

ProSystem fx

1. What overall rating would you give your tax preparation software?		
1—Very bad	5	0.7%
2	15	2.2%
3	63	9.1%
4	265	38.2%
5—Very good	346	49.9%
Total	694	100.0%

2. Do you plan to use the same tax preparation software next season?		
Yes	610	97.6%
No	15	2.4%
Total	625	100.0%

3. How easy was the update/installation process?		
1—Very difficult	5	0.8%
2	10	1.6%
3	123	20.1%
4	217	35.5%
5—Very easy	256	41.9%
Total	611	100.0%

4. How easy was the software to use?		
1—Very difficult	12	1.7%
2	34	4.8%
3	147	20.9%
4	339	48.3%
5—Very easy	170	24.2%
Total	702	100.0%

5. If you received training from your software provider, how would you rate the training?		
1—Very poor	2	0.9%
2	11	5.1%
3	61	28.5%
4	89	41.6%
5—Very good	51	23.8%
Total	214	100.0%

6. Did your software contain all of the forms you needed?		
Yes	282	70.7%
No	117	29.3%
Total	399	100.0%

7. How well did your software handle updates during tax season?		
1—Very poorly	8	1.1%
2	22	3.1%
3	71	10.1%
4	270	38.4%
5—Very well	333	47.3%
Total	704	100.0%

8. How well did your software handle transfers of data within returns?		
1—Very poorly	5	0.7%
2	24	3.5%
3	153	22.4%
4	236	34.6%
5—Very well	265	38.8%
Total	683	100.0%

9. How easy was electronic filing?		
1—Very difficult	2	0.3%
2	15	2.1%
3	59	8.4%
4	217	31.0%
5—Very easy	407	58.1%
Total	700	100.0%

10. If you filed multistate business returns, how well did your software handle them?		
1—Very poorly	7	1.2%
2	14	2.4%
3	100	17.1%
4	215	36.8%
5—Very well	248	42.5%
Total	584	100.0%

11. If you ran the software's conversion package, how would you rate it?		
1—Very bad	3	3.2%
2	9	9.6%
3	23	24.5%
4	36	38.3%
5—Very good	23	24.5%
Total	94	100.0%

12. What did you like best about your tax preparation software? (choose three)		
Accuracy	490	27.9%
Conversion process	7	0.4%
Ease of importing data	64	3.6%
Ease of use	185	10.5%
Installation process	40	2.3%
Integration with other software	87	5.0%
Learning curve	42	2.4%
Number of forms/comprehensiveness	508	29.0%
Price	14	0.8%
Support	239	13.6%
Tax research included in package	37	2.1%
Other	41	2.3%
Total	1754	100.0%

13. What did you like least about your tax preparation software? (choose three)		
Accuracy	21	1.6%
Conversion process	31	2.3%
Ease of importing data	52	3.9%
Ease of use	141	10.6%
Installation process	36	2.7%
Integration with other software	94	7.0%
Learning curve	137	10.3%
Number of forms/comprehensiveness	21	1.6%
Price	488	36.5%
Support	154	11.5%
Tax research included in package	86	6.4%
Other	75	5.6%
Total	1336	100.0%

14. How well did your tax preparation software integrate with your accounting and other software?		
1—Very poorly	26	4.0%
2	47	7.2%
3	218	33.2%
4	235	35.8%
5—Very well	131	19.9%
Total	657	100.0%

15. Did you ever need technical support from your software vendor during this year's tax season?		
Yes	610	86.6%
No	94	13.4%
Total	704	100.0%

16. How easy to was it to get technical support from the vendor?		
1—Very difficult	25	4.1%
2	55	9.1%
3	130	21.5%
4	225	37.1%
5—Very easy	171	28.2%
Total	606	100.0%

17. How good was the technical support you received?		
1—Very bad	10	1.7%
2	47	7.8%
3	102	16.9%
4	229	37.9%
5—Very good	217	35.9%
Total	605	100.0%

18. For how many clients did your firm prepare returns during this year's tax season?		
1 to 50	35	5.0%
51 to 100	39	5.6%
101 to 200	51	7.3%
201 to 500	137	19.5%
501 to 1,000	130	18.5%
1,001 to 2,000	121	17.3%
2,001 to 5,000	126	18.0%
5,001 or more	62	8.8%
Total	701	100.0%

19. What percentage of those returns were for individuals?		
0%		0.0%
1% to 25%	39	5.6%
26% to 50%	237	34.1%
51% to 75%	345	49.6%
76% to 100%	74	10.6%
Total	695	100.0%

20. What percentage were business returns?		
0%	3	0.4%
1% to 25%	178	25.7%
26% to 50%	394	56.9%
51% to 75%	97	14.0%
76% to 100%	21	3.0%
Total	693	100.0%

21. How much responsibility do you have for tax preparation software purchasing decisions in your firm?		
I make the decision	268	38.1%
I have input into the decision	259	36.8%
I am not involved in the decision	177	25.1%
Total	704	100.0%

22. How many preparers work in your firm?		
1	77	10.9%
2 to 5	171	24.3%
6 to 20	222	31.5%
21 to 100	162	23.0%
101 to 500	44	6.3%
501 or more	28	4.0%
Total	704	100.0%