

ATX

1. What overall rating would you give your tax preparation software?		
1—Very bad	2	1.1%
2	3	1.6%
3	19	10.1%
4	79	41.8%
5—Very good	86	45.5%
Total	189	100.0%

2. Do you plan to use the same tax preparation software next season?		
Yes	158	96.9%
No	5	3.1%
Total	163	100.0%

3. How easy was the update/installation process?		
1—Very difficult		0.0%
2	3	1.6%
3	13	7.0%
4	37	20.0%
5—Very easy	132	71.4%
Total	185	100.0%

4. How easy was the software to use?		
1—Very difficult	1	0.5%
2	2	1.1%
3	14	7.4%
4	68	36.0%
5—Very easy	104	55.0%
Total	189	100.0%

5. If you received training from your software provider, how would you rate the training?		
1—Very poor		0.0%
2		0.0%
3	3	12.5%
4	11	45.8%
5—Very good	10	41.7%
Total	24	100.0%

6. Did your software contain all of the forms you needed?		
Yes	180	95.2%
No	9	4.8%
Total	189	100.0%

7. How well did your software handle updates during tax season?		
1—Very poorly		0.0%
2	2	1.1%
3	8	4.3%
4	40	21.3%
5—Very well	138	73.4%
Total	188	100.0%

8. How well did your software handle transfers of data within returns?		
1—Very poorly	2	1.1%
2	8	4.3%
3	23	12.4%
4	53	28.5%
5—Very well	100	53.8%
Total	186	100.0%

9. How easy was electronic filing?		
1—Very difficult	1	0.5%
2	1	0.5%
3	10	5.4%
4	27	14.5%
5—Very easy	147	79.0%
Total	186	100.0%

10. If you filed multistate business returns, how well did your software handle them?		
1—Very poorly	2	2.3%
2	1	1.1%
3	16	18.2%
4	34	38.6%
5—Very well	35	39.8%
Total	88	100.0%

11. If you ran the software's conversion package, how would you rate it?		
1—Very bad		0.0%
2	2	9.5%
3	6	28.6%
4	5	23.8%
5—Very good	8	38.1%
Total	21	100.0%

12. What did you like best about your tax preparation software? (choose three)		
Accuracy	45	8.8%
Conversion process	2	0.4%
Ease of importing data	5	1.0%
Ease of use	123	23.9%
Installation process	30	5.8%
Integration with other software	2	0.4%
Learning curve	17	3.3%
Number of forms/comprehensiveness	91	17.7%
Price	149	29.0%
Support	25	4.9%

Tax research included in package	21	4.1%
Other	4	0.8%
Total	514	100.0%

13. What did you like least about your tax preparation software? (choose three)		
Accuracy	8	2.3%
Conversion process	9	2.6%
Ease of importing data	35	10.0%
Ease of use	8	2.3%
Installation process	16	4.6%
Integration with other software	49	14.0%
Learning curve	9	2.6%
Number of forms/comprehensiveness	13	3.7%
Price	38	10.9%
Support	78	22.3%
Tax research included in package	43	12.3%
Other	43	12.3%
Total	349	100.0%

14. How well did your tax preparation software integrate with your accounting and other software?		
1—Very poorly	19	11.9%
2	18	11.3%
3	83	51.9%
4	28	17.5%
5—Very well	12	7.5%
Total	160	100.0%

15. Did you ever need technical support from your software vendor during this year's tax season?		
Yes	140	74.1%
No	49	25.9%
Total	189	100.0%

16. How easy to was it to get technical support from the vendor?		
1—Very difficult	12	8.6%
2	24	17.1%
3	26	18.6%
4	44	31.4%
5—Very easy	34	24.3%
Total	140	100.0%

17. How good was the technical support you received?		
1—Very bad	7	5.0%
2	11	7.9%
3	27	19.3%
4	43	30.7%
5—Very good	52	37.1%
Total	140	100.0%

18. For how many clients did your firm prepare returns during this year's tax season?		
1 to 50	36	19.3%
51 to 100	37	19.8%
101 to 200	51	27.3%
201 to 500	44	23.5%
501 to 1,000	15	8.0%
1,001 to 2,000	3	1.6%
2,001 to 5,000	1	0.5%
5,001 or more		0.0%
Total	187	100.0%

19. What percentage of those returns were for individuals?		
0%	2	1.1%
1% to 25%	7	3.8%
26% to 50%	25	13.5%
51% to 75%	77	41.6%
76% to 100%	74	40.0%
Total	185	100.0%

20. What percentage were business returns?		
0%	8	4.3%
1% to 25%	113	61.1%
26% to 50%	48	25.9%
51% to 75%	13	7.0%
76% to 100%	3	1.6%
Total	185	100.0%

21. How much responsibility do you have for tax preparation software purchasing decisions in your firm?		
I make the decision	177	94.1%
I have input into the decision	10	5.3%
I am not involved in the decision	1	0.5%
Total	188	100.0%

22. How many preparers work in your firm?		
1	105	56.1%
2 to 5	74	39.6%
6 to 20	5	2.7%
21 to 100	1	0.5%
101 to 500	2	1.1%
501 or more		0.0%
Total	187	100.0%