

## CCH Access Tax

<b>1. What overall rating would you give your tax preparation software?</b>		
1—Very bad	5	3.2%
2	12	7.8%
3	23	14.9%
4	57	37.0%
5—Very good	57	37.0%
<b>Total</b>	<b>154</b>	<b>100.0%</b>

<b>2. Do you plan to use the same tax preparation software next season?</b>		
Yes	134	98.5%
No	2	1.5%
<b>Total</b>	<b>136</b>	<b>100.0%</b>

<b>3. How easy was the update/installation process?</b>		
1—Very difficult		0.0%
2		0.0%
3	8	36.4%
4	5	22.7%
5—Very easy	9	40.9%
<b>Total</b>	<b>22</b>	<b>100.0%</b>

<b>4. How easy was the software to use?</b>		
1—Very difficult	9	5.8%
2	13	8.3%
3	37	23.7%
4	65	41.7%
5—Very easy	32	20.5%
<b>Total</b>	<b>156</b>	<b>100.0%</b>

<b>5. If you received training from your software provider, how would you rate the training?</b>		
1—Very poor	6	5.9%
2	9	8.8%
3	27	26.5%
4	41	40.2%
5—Very good	19	18.6%
<b>Total</b>	<b>102</b>	<b>100.0%</b>

<b>6. Did your software contain all of the forms you needed?</b>		
Yes	139	89.7%
No	16	10.3%
<b>Total</b>	<b>155</b>	<b>100.0%</b>

<b>7. How well did your software handle updates during tax season?</b>		
1—Very poorly	1	0.6%
2	5	3.2%
3	18	11.5%
4	50	32.1%
5—Very well	82	52.6%
<b>Total</b>	<b>156</b>	<b>100.0%</b>

<b>8. How well did your software handle transfers of data within returns?</b>		
1—Very poorly	1	0.6%
2	5	3.2%
3	32	20.8%
4	65	42.2%
5—Very well	51	33.1%
<b>Total</b>	<b>154</b>	<b>100.0%</b>

<b>9. How easy was electronic filing?</b>		
1—Very difficult	1	0.6%
2	3	1.9%
3	15	9.6%
4	46	29.5%
5—Very easy	91	58.3%
<b>Total</b>	<b>156</b>	<b>100.0%</b>

<b>10. If you filed multistate business returns, how well did your software handle them?</b>		
1—Very poorly	1	0.8%
2	10	7.7%
3	21	16.2%
4	53	40.8%
5—Very well	45	34.6%
<b>Total</b>	<b>130</b>	<b>100.0%</b>

<b>11. If you ran the software's conversion package, how would you rate it?</b>		
1—Very bad	2	5.1%
2	3	7.7%
3	12	30.8%
4	15	38.5%
5—Very good	7	17.9%
<b>Total</b>	<b>39</b>	<b>100.0%</b>

<b>12. What did you like best about your tax preparation software? (choose three)</b>		
Accuracy	92	23.8%
Conversion process	2	0.5%
Ease of importing data	20	5.2%
Ease of use	50	12.9%
Installation process	7	1.8%
Integration with other software	31	8.0%
Learning curve	13	3.4%
Number of forms/comprehensiveness	102	26.4%
Price	9	2.3%
Support	43	11.1%

Tax research included in package	7	1.8%
Other	11	2.8%
<b>Total</b>	<b>387</b>	<b>100%</b>

<b>13. What did you like least about your tax preparation software? (choose three)</b>		
Accuracy	6	1.9%
Conversion process	12	3.8%
Ease of importing data	12	3.8%
Ease of use	38	11.9%
Installation process	3	0.9%
Integration with other software	27	8.5%
Learning curve	48	15.1%
Number of forms/comprehensiveness	7	2.2%
Price	84	26.4%
Support	40	12.6%
Tax research included in package	18	5.7%
Other	23	7.2%
<b>Total</b>	<b>318</b>	<b>100.0%</b>

<b>14. How well did your tax preparation software integrate with your accounting and other software?</b>		
1—Very poorly	8	5.3%
2	11	7.3%
3	51	34.0%
4	52	34.7%
5—Very well	28	18.7%
<b>Total</b>	<b>150</b>	<b>100.0%</b>

<b>15. Did you ever need technical support from your software vendor during this year's tax season?</b>		
Yes	131	85.1%
No	23	14.9%
<b>Total</b>	<b>154</b>	<b>100.0%</b>

<b>16. How easy to was it to get technical support from the vendor?</b>		
1—Very difficult	10	7.7%
2	19	14.6%
3	35	26.9%
4	31	23.8%
5—Very easy	35	26.9%
<b>Total</b>	<b>130</b>	<b>100.0%</b>

<b>17. How good was the technical support you received?</b>		
1—Very bad	7	5.3%
2	22	16.8%
3	25	19.1%
4	47	35.9%
5—Very good	30	22.9%
<b>Total</b>	<b>131</b>	<b>100.0%</b>

<b>18. For how many clients did your firm prepare returns during this year's tax season?</b>		
1 to 50	1	0.6%
51 to 100	11	7.1%
101 to 200	15	9.7%
201 to 500	20	12.9%
501 to 1,000	20	12.9%
1,001 to 2,000	22	14.2%
2,001 to 5,000	33	21.3%
5,001 or more	33	21.3%
<b>Total</b>	<b>155</b>	<b>100.0%</b>

<b>19. What percentage of those returns were for individuals?</b>		
0%		0.0%
1% to 25%	12	7.7%
26% to 50%	56	36.1%
51% to 75%	74	47.7%
76% to 100%	13	8.4%
<b>Total</b>	<b>155</b>	<b>100.0%</b>

<b>20. What percentage were business returns?</b>		
0%	1	0.6%
1% to 25%	33	21.3%
26% to 50%	86	55.5%
51% to 75%	31	20.0%
76% to 100%	4	2.6%
<b>Total</b>	<b>155</b>	<b>100.0%</b>

<b>21. How much responsibility do you have for tax preparation software purchasing decisions in your firm?</b>		
I make the decision	55	35.3%
I have input into the decision	43	27.6%
I am not involved in the decision	58	37.2%
<b>Total</b>	<b>156</b>	<b>100.0%</b>

<b>22. How many preparers work in your firm?</b>		
1	12	7.7%
2 to 5	37	23.7%
6 to 20	36	23.1%
21 to 100	30	19.2%
101 to 500	20	12.8%
501 or more	21	13.5%
<b>Total</b>	<b>156</b>	<b>100.0%</b>