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From the April/May 2006 Review of
Tax Prep Suites

Thomson Creative Solutions offers what is arguably the most comprehensive line of applications for public accountants that includes its UltraTax CS professional tax compliance suite, as well as tax planning, fixed asset management, write-up, trial balance, practice management, engagement, financial analysis, paperless document management and client accounting. All of these programs share data from the same database, allowing excellent cross-application integration with the tax suite and thereby reducing data entry and ensuring consistency of information.

The tax suite supports all federal year-end income reporting as well as those for all states and municipalities that require returns. An UltraTax CS license meeting the filing needs of our four-person professional prototype firm (defined in the intro) would cost about $6,200 including e-filing costs. Creative Solutions offers each of the modules individually and also has a pay-per-return option.

Thomas J. Longman CPA, (www.tomlongman.com) based in Miami, Florida, selected Creative Solutions because his firm was looking for a company with good standing and market share. They needed a product that would help reduce training time due to turnover, offer reliable software integration, good tech support, software updates, education, etc. "Most importantly, we were looking for a company that could add 'real value' to our firm instead of just buying from another product vendor," Longman says. Longman refers to Creative Solutions' integrated software approach as the "Jon Baron Approach," and says it has enabled his firm to reduce training and high labor costs and increase productivity and efficiency to clients,

which in turn has led to increased profitability. "This certainly has

Learning Curve — 4.5 Stars

Creative Solutions has given UltraTax CS a new start screen, replacing the formerly mostly blank window with a homepage that provides links to common tasks such as creating clients, opening existing clients, recent return activity, tax research functions, and client status summaries. Traditional function icons and pull-down menus are also available across the top of the screen. The program's client selection list opens within a subwindow that is sortable by ID, name and type of return, and is filterable and searchable by several methods. UltraTax provides three methods of data entry: Interview, Form and Quick View, with the latter being mostly for review purposes. Within client returns, the program opens into a screen with a menu tree on the left that enables jumping to data-entry sections such as general information, payments, income, adjustments, itemizations and credits, with the rest of the screen housing either the interview screen or the form view. Within the interview mode, the system provides several tabs that further break down the information entry area the user is in, allowing users to easily jump to necessary areas.

General navigation and data entry within UltraTax CS is intuitive, with customizable options that enable users to make the program more comfortable for their needs. Additionally, many of the entry fields use smart lists that build every time an entry is made, allowing the user to select common entries such as ZIP Code, employer and other options from a list. Several assistive functions are available throughout the system, including right-click menus, line-by-line instructions and content-specific Help. The new homepage to the interface is a simple addition but enhances the product by allowing users to more quickly find files and get to work, although the interview mode could perhaps use additional user prompts to go to the next section or to close a return.

Use/Workflow & Productivity Tools — 5 Stars

preparers to potential issues, such as the use of blue marks in the corners of input fields, indicating that the field had information in the prior year, but has no data entered for the current-year return.

UltraTax CS enables linking to RIA, PPC and IRS research materials, with the ability to query line-specific research and analysis, as well as attaching notes and follow-up markings to returns and specific line entries. Creative Solutions has been aggressively developing its web-based components over the past several years, and includes online client organizers, as well as secure client web portals that enable clients to access and fill out their organizers online, with the data flowing directly into their client files in the firm's UltraTax system. Depending upon the client relationship and firm choices, the clients can also be given access to *.PDF versions of prior tax documents. UltraTax easily handles multiple state allocations and K-1 distributions as needed. The program also includes a robust depreciation module, capable of all state's specific calculations as well as property tax returns.

Integration/Import & Export — 4 Stars
As noted above, total integration throughout the line of Creative Solutions products greatly enhances workflow and decreases redundant data entry. The company
produces virtually everything an accountant or tax professional could need, with each of these programs supporting the others. Integration within the tax package itself ensures proper transfer of K-1 data and child/parent return relationships.
Users will also benefit from the electronic client organizers, where attachments such as spreadsheets or scanned documents can be sent to the preparer. Through integration with Trial Balance CS or Engagement CS, third-party accounting packages
and spreadsheets can be imported into UltraTax CS. UltraTax CS integrates with

the research offerings of RIA CheckPoint, enabling the linking of line entries

company sponsors ARNE2, an online user community for users of the software that enables professionals to assist each other with real-world issues and tax treatments. The company offers an extensive array of training options through its Creative Solutions University, including online, telephone-based, group and on-site options. Additional training is offered at the company's annual user conference.

Product Evolution & Vendor Vision — 5 Stars
Creative Solutions, a Thomson company, has actively pursued continued integration with research vendors PPC and RIA, both of which are also Thomson companies. The vendor offers an exceptional array of professional accounting applications and continues to develop and improve on them, especially its online functionality and document management systems. The tax system has seen advancements year over
year, with the company continually seeking user feedback to make additions to its applications.

Relative Value — 5 Stars
UltraTax CS is one of the stronger systems on the market, easily capable of handling complex corporate and individual returns while maintaining a generally friendly user interface. The system's greatest asset, once again, is its total integration with other Creative Solutions products, including Write-Up CS, Trial Balance CS, FileCabinet CS, Planner CS, Payroll CS, Practice CS, Fixed Assets CS and Engagement CS. This integration makes the system most valuable to a practice that is looking to implement a total firm-wide accounting and tax application. That said, the system easily runs as a stand-alone program, providing a very strong and capable compliance tool.

2006 Overall Rating — 5 Stars

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