

ATX

1. What overall rating would you give your tax preparation software?		
1—Very bad	0	0.0%
2	4	2.0%
3	16	7.9%
4	99	49.0%
5—Very good	83	41.1%
Total	202	100.0%

2. Do you plan to use the same tax preparation software next season?		
Yes	182	96.8%
No	6	3.2%
Total	188	100.0%

3. How easy was the update/installation process?		
1—Very difficult	0	0.0%
2	2	1.0%
3	10	5.0%
4	54	26.9%
5—Very easy	135	67.2%
Total	201	100.0%

4. How easy was the software to use?		
1—Very difficult	0	0.0%
2	0	0.0%
3	13	6.4%
4	89	43.6%
5—Very easy	102	50.0%
Total	204	100.0%

5. If you received training from your software provider, how would you rate the training?		
1—Very poor		0.0%
2	4	13.8%
3	5	17.2%
4	14	48.3%
5—Very good	6	20.7%
Total	29	100.0%

6. Did your software contain all of the forms you needed?		
Yes	190	93.1%
No	14	6.9%
Total	204	100.0%

7. How well did your software handle updates during tax season?		
1—Very poorly	1	0.5%
2	3	1.5%
3	8	3.9%
4	56	27.5%
5—Very well	136	66.7%
Total	204	100.0%

8. How well did your software handle transfers of data within returns?		
1—Very poorly	3	1.5%
2	8	4.0%
3	22	10.9%
4	68	33.8%
5—Very well	100	49.8%
Total	201	100.0%

9. How easy was electronic filing?		
1—Very difficult	1	0.5%
2	1	0.5%
3	12	5.9%
4	36	17.8%
5—Very easy	152	75.2%
Total	202	100.0%

10. If you filed multistate business returns, how well did your software handle them?		
1—Very poorly	2	2.1%
2	2	2.1%
3	15	16.0%
4	42	44.7%
5—Very well	33	35.1%
Total	94	100.0%

11. How well did your software handle provisions of the Affordable Care Act?		
1—Very poorly	2	1.0%
2	7	3.5%
3	61	30.2%
4	76	37.6%
5—Very well	56	27.7%
Total	202	100.0%

12. If you ran the software's conversion package, how would you rate it?		
1—Very bad		0.0%
2	1	5.6%
3	1	5.6%
4	7	38.9%
5—Very good	9	50.0%
Total	18	100.0%

13. What did you like best about your tax preparation software? (choose three)		
Price	146	26.1%
Installation process	40	7.2%
Conversion process	1	0.2%
Support	32	5.7%
Ease of use	129	23.1%
Accuracy	46	8.2%
Learning curve	20	3.6%
Number of forms/comprehensiveness	112	20.0%
Integration with other software	1	0.2%
Tax research included in package	32	3.6%
Ease of importing data	6	1.1%
Other	6	1.1%
Total	559	100.0%

14. What did you like least about your tax preparation software? (choose three)		
Accuracy	24	6.8%
Conversion process	14	4.0%
Ease of importing data	37	10.5%
Ease of use	9	2.6%
Installation process	12	3.4%
Integration with other software	49	13.9%
Learning curve	17	4.8%
Number of forms/comprehensiveness	17	4.8%
Price	32	9.1%
Support	51	14.5%
Tax research included in package	52	14.8%
Other	38	10.8%
Total	352	100.0%

15. How well did your tax preparation software integrate with your accounting and other software?		
1—Very poorly	17	9.9%
2	18	10.5%
3	87	50.6%
4	33	19.2%
5—Very well	17	9.9%
Total	172	100.0%

16. Did you ever need technical support from your software vendor during this year's tax season?		
Yes	141	69.5%
No	62	30.5%
Total	203	100.0%

17. How easy to was it to get technical support from the vendor?		
1—Very difficult	5	3.5%
2	6	4.3%
3	31	22.0%
4	49	34.8%
5—Very easy	50	35.5%
Total	141	100.0%

18. How good was the technical support you received?		
1—Very bad	3	2.1%
2	9	6.4%
3	24	17.1%
4	50	35.7%
5—Very good	54	38.6%
Total	140	100.0%

19. For how many clients did your firm prepare returns during this year's tax season?		
1 to 50	44	21.9%
51 to 100	43	21.4%
101 to 200	56	27.9%
201 to 500	41	20.4%
501 to 1,000	15	7.5%
1,001 to 2,000	1	0.5%
2,001 to 5,000	0	0.0%
5,001 or more	1	0.5%
Total	201	100.0%

20. What percentage of those returns were for individuals?		
0%	0	0.0%
1% to 25%	7	3.5%
26% to 50%	23	11.5%
51% to 75%	81	40.5%
76% to 100%	89	44.5%
Total	200	100.0%

21. What percentage were business returns?		
0%	13	6.5%
1% to 25%	120	60.0%
26% to 50%	55	27.5%
51% to 75%	10	5.0%
76% to 100%	2	1.0%
Total	200	100.0%

22. How much responsibility do you have for tax preparation software purchasing decisions in your firm?		
I make the decision	193	95.1%
I have input into the decision	5	2.5%
I am not involved in the decision	5	2.5%
Total	203	100.0%

23. How many preparers work in your firm?		
1	130	65.0%
2 to 5	66	33.0%
6 to 20	2	1.0%
21 to 100	1	0.5%
101 to 500	1	0.5%
501 or more	0	0.0%
Total	200	100.0%