practice management tools that enhance firm workflow. It can be used independently but is at its most productive and efficient when used as a central component of the CS ...

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From the **2016 Reviews of Professional Tax Preparation** Systems.

Best Firm Fit: UltraTax CS is best-suited to full service accounting and tax firms looking to enhance productivity across workflows through use of the broad CS Suite.

Highlights

- Comfortable interface is easy to learn and maintains design across modules

Core Product Functions/Features: 4.75 Stars

The UltraTax CS system can be used to prepare all federal and related state tax forms, including 1040, 1041, 1065, 1120, 1120s, 706, 709, 990 and 5500. The program's interface is well-designed, giving users quick access to live data regarding client filing statuses, news and system updates. A link is included for users to access the IRS refund information website.

Daily workflow tasks are simplified by form lists and data input sheets, as well as the option to input data directly onto form replicas. The data input sheets include selection lists for data such as account numbers, employers, zip codes and other information that users have previously entered for other clients. As data is entered, it automatically calculates and flows to necessary fields in other forms and returns, including K-1 info moving into partner or beneficiary 1040 returns from 1065, 1041 and 1120S returns. The system does the same form Kiddie Tax info.

The UltraTax CS system supports users with up to four monitors, with users having the ability to use different screens for different views, such as data input on one screen, prior year data on another, diagnostics on the third, and the fourth to give the client a review of their return.

Integration Options: 4.75 Stars

As one of the core benefits of the UltraTax CS system, it offers seamless integration with other programs in the suite, including the Accounting CS and Accounting CS Payroll systems, which allows year-end data to flow into the tax system. Key integrations with tax planning, document management, practice management, client portals and other solutions also greatly enhance productivity.

The tax system also offers direct integration with the Checkpoint tax research

are digitally organized into tax folders and the data can even be imported into client returns. The program also has options for scanning bar codes on Forms W-2 and K-1.

UltraTax CS includes comprehensive diagnostic tools that look for errors and missing data, and assist in identifying potential tax-minimizing strategies such as IRA contributions.

Remote Capabilities: 4.5 Stars

UltraTax CS was designed as an installed program either on a desktop or firm server, with the ability to add as many users as necessary. The system is also offered as a hosted solution and as a SaaS model, giving firms the convenience of anywhere/anytime access and no system maintenance. Thomson Reuters offers apps for Practice CS and NetClient CS, which let mobile users check on client data, tax status and firm tasks. For client collaboration, firms can use the NetClient CS Portals and client organizers.

Help/Support – 4.75 Stars

The UltraTax CS system offers good built-in help functions, including field-specific form instructions, and the program's Help and How-Top Center has a comprehensive, searchable database of useful topics and program guidance. Online resources include a private social network for CS users, program downloads, featured tips and support contact options. Online, email and phone support are included in system pricing, with extended support hours until 10pm during March and April, and until midnight on March 15, April 18, September 15 and October 17.

Summary & Pricing

UltraTax CS is an exceptional tax compliance package, particularly for full-service accounting and tax firms using other parts of the CS Suite. The extensive integration

between programs streamlines tax workflow processes, while ensuring data integrity

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