

Centers for Medicare & Medicaid Services

<Business Owner’s Office/Center>

<Business Owner’s Group>

7500 Security Blvd

Baltimore, MD 21244-1850

Project Closeout Report

Version:

**Last Modified**:

*[Project Closeout Report Version 1.2 – June 4, 2010]*

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

**TEMPLATE REVISION HISTORY**

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Author** | **Description of Changes** |
| 1.0 | 9/23/2009 | K. Maenner, OIS/EASG/DITPPA | Baseline Version |
| 1.1 | 2/11/2010 | K. Maenner, OIS/EASG/DITPPA | Added language in the Lessons Learned section specific to the TRB. |
| 1.2 | 6/4/2010 | C. Shaunessy  OIS/EASG/DITG | Corrected page footer, added an approvals page, and labeled tables. |
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***Notes to the Author***

[This document is a template for creating a Project Completion Report document for a given project. The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values specific to the particular project.

Blue italicized text enclosed in square brackets (i.e., [text]) provides instructions to the document author, or describes the intent, assumptions and context for content included in this document.

Blue text enclosed in angle brackets (i.e., <text>) indicates a field that should be replaced with information specific to the particular project.

Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as appropriate.

When using this template, follow these steps:

Replace all text enclosed in angle brackets (e.g., <System Name (Acronym)>) with the appropriate information for the specific project. These angle brackets appear in both the body of the document and in headers and footers.

Modify any boilerplate text as appropriate to the specific project.

To add any new sections to the document, ensure that the appropriate header and body text styles are maintained. Styles used for the section headings are Heading 1 (Times New Roman 16 pt) and section sub-headings are Heading 2 (Times New Roman 14 pt). The style used for boilerplate and body text is Body Text (Times New Roman 12 pt).

To update the Table of Contents, right-click and select “Update field” and choose the option-“Update entire table”. Ensure that sub-headings at each level in the Table of Contents are appropriately indented for improved readability.

Delete this “Notes to the Author” page and all instructions to the author (i.e., all blue italicized text enclosed in square brackets) before finalizing the initial draft of the document.]

**REVISION HISTORY**

[Use the table below to record information regarding changes made to the document over time.]

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Author** | **Description of Changes** |
| 1.0 |  |  | Baseline Version |
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**LIST OF FIGURES**

*[Insert a List of Figures appearing within the document along with a page reference for each identified figure as appropriate.]*

<Figure #: Figure Title or Description……………………………………………Page Number>

**LIST OF TABLES**

*[Insert a List of Tables appearing within the document along with a page reference for each identified table as appropriate.]*

<Table #: Table Title or Description………………………..……………………Page Number>

# 

# INTRODUCTION

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

**Table 1: General Project Information**

|  |  |
| --- | --- |
|  | **Description** |
| **Project Name** | [Project name] |
| **Project Description** | [Description of project] |
| **Project Manager** | [Project Manager name] |
| **Project Sponsor** | [Project Sponsor name] |
| **General Comments** | [Any additional general comments] |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Baseline** | **Actual** | **Variance** | **% Variance** |
| **Start Date** | [mm/dd/yyyy] | [mm/dd/yyyy] | [000 days] | [00.0%] |
| **Finish Date** | [mm/dd/yyyy] | [mm/dd/yyyy] | [000 days] | [00.0%] |
| **Hours** | [000 hours] | [000 hours] | [000 hours] | [00.0%] |
| **Days** | [000 days] | [000 days] | [000 days] | [00.0%] |
| **Budget** | [$0,000.00s] | [$0,000.00s] | [$0,000.00s] | [00.0%] |

# Management Effectiveness

[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

[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

[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

[Summarize project contract closure activities such as formally closing all contracts associated with the completed project.]

# Information Distribution & Archive

[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 2: Information Distribution & Archive**

|  |  |  |
| --- | --- | --- |
| **Item** | **Distribution List** | **Distribution Medium** |
| [Archived Item] | [name] | [Email, fax, website, etc] |
| [Archived Item] | [name] | [Email, fax, website, etc] |

# APPENDIX A: project closeout report approval

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 Report will be coordinated with, and approved by, the undersigned, or their designated representatives.

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |
| Title: |  |  |  |
| Role: | Submitting Organization’s Approving Authority |  |  |
|  |  |  |  |
|  |  |  |  |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |
| Title: |  |  |  |
| Role: | CMS Business Owner |  |  |
|  |  |  |  |
|  |  |  |  |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |
| Title: |  |  |  |
| Role: | Project Manager |  |  |

# appendix b: REFERENCED DOCUMENTS

[This section provides a bibliography of key project references and deliverables that have been produced before this point in the project development. These documents may have been produced in a previous development life cycle that resulted in the initial version of the system now undergoing disposition or may have been produced in subsequent enhancement efforts as appropriate. Insert the name, version number, configuration item control number, and physical location of any documents referenced in this document. Add rows to the table as necessary.]

**Table 3: Referenced Documents**

| Document Name | Document Number | Location |
| --- | --- | --- |
| *<Document’s name and version number>* | *<Document’s configuration item control number>* | *<Location of document >* |
|  |  |  |
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# APPENDIX C: KEY TERMS and acronyms

The following table provides definitions and explanations for terms and acronyms relevant to the content presented within this document.

**Table 4: Key Terms**

| Term | Definition |
| --- | --- |
| *<Insert Term>* | <*Provide definition of term and acronyms used in this document*> |
|  |  |
|  |  |