

ProSeries

1. What overall rating would you give your tax preparation software?		
1—Very bad	1	0.2%
2	11	2.4%
3	44	9.7%
4	195	42.9%
5—Very good	204	44.8%
Total	455	100.0%

2. Do you plan to use the same tax preparation software next season?		
Yes	386	97.0%
No	12	3.0%
Total	398	100.0%

3. How easy was the update/installation process?		
1—Very difficult	1	0.2%
2	6	1.3%
3	18	4.0%
4	88	19.4%
5—Very easy	341	75.1%
Total	454	100.0%

4. How easy was the software to use?		
1—Very difficult	1	0.2%
2	3	0.7%
3	32	7.0%
4	185	40.3%
5—Very easy	238	51.9%
Total	459	100.0%

5. If you received training from your software provider, how would you rate the training?		
1—Very poor	0	0.0%
2	3	3.6%
3	9	10.7%
4	44	52.4%
5—Very good	28	33.3%
Total	84	100.0%

6. Did your software contain all of the forms you needed?		
Yes	300	65.6%
No	157	34.4%
Total	457	100.0%

7. How well did your software handle updates during tax season?		
1—Very poorly	1	0.2%
2	6	1.3%
3	20	4.4%
4	131	28.6%
5—Very well	300	65.5%
Total	458	100.0%

8. How well did your software handle transfers of data within returns?		
1—Very poorly	4	0.9%
2	7	1.5%
3	41	9.1%
4	133	29.4%
5—Very well	267	59.1%
Total	452	100.0%

9. How easy was electronic filing?		
1—Very difficult	0	0.0%
2	3	0.7%
3	15	3.3%
4	103	22.9%
5—Very easy	329	73.1%
Total	450	100.0%

10. If you filed multistate business returns, how well did your software handle them?		
1—Very poorly	3	1.4%
2	10	4.6%
3	34	15.5%
4	89	40.6%
5—Very well	83	37.9%
Total	219	100.0%

11. How well did your software handle provisions of the Affordable Care Act?		
1—Very poorly	2	0.4%
2	11	2.4%
3	51	11.2%
4	176	38.7%
5—Very well	215	47.3%
Total	455	100.0%

12. If you ran the software's conversion package, how would you rate it?		
1—Very bad	4	4.8%
2	5	6.0%
3	10	11.9%
4	28	33.3%
5—Very good	37	44.0%
Total	84	100.0%

13. What did you like best about your tax preparation software? (choose three)		
Accuracy	188	15.7%
Conversion process	8	0.7%
Ease of importing data	33	2.8%
Ease of use	339	28.3%
Installation process	113	9.4%
Integration with other software	14	1.2%
Learning curve	82	6.8%
Number of forms/comprehensiveness	147	12.3%
Price	165	13.8%
Support	77	6.4%
Tax research included in package	22	1.8%
Other	11	0.9%
Total	1671	100.0%

14. What did you like least about your tax preparation software? (choose three)		
Accuracy	21	2.4%
Conversion process	23	2.6%
Ease of importing data	54	6.2%
Ease of use	31	3.6%
Installation process	15	1.7%
Integration with other software	61	7.0%
Learning curve	26	3.0%
Number of forms/comprehensiveness	104	11.9%
Price	216	24.7%
Support	111	12.7%
Tax research included in package	162	18.6%
Other	49	5.6%
Total	873	100.0%

15. How well did your tax preparation software integrate with your accounting and other software?		
1—Very poorly	19	4.5%
2	25	6.0%
3	164	39.0%
4	134	31.9%
5—Very well	78	18.6%
Total	420	100.0%

16. Did you ever need technical support from your software vendor during this year's tax season?		
Yes	277	61.0%
No	177	39.0%
Total	454	100.0%

17. How easy to was it to get technical support from the vendor?		
1—Very difficult	9	3.2%
2	23	8.3%
3	48	17.3%
4	115	41.5%
5—Very easy	82	29.6%
Total	277	100.0%

18. How good was the technical support you received?		
1—Very bad	7	2.5%
2	23	8.3%
3	48	17.3%
4	98	35.4%
5—Very good	101	36.5%
Total	277	100.0%

19. For how many clients did your firm prepare returns during this year's tax season?		
1 to 50	95	20.9%
51 to 100	79	17.4%
101 to 200	88	19.4%
201 to 500	106	23.3%
501 to 1,000	63	13.9%
1,001 to 2,000	17	3.7%
2,001 to 5,000	4	0.9%
5,001 or more	2	0.4%
Total	454	100.0%

20. What percentage of those returns were for individuals?		
0%	1	0.2%
1% to 25%	14	3.1%
26% to 50%	50	11.1%
51% to 75%	193	42.8%
76% to 100%	193	42.8%
Total	451	100.0%

21. What percentage were business returns?		
0%	25	5.5%
1% to 25%	281	62.0%
26% to 50%	119	26.3%
51% to 75%	19	4.2%
76% to 100%	9	2.0%
Total	453	100.0%

22. How much responsibility do you have for tax preparation software purchasing decisions in your firm?		
I make the decision	404	89.2%
I have input into the decision	38	8.4%
I am not involved in the decision	11	2.4%
Total	453	100.0%

23. How many preparers work in your firm?		
1	250	54.8%
2 to 5	170	37.3%
6 to 20	30	6.6%
21 to 100	2	0.4%
101 to 500	4	0.9%
501 or more	0	0.0%
Total	456	100.0%