RSS Reporting Requirements Checklist for the 2023-2024 Certification Year
Submit to: cmecertification@urmc.rochester.edu

July, August, September 2023 (Quarter 1)  
☐ 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)  

due October 31, 2023

October, November, December 2023 (Quarter 2)  
☐ 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)  

due January 31, 2024

**2024 – 2025 Activity Development Form **  

due April 30, 2024

January, February, March 2024 (Quarter 3)  
☐ 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)  

due April 30, 2024

April, May, June 2024 (Quarter 4)  
☐ 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  

due July 31, 2024