

2017 Drake - Conversion Quick Answers

Who performs the conversion?

- ✓ All returns are converted by the Wolters Kluwer Conversion Lab.
- ✓ Follow the steps at conversions.cch.com website to securely submit data for conversion.
 - There is no additional charge for this service.
 - Orders are processed on a first in, first out basis; contact [Conversion Support](#) for current processing times.

What is converted?

- ✓ Each competitor conversion is unique. Click the competitor name at conversions.cch.com to review **Conversion Details** documents for each available return type, organized by IRS form.
- ✓ **Completed Returns** ready for Roll Forward (Pro forma) - 1040, 1065, 1120, 1120S:
 - Transfers return data to CCH software for use in the next tax year.
 - **Current year returns** can be rolled forward and updated after the 2018 tax software release.
 - **Prior year returns** can be rolled forward and updated immediately after conversion.
 - Preparation of **4th Quarter Estimates** and other **Planning** tasks are not available for the current conversion year.
 - Organizers may be created for 1040 and 1041 from the converted returns.

What is not converted?

- ✓ **The tax conversion is not intended to replicate the source tax return.**
 - **Drake Online tax returns are not supported.** Files must come from the Drake Desktop software.
 - **No state data of any kind** is converted, including depreciation differences, loss carryovers, etc.
 - Preparer and Signer Information, Client Correspondence and other non-tax items are not converted.
 - The following return types are not converted:
 - 1041 – Fiduciary Returns
 - 990, 990PF, 990T – Exempt Organization Returns
 - 5500 – Employee Benefit Returns
 - 706, 709 – Estate and Gift Tax Returns
- ✓ See **User Guide FAQs and Conversion Details** documents for additional information and limitations at conversions.cch.com.

When can 2017 returns be converted?

- ✓ **Completed Returns** ready for Roll Forward (Pro forma) can be converted beginning **November 5, 2018**.
 - To expedite conversion, submit files to conversions.cch.com prior to this date.
Your files will be held in queue and processed once the conversion programs are available.
- ✓ Prior Years (2014 - 2016) may be submitted at any time; *2014 return conversions end October 31, 2018.*

How do I contact Conversion Support?

- ✓ Email: conversions@wolterskluwer.com | Phone: 800-739-9998, Option 2 – 2 - 2