

2017 Lacerte Conversion Quick Answers

Who performs the conversion?

- ✓ All returns are converted by the Wolters Kluwer Conversion Lab.
- ✓ Follow the steps at conversions.cch.com 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, organized by IRS form, for both Completed Returns and Returns On Extension.
- ✓ **Completed Returns** ready for Roll Forward (Pro forma) - 1040, 1065, 1120, 1120S, 1041, 990, 5500:
 - Transfers return data to CCH software for use in the next tax year.
 - **Current year returns** may 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 returns from the converted tax data.
- ✓ **Returns On Extension** - 1040, 1120 and 1120S only:
 - Transfers return data to CCH software for immediate use when finalizing 2017 Returns on Extension.
 - Can also be used for amending prior year returns.
 - **Not recommended** for Completed 2017 Returns!
 - Every return must be opened, reconciled and updated to ensure correct carryovers to the next tax year.

What is not converted?

- ✓ **Neither conversion method is intended to replicate the source tax return.**
 - Individual (1040) returns should be considered Federal only.
 - Refer to the **Conversion Details** document for limited state data items converted.
 - **No state data of any kind is converted for business returns**, including depreciation differences, loss carryovers, etc.
 - Preparer and Signer Information, Client Correspondence and other non-tax items are not converted.
 - Forms 706 and 709, Estate and Gift returns, are not converted.
- ✓ See **User Guide FAQs** and **Conversion Details** document for additional information and limitations at conversions.cch.com.

When can 2017 returns be converted?

- ✓ **Returns On Extension** will be converted beginning **July 16, 2018**.
- ✓ **Completed Returns** ready for Roll Forward (Pro forma) will be converted beginning **November 5, 2018**.
 - To expedite conversion, submit files to conversions.cch.com prior to these dates.
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 get additional information?

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