answers it inside the return.

Each change shows who made it. A change made by a person shows their name. A change made by the agent shows Agent. When a field is tied to a source document, Activity shows the file, and you can open it beside the return.

The agent prepares the return. Its work is yours to review. Activity helps you see which numbers to check and where a tied number came from. Then you trust the number, or change it, and your name shows.

02

The question every reviewer asks

A return passes through many hands. The agent fills forms from client documents. A preparer adjusts a line. A reviewer checks the totals. When a number looks off, the reviewer needs two facts. Who changed it, and what document it came from.

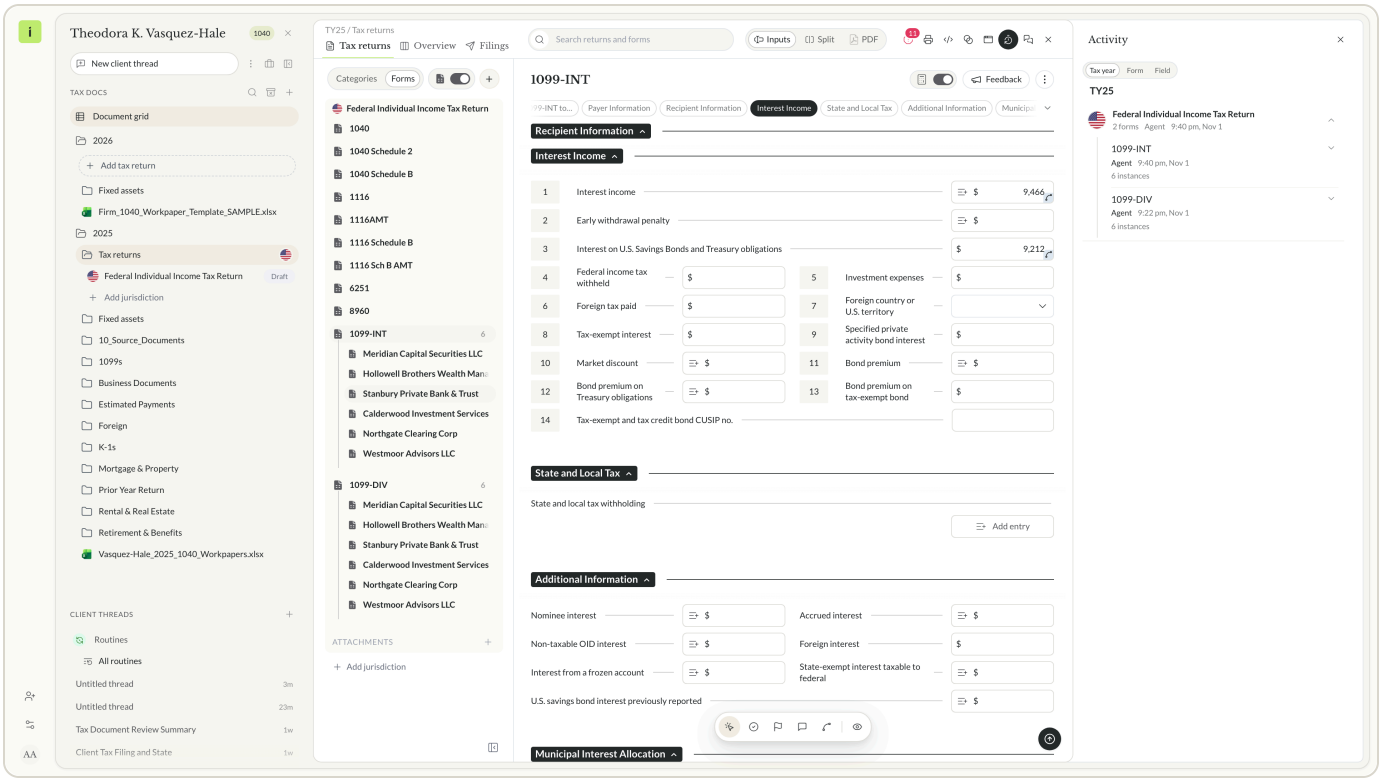
Without them, the reviewer asks around or starts over from the documents. Activity puts both facts next to the field.

03

Where to find Activity

Open a client's return on the Tax returns tab. Click Activity in the return header. The Activity panel opens beside the return.

Figure 1 The return with the Activity panel open.



04

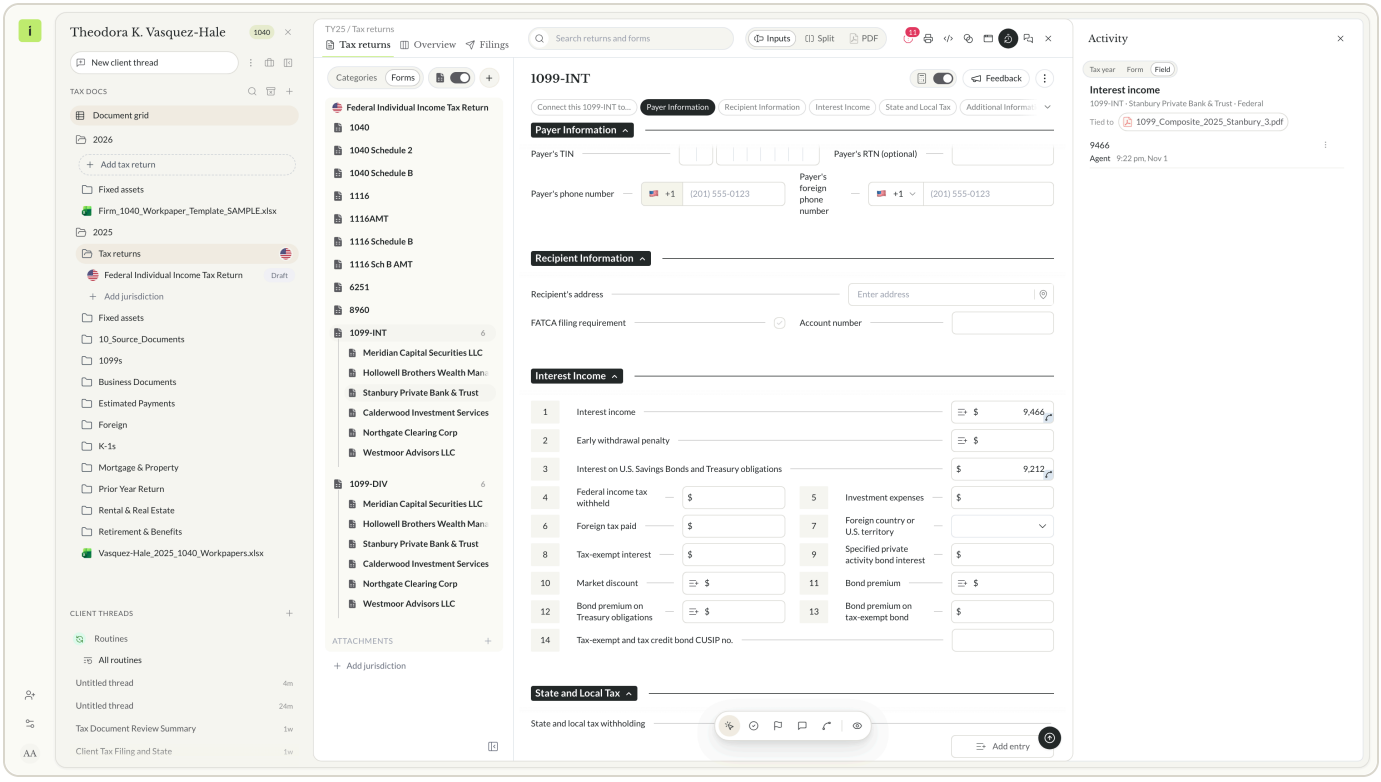
Who made each change

An entry shows who made the change and when.

A person.
A change made by someone on your team shows their name. Your own changes show your name.

The agent.
A change made by the agent shows Agent. This keeps the agent's work visible as work for you to review.

Figure 2 The Field tab with an entry by Agent.



05

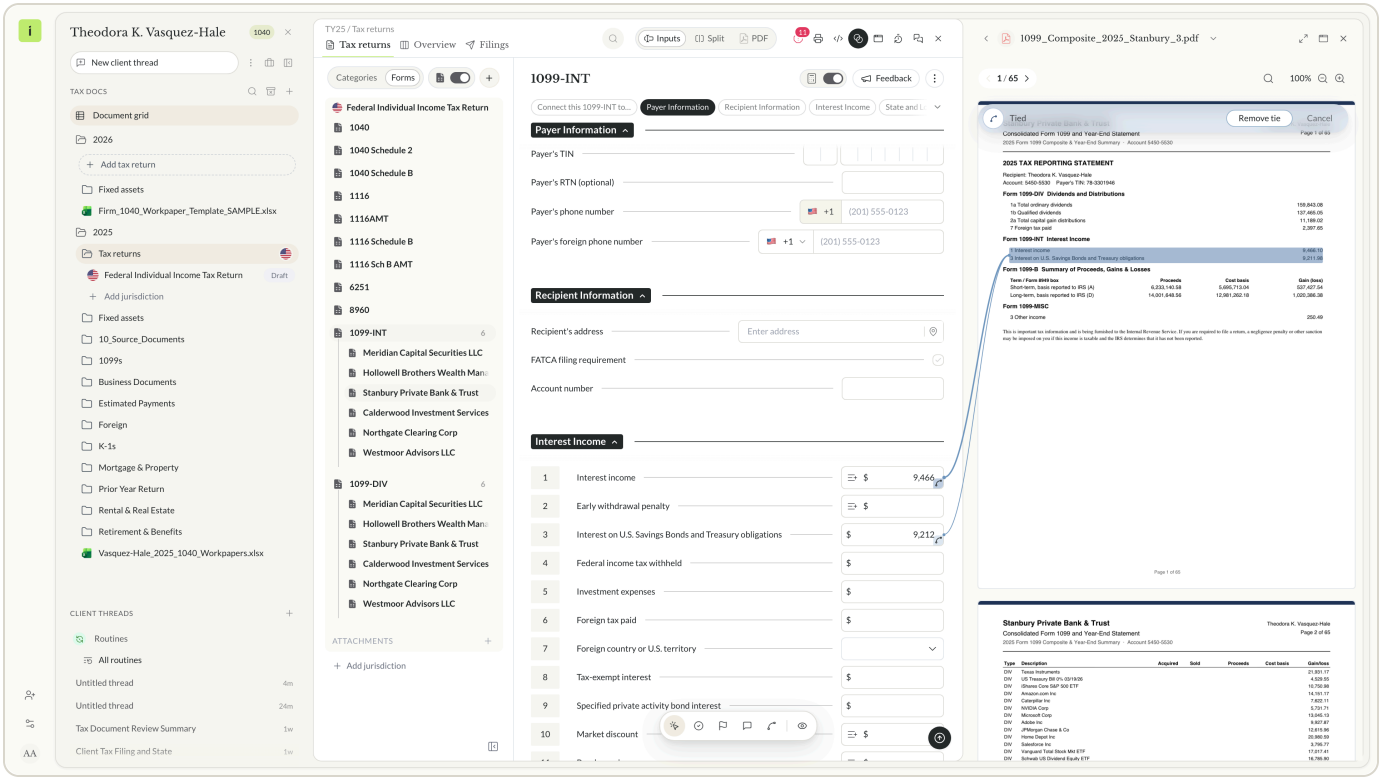
The source document behind a field

When a field is tied to a source document, Activity shows Tied to and the file name under the field, with the file's icon.

Click the file and the document opens beside the return. You can compare the number on the form with the document it came from, such as a W-2, a 1099 or a K-1.

Not every field has a tie. When a field has none, Activity still shows who made each change.

Figure 3 A tied field and its source document open beside the return.



06

Trust the number or change it

If the number matches the document, you can rely on it. If it does not, change it in the form.

Your change shows your name in Activity. Anyone who opens the field later sees that you made it.

07

A return, a form or one field

Activity has three tabs.

Tax year.
The returns for the year, grouped by return, with the forms that changed and the latest person or Agent.

Form.
One form, field by field, with the latest person or Agent.

Field.
One field, newest change first. Click a field on the Form tab to open it here.

08

Ways to use Activity by practice area

These are ideas you can build into your own review. They use only what Activity shows.

1040 returns.
Open the wages field, check that it is tied to the W-2 and open the file.

1065 and 1120-S K-1s.
When a K-1 line looks off, see whether the agent or a preparer entered it and open the K-1 it is tied to.

1120 and 1041 returns.
Start a review on the Tax year tab to see which forms changed and who made the latest change.

State returns.
Open the state return's forms and check who made each change before you sign off.

Handing off a return.
A reviewer can open a field and see who made the last change without asking the preparer.

09

What Activity does not do

Activity does not decide whether a number is right. You do.

Activity does not sign off on a return. The agent’s work stays yours to review.

A source document shows only when the field is tied to one.

instead

Activity in Instead

Activity is part of Instead. See who made each change and open the documents behind tied fields.

Start your trial

Start your trial at instead.com