

ACA REPORTING & COMPLIANCE

Implementation Working Agreement Template

With the Affordable Care Act (ACA) resulting in over 20,000 pages of new regulations, nothing about the implementation of an ACA compliance reporting solution promises to be simple.

However, with the right resources you can have an ACA compliance reporting implementation success story. Thomson Reuters ONESOURCE™ offers this template to create an implementation working agreement that will help you establish leadership, create guidelines, identify risks, and create a picture of success.

1. Establish Leaders

1.1. Name of Internal Leader: _____

1.1.1. Name of Internal Back-Up: _____

1.1.2. List departments involved in implementation and decision-maker for each department:

1.1.2.1. Department: _____ Name: _____

1.1.2.2. Department _____ Name: _____

1.1.2.3. Department _____ Name: _____

1.1.2.4. Department: _____ Name: _____

1.2. Name of External Leader: _____

1.2.1. Name of External Back-Up: _____

2. Create Meeting Guidelines

2.1. To ensure all necessary players are available and to ensure meeting efficiency, determine:

2.1.1. How often you will meet with key internal players: _____

2.1.1.1. When you will meet: _____

2.1.1.2. Who will be the regular attendees: _____

2.1.2. How often you will meet with key external players: _____

2.1.2.1. When you will meet: _____

2.1.2.2. Who will be the regular attendees: _____

2.2. To avoid wasting time and resources when noncritical guests are invited to your meeting, write guidelines on when it is appropriate to invite someone to a meeting:

2.2.1. _____

2.2.2. _____

2.2.3. _____

2.3. To maintain a consistent meeting format and quickly highlight the most important discussion points, outline:

2.3.1. The format for reviewing status of tasks:

2.3.1.1. "Green" status for a task indicates _____

2.3.1.2. "Amber" status for a task indicates _____

2.3.1.3. "Red" status for a task indicates _____

2.3.2. How to determine if the status of tasks will impact any upcoming milestones: _____

3. Identify Risks & Roadblocks

3.1. In order to stay aware of (and avoid) potential pitfalls, identify situations or decisions in each category that would put the implementation at risk:

3.1.1. Approval Processes: _____

3.1.2. Change in personnel (i.e. upcoming vacations, leave): _____

3.1.3. Change in resources: _____

3.1.4. Vendor requirements: _____

3.1.5. Other: _____

4. Create a Picture of Success

4.1. As a means of making sure everyone is on the same page:


4.1.1. Write your shared vision statement by including:

4.1.1.1. State the problem: _____

4.1.1.2. Describe the solution: _____

4.1.1.3. Explain what your stakeholders will need in order to consider the solution successful: _____

4.1.2. Identify all major milestones: _____

 For additional resources on how to ensure a successful implementation process, visit tax.thomsonreuters.com/aca to watch our "Vendor Selection and Implementation Best Practices" webinar recording or to download our "Implementation Guidelines."

Your Implementation Manager:
