# X12N TGB WG5 Claim Status and Claim Acknowledgment Information

**January 27 - 30, 2020**  
**Portland, Oregon**

## Group Leadership

<table>
<thead>
<tr>
<th>Chair Name</th>
<th>Company</th>
<th>Term End Date</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Karen Shutt</td>
<td>Highmark, Inc.</td>
<td>Fall 2021</td>
<td><a href="mailto:Karen.shutt@highmark.com">Karen.shutt@highmark.com</a></td>
</tr>
<tr>
<td>Open</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Secretary Name</th>
<th>Company</th>
<th>Term End Date</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cindy Monarch</td>
<td>BCBS of Michigan</td>
<td>Appointed (Thru Fall 2020)</td>
<td><a href="mailto:cmonarch@bcbsm.com">cmonarch@bcbsm.com</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Quorum Requirement Statement

*This group enforces quorum requirements for group voting items.*  

*This group does not enforce quorum requirements for group voting items.*  

## Scheduled Meetings

<table>
<thead>
<tr>
<th>Type of Meeting</th>
<th>Date</th>
<th>Location/Conference Call</th>
<th>Contact</th>
<th>Agenda</th>
</tr>
</thead>
</table>
| Current Meeting       | January 27-30, 2020 | Hilton Downtown Portland  
Portland, OR 97204  
(503)-226-1611  
Co-chairs | • Posted to Central Desktop prior to the meeting. |
| Next Standing Meeting | May 31-June 4, 2020 | Hyatt Regency Jacksonville  
Riverfront  
225 E. Coastline Dr.,  
Jacksonville, FL  
32202  
(904) 588-1234  
Co-chairs | • Posted to Central Desktop prior to the meeting. |
| Interim Meeting       | 2nd and 4th Tuesdays, 1:00 - 2:30 pm EST | 712-432-0393  
Access Code: 219956  
Co-chairs | • Posted to Central Desktop prior to the meeting. |
| Management Meeting    |                     |                                           |           |                                                 |
## Voting Item:  
**Type** | **Issue Description**
---|---
Other | Work group X330 (277CA) comment responses

### Motion
Accept all comment responses developed by the work group for the 277CA.

### Vote

<table>
<thead>
<tr>
<th>Motion Made by</th>
<th>2nd By</th>
<th>Approve</th>
<th>Disapprove</th>
<th>Abstain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cindy Monarch</td>
<td>Kena Gwinn</td>
<td>11</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>

### Discussion
- None

### Result
- Motion passed

---

## Voting Item:  
**Type** | **Issue Description**
---|---
Other | Work group X329 (276/277) comment responses

### Motion
Approve work group comment responses for the 276/277.

### Vote

<table>
<thead>
<tr>
<th>Motion Made by</th>
<th>2nd By</th>
<th>Approve</th>
<th>Disapprove</th>
<th>Abstain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tara Roberts</td>
<td>Kena Gwinn</td>
<td>12</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

### Discussion
- None

### Result
- Motion passed unanimously

---

## Voting Item:  
**Type** | **Issue Description**
---|---
Other | Move 276/277, 277CA, and 277RFAI towards publication

### Motion
To hold an interim Informational Forum for the 277RFAI, 276/277, and 277CA.

### Vote

<table>
<thead>
<tr>
<th>Motion Made by</th>
<th>2nd By</th>
<th>Approve</th>
<th>Disapprove</th>
<th>Abstain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laurie Burckhardt</td>
<td>Kena Gwinn</td>
<td>9</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>

### Discussion
- TRC (Cynthia Fiore) will need to update track; Laurie indicates she will assist.

### Result
- Motion passed.

---

## Key Discussion Items

**Monday 01/27/2020**

### Discussion - Welcome, introductions
- Karen welcomed participants and participants introduced themselves.

### Decisions
- None

### Discussion - Review meeting schedule (changes)
- Karen reviewed this week’s meeting schedule with participants.
  - Noted one change in the agenda on Wednesday afternoon at 3:30 the Regulatory Forum.

### Decisions
- None

### Discussion - Code Committee Update
- Karen provided an overview of yesterday’s Codes Committee meeting outcomes
<table>
<thead>
<tr>
<th>Decisions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
</tr>
</tbody>
</table>

**Discussion - 7030 Public Comment Update**

- Karen provided status on TGB/WG5 guides for version 7030:
  - 277 Pending is done (gone through TAS) and pending publication approval.
  - 277RFAI we will review how to handle BRTS, will work through that this week; IF for June Standing Meeting.
  - 277CA and 276/277 completed the second comment period.
    - We will be adjudicating the comments received this week.

<table>
<thead>
<tr>
<th>Decisions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
</tr>
</tbody>
</table>

**Discussion – Plan Interim call schedule**

- Work group agreed to continue interim meetings on the 2nd and 4th Tuesday from 1-2:30 EST
  - Noted that there is some discussion in management regarding making some changes to gotomeeting information; we currently share gotomeeting with TGB/WG2; Karen will inform everyone via iMeet if there are any changes.
  - The first interim meeting will occur on Tuesday, February 11th, from 1:00 pm to 2:30 pm.

<table>
<thead>
<tr>
<th>Decisions</th>
</tr>
</thead>
<tbody>
<tr>
<td>TGB/WG5 Interim meetings will occur on the 2nd and 4th Tuesday from 1:00 to 2:30 EST.</td>
</tr>
<tr>
<td>The first TGB/WG5 interim Meeting is scheduled for Tuesday, February 11th, from 1:00 pm to 2:30 pm.</td>
</tr>
</tbody>
</table>

**Discussion - Begin review of public comment responses for the X330 (277CA) Guide**

- Karen reviewed the 10 comments received with participants and responses were developed.
  - During discussion of a comment received regarding the removal of the provider level STC segment participants agreed this would be a good 277CA example (claim contains an invalid provider NPI); Karen noted ‘Create TR3 example’ in the Work Group Discussion column.
  - 7 comments were adjudicated, and 3 comments will be sent to C5.
  - Karen requested a motion to approve all comment responses except for the three comments that will be sent to C5 for review.
    - Motion made, refer to Voting Item.

<table>
<thead>
<tr>
<th>Decisions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workgroup response decisions are documented in 277CA X330 09-B5-All initial posts document found on TGB/WG5 iMeet work group space.</td>
</tr>
<tr>
<td>Motion to approve comment responses passed; refer to Voting Item.</td>
</tr>
</tbody>
</table>

**Discussion - Begin review of public comment responses for the X329 (276/277) Guide**

- Karen reviewed comments received with participants.
  - Participants discussed a comment pertaining to the removed provider level STC segment and agreed this would be a good 276/277 example (claim status contains an invalid provider NPI); Karen noted ‘Create TR3 example’ in the Work Group Discussion column.
• Work group will continue review during tomorrow’s meeting.

### Decisions
• Workgroup decisions are documented in 277CA X330 09-B5-All initial posts document found on TGB/WG5 iMeet work group space.

### Discussion – General Discussion
• Participants discussed a question regarding how long a payer would be required to retain a claim in order to return a claim status response.

### Decisions
• None

### Tuesday 01/28/2020

#### Discussion – Election for open position
• Laurie Woodrome opened the election for the open co-chair position, noted term ends Winter, 2022, and encouraged participants to become co-chair.
• There were no nominations, the position will carry over to the Summer Standing Meeting for another vote.
• Laurie noted that if there are no nominations in the next year, the work group will lose the co-chair position.

#### Decisions
• No nominations were made.

### Discussion - Open Session (TR3 Questions/Suggestions?)
• Question regarding the 276 being submitted for a specific claim and the payer returning a 277 with multiple claims but it doesn’t contain the claim specified in the 276; would this be appropriate based on minimally necessary?
  o Karen noted depends upon the payer and what they use to search and locate the claim (it varies) as well as what is provided in the 276 (e.g., was there a date range or a specific date; did the 276 contain the payer’s internal claim number).
  o Noted the payer’s search information may be reflected in their companion guide.
  o Participants discussed the various data that could be used to locate a claim/claims and tracking of the 276/277 via the TRN segment.

#### Decisions
• None

### Discussion – Continue review of public comment responses for the X329 (276/277)
• Karen reviewed received comments with participants and responses were developed.
  o There were a total of 9 comments received; 7 were adjudicated and 2 comments will be sent to C5.
• Karen requested a motion to approve the comment responses; motion made, refer to Voting Item.

#### Decisions
• Refer to the 276_277 X329 09-05 All initial posts document found on TGB/WG5 iMeet work group space for work group response decisions.
• Motion to approve comment responses passed unanimously; refer to Voting Item.

### Discussion: Begin X340 (277RFAI) CR/BRTS development
• Participants started working on the Informational Forum presentation for the 277RFAI.
  o Unable to complete, will finish this up during tomorrow’s meeting.

#### Decisions
• None

### Wednesday 01/29/2020

#### Discussion - TGB Management Meeting
• Management discussed with co-chairs the need to finish 7030 guides.
• Management indicated guide examples need to be created and submitted by Summer Standing Meeting.
  o There needs to be at least 1 example per guide.
  o Work groups do not need to follow the CR BRTS process for example; can create and submit as a
    word document.
• Discussed work groups needing to prioritize any open CRs.
• Management discussed with co-chairs elevating version 7030 to version 8010.

Decisions
• None

Discussion: Continue X340 (277RFAI) CR/BRTS development
• Work group completed creating the Informational Forum presentation for the 277RFAI.
• Work group created the CRs and submitted them (CR#s 2066, 2067, and 2068).

Decisions
• None

Discussion – General Discussion
• Work group discussed moving from version 7030 to version 8010.
  o Participants agreed an understanding of the differences between the versions is needed.
  o Discussed CRs for published 7030 guides will move into version 8020 and CRs for non-published
    7030 guides would be applied to version 8010.

Decisions
• None

Discussion – Report Out
• Karen worked with participants and created the Report Out of the week’s activities.

Decisions
• None

Discussion – Develop transaction examples
• Karen located the BRTS documents previously completed to support TR3 transaction examples.
• Work group started working on examples for the 276/277.
  o Participants discussed version 7030 moving to version 8010, may need to review completed
    examples just ensure nothing needs to be revised.

Decisions
• None

Discussion: Interim Informational Forum
• Laurie Burckhardt discussed with work group participants holding an interim Informational Forum for the
  277CA, 276/277, and 277RFAI the week of March 16th.
  o Noted a Work Group interim call would need to be held following the Informational Forum to then
    hold the vote to move forward to publication (pending N and TAS approval).
  o Noted the advantages of doing this and noted if we wait until June to hold Informational Forum, the
    guides would not be able to go to TAS until October.
  o Karen asked how change logs will be handled; Laurie B. indicates they are working on this.
  o Discussed information in TR3s regarding HPID with Laurie and she indicated the verbiage in the TR3
    will remain.
  o Motion made to hold an interim Informational Forum; refer to Voting Item.

Decisions
• Motion to hold Interim Informational Forum for the 277RFAI, 276/277, and 277CA passed; refer to Voting
  Item.

Thursday 01/30/2020
**Discussion: Continue development of Examples**

- Karen reviewed where the Example documents are can be found in X12N/TGB/WG5 iMeet workspace.
- Tara and Cindy indicated they could help develop examples; Cindy will develop a template to use for examples.
- Participants reviewed guides to identify needed examples and documented them in the example documents; Karen will upload these into X12N/TGB-WG5 iMeet workspace.
- Agreed the examples will be reviewed during interim meetings.

**Decisions**

- None

**Discussion: Create Informational Forum presentations**

- Karen worked with participants and created the Informational Forum presentation for the 276/277 (X329) and 277CA (X330).
  - Comment information for both guides will be in a single presentation.
  - Karen will post the presentation in iMeet.

**Decisions**

- None