UltraTax CS

1. What overall rating would you give your tax preparation software?		
1—Very bad	1	0.1%
2	15	2.2%
3	45	6.6%
4	227	33.2%
5—Very good	395	57.8%
Total	683	100.0%

2. How easy was the update/installation process?		
1—Very difficult	4	0.8%
2	12	2.5%
3	62	12.9%
4	145	30.1%
5—Very easy	259	53.7%
Total	482	100.0%

3. How easy was the software to use?		
1—Very difficult	3	0.4%
2	19	2.8%
3	82	12.0%
4	310	45.4%
5—Very easy	269	39.4%
Total	683	100.0%

4. If you received training from your software provider, how would you rate the training?		
1—Very poor	3	1.2%
2	14	5.7%
3	53	21.5%
4	98	39.8%
5—Very good	78	31.7%
Total	246	100.0%

5. Did your software contain all of the forms you needed?		
Yes	630	93.5%
No	44	6.5%
Total	**674**	**100.0%**

6. How well did your software handle updates during tax season?		
1—Very poorly	7	1.0%
2	7	1.0%
3	39	5.7%
4	166	24.3%
5—Very well	464	67.9%
Total	**683**	**100.0%**

7. How well did your software handle transfers of data within returns?		
1—Very poorly	4	0.6%
2	12	1.8%
3	51	7.5%
4	202	29.7%
5—Very well	412	60.5%
Total	**681**	**100.0%**

8. How easy was electronic filing?		
1—Very difficult	3	0.4%
2	4	0.6%
3	42	6.2%
4	178	26.1%
5—Very easy	454	66.7%
Total	**681**	**100.0%**

9. If you filed multistate business returns, how well did your software handle them?

1—Very poorly	8	1.6%
2	8	1.6%
3	66	13.3%
4	191	38.6%
5—Very well	222	44.8%
Total	**495**	**100.0%**

10. If you ran the software's conversion package, how would you rate it?

1—Very bad	1	0.9%
2	9	8.3%
3	20	18.3%
4	40	36.7%
5—Very good	39	35.8%
Total	**109**	**100.0%**

11. What did you like best about your tax preparation software? (choose three)

Accuracy	440	24.3%
Conversion process	8	0.4%
Ease of importing data	70	3.9%
Ease of use	309	17.1%
Installation process	48	2.7%
Integration with other software	173	9.6%
Learning curve	50	2.8%
Number of forms/comprehensiveness	377	20.8%
Price	69	3.8%
Support	201	11.1%
Tax research included in package	35	1.9%
Other	30	1.7%
Total	**1810**	**100.0%**

12. What did you like least about your tax preparation software? (choose three)		
Accuracy	22	1.7%
Conversion process	38	2.9%
Ease of importing data	59	4.5%
Ease of use	80	6.0%
Installation process	45	3.4%
Integration with other software	91	6.9%
Learning curve	103	7.8%
Number of forms/comprehensiveness	24	1.8%
Price	499	37.7%
Support	159	12.0%
Tax research included in package	129	9.7%
Other	76	5.7%
Total	**1325**	**100.0%**

13. How well did your tax preparation software integrate with your accounting and other software?		
1—Very poorly	31	5.0%
2	44	7.1%
3	168	26.9%
4	173	27.7%
5—Very well	208	33.3%
Total	**624**	**100.0%**

14. Did you ever need technical support from your software vendor during this year's tax season?		
Yes	587	85.9%
No	96	14.1%
Total	**683**	**100.0%**

15. How easy to was it to get technical support from the vendor?		
1—Very difficult	24	4.1%
2	43	7.3%
3	117	19.9%
4	203	34.6%
5—Very easy	200	34.1%
Total	**587**	**100.0%**

16. How good was the technical support you received?		
1—Very bad	21	3.6%
2	35	6.0%
3	115	19.6%
4	176	30.0%
5—Very good	240	40.9%
Total	**587**	**100.0%**

17. For how many clients did your firm prepare returns during this year's tax season?		
1 to 50	38	5.6%
51 to 100	62	9.1%
101 to 200	92	13.5%
201 to 500	180	26.4%
501 to 1,000	167	24.5%
1,001 to 2,000	90	13.2%
2,001 to 5,000	46	6.7%
5,001 or more	8	1.2%
Total	**683**	**100.0%**

18. What percentage of those returns were for individuals?		
0%	0	0.0%
1% to 25%	19	2.8%
26% to 50%	133	19.5%
51% to 75%	397	58.1%
76% to 100%	134	19.6%
Total	**683**	**100.0%**

19. What percentage were business returns?		
0%	10	1.5%
1% to 25%	286	41.9%
26% to 50%	334	48.9%
51% to 75%	44	6.4%
76% to 100%	9	1.3%
Total	**683**	**100.0%**

20. How much responsibility do you have for tax preparation software purchasing decisions in your firm?		
I make the decision	446	65.3%
I have input into the decision	175	25.6%
I am not involved in the decision	62	9.1%
Total	**683**	**100.0%**

21. How many preparers work in your firm?		
1	156	22.8%
2 to 5	309	45.2%
6 to 20	181	26.5%
21 to 100	35	5.1%
101 to 500	2	0.3%
501 or more	0	0.0%
Total	**683**	**100.0%**