

## CCH ProSystem fx

<b>1. What overall rating would you give your tax preparation software?</b>		
1—Very bad	2	0.3%
2	17	2.9%
3	39	6.7%
4	200	34.1%
5—Very good	328	56.0%
<b>Total</b>	<b>586</b>	<b>100.0%</b>

<b>2. How easy was the update/installation process?</b>		
1—Very difficult	2	0.4%
2	14	2.8%
3	94	18.6%
4	167	33.1%
5—Very easy	228	45.1%
<b>Total</b>	<b>505</b>	<b>100.0%</b>

<b>3. How easy was the software to use?</b>		
1—Very difficult	13	2.2%
2	27	4.6%
3	94	16.1%
4	279	47.9%
5—Very easy	170	29.2%
<b>Total</b>	<b>583</b>	<b>100.0%</b>

<b>4. If you received training from your software provider, how would you rate the training?</b>		
1—Very poor	3	2.0%
2	7	4.6%
3	40	26.1%
4	63	41.2%
5—Very good	40	26.1%
<b>Total</b>	<b>153</b>	<b>100.0%</b>

<b>5. Did your software contain all of the forms you needed?</b>		
Yes	522	89.4%
No	62	10.6%
<b>Total</b>	<b>584</b>	<b>100.0%</b>

<b>6. How well did your software handle updates during tax season?</b>		
1—Very poorly	4	0.7%
2	11	1.9%
3	63	10.8%
4	195	33.3%
5—Very well	313	53.4%
<b>Total</b>	<b>586</b>	<b>100.0%</b>

<b>7. How well did your software handle transfers of data within returns?</b>		
1—Very poorly	6	1.1%
2	14	2.5%
3	105	18.4%
4	197	34.5%
5—Very well	249	43.6%
<b>Total</b>	<b>571</b>	<b>100.0%</b>

<b>8. How easy was electronic filing?</b>		
1—Very difficult	2	0.3%
2	12	2.1%
3	39	6.7%
4	150	26.0%
5—Very easy	375	64.9%
<b>Total</b>	<b>578</b>	<b>100.0%</b>

<b>9. If you filed multistate business returns, how well did your software handle them?</b>		
1—Very poorly	3	0.6%
2	12	2.6%
3	73	15.8%
4	169	36.6%
5—Very well	205	44.4%
<b>Total</b>	<b>462</b>	<b>100.0%</b>

<b>10. If you ran the software's conversion package, how would you rate it?</b>		
1—Very bad	0	0.0%
2	1	1.9%
3	15	28.8%
4	20	38.5%
5—Very good	16	30.8%
<b>Total</b>	<b>52</b>	<b>100.0%</b>

<b>11. What did you like best about your tax preparation software? (choose three)</b>		
Accuracy	415	28.8%
Conversion process	2	0.1%
Ease of importing data	47	3.3%
Ease of use	185	12.8%
Installation process	33	2.3%
Integration with other software	48	3.3%
Learning curve	33	2.3%
Number of forms/comprehensiveness	391	27.1%
Price	20	1.4%
Support	223	15.5%
Tax research included in package	24	1.7%
Other	21	1.5%
<b>Total</b>	<b>1442</b>	<b>100.0%</b>

<b>12. What did you like least about your tax preparation software? (choose three)</b>		
Accuracy	21	2.0%
Conversion process	31	3.0%
Ease of importing data	48	4.6%
Ease of use	93	8.9%
Installation process	22	2.1%
Integration with other software	65	6.2%
Learning curve	111	10.6%
Number of forms/comprehensiveness	21	2.0%
Price	419	40.0%
Support	93	8.9%
Tax research included in package	73	7.0%
Other	51	4.9%
<b>Total</b>	<b>1048</b>	<b>100.0%</b>

<b>13. How well did your tax preparation software integrate with your accounting and other software?</b>		
1—Very poorly	26	5.0%
2	32	6.1%
3	206	39.5%
4	163	31.2%
5—Very well	95	18.2%
<b>Total</b>	<b>522</b>	<b>100.0%</b>

<b>14. Did you ever need technical support from your software vendor during this year's tax season?</b>		
Yes	485	82.9%
No	100	17.1%
<b>Total</b>	<b>585</b>	<b>100.0%</b>

<b>15. How easy to was it to get technical support from the vendor?</b>		
1—Very difficult	18	3.7%
2	37	7.7%
3	86	17.8%
4	200	41.4%
5—Very easy	142	29.4%
<b>Total</b>	<b>483</b>	<b>100.0%</b>

<b>16. How good was the technical support you received?</b>		
1—Very bad	9	1.9%
2	29	6.0%
3	79	16.4%
4	174	36.1%
5—Very good	191	39.6%
<b>Total</b>	<b>482</b>	<b>100.0%</b>

<b>17. For how many clients did your firm prepare returns during this year's tax season?</b>		
1 to 50	46	7.9%
51 to 100	34	5.8%
101 to 200	70	12.0%
201 to 500	113	19.3%
501 to 1,000	123	21.1%
1,001 to 2,000	94	16.1%
2,001 to 5,000	75	12.8%
5,001 or more	29	5.0%
<b>Total</b>	<b>584</b>	<b>100.0%</b>

<b>18. What percentage of those returns were for individuals?</b>		
0%	4	0.7%
1% to 25%	36	6.2%
26% to 50%	178	30.8%
51% to 75%	283	49.0%
76% to 100%	77	13.3%
<b>Total</b>	<b>578</b>	<b>100.0%</b>

<b>19. What percentage were business returns?</b>		
0%	3	0.5%
1% to 25%	184	32.1%
26% to 50%	294	51.2%
51% to 75%	75	13.1%
76% to 100%	18	3.1%
<b>Total</b>	<b>574</b>	<b>100.0%</b>

<b>20. How much responsibility do you have for tax preparation software purchasing decisions in your firm?</b>		
I make the decision	264	45.1%
I have input into the decision	197	33.7%
I am not involved in the decision	124	21.2%
<b>Total</b>	<b>585</b>	<b>100.0%</b>

<b>21. How many preparers work in your firm?</b>		
1	95	16.2%
2 to 5	182	31.1%
6 to 20	164	28.0%
21 to 100	107	18.3%
101 to 500	22	3.8%
501 or more	15	2.6%
<b>Total</b>	<b>585</b>	<b>100.0%</b>