*For instructions on using this template, please see Notes to Author/Template Instructions on page 9. Notes on accessibility: This template has been tested and is best accessible with JAWS 11.0 or higher. For questions about using this template, please contact* [*CMS IT Governance*](mailto:IT_Governance@cms.hhs.gov)*. To request changes to the template, please submit an* [*TLC Process Change Request*](https://www.cms.gov/Research-Statistics-Data-and-Systems/CMS-Information-Technology/XLC/Downloads/XLCProcessChangeRequestCR.docx) *(CR).*

|  | CMS Logo |
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<Project Name / Acronym>

Training Plan

Version X.X

MM/DD/YYYY

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# Introduction

Instructions: Provide full identifying information for the automated system, application, or situation for which the Training Plan applies, including as applicable, identifications number(s), title(s)/name(s), abbreviation(s)/acronym(s), part number(s), version number(s), and release number(s). Summarize the purpose of the document, the scope of activities that resulted in its development, the intended audience for the document, and expected evolution of the document. Also describe any security or privacy considerations associated with use of the Training Plan.

## Overview

*Instructions: Briefly describe the purpose and context for the system or situation, and summarize the history of its development. Summarize the training effort needed to support the system or situation. Describe the project and/or organizational boundaries of the training, such as initial training for system users, remedial training for system operations and maintenance staff, etc.*

*(NOTE: This section maybe replaced by the System Design Document.)*

# Training Approach

## Training Needs

Instructions: Identify the personnel needing training, their current skill levels, and the competencies required for each to effectively use and/or support the system. Describe the training needed to close any skill gap and bring the resource to the appropriate competency level. Identify the training needs for the user’s staff if the implementation of the system under development will change the procedures of the user’s office in any way. Also identify the timeframe the required training is needed.

Table 1: Training Needs

| Personnel to be Trained | Current Skill Level | Required Competencies | Training Needed | Timeframe Needed |
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## Prerequisites

Instructions: Identify any prerequisites for individuals to receive training, and develop a strategy regarding prerequisite training as necessary.

## Methods & Tools

Instructions: Describe the training methods to be used and the curriculum for each training method. The methods may include COTS, GOTS, and/or custom-developed computer-based and/or web-based instruction, self-paced written manual, peer training, mentoring, consultation, hands-on practical sessions, classroom lectures, webinars, or any combination of the above. If multiple methods of training will be used, describe each of them in detail in appropriate sub-sections.

If the training will be custom-developed, describe how the course content and training materials will be developed, reviewed, evaluated, maintained, and distributed. Also identify the tools needed for the training (e.g., computer workstations, training materials (e.g., manuals, classroom facilities, and any computer center resources). Be sure to address Section 508 compliance of all electronic training materials and reasonable accommodation for the disabled as appropriate (e.g., closed captioning for video presentations). Identify potential sources (e.g., vendors), costs for providing the training, and locations if applicable. If appropriate, individual course synopses may be included in an appendix to the document that is referenced here.

## Roles & Responsibilities

Instructions: Identify the personnel and their responsibilities for developing and implementing the training, development and distribution of instructional materials, etc. Also identify the person(s) and organization(s) that will conduct the training. Identify any other groups who may serve as consultants, such as members of the development team, experienced users, etc.

## Training Development Schedule

Instructions: Provide a schedule of training activities to be accomplished in accordance with this Training Plan, which may or may not include actual course information. Show the required tasks in chronological order, with beginning and ending dates of each task, the key person(s) responsible for the task, dependencies, and milestones. If appropriate, tables and/or graphics may be used to present the schedule. Ensure that this information is appropriately integrated into the overall project schedule. The schedule should be as comprehensive as possible; however, the schedule may be revised as needed at later points in the lifecycle.

Table 2: Training Schedule

| Task # | Task Description | Begin Date | End Date | Key Person(s) Responsible | Dependencies | Milestones |
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# Training Administration

## Training Evaluation

Instructions: Describe how training evaluation will be performed. Describe how feedback will be elicited from personnel to ensure that training objectives were met (e.g., evaluation tools, forms, etc.). Also describe how the feedback will be analyzed and what will be done with the results, as well as how changes to the training and training materials will be made as a result of the evaluation process.

## Monitoring & Reporting

Instructions: Describe how training registration and training completion will be monitored and tracked..

1. Course Synopses (if applicable)

Instructions: Provide detailed descriptions for each prescribed training course.

Table 3: Course Synopsis

|  |  |
| --- | --- |
| Type | Enter the type of training (e.g., hands-on classroom training, lecture, webinar, individual computer-based training (CBT), individual web-based training, etc.) |
| Duration | Enter how long it will take for an individual to complete the course. |
| Dates / Locations | Enter the planned dates/locations for the course, if applicable. |
| Audience | Enter the target audience for the course (i.e., who should complete the training). |
| Prerequisites | Enter any prerequisites that course participants should have (e.g., prior training, practical experience, etc.). |
| Summary Description | Enter a brief description of the course focusing on the anticipated benefits |
| Course Objectives | Enter at a high-level what the participants will learn in completing the course, which may be presented as bulleted items |
| Course Content | Enter in detail the content of the course, which may be presented in the form of an outline. |
| Testing / Certification | Enter any exams/certifications following completion of the course. |
| Related Courses | Enter any related courses. |
| Logistics | Enter any logistical arrangements necessary for delivery of the course (e.g., instructions regarding participant registration, access to the training facility, hardware/software installation/configuration, establishment of user accounts/passwords for accessing the training, etc.). |

1. Record of Changes

*Instructions: Provide information on how the development and distribution of the Training Plan will be controlled and tracked. Use the table below to provide the version number, the date of the version, the author/owner of the version, and a brief description of the reason for creating the revised version.*

Table 4: Record of Changes

| Version  Number | Date | Author/Owner | Description of Change |
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1. Glossary

Instructions: Provide clear and concise definitions for terms used in this document that may be unfamiliar to readers of the document. Terms are to be listed in alphabetical order.

Table 5: Glossary

| Term | Definition |
| --- | --- |
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1. Referenced Documents

Instructions: Summarize the relationship of this document to other relevant documents. Provide identifying information for all documents used to arrive at and/or referenced within this document (e.g., related and/or companion documents, prerequisite documents, relevant technical documentation, etc.).

Table 6: Referenced Documents

| Document Name | Document Location and/or URL | Issuance Date |
| --- | --- | --- |
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1. Approvals

The undersigned acknowledge that they have reviewed the Test Summary Report and agree with the information presented within this document. Changes to this Test Summary Report will be coordinated with, and approved by, the undersigned, or their designated representatives.

Instructions: List the individuals whose signatures are desired. Examples of such individuals are Business Owner, Project Manager (if identified), and any appropriate stakeholders. Add additional lines for signature as necessary.

Table 7 - Approvals

| Document Approved By | Date Approved |
| --- | --- |
| Name: <Name>, <Job Title> - <Company> | Date |
| Name: <Name>, <Job Title> - <Company> | Date |
| Name: <Name>, <Job Title> - <Company> | Date |
| Name: <Name>, <Job Title> - <Company> | Date |

1. Notes to the Author / Template Instructions

This document is a template for creating a Training Plan for a given investment or project. The final document should be delivered in an electronically searchable format. The Training Plan should stand on its own with all elements explained and acronyms spelled out for reader/reviewers, including reviewers outside CMS who may not be familiar with CMS projects and investments.

This template was designed based on best practices and information to support CMS governance and IT processes. Use of this template is not mandatory, rather programs are encouraged to adapt this template to their needs by adding or removing sections as appropriate. Programs are also encouraged to leverage these templates as the basis for web-based system development artifacts.

This template includes instructions, boilerplate text, and fields. The author should note that:

* *Each section provides instructions or describes the intent, assumptions, and context for content included in that section. Instructional text appears in blue italicized font throughout this template.*
* *Instructional text in each section should be replaced with information specific to the particular investment.*
* *Some text and tables are provided as boilerplate examples of wording and formats that may be used or modified as appropriate.*

When using this template, follow these steps:

1. *Table captions and descriptions are to be placed centered, above the table.*
2. *Modify any boilerplate text, as appropriate, to your specific project.*
3. *All documents must be compliant with Section 508 requirements.*
4. *Figure captions and descriptions are to be placed centered, below the figure. All figures must have an associated tag providing appropriate alternative text for Section 508 compliance.*
5. *Delete this “Notes to the Author / Template Instructions” page and all instructions to the author before finalizing the initial draft of the document.*