individual preparation through its IntelliTax for Windows and corporate, S-Corp, partnership and fiduciary filing, through the IntelliTax SuperSystem. The company also produces a character-based version of its individual preparation software. Orrtax also offers several marketing packages and other productivity bundles. The business and individual versions of the software are sold separately but integrate with each other. The 1040-only version of IntelliTax lists at $495. At the opposite end of the spectrum, the SuperSystem lists at $1,495. Seasonal discounts are available. The programs support all states with individual income taxes.

Learning Curve – 4 Stars
IntelliTax opens to a main menu Launch Pad screen that provides access to the primary functions of the program via clean and intuitive buttons that are easy to understand, such as New Client, Open Client and Print functions. This main menu also includes links to IRS functions and reference materials, as well

as to companies Orrtax partners

as a checklist of sorts, using text-based links to various sections of the return. The interface also includes a vertical navigation pane that enables users to quickly jump to different sections of the return, as well as billing, the client organizer and a two-year tax summary.

Use/Workflow & Productivity Tools – 4.5 Stars

IntelliTax offers form- or interview-based data entry, with the option to toggle back and forth between the two, using some 'smart' data-entry features, such as a ZIP code feature that automatically fills in city/state. The system also uses some web-like entry forms that include check-boxes and 'radio' buttons during some of the client information entry and through the system's IntelliTax Snapshot feature. IntelliTax Snapshot can be used to provide prospective or current clients with quick tax estimates or can be used as a shortcut page, since it includes summary data that links to source forms, including information on

RAL fees, credits and anticipated

the Open Client icon presents the user with a field for searching by SSN. A more intuitive method is available via the Client Profile function, which provides a client list by return type, with a clickable summary list of each client with full contact data, federal/state refund amounts, direct deposit and RAL info, and e-file status. This screen, which offers a customizable and sortable spreadsheet interface, would best serve users as the primary client Open File screen. This year's version includes a My Returns filter that allows users to view only returns assigned to him or her, but this is not a security filter, only a client list filter. The program offers various security levels that can be set for specific features.

Within forms and interview sheets, IntelliTax allows users to attach notes to any field and provides links to supporting documents such as W-2s, Schedule Ds, or K-1s, as well as offering field-specific help and links to line instructions.

Data flows to wherever it is needed

New for TY 2003, the program now has an expanded Tax Summary that can include more than 75 customizable data fields from within a client tax return. The program also now supports MS SQL Server.

Integration/Import & Export – 4 Stars
IntelliTax moves data between its modules and allows transferring of Proforma data but does not allow import or export of data from/to common data formats such as *.XLS or *.TXT. Paul Slagle, senior product manager for IntelliTax, said the company is considering integration with People's Choice Accounting products that will enable import of income statement and balance sheet information into the business tax and Schedule C forms. Orrtax offers free conversions for users switching from Crosslink, Drake, Lacerte, ProSeries, ATX Saber, TaxSlayer, TaxWorks and TaxWise.

Support/Training & Help System – 4 Stars

The company produces IntelliTax

of training options is also available.

Product Evolution & Vendor Vision – 4Stars
Orrtax
endured a change of parent companies
a couple of years ago and has come
out stronger, with an apparently
greater devotion to product development.
The designers have produced a product
that provides essential functions
and added features in an intuitive
package. And they've backed
it up with good online support and
reference tools. The company has
sometimes been slow to incorporate
newer technologies, however, as
is evidenced by its adaptation of
a Windows version not occurring
until 1999.

Mr.
Slagle said the slowness in the
changes is to help ensure a better
user experience. 'The change
from DOS to Windows [and then incorporating
the Microsoft's TaxSaver technology],
provided an excellent user experience
and a pure graphical user interface
that is consistent with the surrounding

32-bit system,' he said. The

system that also offers business modules that are adequate for most small and mid-sized preparation firms. The system is ideally suited to firms providing RALs and other 'added-benefit' services, providing strong feature sets in both of these areas. The program is simple to use and navigate, which should minimize training downtime.

2004 OVERALL RATING:

This review section examines tax software that did not meet one or more of the requirements. That is not intended to diminish the quality of the software in this review. We had to draw the line somewhere regarding our prototype office's needs, and these products here simply take a different approach to their offerings. For this review, there is no prototypical firm because each of the products is quite different in their form support and feature sets. There are a few that barely missed the Tax Suites cut because of one missing module or the lack

of full state support, and there

determined were key aspects in using tax preparation software, aiding professionals in comparing those aspects and making a purchasing decision. The products in this review section received scores in the following six areas:

Learning Curve addresses the ease with which new users are likely to grow comfortable and proficient with the program.

Use/Workflow & Productivity Tools involves the intuitiveness of the user interface (how well a user can get around) and the way work is handled from start (interview) to finish (receipt of return). This includes tools that help professionals keep track of client and IRS status 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 use data between modules, how it exchanges data with software from other vendors, and how the program retrieves existing data from the previous year.

Support/Training & Help System looks at training options and how the vendor has incorporated assistance features into its program, the quality of its support documentation

and the extent of its online help

the software. While it is often said that, '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 well its price matches its offerings.

Finally, the **Overall Rating** will provide the reviewer's general assessment of the product. An Executive Summary follows the review section, providing a brief synopsis of the reviews along with a summary chart with products and their scores in each area.

Technology

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