

UltraTax CS

1. What overall rating would you give your tax preparation software?		
1—Very bad	4	0.5%
2	17	2.0%
3	41	4.7%
4	281	32.4%
5—Very good	523	60.4%
Total	866	100.0%

2. Do you plan to use the same tax preparation software next season?		
Yes	788	97.0%
No	24	3.0%
Total	812	100.0%

3. How easy was the update/installation process?		
1—Very difficult	2	0.3%
2	13	2.0%
3	66	10.3%
4	201	31.3%
5—Very easy	361	56.1%
Total	643	100.0%

4. How easy was the software to use?		
1—Very difficult	5	0.6%
2	17	2.0%
3	88	10.2%
4	396	45.9%
5—Very easy	357	41.4%
Total	863	100.0%

5. If you received training from your software provider, how would you rate the training?		
1—Very poor	4	1.1%
2	17	4.8%
3	78	22.1%
4	142	40.2%
5—Very good	112	31.7%
Total	353	100.0%

6. Did your software contain all of the forms you needed?		
Yes	796	93.0%
No	60	7.0%
Total	856	100.0%

7. How well did your software handle updates during tax season?		
1—Very poorly	1	0.1%
2	9	1.0%
3	43	5.0%
4	214	24.9%
5—Very well	593	69.0%
Total	860	100.0%

8. How well did your software handle transfers of data within returns?		
1—Very poorly	3	0.3%
2	14	1.6%
3	70	8.2%
4	226	26.3%
5—Very well	545	63.5%
Total	858	100.0%

9. How easy was electronic filing?		
1—Very difficult	0	0.0%
2	10	1.2%
3	35	4.1%
4	181	21.1%
5—Very easy	630	73.6%
Total	856	100.0%

10. If you filed multistate business returns, how well did your software handle them?		
1—Very poorly	5	0.8%
2	13	2.1%
3	72	11.7%
4	251	40.6%
5—Very well	277	44.8%
Total	618	100.0%

11. How well did your software handle provisions of the Affordable Care Act?		
1—Very poorly	5	0.6%
2	30	3.5%
3	118	13.9%
4	340	40.0%
5—Very well	356	41.9%
Total	849	100.0%

12. If you ran the software's conversion package, how would you rate it?		
1—Very bad	5	3.5%
2	18	12.6%
3	21	14.7%
4	45	31.5%
5—Very good	54	37.8%
Total	143	100.0%

13. What did you like best about your tax preparation software? (choose three)		
Accuracy	524	22.8%
Conversion process	3	0.1%
Ease of importing data	84	3.7%
Ease of use	408	17.8%
Installation process	52	2.3%
Integration with other software	227	9.9%
Learning curve	62	2.7%
Number of forms/comprehensiveness	441	19.2%
Price	102	4.4%
Support	328	14.3%
Tax research included in package	42	1.8%
Other	21	0.9%
Total	2294	100.0%

14. What did you like least about your tax preparation software? (choose three)		
Accuracy	20	1.3%
Conversion process	54	3.5%
Ease of importing data	93	6.1%
Ease of use	95	6.2%
Installation process	34	2.2%
Integration with other software	107	7.0%
Learning curve	143	9.4%
Number of forms/comprehensiveness	35	2.3%
Price	594	38.9%
Support	123	8.1%
Tax research included in package	174	11.4%
Other	54	3.5%
Total	1526	100.0%

15. How well did your tax preparation software integrate with your accounting and other software?		
1—Very poorly	28	3.5%
2	42	5.3%
3	194	24.4%
4	262	33.0%
5—Very well	268	33.8%
Total	794	100.0%

16. Did you ever need technical support from your software vendor during this year's tax season?		
Yes	736	86.7%
No	113	13.3%
Total	849	100.0%

17. How easy to was it to get technical support from the vendor?		
1—Very difficult	7	1.0%
2	17	2.3%
3	91	12.4%
4	270	36.8%
5—Very easy	348	47.5%
Total	733	100.0%

18. How good was the technical support you received?		
1—Very bad	9	1.2%
2	26	3.5%
3	98	13.4%
4	265	36.2%
5—Very good	335	45.7%
Total	733	100.0%

19. For how many clients did your firm prepare returns during this year's tax season?		
1 to 50	51	6.0%
51 to 100	57	6.7%
101 to 200	82	9.7%
201 to 500	204	24.1%
501 to 1,000	226	26.7%
1,001 to 2,000	146	17.2%
2,001 to 5,000	67	7.9%
5,001 or more	14	1.7%
Total	847	100.0%

20. What percentage of those returns were for individuals?		
0%	1	0.1%
1% to 25%	17	2.0%
26% to 50%	164	19.4%
51% to 75%	502	59.4%
76% to 100%	161	19.1%
Total	845	100.0%

21. What percentage were business returns?		
0%	8	0.9%
1% to 25%	348	41.3%
26% to 50%	427	50.7%
51% to 75%	56	6.6%
76% to 100%	4	0.5%
Total	843	100.0%

22. How much responsibility do you have for tax preparation software purchasing decisions in your firm?		
I make the decision	515	60.9%
I have input into the decision	244	28.8%
I am not involved in the decision	87	10.3%
Total	846	100.0%

23. How many preparers work in your firm?		
1	177	20.9%
2 to 5	344	40.6%
6 to 20	273	32.2%
21 to 100	48	5.7%
101 to 500	5	0.6%
501 or more	0	0.0%
Total	847	100.0%