instead

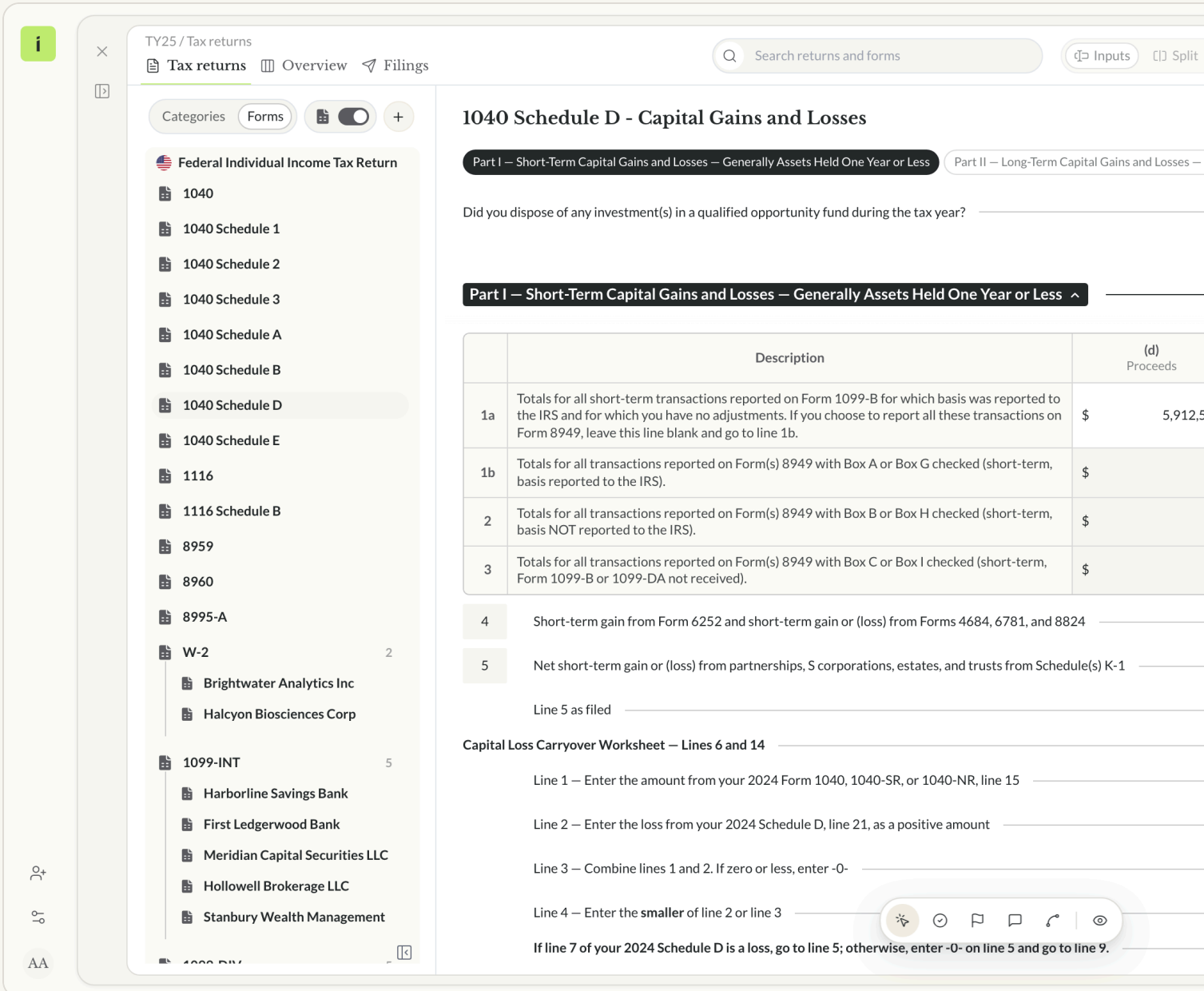
WHITE PAPER

Review on two screens

Inputs, return, sources and workpaper, each in its place

November 2026

instead.com



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INTRODUCTION

Inputs on one screen. The return or its sources on the other.

This paper shows how Review in a separate window works in Instead. It covers the four views of a review, how the return PDF and the Related panel open in their own windows, and a two-screen setup you can use on your next return. It is written for reviewers, preparers and the partners who sign off on the work.

01

Summary

Review in a separate window is now available in Instead.

Reviewing a return means reading two things at once. The inputs and the PDF they produce. The return and the W-2 behind it.

Instead now lets you open two of those views in their own browser windows, and put them on your second screen.

The return PDF	Click the window icon in the return toolbar. The PDF opens in its own window. Open a form in the inputs, and the PDF jumps to it. Switch to the state return, and the PDF window follows.
The Related panel	Click the window icon in the Related panel. Click a trace on the return, and the source document opens at that box on your other screen.
The main window	The inputs and the workpaper stay here, on screen 1.

There is nothing to set up. It is on for every firm.

02

Why review needs two views

Every check compares two things.

A reviewer checks each input against the form it produces. Each number on the return gets checked against the document it came from. Each workpaper line gets checked against its source.

So review is two views at every step. When both views share one screen, each gets half the room. Or you switch back and forth, and find your place again each time.

If you work with a second monitor, Instead can now use it. The view you check against goes on the second screen. The view you work in stays on the first.

The view you work in on one screen. The view you check against on the other.

03

The four views

Inputs, return, source documents and workpaper.

A review in Instead moves between four views. Two of them can now have their own window.

Inputs	The return inputs, form by form, where you enter and check the data. Main window.
The return	The return PDF, the forms as they will be filed. Main window, or its own window.
Source documents	The W-2s, 1099s and other documents behind the numbers, in the Related panel. Main window, or its own window.
The workpaper	Your review workpaper. Main window.

Pair them the way the check needs. Inputs with the return. The return with its sources. The workpaper has the main window.

04

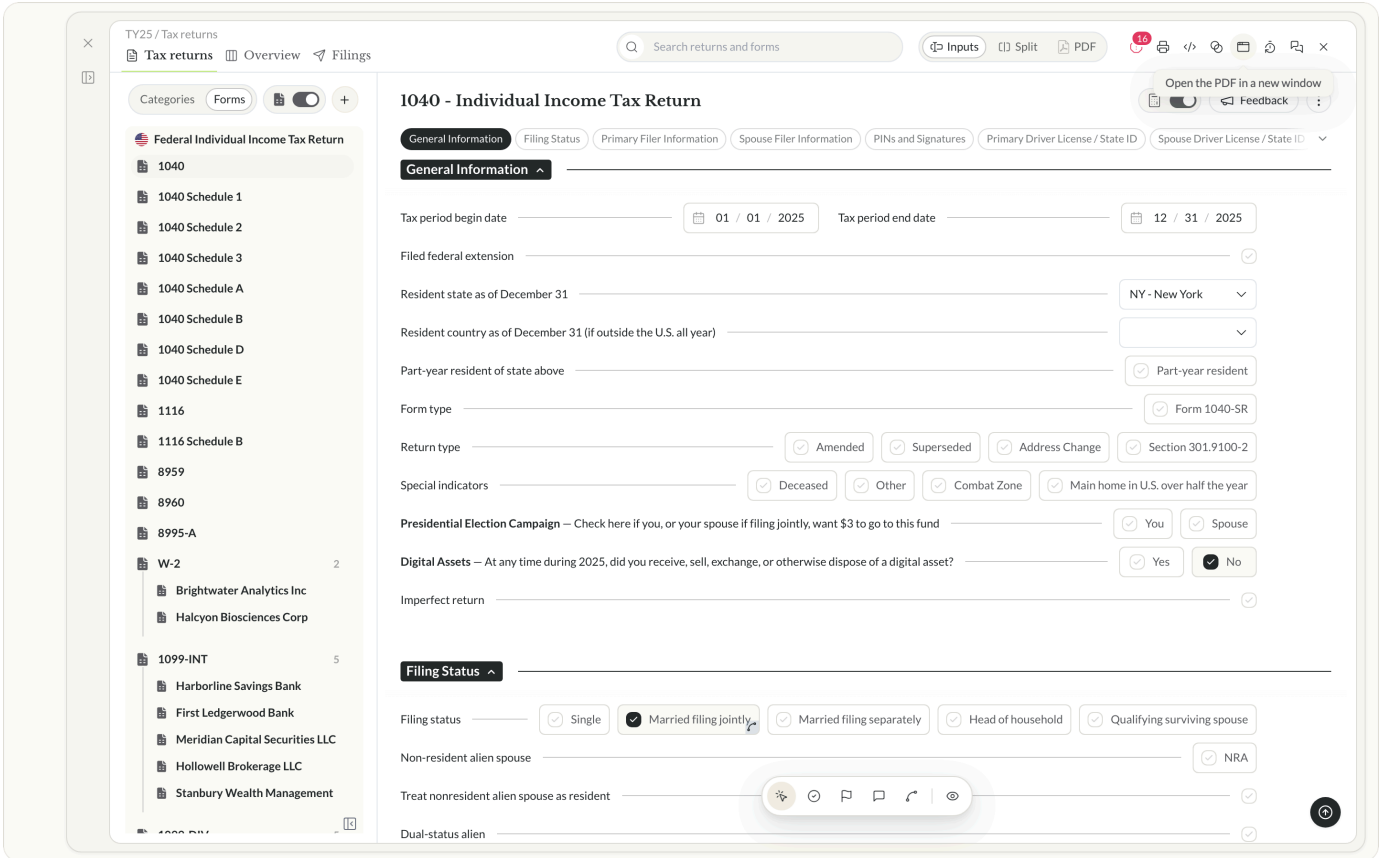
Open the return PDF in its own window

Click the window icon, and the PDF has its own window.

1. Open a client's return in Instead.
2. Click the window icon in the return toolbar. Its tooltip reads "Open the PDF in a new window."
3. The return PDF opens in its own browser window. Move it to your second screen.
4. Keep working in the inputs in the main window.

While the PDF has its own window, the main window shows the inputs only, and the tooltip reads "PDF (in another window)." Close the PDF window when you are done.

Figure 1 The window icon in the return toolbar. The tooltip reads Open the PDF in a new window.



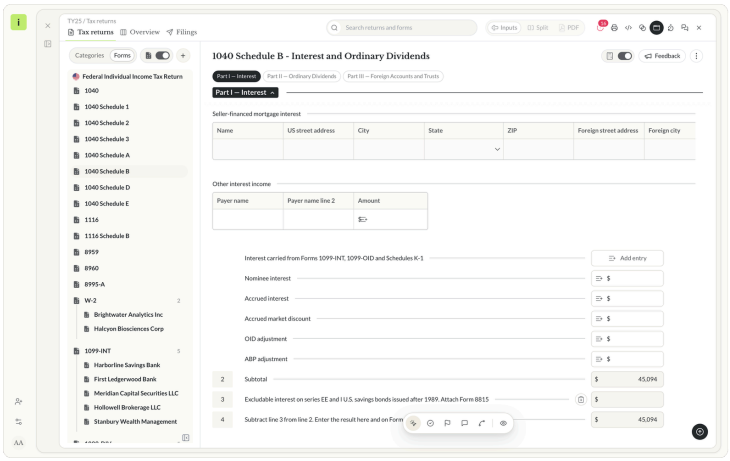
05

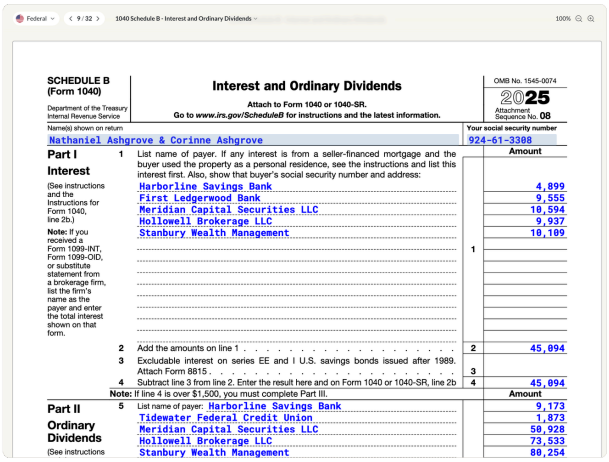
The PDF follows the form and the return you open

Open a form on screen 1, and the PDF jumps to it on screen 2.

Work through the inputs as you always do. Open Schedule B, and the PDF window shows Schedule B. Open the next form, and the PDF moves with you. You do not scroll the PDF to find the form.

Figure 2 Inputs on screen 1, the same form in the PDF window on screen 2.

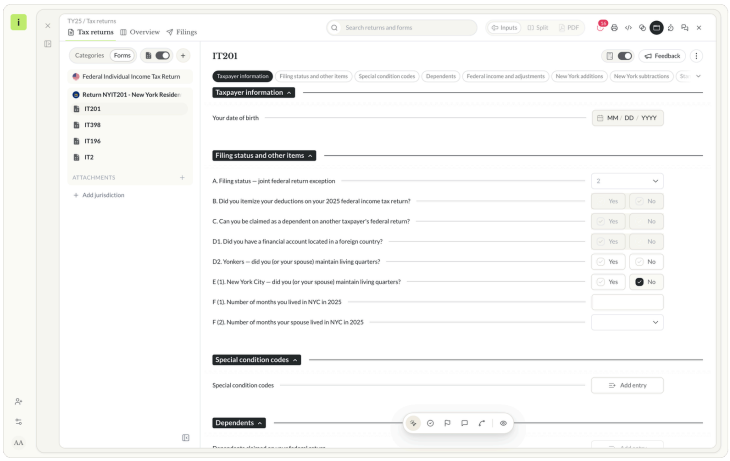


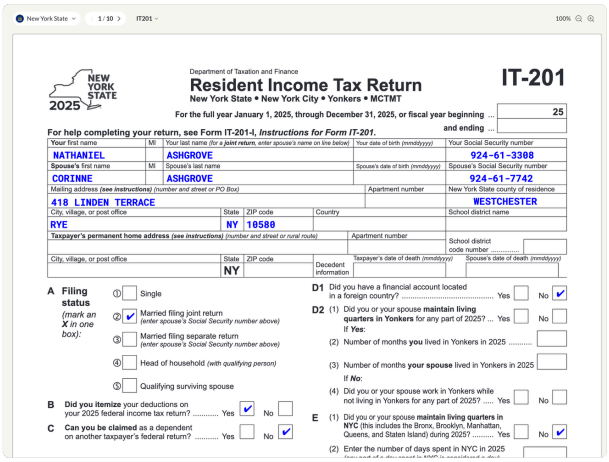


Switch to the state return, and the PDF window follows.

Switch from the federal return to the New York return, and the PDF window shows the IT-201 for the same client. Review the federal return and the state return with the same two windows.

Figure 3 The New York return on screen 1, the IT-201 in the PDF window on screen 2.





06

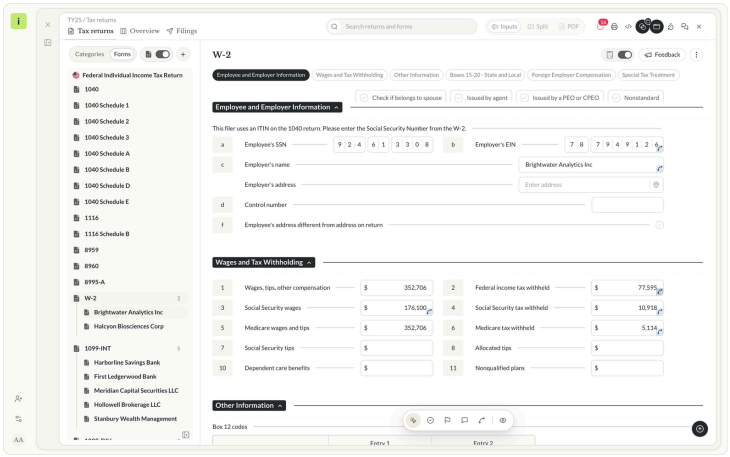
Open the Related panel in its own window

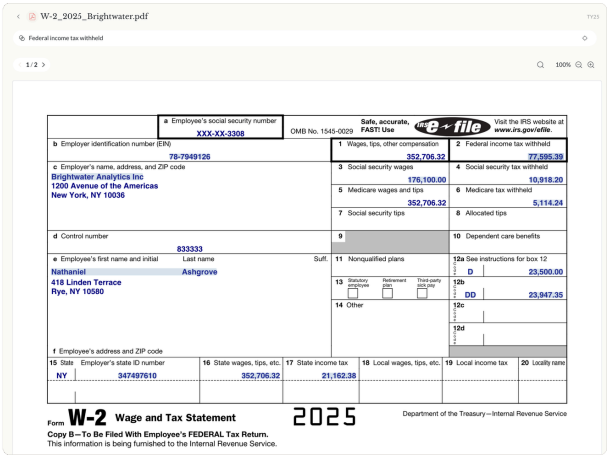
Click a trace on screen 1. The source opens at that box on screen 2.

1. Click the window icon in the Related panel, titled “Open in a new window.” You can also choose “Open in new window” from a document’s menu.
2. Move the Related window to your second screen.
3. Click a trace on the return in the main window. The source document opens at that box.

The Related window follows the field you click in the return. Tie marks show in the Related window too, so you see where on the document the number sits.

Figure 4 A W-2 line on the return on screen 1, the W-2 at that box in the Related window on screen 2.





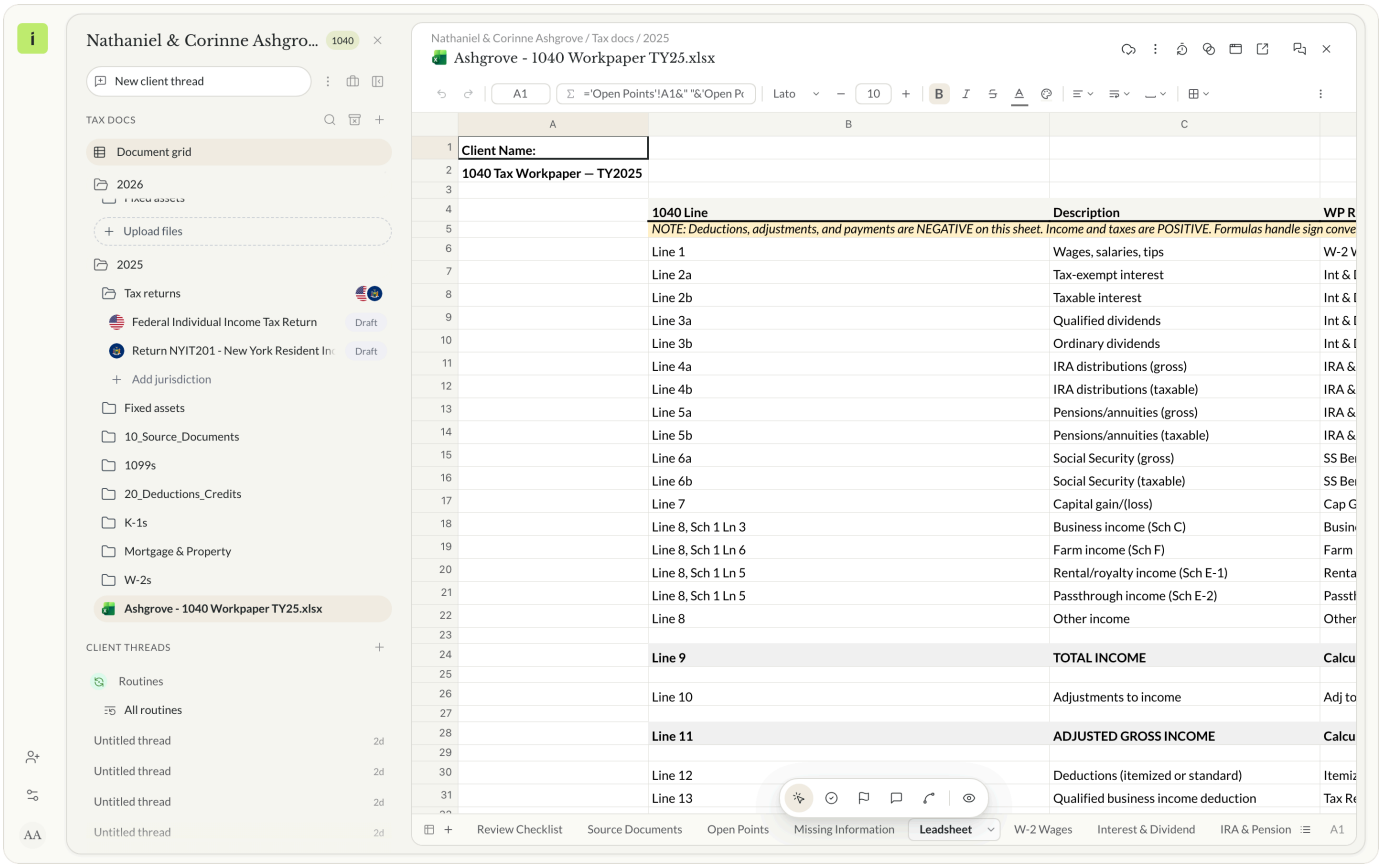
07

Keep the workpaper in view

The workpaper stays in the main window.

Open the workpaper in the main window on screen 1, next to the client's tax documents. The PDF window and the Related window go with the return, so they close when you open the workpaper. When you go back to the return, open them again from the return toolbar and the Related panel.

Figure 5 The workpaper in the main window, on its leadsheet.



08

A two-screen review setup, step by step

Two layouts cover most of a review.

Each uses the main window on screen 1 and one separate window on screen 2.

1. Inputs and the return.
Open the PDF in its own window and move it to screen 2. Work through the inputs form by form, and check each one against the form in the PDF as it follows you. Switch to the state return and keep going.

2. The return and its sources.
Open the Related panel in its own window and move it to screen 2. Click the traces on the return one by one, and read each number at its box on the source document.

The PDF window and the Related window can also be open at the same time.

Close a separate window when you finish with it. Open it again from the same window icon.

Main window on screen 1. One separate window on screen 2.

09

Rolling it out at a firm

Nothing to set up. A few habits to agree on.

It is on for every firm.
The window icons are in the return toolbar and in the Related panel. There is no setting to turn on.

Monitor setup.
A second monitor gives each view a whole screen. The separate windows are browser windows, so a reviewer with one large screen can place them side by side.

Reviewer habits.
Agree which view goes where, so reviewers and preparers talk about the same screen. A simple default is the main window on screen 1 and the PDF or the Related window on screen 2.

What stays in the main window.
The inputs and the workpaper. Open the return PDF or the Related panel in its own window when the check calls for it.

Start with one return.
Try both layouts from section 08 on one return, then keep the ones that fit how your firm reviews.

10

Frequently asked questions

How do I open the return PDF in a new window?
Click the window icon in the return toolbar. Its tooltip reads Open the PDF in a new window. The PDF opens in its own browser window.

Does the PDF window follow the form I open?
Yes. Open a form in the inputs, and the PDF window jumps to it. Switch to the state return, and it follows there too.

Can I open the Related panel in its own window?
Yes. Click the window icon in the Related panel, or choose Open in new window from a document's menu. It follows the field you click in the return.

Where should the workpaper go?
In the main window. The PDF window and the Related window go with the return, and they close when you open the workpaper.

Do I need two monitors?
No. The separate windows are browser windows, so they can sit beside the main window on one large screen. Two monitors give each view a whole screen.

What does the main window show while the PDF has its own window?
The inputs only, until you close the PDF window.

Is it available for every firm?
Yes. Review in a separate window is now available in Instead, with nothing to set up.

11

Start your trial

Review your next return on two screens.

Open a return in Instead. Put the return PDF or the Related panel in its own window on your second screen, and keep the inputs on the first. The separate window follows what you open.

Start your trial at instead.com

The product screens in this paper come from Instead, with a fictional client and fictional documents, in November 2026.

instead

Review in a separate window

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Review on two screens in Instead

Start your trial at instead.com