



**ASC X12 Administrative  
Policy and Procedure**

# **Member Collaboration Tools**

DL2015-17  
MAY 2015

---

DL2015-17

Copyright © 2015, Accredited Standards Committee X12 Incorporated, Format © 2015 Washington Publishing Company. Exclusively published by the Washington Publishing Company. No part of this publication may be distributed, posted, reproduced, stored in a retrieval system, or transmitted in any form or by any means without the prior written permission of the copyright owner.

All rights reserved.

---

## Table of Contents

1. Introduction .....	1
2. Background .....	3
3. Summary of Collaboration Activities and Recommended Tools .....	5
4. Collaborative Workspace – Code of Conduct .....	7
5. Listserv Usage Rules .....	9
6. Central Desktop™ .....	11
6.1. Policies .....	11
6.2. Procedures .....	12
7. GoToMeeting™ and GoTo Webinar™ .....	13
7.1. Policies .....	13
7.2. Procedures .....	14
8. Document History .....	17

---

---

# 1 Introduction

The ASC X12 Board and Steering Committee are jointly responsible for this policy and publish it for the benefit of the members of ASC X12, its subcommittees, task groups, and interested individuals from the general public who actively participate in ASC X12.

Organizations and individuals agree to be bound by this policy and to follow these procedures when they apply for membership, renew an existing membership, or sign a non-member collaboration agreement.

Suggestions for improvements to this document are welcome. They may be submitted at <http://changerequest.x12.org>.

---

---

## 2 Background

Over time ASC X12 has developed or licensed a number of tools that facilitate member collaboration and internal information exchange. Each offers functionality that supports ASC X12 needs and in some cases more than one tool could be used for a specific purpose. This document defines the collaboration tool set and provides usage guidance and best practice instructions that increase consistency within each tool.

The collaboration tool set includes OnlyConnect™, Central Desktop™, ASC X12's Member website, GoToMeeting™, GoToWebinar™ and Listservs. The x12.org website will continue to be used to disseminate approved policies and procedures and other information which is intended for both members and the public.

OnlyConnect™ is ASC X12's primary document management tool. Policies, procedures, constitutions, charters, guidance documents, technical reports, white papers and other organizational documents are housed and maintained in OnlyConnect™. OnlyConnect™ supports discussion, decisions, publisher instructions, voting and publication of ASC X12 documents. Any ASC X12 member may request access to OnlyConnect™. All members have access to approved versions of policies, procedures, constitutions, charters and other documents related to the ASC X12 organization. Access to drafts is controlled by the associated chair(s) and is available to members who are actively participating in the development activity. Access to final documents which are available for sale in the ASC X12 store is not permitted.

Central Desktop™ is ASC X12's primary collaboration tool for RFI responses and activities not related to published documents. All working documents and discussions not directly related to maintenance of ASC X12 documents are stored and conducted in Central Desktop™. Any ASC X12 member may request access to Central Desktop™. Access to specific workspaces is controlled by the associated chair(s) and is available only to those actively participating in the ASC X12 group, subcommittee, or subordinate group, herein collectively referred to as "group". Non-members may request access to a specific subcommittee's Central Desktop™ workspace for particular purposes approved by the overseeing subcommittee chair. Final RFI information will reside in the RFI repository and be accessed via the RFI Portal.

The member website (members.x12.org) houses information useful to members and is used for controlled distribution of internal review documents. Any ASC X12 member may access the member website. Access to internal review documents must be authorized by a chair of the submitting or reviewing group. Review documents are available during a defined review period and are then removed from the member website.

GoToMeeting™ and GoToWebinar™ are ASC X12's primary collaboration tools for meetings via conference call. ASC X12 GoToMeeting™ and GoToWebinar™ sessions shall be initiated for all official ASC X12 meetings, except when use of another conferencing tool or another organization's GoToMeeting™ or GoToWebinar™ session has been expressly approved by the overseeing subcommittee chair. Such approvals must be reported to the ASC X12 Board for tracking and reporting purposes.

Listsers are a legacy tool supported for current users, however use of listsers for member collaboration is discouraged. Any ASC X12 member may be added to an existing listserv. Non-member participation in listsers is discouraged but non-members may be added to a listserv at the discretion of the Subcommittee Chair. The associated Subcommittee Chair will review the listserv roster at least annually to validate non-member participants. New listsers may be created in specific circumstances as approved by the ASC X12 Steering Committee. Listsers are not the preferred tool for any member collaboration activity. Specific usage rules and recommendations for listsers are included in this document.



## 3 Summary of Collaboration Activities and Recommended Tools

To:	Use:
Discuss revisions to a Technical Report or white paper	OnlyConnect™
Revise a Technical Report or white paper	OnlyConnect™
Discuss revisions to a policy or procedure	OnlyConnect™
Revise any policy or procedure	OnlyConnect™
Discuss revisions to a design rule or guidance document	OnlyConnect™
Revise a design rule or guidance document	OnlyConnect™
Discuss revisions to a constitution or charter	OnlyConnect™
Revise any constitution or charter	OnlyConnect™
View current policies, procedures, constitutions, charters, design rules or guidance documents	OnlyConnect™ Member Website* X12.org*
View discussion, decision, publication instruction history	OnlyConnect™
Share documents for internal review or cross group discussion	Member Website
Discuss an open RFI	Central Desktop™
Conduct a discussion within an ASC X12 group, excludes discussions related to the content of published documents	Central Desktop™
View discussion history.	Central Desktop™
Conduct collaborative calls	GoToMeeting™, GoToWebinar™
* Documents available for sale are not available to view on the x12.org or Member websites unless a specific exception has been approved for a particular document.	

---

---

# 4 Collaborative Workspace – Code of Conduct

Users of ASC X12 collaboration tools agree to abide by all applicable ASC X12 policies and procedures. Members and their representatives agree to do so as a condition of membership. Non-members afforded the privilege of participating in ASC X12 discussions via collaborative workspaces must submit a signed form attesting to this agreement before being allowed access to the collaborative workspace.

Collaborative posts:

1. Must be respectful and civil.
2. Must accurately represent the poster, impersonating another person is expressly disallowed.
3. Must be relevant to the discussion at hand.
4. Must not contain unlawful or objectionable content nor disruptive, offensive or abusive language.
5. Must not contain unsuitable or irrelevant website addresses or URLs.
6. Must not include advertisement of any product or service.
7. Must not be spam.

Collaborative discussions are internal:

1. Collaborators shall not disclose information shared during ASC X12 collaborative discussions with external parties, defined herein as anyone not also authorized for the collaboration.
2. Collaborators shall not disclose other participants of the collaboration, nor their positions on matter discussed, to external parties.
3. Collaborators are not authorized to speak on behalf of ASC X12 and shall not use information garnered from collaboration to provide ASC X12 input, information, statements or positions to external parties.
4. Collaborators shall specifically not disclose information to reporters or any member of the press related to ongoing or final collaboration discussions. Inquiries from the press must be referred to the ASC X12 Chair.
5. Collaborators acknowledge that collaborative comments are by nature public, not private.
6. Collaborators shall not download information from the collaborative tool for any purpose other than the intended collaboration.

The ASC X12 Steering Committee will determine whether a collaborative post breaches this code of conduct. ASC X12 has the right (but not the obligation) to edit, refuse to post, or to remove any contribution in whole or in part that is deemed to be in breach of the code of conduct. ASC X12 has the right to suspend the access of any user observed or suspected of violating these policies, pending an investigation and final determination on the matter.

## 5 Listserv Usage Rules

Users of ASC X12 listservs agree to abide by the ASC X12 antitrust policy and these rules.

1. Take care in what you write. Email messages are frequently archived and your message may be stored in a place to which many people have access.
2. When responding to a message, be careful that the response is directed to the intended audience. If the response is intended for an individual member of a listserv, use the individual's email address. Otherwise responses will be forwarded to the listserv.
3. If you find a personal message has gone to a list or group, consider sending an apology to the person and to the group.
4. If you are in a disagreement with an individual on a listserv, shift the dialogue from the listserv to a direct exchange between one another using your individual email addresses. If the debate is of interest to others, summarize the content of the dialogue for the others at a later time.
5. Establish a subject line naming convention so recipients recognize the ASC X12 group or subject addressed. For example: Subcommittee group name: Subject.
6. Always give your name and contact information when sending a message to a listserv. This will ensure that your message will be identifiable to all those on the listserv.
7. Avoid sending messages that are no more than gratuitous replies to replies.
8. Neither post nor respond to unprofessional material, including derogatory or negative comments, about individuals, companies or products.
9. Save the subscription messages for any lists you join. These usually tell you how to unsubscribe.
10. Advertising solicitations for products and/or services are prohibited on all ASC X12 listservs. Such solicitations should be reported to the Subcommittee Chair or webmaster responsible for a particular listserv.
11. Delivery receipts, non-delivery notices, and vacation programs are neither totally standardized nor totally reliable across the range of email applications. It is recommended that they not be used because they can potentially disrupt the proper functioning of a listserv. Consider unsubscribing or setting a "nomail" option (when it's available) when you cannot check your mail for an extended period.
12. Avoid sending large files to the listservs. Either compress the files you send or if files are posted to a particular webpage, refer listserv members to the posting location to view and download the material.
13. Be careful with monospacing fonts and diagrams. These will display differently on different systems, and with different mailers on the same system. Avoid using Rich Text

documents, HTML, encryption or foreign language special characters in messages or attachments.

14. Report any "SPAM" messages to [postmaster@disa.org](mailto:postmaster@disa.org).

# 6 Central Desktop™

## 6.1 Policies

The following specific policies govern access to Central Desktop™:

1. CD is ASC X12's primary collaboration tool for drafting RFI responses and activities not related to published documents.
2. Working documents not directly related to maintenance of ASC X12 published documents must be stored in CD.
3. Online collaborative discussions not directly related to maintenance of ASC X12 published documents must be conducted in CD.
4. Any ASC X12 member may request access to CD.
5. Non-members may be granted access to CD under specific conditions as described in these policies. Such access is granted to an individual, not an organization.
6. No other membership benefits are conveyed to the non-member based on their participation in group discussions or their access to CD.
  - a. Specifically, non-members granted access to CD shall not be granted the right to attend in-person meetings without paying the associated non-member meeting fee, vote in membership ballots, nor access to other tools, including OnlyConnect and the Members Only Website.
  - b. The non-member may participate in group votes via CD only if explicitly permitted by the owning subcommittee's policies and procedures.
7. Non-member access to a group's CD workspace is intended to be short-term and shall not exceed 2 years, except with express permission of the ASC X12 Board.
8. Non-member access to a group's CD workspace shall not be granted solely for the purpose of allowing participation by a party who chooses not to initiate or renew an ASC X12 membership.
9. Access to specific workspaces is controlled by the associated chair(s) and is available to those actively participating in the ASC X12 group.
10. A subcommittee chair has authority to approve non-member participation in a specific workspace if non-members have critical industry knowledge needed by the group. This is not individual approval of non-member participants; it is an overall approval that the group may include non-members in this workspace.
11. The subcommittee chair must notify Steering of each workspace granted approval for non-member participation.

12. The chair of any group with a workspace granted approval for non-member participation must review the non-member participants every three months to ensure the non-member is actively participating and that their industry input is still required.

## 6.2 Procedures

To make a Central Desktop™ workspace accessible to non-members, the following procedures apply:

1. The Subcommittee Chair must notify Steering of each workspace approved for non-member participation. This notice may be posted in the Steering CD workspace or provided orally at the Steering meeting following the approval.
2. Administration will maintain a list of all workspaces authorized for non-member participation, including the date of the authorization and the reason for the exception.
3. Administration will provide a quarterly report to the ASC X12 Board and Steering Committee of all workspaces with non-members subscribed, to at least include statistics by each workspace and by each non-member.
4. Requesting non-member access:
  - a. A non-member emails info@disa.org to request access to a specific CD workspace. The email must include the non-member's contact information, the name of the Organization they are representing, and the reason they cannot join ASC X12 as a member.
  - b. Administration vets the request to verify that the requested workspace is authorized for non-member participation.
    - i. If so, the request is forwarded to the appropriate Subcommittee, Task Group or Work Group chair for approval or denial.
    - ii. If not, Administration replies to the requestor, notifying them that non-member participation is not authorized for the workspace they have requested.
  - c. If the appropriate group chair authorizes participation, Administration obtains the appropriate acknowledgement, enrolls the non-member in CD and grants them access to the workspace.
  - d. If the appropriate group chair denies participation they must provide a reason for the denial. Administration replies to the requestor, notifying them that their participation was not authorized by the appropriate group chair.



# 7 GoToMeeting™ and GoTo Webinar™

## 7.1 Policies

The following specific policies govern access to ASC X12 collaborative discussions conducted via GoToMeeting™ or GoToWebinar™, collectively termed GoToMeeting (GTM) herein:

1. GTM is ASC X12's primary collaboration tool for meetings via conference call.
2. All ASC X12 policies and procedures related to distribution and access shall be adhered to in any GTM session.
3. ASCX12 GTM sessions shall be initiated for all official ASC X12 meetings, except when use of another conferencing tool or another organization's GTM session has been expressly approved by the overseeing subcommittee chair. Such approvals shall not be granted on a permanent basis and must be reported to the ASC X12 Board for tracking and reporting purposes.
4. Non-members may be granted access to GTM sessions under specific conditions as described in these policies.
5. No other membership benefits are conveyed to the non-member based on their participation in ASCX12 meetings via GTM.
  - a. Specifically, non-members granted access to GTM sessions shall not be granted the right to attend in-person meetings without paying the associated non-member meeting fee, vote in membership ballots, nor access to other tools, including OnlyConnect™, Central Desktop™ and the Members Only Website.
  - b. The non-member may participate in group votes conducted during GTM sessions only if explicitly permitted by the owning subcommittee's policies and procedures.
6. Non-member access to GTM sessions is not intended to be long-term or permanent and shall not exceed 2 years, except with express permission of the ASC X12 Board.
7. Non-member access to GTM sessions shall not be granted solely for the purpose of allowing participation by a party who chooses not to initiate or renew an ASC X12 membership.
8. Access to specific GTM sessions is controlled by the associated chair(s) and is available to those actively participating in the ASC X12 group.
9. A subcommittee chair has authority to approve non-member participation in specific GTM sessions if non-members have critical industry knowledge needed by the

group. This is not individual approval of non-member participants; it is an overall approval that the group may include non-members in GTM sessions.

10. The subcommittee chair must notify Steering of each group granted approval for non-member participation in GTM sessions.
11. The chair of any group granted approval for non-member participation in GTM sessions must review the non-member participants every three months to ensure the non-member is actively participating and that their industry input is still required.

## 7.2 Procedures

The following procedures must be followed if a conferencing tool other than ASC X12's GTM is used to conduct an ASC X12 meeting:

1. The Subcommittee Chair must notify Steering of any approved exception, including whether it is a one-time exception or an exception for a specified time period. This notice may be posted in the Steering CD workspace or provided orally at the Steering meeting following approval for the exception.
2. Administration will maintain a list of exceptions, including the date of the authorization, the reason for the exception, and the planned meeting schedule under the exception.
3. The Subcommittee Chair must provide Administration a monthly report of all non-ASC X12 GTM sessions at which ASCX12 business was conducted. This report shall include the group that met, the date and time of all meetings, and the number of attendees at each meeting.
4. Administration will provide a quarterly report of all non-ASC X12 GTM sessions with the normal quarterly summary of ASC X12 GTM sessions.

The following procedures must be followed to permit non-member participation in GTM sessions, except for GTM sessions of a group already granted approval for non-member participation in CD:

1. The Subcommittee Chair must notify Steering when non-members are to be included in any capacity except as a one-time special invitee. This notice may be posted in the Steering CD workspace or provided orally at the Steering meeting following approval for the exception.
2. Administration will maintain a list of individuals who participated in one or more GTM sessions.
3. Administration will maintain a list of GTM sessions with authorized non-member participants, including the date of the authorization and the reason for the exception.

4. Administration will provide a quarterly report of the total number of non-member participants and the total number of GTM sessions which included non-members to the ASC X12 Board and Steering Committee.

---

---

## 8 Document History

- 07/10/2013: New procedure - supersedes the Listserv and Listserv Usages Policies. Approved by the ASC X12 Steering Committee.
- 02/18/2015: Updated to allow non-member access to CD in specific situations. Approved by the ASC X12 Steering Committee.
- 05/08/2015: Updated to require non-member agreement prior to access to ASC X12 tools, and other non-substantive revisions applied. Approved by the ASC X12 Board and Steering Committee.

---

---