



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
- \Box 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)

 \Box Disclosure to Learners Slides/Forms for each RSS Session

- \Box Planner Presenter Financial Relationships Forms and Presenter Content Forms
- \Box 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)

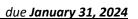
**2024 – 2025 Activit	y Development Form **
-----------------------	-----------------------

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

- □ Disclosure to Learners Slides/Forms for each RSS Session
- \Box 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)

- \Box Disclosure to Learners Slides/Forms for each RSS Session
- \Box Planner Presenter Financial Relationships Forms and Presenter Content Forms
- \Box 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)
- \square RSS Financial Summary Form
- □ RSS Outcomes Measurement Summary Form



due October 31, 2023

<u>due **April 30, 2024**</u>

due **April 30, 2024**

due **July 31, 2024**