

RSS Reporting Requirements Checklist for the 2025-2026 Certification Year

Submit to: cmecertification@urmc.rochester.edu

July, August, September 2025 (Quarter 1)

due October 31, 2025

- ☐ Disclosure to Learners Slides/Forms for each RSS Session
- ☐ Planner Presenter Financial Relationships Forms
- ☐ Presenter Content Forms
- ☐ Mitigation of Relevant Financial Relationships Form for Planners, Presenters, Others (if needed)
- ☐ Excel attendance spreadsheet
- ☐ Maintenance of Certification (MOC) records (if applicable)
- ☐ Commercial Support Letter of Agreement (if applicable)

October, November, December 2025 (Quarter 2)

due January 31, 2026

- ☐ Disclosure to Learners Slides/Forms for each RSS Session
- ☐ Planner Presenter Financial Relationships Forms
- ☐ Presenter Content Forms
- ☐ Mitigation of Relevant Financial Relationships Form for Planners, Presenters, Others (if needed)
- ☐ Excel attendance spreadsheet
- ☐ Maintenance of Certification (MOC) records (if applicable)
- ☐ Commercial Support Letter of Agreement (if applicable)

****2026 – 2027 Activity Development Form ****

due April 30, 2026

January, February, March 2026 (Quarter 3)

due April 30, 2026

- ☐ Disclosure to Learners Slides/Forms for each RSS Session
- ☐ Planner Presenter Financial Relationships Forms
- ☐ Presenter Content Forms
- ☐ Mitigation of Relevant Financial Relationships Form for Planners, Presenters, Others (if needed)
- ☐ Excel attendance spreadsheet
- ☐ Maintenance of Certification (MOC) records (if applicable)
- ☐ Commercial Support Letter of Agreement (if applicable)

April, May, June 2026 (Quarter 4)

due July 31, 2026

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- ☐ Presenter Content Forms
- ☐ Mitigation of Relevant Financial Relationships Form for Planners, Presenters, Others (if needed)
- ☐ Excel attendance spreadsheet
- ☐ Maintenance of Certification (MOC) records (if applicable)
- ☐ Commercial Support Letter of Agreement (if applicable)
- ☐ **RSS Financial Summary Form**
- ☐ **RSS Outcomes Measurement Summary Form (Summary of Evaluations)**