

# 2017 TaxWise Conversion Quick Answers

## Who performs the conversion?

- ✓ All returns are converted by the Wolters Kluwer Conversion Lab.
- ✓ Follow the steps at [conversions.cch.com](http://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](http://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:
  - 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 **4<sup>th</sup> 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.**
  - **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.
  - The following return types are not converted:
    - 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 details and limitations at [conversions.cch.com](http://conversions.cch.com).

## When can 2017 returns be converted?

- ✓ **Completed Returns** ready for Roll Forward (Pro forma) will be converted beginning **November 5, 2018**.
  - To expedite conversion, files may be submitted to [conversions.cch.com](http://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](mailto:conversions@wolterskluwer.com) | Phone: 800-739-9998, Option 2 – 2 - 2