Centers for Medicare & Medicaid Services
<Business Owner's Office/Center>
<Business Owner's Group>
7500 Security Blvd
Baltimore, MD 21244-1850

<System Name (Acronym)>
Release Plan

Version: <1.0>
Last Modified: <Month Day, Year>

[Release Plan Template Version 1.0 – June 11, 2008
Approved for use by the ESD Deliverables Workgroup]

Document Number: <document's configuration item control number>
Contract Number: <current contract number of company maintaining document>

<System Name and/or Acronym>

Note to the Author

[This document is a template for creating a Release Plan for a given development project. A Release Plan is only necessary for a project that will be utilizing a phased or incremental approach for its development and implementation. A Release Plan is unnecessary if there is only one release planned (i.e., a phased implementation is not intended).

The Release Plan describes what portions of the system functionality will be developed and implemented in which releases and the rationale for each release. The Release Plan is closely related to the Implementation Plan and the Release Management Plan. The Implementation Plan provides the details regarding initial implementation of the releases, including sequencing and site specific information. The Release Management Plan provides detailed information for subsequent planning, management, and monitoring of releases after the project has moved into the Operations and Maintenance Phase of the life cycle.

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:

1) *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.*
2) *Modify any boilerplate text as appropriate to the specific project.*
3) *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).*
4) *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.*
5) *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 Release Plan.]*

<System Name and/or Acronym>

APPROVALS

[Obtain signature approval of the final document from the delivering organization's Project Manager and the primary CMS recipient (i.e., generally the Government Task Leader (GTL)). Additional signature lines may be added as needed (e.g., CMS Business Owner).]

Submitting Organization's Approving Authority:

_____

Signature   Printed Name   Date   Phone Number

_____

<Position Title> *[e.g., <System Name and/or Acronym> Project Manager]*

CMS' Approving Authority:

_____

Signature   Printed Name   Date   Phone Number

_____

<Position Title> *[e.g., <Contract or System Name> Government Task Leader]*

<System Name and/or Acronym>

REVISION HISTORY

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

Version	Date	Organization/Point of Contact	Description of Changes
1.0	<mm/dd/yy>	<Organization Identifier / Point-of-Contact Name>	Baseline Version

<System Name and/or Acronym>

TABLE OF CONTENTS

<System Name and/or Acronym>

LIST OF FIGURES

[Insert a List of Figures appearing within the Release Plan along with a page reference for each identified figure as appropriate. Labels of Figure titles and descriptions are to be placed centered, above the figure within the main body of the document. All figures must have an associated tag providing appropriate alternative text for Section 508 compliance.]

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

LIST OF TABLES

[Insert a List of Tables appearing within the Release Plan along with a page reference for each identified table as appropriate. Labels of Table titles and descriptions are to be placed centered, above the table within the main body of the document.]

<System Name and/or Acronym>

1. INTRODUCTION

[Provide full identifying information for the automated system, application, or situation for which the Release Plan applies, including as applicable, identification 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 Release Plan.]

2. REFERENCED DOCUMENTS

[Summarize the relationship of this document to other relevant documents (e.g., the Project Management Plan (Communication Management Plan, Development Approach Plan, Risk Management Plan), Requirements Document, High-Level Technical Design Concept/Alternatives, Logical Data Model, System Design Document (SDD), Interface Control Document (ICD), Database Design Document (DDD), Data Conversion Plan, Test Plan, Training Plan, Version Description Document (VDD), Implementation Plan, and Release Management Plan, if they exist).

Provide identifying information for all documents used to arrive at and/or referenced within the Release Plan (e.g., related and/or companion documents, prerequisite documents, relevant technical documentation, etc.).]

Table 1: Referenced Documents

Document Name	Document Number	Issuance Date
<document name>	<document's configuration item control number>	<Month Day, Year>

3. OVERVIEW

[Briefly describe the purpose and context for the system or situation, and summarize the history of its development. Include the high-level context diagram(s) for the system and subsystems previously provided in the High-Level Technical Design Concept/Alternatives, Requirements Document, and/or System Design Document (SDD), updated as necessary to reflect any changes that have been made based on more current information or understanding. If the high-level context diagram has been updated, identify the changes that were made and why.]

<System Name and/or Acronym>

4. ASSUMPTIONS, CONSTRAINTS, RISKS

4.1. Assumptions

[Describe any assumptions about the current capabilities and use of the system when it is released in accordance with this plan. Include any information regarding external circumstances or commitments that may impact the release of the system.

Describe any dependencies that can affect the deployment of the system. Be sure to identify any other systems or subsystems that are impacted directly as a result of this Release Plan. Describe any dependencies including staffing, divisional/group participation, external system dependencies or dependencies due to specific business cycles that can impact this Release Plan.]

4.2. Constraints

[Describe factors that limit the ability to deploy the system or have some impact to the release of the system in accordance with this plan (e.g., budget and schedule constraints). Be sure to include constraints due to group/divisional involvement or any other external system or infrastructure constraints that impact the environment.]

4.3. Risks

[Describe any risks associated with release of the system in accordance with this Release Plan. Identify any adverse impacts to stakeholders (e.g., end users) during the release cycle. Be sure to include any factors that may adversely impact a successful deployment. Also provide a mitigation strategy for each identified risk that describes specifically the fallback position if a risk is realized. This information should also be documented in the project's Risk List and managed in accordance with the Project Management Plan (Risk Management Plan).]

5. RELEASE APPROACH

5.1. Rationale

[Describe the rationale for establishing this release approach. Reference any information or other deliverables (e.g. Requirements Document, High Level Technical Design Concepts/Alternatives, Project Management Plan (Financial Management Plan, Development Approach Plan, and/or Risk List), and Project Process Agreement (PPA)) that may have influenced the development of the release approach. Include key considerations such as how the assumptions, constraints, and risks from the previous section impact the release strategy. Also consider lessons learned from other deployments.]

<System Name and/or Acronym>

5.2. Release Strategy

[Describe at a high level the overall strategy for segmenting the delivery of the Business Product/Code into specific releases. Identify if the release strategy is for a phased function rollout/deployment or for a phased user base rollout/deployment.]

5.2.1. Release Content

[Identify each specific release, including a description of the functionality to be delivered in each release. Explain what the proposed system will do (and not do, if necessary). Map individual requirements from the Requirements Document to the specific release(s) that will provide that functionality, as appropriate. Provide any additional rationale for dividing the content into the specific releases.]

5.2.2. Release Schedule

[Provide a high-level schedule for planned delivery of the releases and the significant milestones associated with transitioning each release through the life cycle to production.]

5.2.3. Release Impacts

[Describe any business and/or system impacts associated with each release and the business processes that will be modified as a result of the deployment specified in this Release Plan. Identify any systems and interfaces that are directly impacted by the release strategy and any impacts to end users during the release cycle. Describe the relevant benefits, objectives, and goals to be met with each release.]

5.2.4. Release Notification

[If there is release-specific communication that needs to occur that is not already described in the Project Management Plan (Communication Management Plan), please describe here. Specify the individual stakeholders and/or groups requiring notification of an impending release. Also describe the method for providing notification prior to and/or following successful release of the system/application. Specify the information required by each person or group and the timeframes for receipt of the information, prior to release. For example, the help desk may require that a notification be received 10 days prior to release and provide the implementation date, a user impact assessment, and a help desk impact assessment.]

6. GLOSSARY

[Provide clear and concise definitions for terms used in the Release Plan that may be unfamiliar to readers of the document. Terms are to be listed in alphabetical order.]

<System Name and/or Acronym>

<Term Name>

<Term definition>

<Term Name>

<Term definition>

7. ACRONYMS

[Provide a list of acronyms and associated literal translations used within the document. List the acronyms in alphabetical order utilizing a tabular format as depicted below.]

<ACRONYM>	<Literal Translation>
CMS	Centers for Medicare & Medicaid Services
O&M	Operations and Maintenance

8. APPENDICES

[Utilize appendices to facilitate ease of use and maintenance of the Release Plan. Each appendix should be referenced in the main body of the document where that information would normally have been provided.]