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*From the [April/May 2008 Review](#)  
of Tax Compliance Suites*

UltraTax CS is the comprehensive professional tax preparation system offered by Thomson Tax & Accounting, which also offers a full array of accounting and firm management programs under the CS brand. All of these systems, including write-up, trial balance, engagement, document management, tax planning, payroll, secure online portals, client bookkeeping, engagement management and asset management, fully integrate with each other and with the UltraTax CS system. This provides a unified practice environment that can streamline everything from data entry through reporting. UltraTax CS provides compliance for all entities, including 1040, 1065, 1120, 1120S, 1041, 706, 709 and 990, with support for all states and many municipalities, many property tax returns, and e-filing of all federal and most state returns for which such filing is accepted.

The tax program's modules are available individually, with pricing starting at \$2,100. A fully inclusive multi-state, multi-preparer package costs around \$6,000, although most firms can reduce this cost significantly by selecting only the entities and states necessary, and by using the company's pay-per-return option for infrequently used entities. Also available through Thomson's CS line is a virtual/remote office option and a website building tool for accountants.

### **General Operations/ Ease-of-Use — 4.5 Stars**

The UltraTax CS system lets users get straight to compliance and management tasks by providing an excellent primary interface that uses separate information areas to offer links to specific functions. This customizable Home Page includes traditional icons at the top, along with panels in the main screen that identify

frequently performed tasks and recent return activity based on the individual

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which provides similar sorting, filtering and search functions within a popup window. UltraTax CS enables data entry directly onto form replicas or through an interview mode.

When working in a client return, the interface changes to offer a form/section navigation menu on the left. Data is automatically calculated as it is entered, with the system using various color schemes to note an entry's source as manually input, transferred, calculated or override. Right-click menu options give access to field-specific instructions and review functions such as notes. When using the form view mode, the left-hand navigation menu and tabs above the work area give access to primary form pages and subsidiary forms, worksheets and schedules. In the interview mode, the left-side menu breaks return data entry into logical sections (income, business, rental, farm, taxes, credits, etc.), while tabs further break each of these sections down into specific areas, such as W-2, 1099 and 2439. All data automatically flows throughout the system, including between interrelated parent/child returns and K-1 pass-throughs.

### **Workflow & Productivity Tools — 5 Stars**

To speed data entry, UltraTax CS provides smart selection lists for data-entry fields that are likely to have repeated information, such as employers, EINs and cities. These fields remember previous entries, allowing users to select from a list on future returns, which can be especially useful when preparing returns for individuals working for the same employer, and for interrelated business entities. This smart entry feature, in addition to remembering previously entered information, also lets users skip over areas unrelated to the current return, such as spousal information for a client filing as single.

The program also allows multiple clients to be open at the same time. Among the key features noted in every review of UltraTax CS is the benefit of total

integration with all of the other systems in the CS line. With all of the programs

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the review and diagnostic functions can be accessed with one click from the application toolbar. UltraTax CS supports the use of multiple monitors for simultaneously working within the program and viewing source documents, spreadsheets, research websites or other items on full screens. With optional UltraTax 1040 Portals, a tax practice can offer clients secure online access to individual returns, as well as the ability to upload documents and other materials. Similar portals are available through NetClient CS for non-1040 clients. As another online option, the implementation of Virtual Office CS allows firms with remote staff to access and work with client returns from any location. The program supports bar-coding of all returns and forms. New for TY 2007, Thomson introduced watermark functions for noting copy versions, the previously mentioned Client Profiles screen, proforma of client notes and data-entry displays, and the ability to export client reports.

### **Integration/ Import & Export — 5 Stars**

As noted, UltraTax CS integrates with the various Thomson CS accounting and practice management programs, as well as with Microsoft Excel for report generation and importing of client data. The program also offers excellent professional tax research capabilities through integration with PPC's 1040 Deskbook, and through RIA's Tax Reference Guides, Checkpoint system and LineFinder feature. As well, document management functions allow saving returns, reports and other items to PDF and Excel.

### **Support/Training & Help System — 5 Stars**

With its smart data-entry fields, line-by-line instructions and other features, UltraTax CS offers abundant assistive capabilities, including built-in task wizards, tutorials and access to the online ARNE2 community of tax and accounting

professionals. Thomson offers live and web-based training options through its

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to move up into additional modules as their client bases grow increasingly complex and diverse.

**2008 Overall Rating: 5 Stars**

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