

Status Report/Annual Update Form

Once a measure is endorsed, it will enter a 5-year maintenance period. At year three, the developer or steward must submit a status report indicating whether any material changes to the measure specifications have occurred or are needed. At year five, the developer or steward must resubmit the measure to Battelle for endorsement review.

Material changes are defined as any modification to the measure specifications that significantly affects the measure results such as:

- Changes to the measured population (e.g., age ranges, diagnoses, inclusion/exclusion criteria, insured populations);
- Changes to what is being measured (e.g., target values like blood pressure or cholesterol);
- Inclusion of new data sources; or
- Expansion or change in the unit of analysis or care settings (e.g., adding clinician level to a measure previously endorsed at the practice level; note that such expansions remain under the same CBE ID).

A status report is *not* required if the measure was conditionally endorsed with the requirement to return for full maintenance review at 3 years.

In years without a scheduled re-evaluation, measure developers or stewards may submit an **annual update**. Annual updates allow for limited changes, such as updating procedure, diagnostic, or other codes. The update should indicate whether any material changes have occurred or are needed since the last review, including the reasons for these changes.

Submission Instructions

Please complete the Status Report/Annual Update Form and send it to PQMsupport@battelle.org. Battelle staff will review your submission to determine if any changes require an early endorsement review before the end of the 5-year maintenance cycle. If an early maintenance review is required, Battelle will contact the measure's point(s) of contact to confirm next steps. For more information, please refer to the Maintenance of Endorsement section of the [E&M Guidebook](#).

CBE ID#: _____ **Measure Title:** _____

Date of Last Annual Update (Month, Date, Year, if applicable): _____

Last Endorsement Cycle (Fall/Spring, Year): _____

1. Please indicate the purpose for submitting the Status Report/Annual Update Form.

- Status Report – 3-year status requirement
 Annual Update (not related to 3-year status requirement)

2. Has the primary or secondary point contact for the measure changed? Battelle will update any changes in the STAR database based on the information provided below.

If yes, please provide the updated point of contact below.

- No
 Yes

a. Primary Point of Contact

Primary Point of Contact Name: _____

Primary Point of Contact Email: _____

Primary Point of Contact Phone: _____

b. Secondary Point of Contact

Secondary Point of Contact Name: _____

Secondary Point of Contact Email: _____

Secondary Point of Contact Phone: _____

Secondary Point of Contact Address: _____

3. Has the steward point of contact for the measure changed?

*If yes, please provide the updated point of contact below. **Note:** this field is for an individual change within the steward organization, not a change of the steward organization. If there is a change in the measure steward, please contact PQMsupport@battelle.org.*

No

Yes

a. Primary Steward Point of Contact

Steward Contact Name: _____

Steward Contact Email: _____

Steward Contact Phone: _____

b. Secondary Steward Point of Contact

Steward Contact Name: _____

Steward Contact Email: _____

Steward Contact Phone: _____

4. Limited or material changes have occurred/are needed to the measure specifications since the last annual update or endorsement review?

If “Yes,” please complete #5 and #6 below. If “No,” the form is complete and ready to be submitted.

No – No limited or material changes since last update or review (form complete, ready for submission).

Yes – Limited changes have occurred/are needed (please complete Sections 5 - 7 below).

Yes – Material changes have occurred/are needed (please complete Sections 5 - 7 below).

5. If you indicated “Yes” to #4, briefly describe the needed changes to the measure specifications and provide the rationale. Specifically, describe how the change in specifications affects the measure results.

***Note:** If a material change is identified, the measure will undergo an early maintenance review, which requires updated testing data. See the Emergency Review/Off-Cycle Reviews section of the E&M Guidebook for more details.*

6. If you indicated “Yes” to #4, indicate which measure fields require changes.

For example, the changes noted in #5 require that the following fields be updated:

- *Measure Specifications*
- *Scientific Acceptability*

7. If you indicated “Yes” to #4, indicate when the limited or material changes have occurred/are needed.

For example, the changes indicated above have been made as of January 1, 2026; or the changes indicated above will be completed by September 30, 2026.