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 |
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<Project Name / Acronym>

Schedule Management 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.

The Schedule Management Plan describes how the Project Schedule will be established and managed.

# 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.

# Assumptions/Constraints/Risks

## Assumptions

Instructions: Describe any assumptions or dependencies that have a significant impact on the Project Schedule. These may concern such issues as scheduling dependencies, technology and human resource availability, third party responsibilities, and work hours per week/year.

## Constraints

Instructions: Describe any limitations or constraints for the project that may impact milestones, critical path, task duration, dependencies, resources, external system and personnel dependencies, CMS dependencies, risks, and other areas possibly affected during the course of the project.

## Risks

Instructions: Describe any risks associated with management of the Project Schedule and proposed mitigation strategies.

# Schedule Approach

Instructions: Describe the approach for establishing and baselining the Project Schedule in accordance with proven project management practices. The approach should include the methodology for defining tasks and dependencies, estimating the level of effort, determining critical path and milestones, and allocating resources. If multiple schedules will exist, describe the process for integrating them into one master schedule (e.g., If multiple contractors and/or subcontractors are involved in the project, describe the approach for integrating all associated schedules into one master schedule).

## Task Definition

Instructions: Describe the approach for defining tasks, including creating and/or refining the Work Breakdown Structure (WBS), utilizing historical task lists, identifying durations and dependencies, and determining critical path and milestones.

## Estimate Level of Effort

Instructions: Describe the approach for estimating level of effort. This section should include any automated tools used, historical data, factors, attributes, etc.

## Resource Allocation

Instructions: Describe the approach for allocating resources to tasks. If appropriate, refer to the Project Management Plan (PMP), or a separate Staffing Management Plan, if one exists.

## Methods & Tools

Instructions: Describe the methods and tools that will be used to establish and store the master Project Schedule and any related subordinate schedules (e.g., Microsoft Project, Clarity, etc.). Also identify and describe any standard reports that will be used to measure and report the status of the Project Schedule (e.g., Gantt chart, network diagram, resource usage, task usage, etc available from Microsoft Project).

# Schedule Management

Instructions: Describe the approach for managing the master Project Schedule and any related subordinate schedules in accordance with proven project management practices. Describe how the Project Schedule will be managed after it is baselined, and how schedule performance will be measured and reported.

## Determining Schedule Changes

Instructions: Describe how changes to the Project Schedule will be identified.

## Obtaining Agreement on Schedule Changes

Instructions: Describe how agreement from the appropriate stakeholders will be obtained for proposed changes to the Project Schedule.

## Managing Schedule Changes

Instructions: Describe how changes to the Project Schedule will be managed. Include information regarding any tracking system that will be used, the frequency of reviews of the schedule, approval levels necessary for authorizing changes, variance analysis, and corrective action methodology.

## Measuring & Reporting Schedule Performance

Instructions: Describe how schedule performance will be measured and progress will be tracked. Include how often the Project Schedule will be reviewed/updated and how percent complete will be determined.

1. Record of Changes

*Instructions: Provide information on how the development and distribution of the Schedule Management 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 |
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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 : 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 Schedule Management Plan and agree with the information presented within this document. Changes to this Schedule Management 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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| Signature: |  | Date: |  |
| Print Name: |  |  |  |
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| Print Name: |  |  |  |
| Title: |  |  |  |
| Role: |  |  |  |

1. Notes to the Author / Template Instructions

This document is a template for creating a Schedule Management Plan for a given investment or project. The final document should be delivered in an electronically searchable format. The Schedule Management 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.