

# What to look for in new tax software

Once you're ready to evaluate new tax software, what are some must-haves to look for? Here's a checklist to get you started.

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|-----------------------|--|---|-----------------------|---|---|
| <input type="radio"/> | <b>Installation</b><br>Will it be easy to migrate your data and install your new software?   |    | <input type="radio"/> | <b>Interface</b><br>Is the user interface intuitive and easy-to-use, even for beginners?  |    |
| <input type="radio"/> | <b>Integration</b><br>What other programs does your software integrate with? Consider your research guidance, firm management solutions, bookkeeping, accounting, and auditing tools, and client data sources. |    | <input type="radio"/> | <b>Accuracy</b><br>What is the accuracy rating of the software within the profession as compared to other programs? It's important to consider accuracy as it minimizes risk and redundancy.                        |    |
| <input type="radio"/> | <b>Software updates</b><br>Are updates automatic so they don't disrupt your workflow, especially during busy season?   |    | <input type="radio"/> | <b>Regulatory changes</b><br>Do you receive real-time regulatory updates when they occur?   |    |
| <input type="radio"/> | <b>Affordability</b><br>Are total costs commensurate with value? Consider software costs, annual fees, and cost-per-return/user so that they do not become a burden.   |  | <input type="radio"/> | <b>Diagnostic tools</b><br>Are diagnostic tools available? These can check for errors and help reduce risk of human error.  |  |
| <input type="radio"/> | <b>Technical support</b><br>What technical support is available? Can you access help via the phone, email or live chat?  |  | <input type="radio"/> | <b>Electronic signatures</b><br>Can returns and engagement letters be sent out digitally for review and signature?  |  |
| <input type="radio"/> | <b>Electronic file sharing and client portal integration</b><br>Can you gather client information through an online organizer? Are finalized tax returns sent digitally via a secure client portal?            |  | <input type="radio"/> | <b>Barcode scanning</b><br>Can documents with bar codes, like Forms W-2 and Schedules K-1, be scanned?  |  |
| <input type="radio"/> | <b>Electronic payments</b><br>Are digital invoices an option? Can clients pay electronically?  |  | <input type="radio"/> | <b>Data importing</b><br>How is data imported? Is it automatically entered from QuickBooks or Excel? Does it extract data from source documents? Or can you download client data from their financial institutions? |  |
| <input type="radio"/> | <b>Customer reviews</b> What do current customers think about the software? Look through customer reviews.   |  |                       |   |   |

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