

## Drake

<b>1. What overall rating would you give your tax preparation software?</b>		
1—Very bad	2	0.5%
2	2	0.5%
3	26	6.5%
4	117	29.0%
5—Very good	256	63.5%
<b>Total</b>	<b>403</b>	<b>100.0%</b>

<b>2. Do you plan to use the same tax preparation software next season?</b>		
Yes	383	99.0%
No	4	1.0%
<b>Total</b>	<b>387</b>	<b>100.0%</b>

<b>3. How easy was the update/installation process?</b>		
1—Very difficult	0	0.0%
2	3	0.8%
3	6	1.5%
4	47	12.0%
5—Very easy	336	85.7%
<b>Total</b>	<b>392</b>	<b>100.0%</b>

<b>4. How easy was the software to use?</b>		
1—Very difficult	2	0.5%
2	4	1.0%
3	23	5.7%
4	140	34.7%
5—Very easy	235	58.2%
<b>Total</b>	<b>404</b>	<b>100.0%</b>

<b>5. If you received training from your software provider, how would you rate the training?</b>		
1—Very poor	0	0.0%
2	0	0.0%
3	10	6.0%
4	61	36.5%
5—Very good	96	57.5%
<b>Total</b>	<b>167</b>	<b>100.0%</b>

<b>6. Did your software contain all of the forms you needed?</b>		
Yes	352	86.9%
No	53	13.1%
<b>Total</b>	<b>405</b>	<b>100.0%</b>

<b>7. How well did your software handle updates during tax season?</b>		
1—Very poorly	1	0.2%
2	2	0.5%
3	9	2.2%
4	43	10.6%
5—Very well	350	86.4%
<b>Total</b>	<b>405</b>	<b>100.0%</b>

<b>8. How well did your software handle transfers of data within returns?</b>		
1—Very poorly	1	0.2%
2	5	1.2%
3	39	9.7%
4	97	24.2%
5—Very well	259	64.6%
<b>Total</b>	<b>401</b>	<b>100.0%</b>

<b>9. How easy was electronic filing?</b>		
1—Very difficult	1	0.2%
2	1	0.2%
3	13	3.2%
4	56	13.9%
5—Very easy	332	82.4%
<b>Total</b>	<b>403</b>	<b>100.0%</b>

<b>10. If you filed multistate business returns, how well did your software handle them?</b>		
1—Very poorly	1	0.5%
2	6	2.9%
3	21	10.2%
4	72	35.1%
5—Very well	105	51.2%
<b>Total</b>	<b>205</b>	<b>100.0%</b>

<b>11. How well did your software handle provisions of the Affordable Care Act?</b>		
1—Very poorly	0	0.0%
2	2	0.5%
3	20	5.0%
4	114	28.4%
5—Very well	266	66.2%
<b>Total</b>	<b>402</b>	<b>100.0%</b>

<b>12. If you ran the software's conversion package, how would you rate it?</b>		
1—Very bad	1	1.3%
2	2	2.7%
3	6	8.0%
4	31	41.3%
5—Very good	35	46.7%
<b>Total</b>	<b>75</b>	<b>100.0%</b>

<b>13. What did you like best about your tax preparation software? (choose three)</b>		
Accuracy	88	7.7%
Conversion process	3	0.3%
Ease of importing data	11	1.0%
Ease of use	220	19.1%
Installation process	54	4.7%
Integration with other software	2	0.2%
Learning curve	31	2.7%
Number of forms/comprehensiveness	75	6.5%
Price	367	31.9%
Support	281	24.5%
Tax research included in package	12	1.0%
Other	5	0.4%
<b>Total</b>	<b>1149</b>	<b>100.0%</b>

<b>14. What did you like least about your tax preparation software? (choose three)</b>		
Accuracy	24	3.5%
Conversion process	25	3.6%
Ease of importing data	76	11.0%
Ease of use	38	5.5%
Installation process	7	1.0%
Integration with other software	127	18.3%
Learning curve	65	9.4%
Number of forms/comprehensiveness	68	9.8%
Price	10	1.4%
Support	18	2.6%
Tax research included in package	155	22.3%
Other	81	11.7%
<b>Total</b>	<b>694</b>	<b>100.0%</b>

<b>15. How well did your tax preparation software integrate with your accounting and other software?</b>		
1—Very poorly	31	8.7%
2	38	10.6%
3	139	38.8%
4	84	23.5%
5—Very well	66	18.4%
<b>Total</b>	<b>358</b>	<b>100.0%</b>

<b>16. Did you ever need technical support from your software vendor during this year's tax season?</b>		
Yes	360	89.1%
No	44	10.9%
<b>Total</b>	<b>404</b>	<b>100.0%</b>

<b>17. How easy to was it to get technical support from the vendor?</b>		
1—Very difficult	0	0.0%
2	2	0.6%
3	9	2.5%
4	37	10.3%
5—Very easy	311	86.6%
<b>Total</b>	<b>359</b>	<b>100.0%</b>

<b>18. How good was the technical support you received?</b>		
1—Very bad	2	0.6%
2	8	2.2%
3	22	6.1%
4	96	26.7%
5—Very good	231	64.3%
<b>Total</b>	<b>359</b>	<b>100.0%</b>

<b>19. For how many clients did your firm prepare returns during this year's tax season?</b>		
1 to 50	109	27.0%
51 to 100	55	13.6%
101 to 200	66	16.4%
201 to 500	107	26.6%
501 to 1,000	52	12.9%
1,001 to 2,000	14	3.5%
2,001 to 5,000	0	0.0%
5,001 or more	0	0.0%
<b>Total</b>	<b>403</b>	<b>100.0%</b>

<b>20. What percentage of those returns were for individuals?</b>		
0%	1	0.3%
1% to 25%	3	0.8%
26% to 50%	37	9.3%
51% to 75%	182	45.7%
76% to 100%	175	44.0%
<b>Total</b>	<b>398</b>	<b>100.0%</b>

<b>21. What percentage were business returns?</b>		
0%	19	4.8%
1% to 25%	249	62.7%
26% to 50%	116	29.2%
51% to 75%	9	2.3%
76% to 100%	4	1.0%
<b>Total</b>	<b>397</b>	<b>100.0%</b>

<b>22. How much responsibility do you have for tax preparation software purchasing decisions in your firm?</b>		
I make the decision	366	90.6%
I have input into the decision	31	7.7%
I am not involved in the decision	7	1.7%
<b>Total</b>	<b>404</b>	<b>100.0%</b>

<b>23. How many preparers work in your firm?</b>		
1	214	53.0%
2 to 5	175	43.3%
6 to 20	14	3.5%
21 to 100	1	0.2%
101 to 500	0	0.0%
501 or more	0	0.0%
<b>Total</b>	<b>404</b>	<b>100.0%</b>