

RSS Reporting Requirements Checklist for the 2024-2025 Certification Year

Submit to: cmecertification@urmc.rochester.edu

July, August, September 2024 (Quarter 1)

due October 31, 2024

- 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 2024 (Quarter 2)

due January 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)

****2025–2026 Activity Development Form ****

due April 30, 2025

January, February, March 2025 (Quarter 3)

due April 30, 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)

April, May, June 2025 (Quarter 4)

due July 31, 2025

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- Presenter Content Forms
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- RSS Financial Summary Form**
- RSS Outcomes Measurement Summary Form (Summary of Evaluations)**