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which also offers professional and client accounting applications, digital document management, practice management and an extensive array of web site services. All of CSI's products feed to and from a common database, helping to ensure data consistency and automatically transferring it between various applications including the company's FileCabinet Solution paperless office application. The company also produces UltraTax Planner and Depreciation Solution. UltraTax is available in modules for all federal entities, all 1040, 1120, 1120S, 1065, and 1041 states, and can be fully licensed or used on a pay-per-return basis. New subscriber cost for our four-person prototype firm (see above) is about \$6,240, including return filing fees. Renewals will cost approximately \$5,400 with early renewal discount applied.

### **Learning Curve – 4.5 Stars**

All of the UltraTax modules share the same interface, so users can quickly grow familiar with data entry. The program offers several input views, including Interview- and Form-based entry, and also provides client organizers. As well, a QuickView Watch Window option provides a summary of key return data along with a diagnostic worksheet. Selection and creation of new clients is made from an easy-to-understand window that provides a client list that is sortable by type, preparer and several other options, or can be searched by ID or client name. The screen designs use a folder tree for moving between types of forms or data-entry areas, with a large work area with large print, and provides links to worksheets, forms, calculations or other source documents.

The program's consistency, field-specific help and ability to automatically pull shared data from other returns makes it fairly easy to learn without significant training. Charles Tzinberg, CPA, managing partner of Glen Carbon, Illinois-based Tzinberg, Goldenberg & Deck, started using CSI services and software in 1989 and

says when the firm initially switched to the software they received training at a CSI

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allowing clients to enter much of their own data, which the system then inputs directly into their return. CSI also offers printable tax organizers.

UltraTax is one of the few tax programs that allows users to work with multiple clients/types at the same time. However, both returns cannot be viewed simultaneously. If more than one client is open, a button with the client number appears at the top right of the screen and allows users to switch between the clients. A built-in status system allows users to view all returns in process or selected entities, and enables sorting by various categories, so that professionals can quickly view return status and acknowledgements for clients.

During data entry, the system uses different text colors to identify the source: Preparer-keyed data is coded in black, blue data is system calculated or transferred, and red denotes overridden fields. The program automatically calculates data and includes links from the forms directly to the worksheet from which the information was transferred, making it easy to verify computations. UltraTax also handles multi-state allocations well, according to Mr. Tzinberg. 'Being on the Missouri-Illinois border means almost all of our returns are at least two state, and many of them are fairly complex,' he said. 'The program's ability to add global apportionment factors is a real time-saver when doing multi-state business returns.'

Additionally, diagnostics and review tools accelerate the review process, alerting the reviewer/preparer to incorrect or missing data. The diagnostics tool is available by clicking an icon in the upper toolbar, and also via hyperlinked messages on the entry forms, showing unresolved issues and linking the user to the appropriate data-entry screen for corrections. UltraTax also includes its own word processing system that allows users to create customized client letters and invoices. The program's database manager allows extensive searching, enabling users to find and sort tax clients using a variety of search criteria.

A variety of other tools and features are also available, including one-click return

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a result, UltraTax can extract data very quickly from the company's accounting and business management software. Information from CSI's write-up, engagement and trial balance programs transfers directly into UltraTax for business returns, while asset information in Depreciation Solution is automatically shared with UltraTax and other CSI programs because the applications share a database. The program also integrates with Payroll Solution, enabling sharing of W-2 information, and moves 1065, 1120s and 1041 K-1s directly into the individual returns of the partners, shareholders or beneficiaries if their returns are also being prepared with the software.

UltraTax and other CSI products do not export to an easily shared data format such as to Excel spreadsheets, ASCII or \*.TXT, but do exchange information with other CSI applications and BNA, and can produce \*.PDF documents for electronic transmission. The company offers conversion from CPASoftware, Drake, Dunphy, ExacTax, RIA, Lacerte, Orrtax, ProSystem fx Tax, Tax\$imple, TaxWise, TaxWorks and ProSeries. The company also noted that its trial balance, audit and engagement products integrate with GoSystem Tax.

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

CSI offers several training options through its Creative Solutions University, including group classroom training, on-site training sessions, tele-training, web-based training, an interactive training program and multiple training opportunities at the company's annual user's conference. Many of the company's training sessions are eligible for CPE credit, as well. CSI also offers an excellent support system within the program, with context-specific help and government form directions, as well as a support system that is anchored by its popular online user support community ARNE2. Additionally, a feature called the Tax Subject Index helps a user find the appropriate form to enter a specific type of data. Tax season phone support is available 9 a.m. to 9 p.m. M-F (ET); 9 a.m. to 6 p.m. Saturdays; and select Sundays.

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He said the company is working on increased integration between UltraTax, which already integrates with CSI's other products, and others, including 'Thomson Tax and Accounting products and services such as RIA CheckPoint and PPC Desk Guides, as well as integration with Excel for ease in importing spreadsheet information.' Mr. LaRue said his company uses surveys, online discussion forums, focus groups and other methods of reaching out to its user base for continued development ideas.

### **Relative Value- 4.5 Stars**

UltraTax is one of the more powerful systems on the market, with the ability to handle complex tax issues, provide full integration between suites and offer a wide range of utilities and diagnostic tools. Firms using other accounting and management software from CSI throughout the year would see the greatest value in implementing UltraTax, since much of the tax season data entry would be automatically transferred. The system is designed to work in a paperless environment (but it does print), so moving a practice toward that goal would more easily be achieved. The initial investment in this program is a little higher than with some other programs, but firms seeking a truly integrated system will realize a cost savings from saved data-entry time. The product would be best suited to firms with five or more preparers, although it can serve sole practitioners and small firms as well.

### **2004 OVERALL RATING:**

The tax preparation suites included in this review section were graded on the following six areas: Learning Curve; Use/Workflow & Productivity Tools; Integration/Import & Export; Support/Training & Help

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for returns, as well as additional tools such as integrated calculators and cross-form linking that streamline the entire process.

The **Integration/Import & Export** rating assesses the program's capability to import and export data to software from other vendors, and how the program retrieves existing data from the previous year. **Support/Training & Help System** looks at how the vendor has incorporated assistance features into its program (through its help utility), the quality of its support documentation (both print and built-in), and the extent of its online help component, whether it be simple FAQs, online user communities or more advanced systems. This section will also consider the availability of phone-based support and optional training programs offered by the vendor.

The **Product Evolution & Vendor Vision** score is reflective of the company's commitment to continued development of its product by looking at the technological culture of the company and its product development history.

Software developers with an eye to the future are more likely to provide user-focused resources including downloadable or automatic program updates, and often lead the field in providing additional tools and program capabilities that help in the productivity of the software.

**Relative Value** will provide a subjective determination of the dollar-value ratio of the software. While it is often said, 'you get what you pay for,' the most expensive option does not necessarily guarantee the best value, nor is the product with the lowest sticker price always the greater bargain. On this line, we will look at the value

of the features and tools provided in a software suite and provide a judgment on how

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