

# 2017 Ultra Tax CS 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, 990:
  - 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.
- ✓ **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 years.
  - **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 **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.
  - Form 5500, Employee Benefit Return and Forms 706/709, Estate and Gift returns, are not converted.
- ✓ See **User Guide FAQs and Conversion Details** documents for additional information and limitations at [conversions.cch.com](http://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](http://conversions.cch.com) prior to these dates.  
Your files are 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