



**X12 Corporate Administrative
Policy and Procedure**

Collaboration and Review Tools

(CAP07)

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1 Introduction

The X12 Board of Directors (Board) is responsible for this policy and associated procedures.

Members agree to be bound by these policies and to follow the associated procedures as a condition of membership. Non-member participants afforded specific collaboration privileges agree to be bound by these policies and to follow the associated procedures as a condition of those privileges.

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

2 Authority

The corporate rules of order and standing rules detailed herein supplement the **X12 Bylaws (CAP01)**. In the case of any inconsistency between corporate rules and the Bylaws, the Bylaws prevail.

Corporate rules of order and standing rules may be augmented by more detailed or more restrictive committee rules; however, such rules shall not duplicate, supersede, contradict, countermand, or overrule the corporate rules. In the case of any inconsistency between corporate rules and committee rules, the corporate rules prevail.

3 Background

Over time X12 has developed or licensed several tools that facilitate member collaboration, internal information exchange, and work product review. Each offers functionality that supports X12 needs and, in some cases, more than one tool could be used for a specific purpose. This document defines the collaboration, internal information exchange, and work product review tools utilized for X12 work product development and related activities, excluding development of the X12 EDI Standard, and defines related policies and procedures.

4 Collaboration and Review Tools Policy

X12's member collaboration tool set includes OnlyConnect™, iMeet Central™, the X12 Member website, GoToMeeting™, and GoToWebinar™.

X12's internal review tool set includes OnlyConnect™, Glass™, and the X12 Member website.

Glass™ is X12's external review tool.

Listservs are X12's legacy tool for information dissemination.

A description of each tool, the intended and permitted uses, and related policies are defined below. See Section 5 for a matrix of the tools and the activities they support.

4.1 OnlyConnect™

OnlyConnect™ is X12's primary document management tool. Policies, procedures, constitutions, charters, guidance, technical reports, white papers and other work products are housed and maintained in OnlyConnect™. OnlyConnect™ supports review, commenting, discussion, decisions, publisher instructions, and voting for these types of X12 work products.

Any X12 member representative may request credentials to access OnlyConnect™. Once they have established the necessary credentials, member representatives can request, and may be granted, access to draft work products for the purpose of actively participating in development of the work product. Staff authorizes access to draft work products based on official attendance records or on approval for the access from the associated group chair. A member representative's access to a draft work product will be revoked if active participation lapses. There shall be no OnlyConnect™ access to final documents which are available in the X12 store.

As permitted by corporate policies, staff provides access to preliminary drafts produced from OnlyConnect™ content for authorized member review purposes. X12 members, and non-members permitted access, shall not post, distribute, or share preliminary drafts via any mechanism or with any party.

As permitted by corporate policies, staff also provides near-final drafts intended for public review or review by an external group prior to final approval. X12 members, and non-members permitted access, shall not post, distribute, or share near-final drafts via any mechanism or with any party.

4.2 iMeet Central™

iMeet Central™ is X12's primary tool for collaboration not directly tied to work product maintenance. Examples of this type of collaboration include change request review, requirements gathering, technical specifications, response development, internal document review, and administrative discussions. All written collaboration not conducted within OnlyConnect™ shall be conducted in iMeet Central™. All working documents, excepting those which reside in OnlyConnect™, shall be stored in iMeet Central™. Official RFI responses reside in the RFI repository and are accessed via the RFI Portal.

iMeet Central™ is also X12's primary distribution tool for meeting participant information, including agendas, to-do lists, and work packets.

Any X12 member representative may request credentials to access iMeet Central™. Once they have established the necessary credentials, member representatives can request, and may be granted, access to one or more specific iMeet Central™ workspaces so they may actively participate in collaboration. Access is not permitted as a means of monitoring or tracking a group's collaborations or activities. Staff authorizes access to iMeet Central™ workspaces based on official attendance records or based on approval for the access from a chair of the group that collaborates in the workspace. A member representative's access to iMeet Central™ workspaces will be revoked if active participation lapses.

Non-member Access

X12 permits non-member participation in iMeet workspaces in certain circumstances as approved by the overseeing committee chair. A committee chair has authority to approve non-member participation in a specific workspace if non-members have critical industry knowledge about a specific activity, function, or process that is needed on a short-term basis to fill a knowledge gap within the group's constituents. Non-member participation shall not be approved for any workspace as a means of dues avoidance.

If permitted, non-member privileges rest with the individual, not the individual's organization. Non-members can request, and may be granted, access to one or more specific iMeet Central™ workspaces so they may actively participate in collaboration. Access is not permitted as a means of observing, monitoring or tracking a group's collaborations or activities. Non-member access to a workspace requires active participation and shall otherwise be terminated. Non-member access to a group's iMeet workspace is intended to be short-term and shall not exceed 2 years, except with express permission of the X12 Board.

No other membership benefits are conveyed to the non-member based on their participation in group discussions or their access to iMeet. Specifically, non-members granted access to iMeet shall not be granted the right to attend Standing meetings without paying the associated meeting fee, to vote, to receive member discounts, nor to access to other X12 tools.

Staff authorizes non-member access to iMeet Central™ workspaces based on corporate policies, approval from the committee chair, or approval from a chair of the group that collaborates in the workspace. A non-member's access to iMeet Central™ workspaces is subject to specific conditions and staff shall terminate the access when those conditions no longer apply.

The chair of any group with a workspace permitting non-member participation shall review the non-member participants annually to ensure the non-member is actively participating and that their industry input is still required, and shall report to the committee chair on the results of that review.

4.3 Glass™

Glass™ is X12's primary review tool. As a content reviewer, Glass™ does not support commenting, discussion, or direct collaboration.

Any X12 member representative may register to access Glass™. Once the necessary credentials are established, member representatives will have access to a specific suite of documents, some of which will be final published versions and some of which will be in draft status.

Non-members may register to access Glass™. Once they have established the necessary credentials, non-members will have access to a specific suite of documents. Non-member access shall be constrained in accordance with corporate policies and non-members will not have access to the full suite of documents available to members.

4.4 X12 Member Website

X12's member website (members.x12.org) serves several purposes, which are not all articulated herein; related to X12 member collaboration and review, the member website is used for controlled distribution of draft work products for internal review. These internal review documents are available during a defined review period and are then removed from the member website. Such internal review is generally only necessary when one X12 group needs to review the near-final work product of another X12 group. The member website is not intended to house discussion or collaboration related to the distributed materials. Related comments, discussions, and other types of follow-up collaboration shall be conducted in a meeting, in OnlyConnect™, or in iMeet Central™.

Any X12 member representative may register to access the member website. Once they have established the necessary credentials, member representatives may be granted access to specific internal reviews. Staff

authorizes access to specific internal reviews based on official attendance records or based on approval for the access from a chair of the group that develops the work product. A member representative's access to specific internal reviews will be revoked if active participation lapses.

4.5 GoToMeeting™ and GoToWebinar™

GoToMeeting™ and GoToWebinar™ are X12's collaboration tools for meetings conducted via conference call or webinar. All X12 meetings conducted via conference call or webinar shall be initiated under an X12 account using either GoToMeeting™ or GoToWebinar™. Based on registration and attendance tracking processes, all Standing meeting sessions shall be conducted using GoToWebinar™. Interim meetings shall be conducted using either GoToWebinar™ or GoToMeeting™.

X12 meeting invitations are distributed in accordance with corporate policy, by staff or by the chair calling the meeting. An X12 member representative who receives a GoToMeeting™ or GoToWebinar™ meeting invitation shall not forward the invitation to any other party for any purpose.

4.6 Listservs

Listservs are a legacy tool supported for specific subcommittees pending their integration to iMeet Central™. However, use of listservs is restricted to information dissemination; use of a listserv for member collaboration is not permitted. Any X12 member representative may be added to an existing listserv. Non-member participation in listservs is discouraged but non-members may be added to a listserv at the discretion of the Committee Chair. New listservs shall not be created.

4.7 Monitoring and Reporting

Staff will provide the board and committee chairs with participation statistics annually.

Committee chairs will ensure the chair of each group that utilizes a collaboration tool reviews the participation statistics annually and confirms which participants are still actively participating with the group and are therefore qualified for the access privileges and which should have their access removed.

5 Matrix of Tools and Activities

Activity	Tool
Discussion of revisions to a technical report, design rule, guidance document, white paper, policy, or procedure	OnlyConnect™ iMeet Central™
Revisions to a technical report, design rule, guidance document, white paper, policy, or procedure	OnlyConnect™
Publisher instructions for a technical report, design rule, guidance document, white paper, policy, or procedure	OnlyConnect™
Discussion of external code list maintenance	iMeet Central™
Discussion of an open RFI	iMeet Central™
Discussion within an X12 group, other than those specified for OnlyConnect™ above. This includes meeting schedules, agendas, announcements, task tracking, requirements gathering, solutions development, and other such activities.	iMeet Central™
Internal review of draft documents by one X12 group	OnlyConnect™ iMeet Central™ Glass™
Internal review of draft documents by more than one X12 groups	Member Website Glass™
External review of draft documents	Glass™
Member access to selected published documents	Glass™
Non-member access to selected published documents	Glass™
Collaborative online Standing meeting sessions	GoToWebinar™
Collaborative online interim meetings	GoToMeeting™ GoToWebinar™

6 Collaboration Code of Conduct

As a condition of use, all X12 collaboration tool users agree to abide by applicable 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 X12 discussions via collaborative tools must agree to do so prior to being granted access.

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 this code of conduct. 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. The X12 Executive Director shall determine violations to this code of conduct and take any necessary action.

Collaborative posts:

1. Shall be respectful and civil.
2. Shall accurately represent the identity of the poster. Impersonating another person, whether real or fictional, is expressly disallowed.
3. Shall be relevant to the discussion at hand.
4. Shall not contain unlawful or objectionable content.
5. Shall not contain disruptive, offensive or abusive language.
6. Shall not contain unsuitable or irrelevant URLs.
7. Shall not include advertisement of any product or service.
8. Shall not be spam.

Collaborative discussions are internal:

1. Collaborators shall not disclose information shared during X12 collaborative discussions with external parties, defined herein as anyone not also authorized for the specific collaboration.
2. Collaborators shall not disclose the identity of any other collaboration participant, nor their positions on any matter discussed, to external parties.
3. Collaborators are not authorized to speak on behalf of X12 and shall not use information garnered from collaboration to provide 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. Any inquiry from the press shall be referred to the X12 Board Chair or Executive Director.
5. Collaborators shall not download information from the collaborative tool for any purpose other than the intended collaboration.

The preceding notwithstanding, collaborators acknowledge that collaborative comments are by nature public, not private, and should exercise their own due caution when posting comments of any nature.

7 Procedures

7.1 Request OnlyConnect™ Credentials

Any X12 member may register to request access OnlyConnect™.

1. The member representative completes the online registration form at www.wpc-edi.com/onlyconnect
2. Staff forwards the request to the appropriate chair for consideration

3. The chair decides
4. If approval is granted, staff grants the access and notifies the member representative
5. If approval is denied, staff notifies the member representative

7.2 Request OnlyConnect™ Access

An X12 member representative who is participating with an X12 group may submit the online form, **Request for OnlyConnect™ Role Privileges**, to request access to the group's **OnlyConnect™** documents.

1. The member representative completes the online form at www.x12.org/forms
2. Staff forwards the request to the appropriate chair for consideration
3. The chair decides
4. If approval is granted, staff grants the access and notifies the member representative
5. If approval is denied, staff notifies the member representative

7.3 Request Workspace Access – Member Rep

An X12 member representative who is participating with an X12 group may submit the online form, **Member Request for Workspace Access**, to request access to the group's iMeet™ workspace.

1. The member representative completes the online form at www.x12.org/forms
2. Staff forwards the request to the appropriate chair for consideration
3. The chair decides
4. If approval is granted, staff grants the access and notifies the member representative
5. If approval is denied, staff notifies the member representative

7.4 Request Workspace Access – Non-Member

X12 authorizes non-member participation in an iMeet™ workspace in certain circumstances. **Non-members** who would like to participate in such a group may submit the online form, **Non-Member Request for Workspace Access**, to request approval for participation privileges.

1. The non-member completes the online form at www.x12.org/forms
2. Staff forwards the request to the appropriate chair for consideration
3. The chair decides
4. If approval is granted, staff grants the access and notifies the non-member
5. If approval is denied, staff notifies the non-member

7.5 Request Non-Member Access to Workspace

A chair of a group using an iMeet™ workspace for collaboration may submit the online form, **Request to designate a workspace for non-member participation**, to request approval for the inclusion of non-member collaborators.

1. The chair of the associated group completes the online form at www.x12.org/forms
2. Staff forwards the request to the committee chair for consideration
3. The committee chair decides
4. Staff notifies the requesting chair of the decision
5. If approval is granted.
 - a. Staff informs the requesting chair of the approval
 - b. Staff adjusts the workspace attributes as necessary
 - c. In order to be considered for these exception privileges, each non-member participant must complete the online form, **Non-Member Request for Workspace Access**
6. If approval is denied, staff informs the requesting chair of the decision

8 Document History

New versions of this document are effective on the approval date.

Date	Description of Revisions
07/18/17	V4: Renamed from ADP15 to CAP07 and updated.
05/08/15	V3: Updated to require non-member agreement prior to access to X12 tools, and other non-substantive revisions applied.
02/18/15	V2: Updated to allow non-member access to iMeet in specific situations.
07/10/13	Initial version, supersedes the Listserv and Listserv Usages Policies.