

ACTEC Software Survey

Technology in the Practice Committee

Reviewer Name**Date (mm/dd/yyyy)****Operating System****Software being reviewed:****Version Number, if any:****Vendor Name:****Vendor URL:****How long have you used the software?**

	Demo only	Less than 1 year	1-3 years	4-6 years	7-9 years	10+ years
Software usage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

How satisfied are you with the software?

	Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
Quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Customer support	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ease of Use	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Overall, does this software meet your needs?

- Yes
- Somewhat
- No

Have you used any software in the same category? If so, please include name:

I have not.

Please provide a substantive review of this software below.

I have used Prosystems to prepare gift tax returns for about 15 years.

Pros include that it is accurate, the forms are updated fairly quickly when the IRS issues changes as they often do and it will upload prior years' information making subsequent gift tax returns easy to file and less prone to typos in transcribing information from prior years.

Cons include that system is only accessible by downloading software (updates are sent by email to the registered user). This program cannot be accessed online or on a network, and because we have several tax preparers we need to have a separate PC dedicated to being the "ProSystems PC." We could have it downloaded on multiple PCs, but the users could not access each other's returns. It is also very challenging to train someone on the software - a new user has to essentially use trial and error to figure out the quirks of the system, which are logical once learned, but not intuitive.

Pricing is fair - we opted to pay a lower annual fee and then to pay a separate fee per return prepared, since changes to legislation lead us to have spikes in the number of returns we prepare in any given year.

Please return your completed survey to
Karen Stockmal at karen.stockmal@kmslawoffices.com.

All surveys will be reviewed before being submitted
for publication on the private side the ACTEC website, www.actec.org.