For instructions on using this template, please see Notes to Author/Template Instructions on page 25. Notes on accessibility: This template has been tested and is best accessible with JAWS 11.0 or higher. For questions about using this template and To request changes to the template, please contact [CMS IT Governance](mailto:IT_Governance@cms.hhs.gov) ([IT\_Governance@cms.hhs.gov](mailto:IT_Governance@cms.hhs.gov)).

|  | Centers for Medicare & Medicaid Services |
| --- | --- |

<Project Name / Acronym>

Development Approach Plan

Version X.X

MM/DD/YYYY

**Document Number:** <document’s configuration item control number>

**Contract Number:** <current contract number of company maintaining document>

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# Introduction

Instructions: 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 this document.

This Development Approach Plan describes the approach for development of the <System Name (Acronym)>.

# Overview

Instructions: Provide a high-level overview of the project. Focus on the process and deliverable aspects of the project, including contract type, major milestones, and stakeholders. Briefly describe the purpose and context for the system, and summarize the history of its development.

# Assumptions/Constraints/Risks

## Assumptions

Instructions: Describe any assumptions or dependencies regarding the development approach for the project. These may concern such issues as: development methodology, SOW requirements, development and/or test environments, etc.

## Constraints

Instructions: Describe any limitations or constraints that may have a significant impact on the development approach (e.g., resources).

## Risks

Instructions: Describe any risks associated with the development approach and proposed mitigation strategies.

# Development Approach

## Development Methodology

Instructions: Identify the system development methodology that will be utilized for the project. Describe the approach for selecting the particular methodology. For guidance, refer to Selecting a Development Approach, available on the CMS Internet website at: <http://www.cms.gov/Research-Statistics-Data-and-Systems/CMS-Information-Technology/SystemLifecycleFramework/index.html>

## Lifecycle Management & Transition Approach

Instructions: Provide a description of the approach for managing and coordinating the transition from each lifecycle phase, each environment (e.g., contractor’s development facility to CMS’ test environment(s) to production data center), and/or among contractors, as applicable. Also describe the approach for interface control with other system segments performed by other system participants, including other contractors, CMS, and other Government agencies or agents who may furnish equipment, facilities, software, and personnel.

## Methods & Tools

Instructions: Describe the methods, processes, tools and techniques that will be used for development, and how they will integrate with other project processes (e.g., contract management, subcontractor management, project monitoring and control, risk management, etc.). As appropriate, refer to the Project Management Plan (PMP) and/or any applicable subordinate plans that may exist (e.g., Subcontractor Management Plan, Risk Management Plan, etc.). If applicable, describe the contractor’s Software Development Facility (SDF) to include Commercial-off-the-Shelf (COTS) and Computer-Aided Software Engineering (CASE) software, hardware, and programming languages and tools to be used for analysis, design, development, and testing. Identify any deviations from CMS standards and procedures for analysis, design, and secure coding. Use of CMS standards and procedures is strongly recommended. As applicable, include any other standards, best practices, or procedures that may be utilized for the project. Information regarding CMS’s standards and procedures can be found on the CMS Internet website at: <http://www.cms.gov/Research-Statistics-Data-and-Systems/CMS-Information-Technology/SystemLifecycleFramework/index.html>

Table 1: Development Approach Processes

| Process | Tools & Techniques |
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## Roles & Responsibilities

Instructions: Identify key personnel and other staff responsible for development of the system, and describe their roles and responsibilities for major project tasks using the table below.

Table 2: Roles & Responsibilities

| Name | Role | Responsibility |
| --- | --- | --- |
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1. Record of Changes

*Instructions: Provide information on how the development and distribution of the Development Approach 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 : Record of Changes

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

Instructions: Provide a list of acronyms and associated literal translations used within the document. List the acronyms in alphabetical order using a tabular format as depicted below.

Table : Acronyms

| Acronym | Literal Translation |
| --- | --- |
| **CMS** | Centers for Medicare & Medicaid Services |
| **PMP** | Project Management Plan |
| **PPA** | Project Process Agreement |
| **SDMP** | System Development Management Plan |
| **SOW** | Statement of Work |

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 : 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 : 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 Development Approach Plan and agree with the information presented within this document. Changes to this Development Approach Planwill 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.*

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1. Notes to the Author / Template Instructions

This document is a template for creating a Development Approach Plan for a given investment or project. The final document should be delivered in an electronically searchable format. The Development Approach 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 includes instructions, boilerplate text, and fields. The developer 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 investment.*
3. *Do not delete any headings. If the heading is not applicable to the investment, enter “Not Applicable” under the heading.*
4. *All documents must be compliant with Section 508 requirements.*
5. *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.*
6. *Delete this “Notes to the Author / Template Instructions” page and all instructions to the author before finalizing the initial draft of the document.*
7. Template Revision History

The following table records information regarding changes made to the template over time. To provide information about the controlling and tracking of this artifact, please refer to the Record of Changes section of this document.

Table : Template Revision History

| Version  Number | | Date | Author/Owner | Description of Change |
| --- | --- | --- | --- | --- |
| 1.0 | 07/29/2020 | | Alex Smith  CMS/OIT/ICPG/DIIMP | Baseline document. |
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1. Additional Appendices

Instructions: Utilize additional appendices to facilitate ease of use and maintenance of the document.