



Overview: X12

DISCLAIMER

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



X12 TRAINING AND INFORMATION

- X12 training and information materials are posted on x12.org
- Visit the web page to review other useful information and training presentations

OUTLINE

- Background
- Terms and Definitions
- The X12 Organization
- X12 Implementation Statistics
- X12's Mission & Principles
- X12 Policies, Procedures, and Practices
- Wrap-Up

TERMS AND DEFINITIONS

- To ensure consistency in terminology and meaning, X12 maintains a comprehensive corporate glossary called the Wordbook
- Reference the Wordbook online at wordbook.x12.org if you have questions about any term in this presentation

ACRONYMS

- ASC – Accredited Standards Committee
- RSC – Registered Standards Committee

BACKGROUND

- Why Standards?
 - Standardized computer-to-computer transactions are key to successful business communication
 - Consistent codified messages increase the value of the communication and reduce costs
 - X12 work products simplify communication, enhance business processes, improve efficiency, reduce costs and expand organizational reach

BACKGROUND



- The American National Standards Institute (ANSI) was founded in 1918 and has a mission to enhance the global competitiveness of US business and the US quality of life by promoting and facilitating voluntary consensus standards and conformity assessment systems and safeguarding their integrity

BACKGROUND



- ANSI standards cover virtually every aspect of American industry
- ANSI does not develop standards
- ANSI accredits standards committees, also known as Standards Development Organizations (SDO's), and those groups develop standards
- ANSI represents the US internationally

THE X12 ORGANIZATION

- X12 is a 501(c)(6) corporation, overseen by a Board of Directors
- X12 has been accredited by ANSI since 1979
- X12 maintains a vast product library
- X12 establishes committees with specific responsibilities
- X12 collaborates with other organizations to better serve its members & implementors

THE X12 ORGANIZATION

- X12 represents hundreds of members with more than a thousand member representatives
- Members include corporations, associations, organizations, government entities, and materially affected individuals
- Member representatives include experts from health care, insurance, transportation, finance, government, supply chain and other industries

THE X12 IMPLEMENTATION BASE

- Billions of electronic transactions based on X12 standards are utilized daily in industries such as supply chain, transportation, government, and health care



X12 MISSION

- X12 is an ANSI-accredited, consensus-based, non-profit organization focusing on the development, implementation, and ongoing use of interoperable electronic data interchange standards

X12 PRINCIPLES

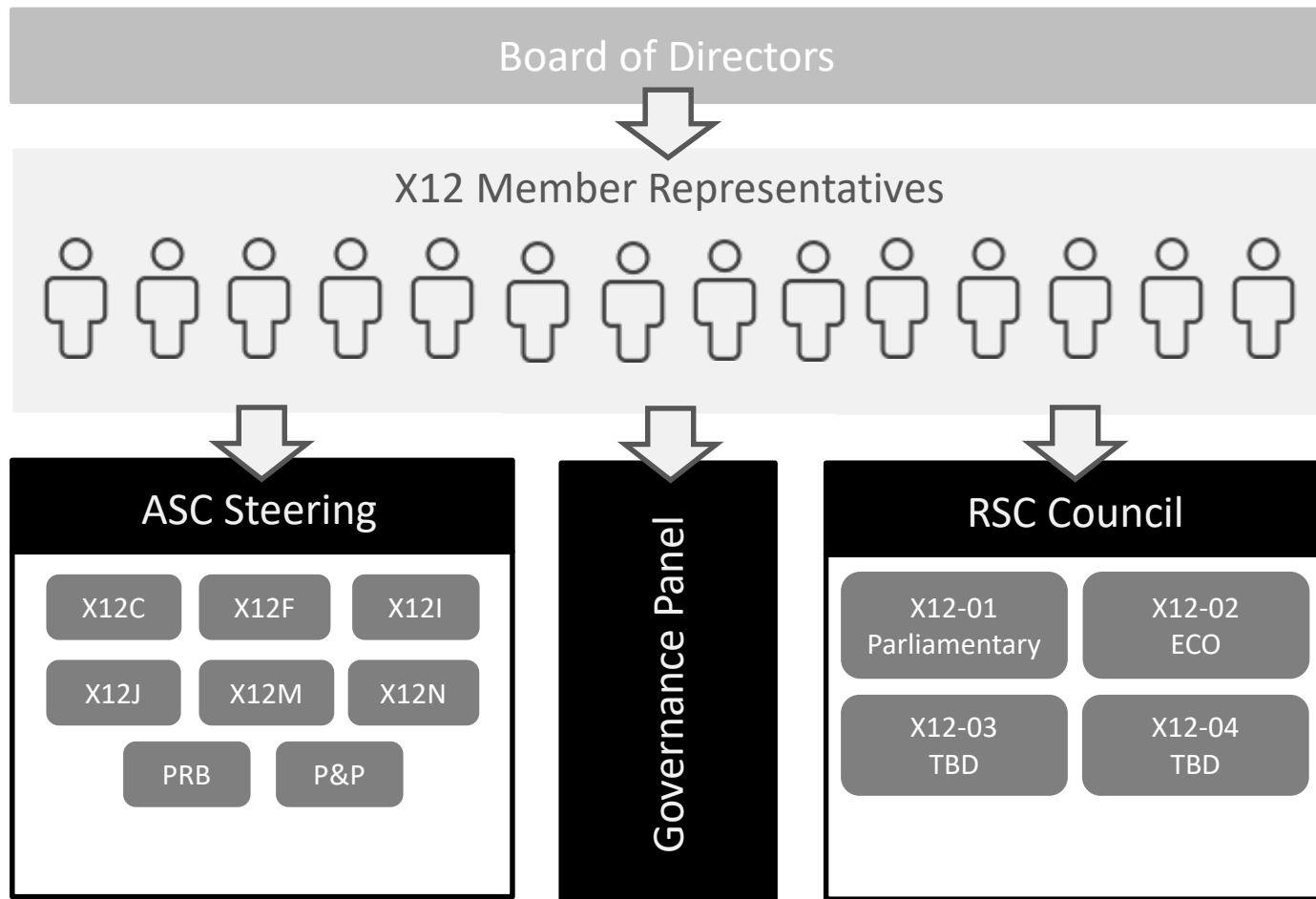
- In support of our mission, X12 will:
 - Publish high-quality consensus-based standards that are simple, efficient, responsive to the needs of stakeholders, and delivered in a timely manner
 - Promote consistent and precise use of standards with supporting offerings, education, and collaboration incubators
 - Evolve our work products to accommodate advancements in technology with consideration of the impact to the existing user base



X12 PRINCIPLES

- Collaborate with other organizations, including related standards organizations, to reduce redundancy, increase interoperability, and provide clear information to implementers
- Maintain comprehensive policies and procedures for organizational activities
- Establish a financial model that ensures the fiscal health of the organization

X12 ORGANIZATIONAL STRUCTURE



X12 BOARD OF DIRECTORS

- The X12 Board is responsible for organizational oversight and operations
- The X12 Board defines the direction and strategy of the organization, protects the organization's assets, and supervises, controls, and directs its affairs
- Elected directors serve for a two-year term, with staggered terms to ensure consistency
- Board elections are conducted in January each year

X12 MEMBERS

- X12 has established a number of different memberships
 - Individual Membership - Open to self-employed individuals who have no employees
 - Emeritus Membership - An honorary membership granted to a retired individual who is not actively working and who has an established history of active X12 participation
 - Reciprocal Membership - Based on a formal agreement between X12 and another organization

X12 MEMBERS

- Membership Types, continued
 - Non-Profit Organization Membership – Open to organizations with a tax exemption under sections 501(c)(3) through 501(c)(9)
 - For-Profit Organization Membership – Open to organizations that do not have a tax exemption under sections 501(c)(3) through 501(c)(9)
 - Academic Membership – Open to degree conferring academic organizations, for academic purposes only, such as teaching or academic research

X12 MEMBERS

- Membership Types, continued
 - Government Membership – Open to a group that is part of a federal or state agency, or to departments and divisions under the auspices of such an agency

X12 MEMBERS

- The term “member” is reserved for references to X12 membership
- Recognized participants of specific committees, subcommittees or other subordinate groups who have met the requirements for specific privileges within that group are referenced as stakeholders or constituents

STAKEHOLDERS AND CONSTITUENTS

- Stakeholder - An X12 member with a material interest in an X12 group's activities that has met the requirements for specific privileges within the group
- Constituent – A member representative that has met the requirements for specific privileges within an X12 group



MEMBER REPRESENTATIVES

- Member representatives are individuals employed by an X12 member who participate in X12 activities on the member's behalf
- X12 has established three types of member representatives
 - Primary representative - All members must name a primary representative
 - Alternate representative
 - Designated representative

MEMBER REPRESENTATIVES

- Primary representative
 - The official liaison between X12 and a member
 - The only authorized representative who can speak at X12 on behalf of the member
 - Receives official X12 correspondence
 - Is responsible for communicating X12 information to the member's other representatives
 - Votes on behalf of the member in corporate ballots



MEMBER REPRESENTATIVES

- Alternate representative
 - Represents the member in the absence of, or in lieu of, the primary representative
- Designated representative
 - An individual verified by the primary representative as authorized to represent the member in certain X12 committee activities
 - Not an official liaison between the member and X12

X12 COMMITTEES

- The X12 Board establishes committees to facilitate efficient and effective completion of specific objectives
 - Standing committees have long-term responsibilities and activities
 - Ad hoc committees are for short-term activities

X12 STANDING COMMITTEES

- X12 has two standards development committees and a governance committee
- The committees that develop standards and other work products are:
 - The Accredited Standards Committee
 - The Registered Standards Committee
- The governance committee is:
 - The Governance Panel

X12 STANDING COMMITTEES

- Accredited Standards Committee
 - Responsible for developing, maintaining, and interpreting X12 standards eligible for submission as American National Standards or UN/EDIFACT International Electronic Data Interchange Standards and for technical reports based on the X12 standards it develops and maintains

X12 STANDING COMMITTEES

- Registered Standards Committee
 - Responsible for establishing, developing, maintaining, and interpreting X12 work products that align with X12's mission and meet the established needs of various industry sectors but are not intended for submission as American National Standards

X12 STANDING COMMITTEES

- Governance Panel

- Responsible for maintaining the corporate Wordbook, presenting governance recommendations to the Board, ensuring all of X12's policies are aligned and consistent, assessing and concurring policies prior to final approval, advising X12 groups that develop policies, and providing input on due process matters to the Board, other committees, and subordinate groups

SUBCOMMITTEES

- An X12 committee may establish subcommittees
 - All attributes of committees apply to subcommittees except that they are formed, governed, and supervised at the committee level instead of the organization level
- The Board, a committee, or a subcommittee may establish other subordinate groups including:
 - Task Groups
 - Work Groups
 - Action Groups

GROUPS

- The general term “Group” may be used in place of the specific type of group for any of the groups explicitly identified above
 - When there is no need to distinguish the group hierarchy in the context
 - To collectively reference all of the groups
 - To collectively reference any sub-set of the groups

GROUP OFFICERS

- All X12 groups have a chair as the designated leader
 - In some situations, two or more co-chairs share the leadership duties
 - Most groups elect the chair or co-chair for a two year term
- Some X12 groups have vice chairs

OTHER ROLES

- Some X12 groups designate secretaries
 - A secretary may or may not be designated as an officer depending on the group's governance
 - Secretaries can be more specifically designated, for example:
 - Recording secretary
 - Parliamentary secretary

GOVERNANCE

- The X12 organization and all its groups operate under approved policies and procedures
- When X12 policies and procedures are silent on a matter and an applicable Robert's rule exists, Robert's Rules of Order apply
- Most decisions are determined by consensus
 - Consensus does not require unanimous agreement, it requires significant agreement

COLLABORATION AND DECISIONS

- Any X12 member representative may observe or participate in most X12 collaborations, including meetings and online discussions
- Some groups have specific constituent requirements that must be met before certain privileges, such as voting, are conferred
 - If you have questions about the constituent requirements of a particular group, talk to the chair of the group

COLLABORATION

- X12 groups utilize several collaboration tools
 - iMeet Central – an online collaboration tool
 - GoToMeeting/GoToWebinar – virtual meetings
 - OnlyConnect – a publication tool
- Once you establish participation with an X12 group, you may join their ongoing collaborations, the group's chair will provide instructions for registering for the appropriate tool(s)

VOTING

- X12 has a number of balloting options
- Ballots are classified three ways:
 - The type of ballot indicates who can cast a vote in the matter
 - The category of ballot indicates the sort of matter being determined
 - The voting method indicates how or where the vote is conducted

VOTING

- Types of Ballot

- Corporate Ballot – A corporate action, every X12 member is entitled to one vote
- Constituent Ballot - A ballot in which every constituent is entitled to one vote, conducted by committees, subcommittees, or subordinate groups with established constituent requirements



VOTING

- Types of Ballots, continued
 - Committee Ballot – A committee action, every X12 member established as a committee stakeholder is entitled to one vote, conducted by committees with no established constituent requirements
 - Subcommittee Ballot – A subcommittee action, every X12 member who is established as a committee stakeholder is entitled to one vote, conducted by subcommittees with no established constituent requirements

- Types of Ballots, continued
 - Participant Ballot - A subordinate group ballot, every X12 member representative in attendance at a meeting or registered as a collaborator for a specific matter is entitled to one vote, participation ballots are not permitted for corporate or committee matters
 - DpANS Ballot – A ballot specifically related to dpANS processing, conducted according to ANSI requirements

VOTING

- Ballot Categories
 - Election Ballot – A ballot issued to elect directors, chairs, vice-chairs, and other officers in accordance with applicable policy
 - Administrative Ballot – A ballot related to policies, procedures, or other non-technical matters
 - Technical Ballot – A ballot issued to approve or revise work products, including standards, technical reports, guidelines, and design rules

VOTING

- Voting Methods

- Electronic - voting conducted electronically outside of a meeting, may be conducted via the corporate voting tool or within an official collaboration tool
- Meeting - voting conducted at a standing or interim meeting, may be conducted via voice vote, show-of-hands or in writing



X12 MEETINGS

- X12 has three types of meetings
 - Corporate meeting – a member meeting called by the board and open to all X12 members, at least one corporate meeting will be conducted annually
 - Standing meeting – a standards development meeting held at a defined interval, currently three times per year, most attendees will gather onsite for this meeting
 - Interim meetings – a standards development meeting held between Standing meetings, usually via an online collaboration tool

X12 MEETINGS

- Standing Meetings
 - Winter meeting – occurs in late January or early February
 - Summer meeting – occurs in late May or early June
 - Fall meeting – occurs in late September or early October
- For upcoming meeting dates and locations, refer to the Meetings page on x12.org

STANDING MEETING LOGISTICS

- Registered attendees receive an access badge when they check-into a Standing meeting
- Onsite registrants will receive an access badge within an hour of their onsite registration
- Attendees must display the access badge for entry and at all times during a session
- Attendance records are automated, be sure your badge is scanned in every session you attend

STANDING MEETING LOGISTICS

- Standing meeting schedules list the date, time, and location for sessions
 - Download it in advance from the Meetings page on x12.org
 - Pick up a printed copy at the Registration Desk
 - Use the online app, go to the Registration Desk for assistance

STANDING MEETING LOGISTICS

- There are many concurrent sessions at Standing meetings
- It is not possible for one attendee to participate in all the sessions



X12 PRODUCTS

- X12's product library includes more than 500 EDI transactions, as well as technical reports, external code lists, schema, and other offerings
- X12 product descriptions are available on the Work Products page at x12.org
- The product library is expanded regularly
- X12 products are available online at the [X12 Store](#)

MAINTENANCE

- To make it easier for members and non-members alike, X12 has centralized the submission of maintenance requests for all work products
- Maintenance requests are submitted at x12.org/maintenance-requests

MAINTENANCE

- All X12 maintenance requests follow a documented process
- X12 work products are subject to various maintenance processes depending on the type of product, accreditation, and other factors
 - For example, specific maintenance process steps are required for ANSI accredited work products

X12 WEBSITE

- You will find a plethora of information on X12's website at x12.org including
 - A Members area
 - Policies & Procedures
 - Training and Information Presentations
 - Online forms
 - Meeting information
 - Committee, Subcommittee, Task Group, Work Group, and Action Group information

- A number of X12 resources and tools require an authenticated login process
- X12 is currently consolidating the various login processes to simplify access, this consolidated process is known as X12 | ID
- Member representative should have an X12 | ID
- More information is available on the Members page at [X12.org](https://www.x12.org)

THANK YOU

- If you have feedback or questions regarding the information presented, post them at www.x12.org/forms/feedback
- More information about X12 is at www.x12.org
- Stay informed by following X12 on Social Media
[Twitter: @ASCX12](https://twitter.com/ASCX12)
[LinkedIn: #X12](https://www.linkedin.com/company/x12)