



Overview: ECO Subcommittee

DISCLAIMER

- This presentation is for informational purposes only
- The content is point-in-time information, subject to revision



ECO INFORMATION/TRAINING SERIES

- ECOP01 Overview - ECO Subcommittee
- ECOP02 ECO Stakeholders & Constituents
- ECOP03 Overview – ECL Policies
- *ECOP04 Overview - ECO Code Maintenance Groups
- *ECOP05 CMG Stakeholders & Constituents
- ECOP06 Transitioning to an ECO CMG
- ECOP07 Submitting an ECL Maintenance Request
- *ECOP08 Proposing a new External Code List

* Indicates the Presentation will be available soon



OUTLINE

- Terms, Definitions, and Acronyms
- Background
- Introduction
- Composition
- Responsibilities
- CMG Types



TERMS AND DEFINITIONS

- Code list
 - A set of codes and associated messages that enables efficient, effective, and consistent communication between trading partners

TERMS AND DEFINITIONS

- **Constituent**
 - An individual, usually a member representative, that has met the requirements for specific privileges within an X12 group
 - Such requirements are documented in the group's governing documents and may be based on formal association with a stakeholder, meeting attendance, participation, self-designation, or other criteria

TERMS AND DEFINITIONS

- External Code List
 - A stand-alone list of codes and associated descriptions established, maintained, and published for common use. Maintenance of the list may be the responsibility of X12 or another organization.
 - Within X12, maintained by the Registered Standards Committee (RSC)
 - Otherwise maintained by disparate organizations
Examples of maintainers are the United States Postal Service and Regenstrief Institute

TERMS AND DEFINITIONS

- Internal Code Lists
 - Established and maintained within the X12 EDI Standard
 - Maintained by the Accredited Standards Committee (ASC)

TERMS AND DEFINITIONS

- Maintenance
 - Updates to X12 work products, including additions, revisions, and deletions
 - Maintenance covers new development and revisions to existing work products

TERMS AND DEFINITIONS

- Member
- An entity or individual that has completed an application, paid the applicable dues and been granted X12 membership for a specific period. This term is used only in reference to X12 membership
- Recognized participants of specific X12 groups who have met requirements for privileges within that group shall be referenced as stakeholders or constituents.

TERMS AND DEFINITIONS

- Member Representative
 - An individual who participates in X12 activities on behalf of an X12 member. There are three types of named member representatives; primary, alternate, and designated

TERMS AND DEFINITIONS

- Observer
 - An X12 member representative or a non-member participant with a material interest in a certain X12 group who does not meet the requirements for constituent privileges within that group but is allowed to be an onlooker. Observers do not have voting or speaking privileges, are not eligible to hold office, and are not entitled to participate in online collaborations.

TERMS AND DEFINITIONS

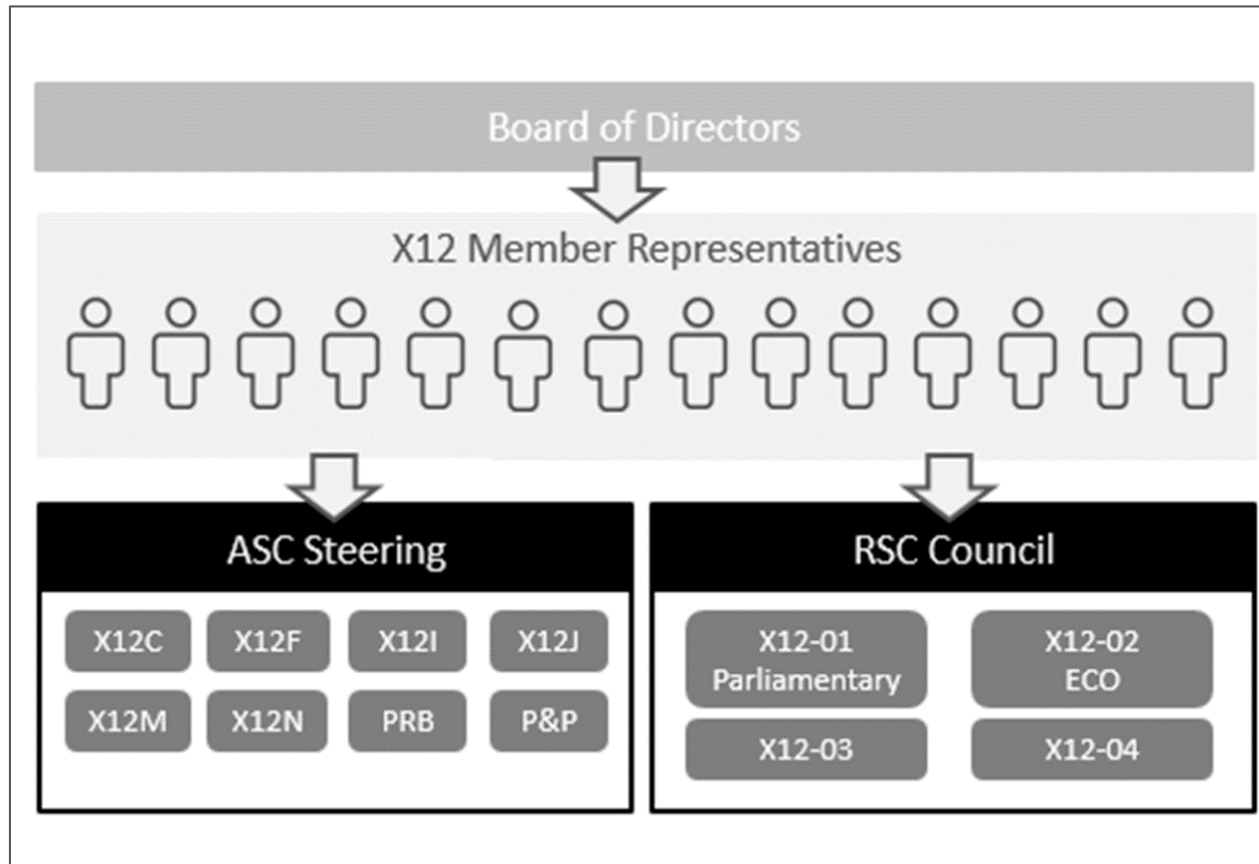
- Stakeholder
 - An X12 member that has met the requirements for specific privileges within an X12 group
 - Such requirements are documented in the group's governing documents and may be based on meeting attendance, collaboration participation, self-designation, or other criteria

ACRONYMS

- CMG – Code Maintenance Group
- CMR – Code Maintenance Request
- ECL – External Code List
- ECO – External Code List Oversight Subcommittee
- RSC – Registered Standards Committee

BACKGROUND

- X12's Organizational Structure



BACKGROUND

- Reasons X12 may establish an external code list instead of utilizing an internal code list include:
 - The list is revised more than three times per year
 - Trading partners use current codes instead of the codes that were available when the EDI Standard was published
 - The list is maintained by a specific set of voters instead of the full X12 membership

BACKGROUND

- The External Code List Oversight (ECO, pronounced echo) Subcommittee operates under X12's Registered Standards Committee (RSC) and is responsible for overseeing maintenance of X12's external code lists (ECL)
- This presentation describes the mission, structure, and policies of the ECO

BACKGROUND

- Related Policies and Procedures
 - ***CAP12 External Code Lists*** details the corporate policies related to the ECO
 - ***RSC101 RSC Operating Manual*** details specific structure and operating policies of the RSC
 - ***RSC130 ECO Mission***
 - ***RSC131 ECO Constitution*** details specific policies of the ECO

INTRODUCTION

- ECO Mission
 - Responsible for the integrity and efficiency of X12's external code lists
 - Understands best practices related to code lists across industries and applies such best practices to X12's external code lists when applicable
 - Maintains related policies and procedures
 - Oversees the maintenance of all of X12's external code lists

ECO COMPOSITION

- The ECO is comprised of a chair and two types of constituents

*See the presentation *ECOP02 ECO Stakeholders and Constituents* for more information about ECO stakeholders and constituents

ECO COMPOSITION

- Chair
 - An RSC stakeholder's member representative
 - Appointed by the RSC chair
 - When the ECO has fewer than ten constituents, the chair is entitled to all constituent privileges, including the right to participate in collaboration and vote

ECO COMPOSITION

- Constituents

- Appointed Constituents

- An RSC stakeholder's member representative with a material interest in ECO activities
 - Appointed by the RSC chair

- Stakeholder Constituents

- Any X12 member with a material interest in ECO activities who meets specific requirements is entitled to be recognized as an ECO stakeholder
 - ECO stakeholders name one ECO constituent to represent them

ECO CHAIR RESPONSIBILITIES

- ECO Chair Responsibilities
 - Ensuring the ECO's duties and responsibilities are met
 - Reporting ECO activities to the RSC Council
 - Speaking for the ECO within X12 and externally as requested by the RSC chair
 - Calling ECO meetings, including setting the agenda
 - Appointing CMG chairs and constituents
 - Working with staff to ensure efficient ECO operations
 - Conferring with the Governance Panel as necessary

ECO RESPONSIBILITIES - OVERVIEW

- ECO Responsibilities
 - Overseeing the maintenance of external code lists
 - Ensuring all external code maintenance activities align with applicable corporate policies
 - Establishing and overseeing CMGs, each with specific maintenance responsibilities
 - Acting as the code maintenance group for an ECL when maintenance has not been assigned to a specific CMG
 - Confirming ECO policies every two (2) years

ECO RESPONSIBILITIES - DETAILS

- Establishing ECO policies
- Establishing the corporate ECL policies
- Establishing the ECL attributes
- Working with staff to provide effective and efficient tools to support maintenance activities



ECO RESPONSIBILITIES - DETAILS

- Establishing CMGs
 - Defining the CMG statement of work
 - Defining the CMG operating methodology
 - Ensuring the CMG charter is approved and published timely
 - Assigning code list maintenance responsibilities

ECO RESPONSIBILITIES - DETAILS

- **Overseeing CMGs**
 - Monitoring participation and appoint a convener or constituents, if necessary
 - Ensuring CMG activities align with the group's statement of work and charter
 - Ensuring CMG activities align with corporate, committee and subcommittee policies
 - Revising the statement of work, if necessary
 - Reassigning maintenance responsibilities, if necessary



ECO RESPONSIBILITIES - DETAILS

- ECO as CMG01
 - The ECO chair shall either act as CMG01 chair or name another ECO constituent to act as the CMG01 chair
 - CMG01 shall operate as a Defined Representative Voting Panel, with the ECO constituents as the defined voting panel



CMG01 STATEMENT OF WORK

- The Transitional Code Maintenance Group, CMG01, operates as permanent action group within the ECO
- CMG01 is responsible for maintaining X12 external code lists when maintenance responsibilities have not been assigned to a designated CMG

CMG OPERATING METHODOLOGY

- Defined Representative Voting Panel
 - The ECO identifies a specific set of voting organizations by role, classification or category as the representative voting panel for the CMG
 - Naming of specific individuals is expressly prohibited
 - The voting panel make-up shall be identified explicitly in the CMG's Charter
 - Each organization named on the panel is entitled to one and only one vote on any matter



CMG OPERATING METHODOLOGY

- X12 Member Voting Panel
 - X12's CMR process is used to determine maintenance decisions
 - The CMG does not vote to approve or disapprove the maintenance requests
 - The CMG does vote to approve requests for the CMR process and on other administrative matters

CMG OPERATING METHODOLOGY

- Material Interest Panel
 - X12 members and non-members with a material interest in the code list(s) assigned to an Material are eligible for recognition as a CMG constituent
 - Non-member stakeholders are assessed a nominal annual participation fee
 - The voting panel consists of all recognized CMG constituents

ECO COMPOSITION

- See the presentation ***ECOP03 External Code List Policies*** for more information about X12 external code lists
- See the presentation ***ECOP04 ECO Code Maintenance Groups*** for more information about CMGs

THANK YOU

- If you have feedback or questions regarding the information presented, post them at www.x12.org/forms/feedback
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