

Lacerte

1. What overall rating would you give your tax preparation software?		
1—Very bad	3	0.5%
2	9	1.4%
3	42	6.4%
4	249	37.7%
5—Very good	357	54.1%
Total	660	100.0%

2. Do you plan to use the same tax preparation software next season?		
Yes	580	96.3%
No	22	3.7%
Total	602	100.0%

3. How easy was the update/installation process?		
1—Very difficult	0	0.0%
2	6	0.9%
3	53	8.2%
4	165	25.4%
5—Very easy	425	65.5%
Total	649	100.0%

4. How easy was the software to use?		
1—Very difficult	0	0.0%
2	3	0.5%
3	40	6.0%
4	249	37.4%
5—Very easy	374	56.2%
Total	666	100.0%

5. If you received training from your software provider, how would you rate the training?		
1—Very poor	0	0.0%
2	0	0.0%
3	24	19.7%
4	50	41.0%
5—Very good	48	39.3%
Total	122	100.0%

6. Did your software contain all of the forms you needed?		
Yes	519	78.4%
No	143	21.6%
Total	662	100.0%

7. How well did your software handle updates during tax season?		
1—Very poorly	6	0.9%
2	16	2.4%
3	86	13.0%
4	180	27.1%
5—Very well	376	56.6%
Total	664	100.0%

8. How well did your software handle transfers of data within returns?		
1—Very poorly	4	0.6%
2	13	2.0%
3	83	12.7%
4	200	30.7%
5—Very well	352	54.0%
Total	652	100.0%

9. How easy was electronic filing?		
1—Very difficult	2	0.3%
2	5	0.8%
3	32	4.8%
4	133	20.2%
5—Very easy	488	73.9%
Total	660	100.0%

10. If you filed multistate business returns, how well did your software handle them?		
1—Very poorly	5	1.0%
2	18	3.7%
3	71	14.4%
4	199	40.4%
5—Very well	200	40.6%
Total	493	100.0%

11. How well did your software handle provisions of the Affordable Care Act?		
1—Very poorly	6	0.9%
2	12	1.8%
3	79	12.0%
4	228	34.7%
5—Very well	332	50.5%
Total	657	100.0%

12. If you ran the software's conversion package, how would you rate it?		
1—Very bad	4	4.4%
2	8	8.9%
3	13	14.4%
4	25	27.8%
5—Very good	40	44.4%
Total	90	100.0%

13. What did you like best about your tax preparation software? (choose three)		
Accuracy	406	23.3%
Conversion process	4	0.2%
Ease of importing data	32	1.8%
Ease of use	461	26.5%
Installation process	93	5.3%
Integration with other software	17	1.0%
Learning curve	84	4.8%
Number of forms/comprehensiveness	319	18.3%
Price	61	3.5%
Support	205	11.8%
Tax research included in package	38	2.2%
Other	20	1.1%
Total	1740	100.0%

14. What did you like least about your tax preparation software? (choose three)		
Accuracy	20	1.7%
Conversion process	25	2.1%
Ease of importing data	96	7.9%
Ease of use	27	2.2%
Installation process	29	2.4%
Integration with other software	117	9.7%
Learning curve	27	2.2%
Number of forms/comprehensiveness	60	5.0%
Price	486	40.1%
Support	101	8.3%
Tax research included in package	139	11.5%
Other	85	7.0%
Total	1212	100.0%

15. How well did your tax preparation software integrate with your accounting and other software?		
1—Very poorly	33	5.6%
2	58	9.9%
3	262	44.6%
4	172	29.3%
5—Very well	63	10.7%
Total	588	100.0%

16. Did you ever need technical support from your software vendor during this year's tax season?		
Yes	526	80.2%
No	130	19.8%
Total	656	100.0%

17. How easy to was it to get technical support from the vendor?		
1—Very difficult	7	1.3%
2	26	5.0%
3	110	21.0%
4	181	34.6%
5—Very easy	199	38.0%
Total	523	100.0%

18. How good was the technical support you received?		
1—Very bad	7	1.3%
2	29	5.6%
3	91	17.5%
4	165	31.7%
5—Very good	229	44.0%
Total	521	100.0%

19. For how many clients did your firm prepare returns during this year's tax season?		
1 to 50	59	9.1%
51 to 100	54	8.3%
101 to 200	79	12.1%
201 to 500	173	26.6%
501 to 1,000	151	23.2%
1,001 to 2,000	97	14.9%
2,001 to 5,000	35	5.4%
5,001 or more	3	0.5%
Total	651	100.0%

20. What percentage of those returns were for individuals?		
0%	0	0.0%
1% to 25%	21	3.2%
26% to 50%	113	17.5%
51% to 75%	360	55.6%
76% to 100%	153	23.6%
Total	647	100.0%

21. What percentage were business returns?		
0%	4	0.6%
1% to 25%	301	46.7%
26% to 50%	285	44.2%
51% to 75%	43	6.7%
76% to 100%	12	1.9%
Total	645	100.0%

22. How much responsibility do you have for tax preparation software purchasing decisions in your firm?		
I make the decision	419	64.4%
I have input into the decision	177	27.2%
I am not involved in the decision	55	8.4%
Total	651	100.0%

23. How many preparers work in your firm?		
1	188	28.9%
2 to 5	274	42.1%
6 to 20	159	24.4%
21 to 100	29	4.5%
101 to 500	0	0.0%
501 or more	1	0.2%
Total	651	100.0%