

ATX

1. What overall rating would you give your tax preparation software?		
1—Very bad	1	0.5%
2	3	1.4%
3	22	10.0%
4	94	42.7%
5—Very good	100	45.5%
Total	220	100.0%

2. How easy was the update/installation process?		
1—Very difficult	1	0.5%
2	2	0.9%
3	10	4.6%
4	43	19.8%
5—Very easy	161	74.2%
Total	217	100.0%

3. How easy was the software to use?		
1—Very difficult	0	0.0%
2	3	1.4%
3	14	6.4%
4	75	34.1%
5—Very easy	128	58.2%
Total	220	100.0%

4. If you received training from your software provider, how would you rate the training?		
1—Very poor	1	4.8%
2	0	0.0%
3	5	23.8%
4	9	42.9%
5—Very good	6	28.6%
Total	21	100.0%

5. Did your software contain all of the forms you needed?		
Yes	206	94.9%
No	11	5.1%
Total	217	100.0%

6. How well did your software handle updates during tax season?		
1—Very poorly	0	0.0%
2	2	0.9%
3	17	7.7%
4	45	20.5%
5—Very well	156	70.9%
Total	220	100.0%

7. How well did your software handle transfers of data within returns?		
1—Very poorly	2	0.9%
2	5	2.3%
3	30	13.7%
4	66	30.1%
5—Very well	116	53.0%
Total	219	100.0%

8. How easy was electronic filing?		
1—Very difficult	0	0.0%
2	0	0.0%
3	19	8.8%
4	28	13.0%
5—Very easy	169	78.2%
Total	186	100.0%

9. If you filed multistate business returns, how well did your software handle them?		
1—Very poorly	0	0.0%
2	2	1.8%
3	18	16.2%
4	42	37.8%
5—Very well	49	44.1%
Total	111	100.0%

10. If you ran the software's conversion package, how would you rate it?		
1—Very bad	0	0.0%
2	2	10.0%
3	1	5.0%
4	7	35.0%
5—Very good	10	50.0%
Total	20	100.0%

11. What did you like best about your tax preparation software? (choose three)		
Accuracy	50	8.4%
Conversion process	1	0.2%
Ease of importing data	5	0.8%
Ease of use	133	22.5%
Installation process	37	6.3%
Integration with other software	2	0.3%
Learning curve	19	3.2%
Number of forms/comprehensiveness	115	19.4%
Price	163	27.5%
Support	36	6.1%
Tax research included in package	26	4.4%
Other	5	0.8%
Total	592	100.0%

12. What did you like least about your tax preparation software? (choose three)		
Accuracy	12	2.9%
Conversion process	13	3.2%
Ease of importing data	57	13.8%
Ease of use	15	3.6%
Installation process	15	3.6%
Integration with other software	73	17.7%
Learning curve	16	3.9%
Number of forms/comprehensiveness	13	3.2%
Price	49	11.9%
Support	60	14.6%
Tax research included in package	51	12.4%
Other	38	9.2%
Total	412	100.0%

13. How well did your tax preparation software integrate with your accounting and other software?		
1—Very poorly	15	7.8%
2	24	12.5%
3	80	41.7%
4	47	24.5%
5—Very well	26	13.5%
Total	192	100.0%

14. Did you ever need technical support from your software vendor during this year's tax season?		
Yes	152	69.1%
No	68	30.9%
Total	220	100.0%

15. How easy to was it to get technical support from the vendor?		
1—Very difficult	6	3.9%
2	13	8.6%
3	28	18.4%
4	57	37.5%
5—Very easy	48	31.6%
Total	152	100.0%

16. How good was the technical support you received?		
1—Very bad	4	2.6%
2	14	9.2%
3	24	15.8%
4	45	29.6%
5—Very good	65	42.8%
Total	152	100.0%

17. For how many clients did your firm prepare returns during this year's tax season?		
1 to 50	53	24.1%
51 to 100	47	21.4%
101 to 200	49	22.3%
201 to 500	54	24.5%
501 to 1,000	15	6.8%
1,001 to 2,000	1	0.5%
2,001 to 5,000	1	0.5%
5,001 or more	0	0.0%
Total	220	100.0%

18. What percentage of those returns were for individuals?		
0%	2	0.9%
1% to 25%	10	4.6%
26% to 50%	19	8.7%
51% to 75%	103	47.2%
76% to 100%	84	38.5%
Total	218	100.0%

19. What percentage were business returns?		
0%	13	5.9%
1% to 25%	123	55.9%
26% to 50%	63	28.6%
51% to 75%	8	3.6%
76% to 100%	13	5.9%
Total	220	100.0%

20. How much responsibility do you have for tax preparation software purchasing decisions in your firm?		
I make the decision	204	92.7%
I have input into the decision	14	6.4%
I am not involved in the decision	2	0.9%
Total	220	100.0%

21. How many preparers work in your firm?		
1	130	59.1%
2 to 5	87	39.5%
6 to 20	2	0.9%
21 to 100	1	0.5%
101 to 500	0	0.0%
501 or more	0	0.0%
Total	220	100.0%