

# X12N FULL SUBCOMMITTEE – SUMMER 2025

Tara Rose, Chair

Michelle Barry, Vice-Chair



# DISCLAIMER

- This presentation is for informational purposes only
- This presentation is not intended to represent legal advice
- The content is point-in-time information and is subject to revision
- If you have questions regarding specific information, please send them to [info@x12.org](mailto:info@x12.org)
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# X12N AGENDA

MONDAY 6/2/2025  
9:00 TO 9:30 AM CT

- Call to Order/Introduction
- Anti-trust & Recording Policies
- X12N – Insurance Subcommittee
- Standing Meeting Logistics
- Educational Deck Updates
- Task Group and Work Group Plans
- X12N Representatives, X12N Internal Liaisons, and X12 Formal
- Recess the Session





# ANTI-TRUST AND RECORDING POLICIES

- Antitrust Policy  
*Bylaws (CAP01), section 18.4*
- Audio & Video Recordings, Photography, and Screen  
Capture Policies  
*Meetings (CAP06), section 10*

# X12N - INSURANCE SUBCOMMITTEE

## → *X12N Purpose and Scope (ASC90)*

- Responsible for the development and maintenance of components of the X12 EDI Standard related to the insurance industry's business activities, including Property, Casualty, Health, Life, and Annuity insurance, Reinsurance, and Pensions
- Develops and maintains interpretations, technical reports and guidelines related to its areas of responsibility

## → Officers

- Tara Rose, Chair
- Michelle Barry, Vice-chair



# STANDING MEETING LOGISTICS

- Two options for tracking sessions during the Standing meeting
- *Download the full meeting schedule from the meetings page on X12.org*
  - *Download the Whova app – all attendees should have received an email with the QR code*
  - *Meeting updates are found in Whova*

# STANDING MEETING LOGISTICS

## → Room Block

- *Please reach out to [support@x12.org](mailto:support@x12.org), [meetings@x12.org](mailto:meetings@x12.org), or go to the registration desk if you booked the hotel through your company or another entity*

## → Task and work group report outs

- *Due Wednesday, 6/4, by 5PM CT*

## → Standing meeting minutes

- *Draft 6/13*
- *Post in the workgroup iMeet space for review and approval by the constituents – 7 days – 6/13-6/20*
  - *If no one comments in the 7 days, then the minutes are approved*
- *Final 6/27*

# EDUCATIONAL DECK UPDATE

- Michelle Barry, X12N Vice-Chair, is heading up the educational deck effort
- Educational deck status

Work Group	Status	Publication Approval
WG1 – Benefit Information	Approved for Publication	4 <sup>th</sup> Quarter 2024
WG2 – Claims, Encounters, and Attachments	Approved for Publication	1 <sup>st</sup> Quarter 2025
WG3 – Payment Information	Approved for Publication	1 <sup>st</sup> Quarter 2025
WG5 – Claim Status and Claim Acknowledgment	Approved for Publication	1 <sup>st</sup> Quarter 2025
WG7 – P&C Policy Administration	Approved for Publication	1 <sup>st</sup> Quarter 2025
WG10 – Services Review	Approved for Publication	1 <sup>st</sup> Quarter 2025
WG15 – Provider Information	Approved for Publication	2 <sup>nd</sup> Quarter 2024
WG16 – Enrollment and Premium Payment	Pending Work Group Approval	
WG22 – Health Care Data Reporting	Pending Leadership Review	
WG23 – EDI Acknowledgments	Summer Standing Agenda Item	



# X12N OFFICER ELECTIONS

→ The following candidates were elected for the next term

Subcommittee/Work Group	Position	Candidate	Term
TGB   WG1 – Benefit Information	Chair	Donna Campbell	Summer 2025-Summer 2027
TGB   WG2 – Claims, Encounters, and Attachments	Co-Chair	Jamie Mosteller	Summer 2025-Summer 2027
TGB   WG10 – Services Review	Co-Chair	Bruce Bellefeuille	Summer 2025-Summer 2027
TGB   WG10 – Services Review	Co-Chair	Justin Arnold	Summer 2025-Summer 2027
TGB   WG15 – Provider Information	Co-Chair	Andy Norgord	Summer 2025-Summer 2027
TGC   WG2 - RFI	Co-Chair	Kellene Parthemore	Summer 2025-Summer 2027

# X12N APPOINTMENTS SUMMER 2025

Liaison/Representative/Task Group	Appointee	Appointed Term
X12C Liaison	Stacey Barber	Summer 2025-Summer 2027
PRB Primary Representative	Stacey Barber	Summer 2025-Summer 2027
PRB Alternate Representative	Christopher Gracon	Summer 2025-Summer 2027
X12N TGH	Pat Wijtyk	Summer 2025-Summer 2027



# X12N SUBORDINATE GROUP PLANS - TGB

Subordinate Group	Chair/Co-chairs	Term Ends	Standing Meeting Plan
Business Task Group	Pam Grosze	<ul style="list-style-type: none"><li>• Summer 2026</li></ul>	<ul style="list-style-type: none"><li>• Meeting 6/3 at 12 PM</li></ul>
WG1 - Benefit Information	Donna Campbell	<ul style="list-style-type: none"><li>• Summer 2025</li></ul>	<ul style="list-style-type: none"><li>• RFIs 2794 &amp; 2750</li><li>• 8040/8060 examples</li><li>• 8040 Review and MR creation</li><li>• IA updates</li></ul>
WG2 - Billing, Encounter, & Claim Attachment	James Mosteller Stanley Nachimson	<ul style="list-style-type: none"><li>• Summer 2025</li><li>• Summer 2026</li></ul>	<ul style="list-style-type: none"><li>• RFIs 2768 &amp; 2797</li><li>• 8060 examples</li><li>• IG page turning</li></ul>
WG3 - Payment Information	Meg Kutz Sandra Hansen	<ul style="list-style-type: none"><li>• Fall 2026</li><li>• Winter 2026</li></ul>	<ul style="list-style-type: none"><li>• CARC CMG03</li><li>• RFIs</li><li>• CARC/RARC mapping updates discussion</li><li>• CARC/RARC mapping for 8040 appendix</li><li>• New group code discussion</li><li>• 8040 examples</li></ul>

# X12N SUBORDINATE GROUP PLANS - TGB

Subordinate Group	Chair/Co-chairs	Term Ends	Standing Meeting Plan
WG5 - Claim Status & Claim Acknowledgments	Duane Collins	<ul style="list-style-type: none"> <li>• Winter 2027</li> </ul>	<ul style="list-style-type: none"> <li>• MR and RFI work</li> <li>• TGH tasks</li> <li>• 8060 examples</li> <li>• CAQH presentation</li> <li>• IG page turning</li> </ul>
WG7 - P&C Policy Administration	Ana Raymond Rene Cannon	<ul style="list-style-type: none"> <li>• Winter 2027</li> <li>• Winter 2026</li> </ul>	<ul style="list-style-type: none"> <li>• IICMVA and State Reporting Update</li> <li>• General auto questions</li> <li>• Review T3 IGs</li> </ul>
WG10 - Services Review	Bruce Bellefeuille LuAnn Hetherington	<ul style="list-style-type: none"> <li>• Summer 2025</li> <li>• Fall 2025</li> </ul>	<ul style="list-style-type: none"> <li>• Eliminate CRC segments from 278</li> <li>• IG page turning: X342, X327, and X328</li> <li>• MR &amp; RFI work</li> <li>• TGH tasks</li> </ul>
WG15 - Provider	Jeff Jennings Convener: Michelle Barry	<ul style="list-style-type: none"> <li>• Fall 2025</li> </ul>	<ul style="list-style-type: none"> <li>• Review of collector notes and spreadsheet</li> </ul>

# X12N SUBORDINATE GROUP PLANS - TGB

Subordinate Group	Chair/Co-chairs	Term Ends	Standing Meeting Plan
WG16 - Enrollment	Tina Martinez	• Winter 2027	• Informational deck • TGH tasks
WG22 - Health Care Data Reporting	Christopher Gracon	• Fall 2025	• Review possible MRs to submit • 8060 examples
WG23 – EDI Acknowledgments	Dave Collins Joel Prater	• Fall 2025 • Fall 2025	• 999 IG page turning





# X12N SUBORDINATE GROUP PLANS - TGC

Subordinate Group	Chair/Co-chairs	Term Ends	Standing Meeting Plan
Coordination	Joel Prater	<ul style="list-style-type: none"><li>Fall 2025</li></ul>	<ul style="list-style-type: none"><li>Not meeting</li></ul>
WG2 – Request for Interpretation (RFI)	Jo Steinert	<ul style="list-style-type: none"><li>Fall 2026</li></ul>	<ul style="list-style-type: none"><li>Not meeting</li></ul>
WG8 – Regulatory/Advisory Collaboration	Convener: Tara Rose		
WG9 – Documentation			<ul style="list-style-type: none"><li>Not meeting</li></ul>

# X12N SUBORDINATE GROUP PLANS – TGH

Subordinate Group	Chair/Co-chairs	Appointed Term	Standing Meeting Plan
Harmonization	Pat Wijtyk	<ul style="list-style-type: none"><li>• Summer 2025</li></ul>	<ul style="list-style-type: none"><li>• Open segment model follow-up</li><li>• New segment models: DMG, PRV, and SVx</li><li>• MR 176</li></ul>



# X12N REPRESENTATIVES

- X12 requires subcommittees to maintain certain representatives to the subcommittee's interests
- PRB Representative – Stacey Barber - Appointed through Summer 2025 (Alternate – Christopher Gracon)
  - TAS Representative – LuAnn Hetherington - Appointed through Fall 2026 (Alternate – Joel Prater)

# X12N INTERNAL LIAISONS

- Internal Liaison: An individual appointed to coordinate between two X12 groups
- X12C Liaison – Stacey Barber  
(Appointed through Summer 2025)
  - X12M Liaison – Steve Rosenberg  
(Appointed through Winter 2027)

# X12 FORMAL LIAISONS

- Formal Liaison: An individual appointed by the X12 Board to represent X12's interests to another organization as defined in a formal agreement between the two organizations
- X12 Formal Liaisons of interest to X12N
  - CAQH CORE – Michelle Barry
  - Cooperative Exchange – Pat Wijtyk
  - Designated Standards Maintenance Organizations (DSMO) – Tara Rose
  - IAIABC – Sherry Wilson
  - WEDI – Cathy Sheppard



# STAY CONNECTED

→ Learn more at [X12.org](https://X12.org)

→ Stay informed by following X12



*@x12standards on Twitter*



*#X12 on LinkedIn*



# WRAP-UP

- Post questions, suggestions, or feedback, use the online form at [X12.org | feedback](https://x12.org/feedback)
- Next X12N Full Subcommittee meeting – Wednesday 6/4 9 AM



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# X12N AGENDA

WEDNESDAY 6/4/2025  
9:00 A.M. ET

- Reconvene
- General Session Highlights
- Recess the Session





# X12 - GENERAL SESSION HIGHLIGHTS

## → Recommendations

- *X12 submitted the letter to withdrawal the second set of recommendations made to NCVHS in April 2023. The recommendation included, in 8020:*

Health Care Claim Status Request and Response (276/277)

Benefit Enrollment and Maintenance (834)

Payroll Deducted and Other Group Premium Payment for Insurance Products (820)

## → MR 74 – 3<sup>rd</sup> Party Liability – Medicaid

- *DG to be created to address this business need*
- *If you, or someone in your organization, want to be involved, visit the feedback form and select the drop down for this topic*

# STANDING MEETING LOGISTICS AND REMINDERS

- Task and work group report outs
  - *Due today, 6/4, by 5PM CT*

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# WRAP-UP

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- Next X12N Full Subcommittee meeting – Thursday 6/5 at 12 PM



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# X12N AGENDA

THURSDAY 6/5

12 TO 12:30 PM CT

- Reconvene
- Summary of Task & Work Group Activities
- Reminders
- Fall 2025 Elections
- Wrap-up
- Adjourn the Session



# X12N SUBORDINATE GROUP - TGB

Work Group	Interim Meetings	Summary
Task Group – Business Management	Third Thursday of the month 11 a.m. ET	
WG1 - Benefit Information	Every Week: Monday 2:00-5:00 p.m. ET Tuesday 3:30 – 5:00 p.m. ET	<ul style="list-style-type: none"><li>• Discussed MR 545 ballot</li><li>• Completed RFI responses for 2794, 2795</li><li>• Discussed RFI 2801</li><li>• Discussed TGH assignment of ‘Use when’ notes</li><li>• Reviewed WG activities for 008040/008060 page</li><li>• Discussed MR 592 and additional need for REF and MSG segments in 2105CA/DA</li></ul>
WG2 - Billing, Encounter, & Claim Attachment	Second and fourth Thursdays 1:00 – 2:30 p.m. ET	<ul style="list-style-type: none"><li>• Discussed RFIs 2786, 2788, 2797, 2800</li><li>• Worked on upgrading 837P examples from 005010 to 008040</li><li>• Reviewed Code Notes from TGH</li></ul>



# X12N SUBORDINATE GROUP - TGB

Work Group	Interim Meetings	Summary
WG3 -Payment Information	Second and fourth Wednesdays 3:00 – 4:00 p.m. ET	<ul style="list-style-type: none"><li>• Reviewed CMG03 discussion on MRN 458</li><li>• Discussed new group code</li><li>• Discussed CORE combination code usage</li><li>• Discussed RFI 2804</li><li>• Reviewed TGH notes document</li><li>• Reviewed 008040 examples</li></ul>
WG5 - Claim Status & Claim Acknowledgments	Second and Fourth Tuesdays 1:00 – 2:30 p.m. ET	<ul style="list-style-type: none"><li>• Reviewed items from interim meetings</li><li>• Received an CORE update regarding their Claim Status sub-group</li><li>• Created and reviewed 11 008060 examples for X329</li></ul>
WG7 - P&C Policy Administration	Every Friday 11:00 a.m. – 12:00 p.m. ET	<ul style="list-style-type: none"><li>• Completed full review of the 811 piece of the Personal Mortgage 811/820 (x308)</li></ul>



# X12N SUBORDINATE GROUP - TGB

Work Group	Interim Meetings	Summary
WG10 – Services Review	Second and fourth Fridays 1:00 – 2:30 p.m. ET	<ul style="list-style-type: none"><li>• Responded to 3 RFIs</li><li>• Submitted 3 new MR's</li><li>• Completed page turning for X342</li><li>• Responded to TGH code notes document</li></ul>
WG15 – Provider Information	First and third Wednesdays 1:00 – 2:00 ET	<ul style="list-style-type: none"><li>• Completed reconciliation of notes spreadsheet for X109</li><li>• Started example for X109</li></ul>



# X12N SUBORDINATE GROUP - TGB

Work Group	Interim Meetings	Summary
WG16 - Enrollment	Third Friday every month 10:00 - 11:00 a.m. ET	<ul style="list-style-type: none"><li>Completed Educational Deck updates</li><li>Responded to TGH N3, N4 and code note reviews</li><li>Began 008060 benefit discussions</li></ul>
WG22 - Health Care Data Reporting	First and third Fridays 11:00 a.m. - 12:00 p.m. ET	<ul style="list-style-type: none"><li>Reviewed TGH DE 127 spreadsheet</li><li>Reviewed TGH code note spreadsheet</li><li>Discussed RFIs 2662, 2799</li></ul>
WG23 – EDI Acknowledgments	Third Wednesday every month 2:00 – 3:00 p.m.	<ul style="list-style-type: none"><li>Discussed RFIs 2794, 2293</li><li>Reviewed TGH code note spreadsheet</li></ul>

# X12N SUBORDINATE GROUP - TGH

Task Group	Interim Meetings	Summary
TGH - Harmonization	Every week: Wednesday 2:00 – 3:00 p.m. ET	<ul style="list-style-type: none"><li>• Reviewed notes to harmonize multiple segments</li><li>• Reviewed MR176</li><li>• Discussed participation of TGH in Development Groups</li><li>• Reviewed harmonization suggestions</li></ul>

# STANDING MEETING LOGISTICS

- Work Group Minutes Deadlines
- Standing meeting minutes
  - *Draft 6/13*
  - *Post in the workgroup iMeet space for review and approval by the constituents – 7 days – 6/13-6/20*
    - If no one comments in the 7 days, then the minutes are approved
  - *Final 6/27*



# X12N ELECTIONS FALL 2025

Subcommittee/Task/Work Group	Position	Term
TGB WG10 – Services Review Information Work Group	Co-Chair	Fall 2025-Fall 2027
TGB WG15 – Provider Information Work Group	Co-Chair	Fall 2025-Fall 2027
TGB WG22 – Health Care Data Reporting	Chair	Fall 2025-Fall 2027
TGB WG23 – EDI Acknowledgments	2 Co-Chair positions	Fall 2025-Fall 2027
X12N TGC	Chair	Fall 2025-Fall 2027
TGB WG2	Co-Chair	Fall 2025-Fall 2027

# NEXT MEETING

- Fall 2025 Standing Meeting – September 28 through October 8, 2025
  - *Greenville, SC*
  - *Onsite: September 28 through October 2*
- More information on meeting logistics will be available closer to the meeting
- Watch for registration announcements and be sure you register

# WRAP-UP

- Thanks for Collaborating with us
- Post questions, suggestions, or feedback via the online form at [X12.org/feedback](https://X12.org/feedback)