

Red flags:

When is it time to change tax software?

The signs are not always obvious. If you answer “yes” to any of these questions, consider it a red flag, and time to consider switching your tax software.



► Security breaches

Does your current software provider address any security concerns you may have to your satisfaction?



► Re-keying data and repetitive manual entries

Do you spend a lot of time inputting information because your current program(s) aren't integrated?



► Cumbersome new user training

Do you spend a lot of time onboarding new staff because your software is not intuitive or user-friendly?



► Utilization is low

Have you noticed a low utilization rate or steady decline in billable utilization rates recently?



► Outdated methods are slowing you down

Do you find yourself relying on Excel worksheets or paper to calculate data and prepare tax returns?



► Disruptive software updates

Does your software update at inconvenient times? Is productivity impacted when you are required to log out during a software update?



► Not mobile friendly

Are the firm management and client collaboration tools that you use not mobile friendly?



► Limited multi-user access

Can multiple users access your software in real-time without requiring synchronization after each use?



► Lack of seamless integration

Does your current software share data with your other internal and third-party programs?



► Tax return review redundancies

Do you review returns multiple times to identify errors and cross-check what needs updating?



► Software crashing

Is productivity impacted when software frequently crashes, freezes, or stalls?



► No time to build your business

Is it a struggle to respond to client and prospect inquiries in a timely manner?



► Manual updates and installation

Do you rely on IT staff to manually push out software updates rather than rely on automatic updates? Do your updates install to all of your devices from the cloud?

To learn more about a fully automated and powerful tax preparation solution, visit: tax.tr.com/ultrataxcs

