

## RSS Reporting Requirements Checklist for the 2023-2024 Certification Year

Submit to: [cmecertification@urmc.rochester.edu](mailto:cmecertification@urmc.rochester.edu)

### **July, August, September 2023** (Quarter 1)

*due October 31, 2023*

- Disclosure to Learners Slides/Forms for each RSS Session
- Planner Presenter Financial Relationships Forms **and** Presenter Content Forms
- Excel attendance spreadsheet
- Handout materials (if available – provide sample from 1-2 sessions)
- Mitigation of Relevant Financial Relationships Form for Planners, Presenters, Others (if needed)
- Commercial Support Letter of Agreement (if needed)
- Maintenance of Certification (MOC) records (if needed)

### **October, November, December 2023** (Quarter 2)

*due January 31, 2024*

- Disclosure to Learners Slides/Forms for each RSS Session
- Planner Presenter Financial Relationships Forms **and** Presenter Content Forms
- Excel attendance spreadsheet
- Handout materials (if available – provide sample from 1-2 sessions)
- Mitigation of Relevant Financial Relationships Form for Planners, Presenters, Others (if needed)
- Commercial Support Letter of Agreement (if needed)
- Maintenance of Certification (MOC) records (if needed)

### **\*\*2024 – 2025 Activity Development Form \*\***

*due April 30, 2024*

### **January, February, March 2024** (Quarter 3)

*due April 30, 2024*

- Disclosure to Learners Slides/Forms for each RSS Session
- Planner Presenter Financial Relationships Forms **and** Presenter Content Forms
- Excel attendance spreadsheet
- Handout materials (if available – provide sample from 1-2 sessions)
- Mitigation of Relevant Financial Relationships Form for Planners, Presenters, Others (if needed)
- Commercial Support Letter of Agreement (if needed)
- Maintenance of Certification (MOC) records (if needed)

### **April, May, June 2024** (Quarter 4)

*due July 31, 2024*

- Disclosure to Learners Slides/Forms for each RSS Session
- Planner Presenter Financial Relationships Forms **and** Presenter Content Forms
- Excel attendance spreadsheet
- Handout materials (if available – provide sample from 1-2 sessions)
- Mitigation of Relevant Financial Relationships Form for Planners, Presenters, Others (if needed)
- Commercial Support Letter of Agreement (if needed)
- Maintenance of Certification (MOC) records (if needed)
- RSS Financial Summary Form**
- RSS Outcomes Measurement Summary Form**