

## Status Report/Annual Update Form

Once a measure is endorsed, it will enter a 5-year maintenance cycle, at which time the measure is resubmitted to Battelle for endorsement review. However, prior to the 5-year maintenance review, at three (3) years since the measure's endorsement, developers/stewards provide a status report indicating whether any changes to the measure specifications are needed. The developer/steward may also submit an attestation if no changes are required.

Additionally, every year, when an endorsed measure is not being re-evaluated for continued endorsement, measure stewards have the option to submit a status report (i.e., annual update) of the measure specifications to Battelle. This report either reaffirms the measure specifications remain the same as those at the time of endorsement or last update, or outlines any changes or updates made to the endorsed measure, including the purpose for the changes.

Please download and complete the Status Report/Annual Update Form. Submit the completed form to [PQMsupport@battelle.org](mailto:PQMsupport@battelle.org). Battelle staff review to confirm if any changes indicated require the measure to be submitted for endorsement review before the 5-year maintenance cycle (i.e., early maintenance review). If an early maintenance review is required, Battelle will contact the measure's point 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 Update (Month, Date, Year, if applicable):** \_\_\_\_\_

**Last Endorsement Cycle (Fall/Spring, Year):** \_\_\_\_\_

**1. Please indicate the purpose for submitting the Annual Update Form.**

- Submitting due to measure changes not associated with the 3-year maintenance of endorsement requirement
- Submitting due to the 3-year maintenance of endorsement requirement

**2. Has the primary or secondary point contact for the measure changed?**

*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: \_\_\_\_\_

Primary Point of Contact Address: \_\_\_\_\_

**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](mailto:PQMsupport@battelle.org).*

- No  
 Yes

**a. Steward Point of Contact**

Steward Contact Name: \_\_\_\_\_  
Steward Contact Email: \_\_\_\_\_  
Steward Contact Phone: \_\_\_\_\_  
Steward Contact Address: \_\_\_\_\_

**4. Indicate whether there are changes to the measure specifications since the last update/endorsement review.**

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

- No, the developer/steward of this measure attests there are no changes to the measure specifications since the date of last update or endorsement review.  
 Yes, there have been changes to the measure specifications since the date of last update or endorsement review.

**5. If you indicated “Yes” to #4, please briefly describe any important changes to the measure specifications since the last measure update and provide a rationale. Specifically, describe how the change in specifications affects the measure results. If a material change in specification is identified, the measure will be pulled off its maintenance cycle for an early maintenance review.**

**An off-cycle, early maintenance review is a formal measure evaluation and endorsement consideration occurring prior to the previously scheduled maintenance of endorsement date. Thus, data from re-testing of the measure with the new specifications is required for an early maintenance review.**

*A material change is defined as any significant modification to the measure specification (see [Emergency Review/Off-Cycle Reviews](#) section in [E&M Guidebook](#) for more information).*

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

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

- *Measure Specifications*
- *Scientific Acceptability*