*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)*).*



<Project Name/Acronym>

# Version Description Document

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: Provide full identifying information for the automated system, application, or situation for which the VDD 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 VDD.

## Overview

Instructions: Briefly describe the purpose of the system and the environments to which the VDD applies. Identify the intended recipients of the software release and the operating system to be used. Provide a brief overview of the system and software architectures. Summarize the history of system development, operation and maintenance. Identify current and planned operating sites. Refer to the SDD and/or Implementation Plan, as appropriate.

### Business Purpose and Stakeholder Impact

Instructions: Describe the business reason for this version and the impact on the business owner, end users, and other stakeholders. Identify all organizations or groups that need to be notified about the timing of the change and system down time.

### System Organization

Instructions: Briefly describe the system or the changes to the original architecture from the last version and the major system/version components essential to this version implementation. Describe hardware, software, and communications, as appropriate. Include any charts, diagrams, and/or graphics as necessary. This information may be obtained from the System Architecture section of the SDD.

## Assumptions/Constraints/Risks

### Assumptions

Instructions: Describe any assumptions or dependencies regarding this software version. These may concern such issues as: related software or hardware, operating systems, other systems or end-user characteristics.

### Constraints

Instructions: Describe any limitations or constraints that have a significant impact on this version of the software. Such constraints may be imposed by any of the following (the list is not exhaustive):

* Hardware or software environment
* End-user environment
* Availability of resources
* Interoperability requirements
* Interface/protocol requirements
* Data repository and distribution requirements

### Risks

Instructions: Describe any risks associated with this version of the software and proposed mitigation strategies.

## Version Description

Instructions: Briefly summarize the contents of the software version that is described in detail in the following subordinate sections. Include a summary of the materials contained in the release, the method and/or medium used for distribution, software components of the computer software configuration items (CSCIs), documents used to establish the configuration of the CSCIs, and any known problems.

### Inventory of Materials Released

Instructions: Describe all of the physical material and/or media (e.g., 3 ½-inch floppy disk, CD-ROM, tapes, listings, etc.) and associated documentation (hardcopy and electronic sources) that make up the software version being released. List all items by identifying numbers, titles, abbreviations, and dates, as applicable, as well as quantities of each item, which are included in the distribution package. Also include any applicable security, privacy, copyright, and licensing considerations.

Table 1 - Inventory of Materials Released

| CSCI Number | Material/Media | Quantity | Comments |
| --- | --- | --- | --- |
| <CSCI Number> | <Material/Media> | <Quantity> | <Comments> |

### Inventory of Software/Firmware Contents

Instructions: Describe all computer software and firmware (including custom-developed, COTS, and/or GOTS executables and environment files) that make up the software version being released. Document where the release is being delivered and at what time the release team should retrieve the release. If an automated version control system (e.g., Endevor or MKS) is used, include the configuration package number. List all items included in the distribution package by identifying numbers (e.g., version, release, serial, license, etc.), titles, abbreviations, dates, types (e.g., module, program, file, pane, etc.), directories/libraries, language, and environment, as applicable, including short descriptions for each as appropriate. Also include any applicable security, privacy, copyright, and licensing considerations. Depending on the amount of information listed in the inventory, the contents may be more appropriately included as an appendix to the VDD that is referenced here.

### Inventory of Incorporated Changes

Instructions: List all changes incorporated into the software version since the previous version was released, especially enhancements to functionality and bug fixes. Identify, as applicable, any previously documented Change Request(s) and/or Problem Report(s) associated with each incorporated change and the effects, if any, of each change on system operation and on interfaces with other hardware and software. This section will not apply to the initial software version.

Table 2 - Change Requests Incorporated in Release

| CR# | Synopsis |
| --- | --- |
| <CR#> | <Synopsis> |

Table 3 - Problem Requests Incorporated in Release

| PR# | Synopsis |
| --- | --- |
| <CR#> | <Synopsis> |

### Interface Compatibility

Instructions: List and describe all other systems, products, or CSCIs that are affected by the changes incorporated in this particular software version, if applicable. This may include other software (e.g., drivers) or even other hardware (e.g., cards and peripherals).

### Adaptation Data

Instructions: Identify and reference all unique-to-site data used to adapt the software version to a given installation site or to given conditions in its operational environment. Describe if the product behaves differently in different environments. Describe any issue requiring special attention due to the operating environment. For software versions after the first, describe any changes made to the adaptation data.

### Previous Testing

Instructions: Reference the Test Results Document, which describes the testing activities which took place in the previous environment, is a required deliverable for CMS Validation and Production environments. The Test Summary Report(s) is required and should follow the standard Test Summary format (if one exits) and placed in this section. If testing was limited for certain conditions, identify those limitations for consideration during subsequent testing activities.

### Possible Problems, Known Bugs/Errors, and Anomalies

Instructions: If a Test Summary Report does not exist, describe any possible problems, known bugs or errors, and anomalies with the software version at the time of release. Identify any steps being taken to resolve the problems or errors, and instructions (either directly or by reference) for recognizing, avoiding, correcting, or otherwise handling each one. The information presented here must be appropriate to the intended recipient of the VDD (for example, a user site may need advice on avoiding errors, while a support site may need instructions on correcting the errors).

## Installation Instructions

Instructions: Provide explicit instructions for installing the software version. Identify any other changes that have to be installed or de-installed/deleted for this version to be used, including hardware and environment changes or site-unique adaptation data not included in the software version. For example, identify any libraries that need to be built before executables are created. Identify any security, privacy, or safety precautions relevant to the installation. Provide procedures for determining if the version has been installed properly and a point-of-contact to be consulted if there are problems or questions with the installation.

## Application Verification

Instructions: Provide explicit instructions for verification of the software as “demonstration of significant application features to prove functionality, stability, and security” as this is what the review boards will require. This is sometimes called “smoke testing”. This is not function testing as that should be outlined and described in the supplied Test Plan document.

## De-Installation Instructions

Instructions: Provide explicit instructions for de-installing this product version and/or deleting or de-installing an older version. Provide procedures for determining if the version has been properly de-installed/deleted. If the installation of the new version should fail, identify how the previous version can be restored to a working state or describe the contingencies that must be made for this situation.

## Release Notes

Instructions: Provide any miscellaneous information that may be helpful or necessary to understand the release that does not fit neatly into any of the other previous categories (e.g., special schedule and/or personnel considerations).

Appendix A: Record of Changes

Instructions: Provide information on how the development and distribution of the Version Description Document (VDD) 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 |
| --- | --- | --- | --- |
| <X.X> | <MM/DD/YYYY> | CMS | <Description of Change> |
| <X.X> | <MM/DD/YYYY> | CMS | <Description of Change> |
| <X.X> | <MM/DD/YYYY> | CMS | <Description of Change> |

Appendix B: 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 |
| --- | --- |
| <Acronym> | <Literal Translation> |
| <Acronym> | <Literal Translation> |
| <Acronym> | <Literal Translation> |

Appendix C: 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 | Acronym | Definition |
| --- | --- | --- |
| <Term> | <Acronym> | <Definition> |
| <Term> | <Acronym> | <Definition> |
| <Term> | <Acronym> | <Definition> |

Appendix D: 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 |
| --- | --- | --- |
| <Document Name> | <Document Location and/or URL> | <MM/DD/YYYY> |
| <Document Name> | <Document Location and/or URL> | <MM/DD/YYYY> |
| <Document Name> | <Document Location and/or URL> | <MM/DD/YYYY> |

Appendix E: Approvals

The undersigned acknowledge that they have reviewed the Version Description Document and agree with the information presented within this document. Changes to this Version Description Document 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 8 - 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 |

Appendix F: Additional Appendices

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

Appendix G: Notes to the Author/Template Instructions

This document is a template for creating a Version Description Document for a given investment or project. The final document should be delivered in an electronically searchable format. The Version Description Document 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 left-aligned, 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 left-aligned, 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.

Appendix H: 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 9 - Template Revision History

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