

CCH Access Tax

1. What overall rating would you give your tax preparation software?		
1—Very bad	5	5.3%
2	7	7.4%
3	22	23.2%
4	39	41.1%
5—Very good	22	23.2%
Total	95	100.0%

2. Do you plan to use the same tax preparation software next season?		
Yes	80	95.2%
No	4	4.8%
Total	84	100.0%

3. How easy was the update/installation process?		
1—Very difficult	0	0.0%
2	0	0.0%
3	1	10.0%
4	6	60.0%
5—Very easy	3	30.0%
Total	10	100.0%

4. How easy was the software to use?		
1—Very difficult	4	4.3%
2	10	10.8%
3	23	24.7%
4	44	47.3%
5—Very easy	12	12.9%
Total	93	100.0%

5. If you received training from your software provider, how would you rate the training?		
1—Very poor	3	4.2%
2	9	12.5%
3	25	34.7%
4	26	36.1%
5—Very good	9	12.5%
Total	72	100.0%

6. Did your software contain all of the forms you needed?		
Yes	77	83.7%
No	15	16.3%
Total	92	100.0%

7. How well did your software handle updates during tax season?		
1—Very poorly	2	2.2%
2	8	8.7%
3	18	19.6%
4	26	28.3%
5—Very well	38	41.3%
Total	92	100.0%

8. How well did your software handle transfers of data within returns?		
1—Very poorly	5	5.4%
2	5	5.4%
3	22	23.7%
4	41	44.1%
5—Very well	20	21.5%
Total	93	100.0%

9. How easy was electronic filing?		
1—Very difficult	0	0.0%
2	6	6.5%
3	12	12.9%
4	29	31.2%
5—Very easy	46	49.5%
Total	93	100.0%

10. If you filed multistate business returns, how well did your software handle them?		
1—Very poorly	3	3.5%
2	5	5.9%
3	22	25.9%
4	27	31.8%
5—Very well	28	32.9%
Total	85	100.0%

11. How well did your software handle provisions of the Affordable Care Act?		
1—Very poorly	4	4.4%
2	7	7.7%
3	19	20.9%
4	37	40.7%
5—Very well	24	26.4%
Total	91	100.0%

12. If you ran the software's conversion package, how would you rate it?		
1—Very bad	3	10.3%
2	4	13.8%
3	10	34.5%
4	8	27.6%
5—Very good	4	13.8%
Total	29	100.0%

13. What did you like best about your tax preparation software? (choose three)		
Accuracy	54	23.9%
Conversion process	4	1.8%
Ease of importing data	12	5.3%
Ease of use	18	8.0%
Installation process	5	2.2%
Integration with other software	15	6.6%
Learning curve	9	4.0%
Number of forms/comprehensiveness	52	23.0%
Price	9	4.0%
Support	37	16.4%
Tax research included in package	5	2.2%
Other	6	2.7%
Total	226	100.0%

14. What did you like least about your tax preparation software? (choose three)		
Accuracy	11	5.6%
Conversion process	13	6.7%
Ease of importing data	13	6.7%
Ease of use	25	12.8%
Installation process	7	3.6%
Integration with other software	10	5.1%
Learning curve	29	14.9%
Number of forms/comprehensiveness	7	3.6%
Price	42	21.5%
Support	16	8.2%
Tax research included in package	11	5.6%
Other	11	5.6%
Total	195	100.0%

15. How well did your tax preparation software integrate with your accounting and other software?		
1—Very poorly	5	6.2%
2	5	6.2%
3	23	28.4%
4	32	39.5%
5—Very well	16	19.8%
Total	81	100.0%

16. Did you ever need technical support from your software vendor during this year's tax season?		
Yes	82	90.1%
No	9	9.9%
Total	91	100.0%

17. How easy to was it to get technical support from the vendor?		
1—Very difficult	1	1.2%
2	8	9.9%
3	24	29.6%
4	24	29.6%
5—Very easy	24	29.6%
Total	81	100.0%

18. How good was the technical support you received?		
1—Very bad	2	2.5%
2	15	18.5%
3	15	18.5%
4	26	32.1%
5—Very good	23	28.4%
Total	81	100.0%

19. For how many clients did your firm prepare returns during this year's tax season?		
1 to 50	3	3.4%
51 to 100	2	2.2%
101 to 200	12	13.5%
201 to 500	13	14.6%
501 to 1,000	18	20.2%
1,001 to 2,000	14	15.7%
2,001 to 5,000	14	15.7%
5,001 or more	13	14.6%
Total	89	100.0%

20. What percentage of those returns were for individuals?		
0%	0	0.0%
1% to 25%	5	5.7%
26% to 50%	39	44.8%
51% to 75%	38	43.7%
76% to 100%	5	5.7%
Total	87	100.0%

21. What percentage were business returns?		
0%	0	0.0%
1% to 25%	19	21.8%
26% to 50%	55	63.2%
51% to 75%	10	11.5%
76% to 100%	3	3.4%
Total	87	100.0%

22. How much responsibility do you have for tax preparation software purchasing decisions in your firm?		
I make the decision	35	39.3%
I have input into the decision	28	31.5%
I am not involved in the decision	26	29.2%
Total	89	100.0%

23. How many preparers work in your firm?		
1	6	6.7%
2 to 5	25	28.1%
6 to 20	27	30.3%
21 to 100	13	14.6%
101 to 500	7	7.9%
501 or more	11	12.4%
Total	89	100.0%