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>

Project Closeout Report

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 (General Project Information)

Instructions: Enter high-level general project information. Expand this section to include more information if needed for the project.

Table 1: Project Information

|  |  |
| --- | --- |
| Project Name | *Enter a name for the proposed project* |
| Project Description | *Enter description of project* |
| Project Manager | *Enter project manager’s name* |
| Project Sponsor | *Enter project sponsor’s name* |
| General Comments | *Enter any additional general comments* |

Table 2: Basic Project Results

|  | Baseline | Actual | Variance | % Variance |
| --- | --- | --- | --- | --- |
| **Start Date** |  |  |  |  |
| **Finish Date** |  |  |  |  |
| **Hours** |  |  |  |  |
| **Date** |  |  |  |  |
| **Budget** |  |  |  |  |

# Management Effectiveness

Instructions: Summarize how effectively the management needs of the customer and project were met. Highlight the significance of approved changes to the baseline, their impact on the project, and how they were managed. Compare baselines to actual and describe discrepancies. Identify and discuss specific issues that challenged the project/project team. Consider areas such as cost, schedule, scope, quality, risk, issue, change, communication, implementation and transition, regulatory compliance, and overall project team performance.

# Lessons Learned

*Instructions: Summarize project lessons learned including the cause of issues, reasoning behind the corrective action chosen, and other types of lessons learned. Identify and discuss specific issues that challenged the project/project team, including those pertaining to the Technical Review Board (TRB).*

# Administrative Closure

*Instructions: Summarize project administrative closure activities such as procedures to transfer the project products or services to production and/or operations; stakeholder approval for all deliverables; confirmation that the project has met all sponsors, clients, and other stakeholder’s requirements; verification that all deliverables have been provided and accepted; validation that completion and exit criteria have been met; regulatory compliance items.*

# Contract Closure

*Instructions: Summarize project contract closure activities such as formally closing all contracts associated with the completed project.*

# Information Distribution & Archive

*Instructions: Summarize the data archived in the project repository. The type of information actually archived will differ depending on the scope and type of project. Consider items such as contracts and proposals, business case, charter, scope statement, schedule, budget estimate, project management documents, surveys, status reports, checklists, and emails.*

*Archived items distributed to individual upon project close out. Note that this list may include individual without access to the project’s archive repository. This should be considered when deciding on an appropriate distribution medium.*

Table 3: Information Distribution & Archive

| Item | Distribution List | Media |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |

1. Record of Changes

*Instructions: Provide information on how the development and distribution of the Project Closeout Report 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. 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 5: Acronyms

| Acronym | Literal Translation |
| --- | --- |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

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 6: Glossary

| Term | Definition |
| --- | --- |
|  |  |
|  |  |
|  |  |
|  |  |

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 7: 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 Project Closeout Report and agree with the information presented within this document. Changes to this Project Closeout Reportwill 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.*

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |
| Title: |  |  |  |
| Role: |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |
| Title: |  |  |  |
| Role: |  |  |  |

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| --- | --- | --- | --- |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |
| Title: |  |  |  |
| Role: |  |  |  |

1. Notes to the Author / Template Instructions

This document is a template for creating a Project Closeout Report for a given investment or project. The final document should be delivered in an electronically searchable format. The Project Closeout Report 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 8: 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.