Reporting Requirements Checklist for 2019-2020 Certification Period

Submit to: cmecertification@urmc.rochester.edu or IIE Box 709

July, August, September (Quarter 1)   due **October 31, 2019**

- ☐ RSS Individual Session Disclosure Form for each session
- ☐ Planner Presenter Content Declaration forms
- ☐ Excel attendance spreadsheet
- ☐ Handout materials (if available – provide sample from 1-2 sessions)
- ☐ Resolution of Conflicts of Interest Form (if needed)
- ☐ Commercial Support Agreements (if needed)

October, November, December (Quarter 2)   due **January 31, 2020**

- ☐ RSS Individual Session Disclosure Form for each session
- ☐ Planner Presenter Content Declaration forms
- ☐ Excel attendance spreadsheet
- ☐ Handout materials (if available – provide sample from 1-2 sessions)
- ☐ Resolution of Conflicts of Interest Form (if needed)
- ☐ Commercial Support Agreements (if needed)
- ☐ **Financial Summary Form**
- ☐ **Outcomes Measurement Summary & Analysis Form**

2020 – 2021 Application ***   *due **April 30, 2020

January, February, March (Quarter 3)   due **April 30, 2021**

- ☐ RSS Individual Session Disclosure Form for each session
- ☐ Planner Presenter Content Declaration forms
- ☐ Excel attendance spreadsheet
- ☐ Handout materials (if available – provide sample from 1-2 sessions)
- ☐ Resolution of Conflicts of Interest Form (if needed)
- ☐ Commercial Support Agreements (if needed)

April, May, June (Quarter 4)   due **July 31, 2021**

- ☐ RSS Individual Session Disclosure Form for each session
- ☐ Planner Presenter Content Declaration forms
- ☐ Excel attendance spreadsheet
- ☐ Handout materials (if available – provide sample from 1-2 sessions)
- ☐ Resolution of Conflicts of Interest Form (if needed)
- ☐ Commercial Support Agreements (if needed)
- ☐ **Financial Summary Form**
- ☐ **Outcomes Measurement Summary & Analysis Form**