

ProSystem fx

1. What overall rating would you give your tax preparation software?		
1—Very bad	1	0.1%
2	25	3.1%
3	67	8.4%
4	301	37.8%
5—Very good	403	50.6%
Total	797	100.0%

2. Do you plan to use the same tax preparation software next season?		
Yes	718	98.2%
No	13	1.8%
Total	731	100.0%

3. How easy was the update/installation process?		
1—Very difficult	1	0.1%
2	26	3.7%
3	130	18.6%
4	250	35.8%
5—Very easy	292	41.8%
Total	699	100.0%

4. How easy was the software to use?		
1—Very difficult	9	1.1%
2	46	5.8%
3	143	18.1%
4	372	47.2%
5—Very easy	218	27.7%
Total	788	100.0%

5. If you received training from your software provider, how would you rate the training?		
1—Very poor	2	0.7%
2	8	2.8%
3	71	25.0%
4	122	43.0%
5—Very good	81	28.5%
Total	284	100.0%

6. Did your software contain all of the forms you needed?		
Yes	656	83.9%
No	126	16.1%
Total	782	100.0%

7. How well did your software handle updates during tax season?		
1—Very poorly	4	0.5%
2	24	3.1%
3	99	12.6%
4	260	33.1%
5—Very well	398	50.7%
Total	785	100.0%

8. How well did your software handle transfers of data within returns?		
1—Very poorly	7	0.9%
2	33	4.3%
3	140	18.2%
4	289	37.5%
5—Very well	302	39.2%
Total	771	100.0%

9. How easy was electronic filing?		
1—Very difficult	1	0.1%
2	9	1.2%
3	58	7.5%
4	230	29.6%
5—Very easy	478	61.6%
Total	776	100.0%

10. If you filed multistate business returns, how well did your software handle them?		
1—Very poorly	8	1.3%
2	21	3.3%
3	98	15.6%
4	262	41.7%
5—Very well	240	38.2%
Total	629	100.0%

11. How well did your software handle provisions of the Affordable Care Act?		
1—Very poorly	11	1.4%
2	30	3.9%
3	175	22.8%
4	307	40.0%
5—Very well	245	31.9%
Total	768	100.0%

12. If you ran the software's conversion package, how would you rate it?		
1—Very bad	3	2.5%
2	4	3.4%
3	31	26.1%
4	43	36.1%
5—Very good	38	31.9%
Total	119	100.0%

13. What did you like best about your tax preparation software? (choose three)		
Accuracy	537	27.5%
Conversion process	6	0.3%
Ease of importing data	57	2.9%
Ease of use	237	12.1%
Installation process	46	2.4%
Integration with other software	103	5.3%
Learning curve	48	2.5%
Number of forms/comprehensiveness	515	26.4%
Price	22	1.1%
Support	300	15.4%
Tax research included in package	47	2.4%
Other	36	1.8%
Total	1954	100.0%

14. What did you like least about your tax preparation software? (choose three)		
Accuracy	32	2.2%
Conversion process	31	2.1%
Ease of importing data	89	6.1%
Ease of use	157	10.7%
Installation process	36	2.5%
Integration with other software	104	7.1%
Learning curve	162	11.0%
Number of forms/comprehensiveness	29	2.0%
Price	541	36.9%
Support	111	7.6%
Tax research included in package	105	7.2%
Other	71	4.8%
Total	1468	100.0%

15. How well did your tax preparation software integrate with your accounting and other software?		
1—Very poorly	23	3.2%
2	63	8.7%
3	252	34.9%
4	233	32.3%
5—Very well	151	20.9%
Total	722	100.0%

16. Did you ever need technical support from your software vendor during this year's tax season?		
Yes	647	84.0%
No	123	16.0%
Total	770	100.0%

17. How easy to was it to get technical support from the vendor?		
1—Very difficult	17	2.6%
2	30	4.7%
3	110	17.1%
4	242	37.5%
5—Very easy	246	38.1%
Total	645	100.0%

18. How good was the technical support you received?		
1—Very bad	11	1.7%
2	37	5.7%
3	101	15.7%
4	217	33.7%
5—Very good	278	43.2%
Total	644	100.0%

19. For how many clients did your firm prepare returns during this year's tax season?		
1 to 50	36	4.7%
51 to 100	42	5.5%
101 to 200	62	8.1%
201 to 500	132	17.3%
501 to 1,000	178	23.3%
1,001 to 2,000	133	17.4%
2,001 to 5,000	107	14.0%
5,001 or more	74	9.7%
Total	764	100.0%

20. What percentage of those returns were for individuals?		
0%	2	0.3%
1% to 25%	43	5.7%
26% to 50%	233	30.7%
51% to 75%	393	51.8%
76% to 100%	87	11.5%
Total	758	100.0%

21. What percentage were business returns?		
0%	2	0.3%
1% to 25%	208	27.4%
26% to 50%	433	57.0%
51% to 75%	94	12.4%
76% to 100%	23	3.0%
Total	760	100.0%

22. How much responsibility do you have for tax preparation software purchasing decisions in your firm?		
I make the decision	279	36.7%
I have input into the decision	301	39.6%
I am not involved in the decision	181	23.8%
Total	761	100.0%

23. How many preparers work in your firm?		
1	87	11.4%
2 to 5	190	25.0%
6 to 20	261	34.3%
21 to 100	148	19.5%
101 to 500	40	5.3%
501 or more	34	4.5%
Total	760	100.0%