
**X12 Administrative
Policy and Procedure**

**Distribution of X12 Materials
including Final, Working, and Draft Material**

(CAP10)

Distribution of X12 Materials

1 Introduction

The X12 Board of Directors (Board) is responsible for this policy and the associated procedures. X12 members agree to adhere to X12's policies and procedures as a condition of membership. Non-member participants afforded specific collaboration privileges agree to adhere to X12's policies and procedures as a condition of those privileges. Any party may submit a revision suggestion at x12.org/maintenance-requests.

2 Authority

X12 maintains corporate rules which define overall corporate policies and procedures. X12's primary organizational policies are established in the **CAP01 - X12 Bylaws**. The policies established herein supplement the **X12 Bylaws (CAP01)**, **X12 Membership (CAP04)**, and **Distribution of X12 Materials (CAP10)** policies to establish X12's policies related to the distribution of final, working, and draft materials policies in full; no related lower-level governance shall be permitted.

3 Background

X12 distributes different types of information to various audiences. Depending on the material being distributed and its intended purpose, access may be a privilege of membership or unrestricted, it may be complimentary or there may be associated fees. This policy governs X12 distribution of final, working, and draft materials, including products, informational or educational content, and operational content such as agendas and minutes.

4 Distribution Policies

Appendix A below is a visual representation of X12 distribution policies. *Appendix A* identifies different types of X12 material and defines the distribution schedule, who is permitted to distribute the material, who is entitled to receive or view the material, how it is distributed, and whether there are fees associated with access or use of the material.

The chart may not be a complete list of materials produced by X12. For materials not explicitly identified below, distribution shall follow the spirit of this section. The X12 board shall resolve any questions related to distribution of X12 material. Questions related to distribution of material may be emailed to executivedirector@x12.org.

In addition to the policies detailed in the chart in *Appendix A*, X12 establishes the following policies related to the distribution of materials.

1. Distribution processes are intended to be one-directional. X12 supports separate mechanisms for situations requiring a response.
2. All materials that are pushed to members or non-members will also be available online at X12.org or members.x12.org.
3. Generally, X12 staff distributes material based on X12 policy or a request from the Board chair or a committee chair.
4. Except for announcements, secondary distribution is not permitted without the express consent of X12 staff. It is permissible to redistribute announcements.
 - a. Secondary distribution includes, but is not limited to, the following:
 - Forwarding the information to another individual regardless of whether the individual is entitled to receive the information
 - Forwarding the information to a group distribution system
 - Posting the information on a shared platform of any kind
 - b. Secondary distribution does not include:
 - Liking or sharing posts from X12's official social media accounts, these actions are permitted and encouraged
 - Information sharing from a member's primary representative to the member's other representatives
5. Generally, all materials are distributed in a protected format to ensure the integrity of the information. In an unusual situation, the X12 Executive Director may approve distribution in an unprotected format.
6. If materials are distributed only to constituents, distribution will be determined based on X12's formal attendance records.
7. If materials are distributed only to member representatives with specific responsibilities, staff will determine distribution based on the latest election or appointment information available.
8. X12 staff is responsible for confirming with reasonable assurance that materials distributed are accurate, comply with X12 policies, procedures and practices, and add value to the receiver. Staff may consult with the board chair or a committee chair before deciding.
9. Material that is published annually is subject to X12 maintenance processes that may result in the approval of substantive or clarifying revisions since the last annual publication. Revisions approved since the last annual publication shall be applied to the next annual publication. If no revisions have been approved since the last annual publication, general housekeeping revisions, such as but not restricted to, version identifiers, dates, or factual corrections, shall be automatically applied to the next annual publication.

5 Terminology

To ensure consistent use of terms, definitions, and acronyms across X12 products and activities, X12 maintains the **Wordbook**, a comprehensive corporate glossary. The

included terms are either proprietary to X12, cite definitions published by another authority, or represent common terms and definitions that are relevant to X12's work. The terms and definitions defined in the **Wordbook** shall be used in X12 work products when applicable, without modification or revision. The **Wordbook** can be referenced online at wordbook.x12.org.

6 Document History

A new version of this document is effective when approved.

Approved	Description
06/14/19	V3: Expanded to include additional materials and other minor revisions.
05/15/19	V2: Renamed from ADP22, reformatted, and applied minor revisions.
04/30/14	Initial version.

Appendix A – Distribution Table

The chart below identifies different types of X12 material and defines the distribution schedule, who is permitted to distribute the material, who is entitled to receive or view the material, how it is distributed, and whether there are fees associated with access or use of the material.

The chart may not be a complete list of materials produced by X12. For X12 material not explicitly identified below, distribution shall follow the spirit of this section. The X12 board shall resolve any issue related to distribution of X12 material. Questions related to distribution of material may be emailed to executivedirector@x12.org.

*If the group has established a secretary position, a group's chair may assign the group's secretary to distribute information on the chair's behalf as described in the chart.

**The distribution mechanisms listed are options, material shall be distributed via at least one of the listed options but is not required to be distributed via all of them.

Material Type	Distributed By*	Permitted Audience	Distribution Mechanisms**	Distribution Schedule	Fees
General Announcement	X12 staff	Members Non-members	Direct email X12.org social media accounts	As appropriate	N/A
Internal Announcement	X12 staff	Members	Direct email iMeet® Central Members web page	As appropriate	N/A
Standing Meeting Agenda/Schedule	X12 staff	Members Non-members	X12.org meeting app	In advance of standing meetings	N/A
Interim Meeting Agenda/Schedule	X12 staff or an X12 group's chair	The group's constituents	iMeet® Central Members web page	In advance of interim meetings	N/A
An X12 group's work item list (aka task list, action item list, follow-up list)	An X12 group's chair	The group's constituents	iMeet® Central	Before or after a standing or interim meeting or as needed	N/A

Material Type	Distributed By*	Permitted Audience	Distribution Mechanisms**	Distribution Schedule	Fees
Approved Minutes for an X12 standards development group	X12 staff	Members Non-members	X12.org	Following a standing or interim meeting	N/A
Draft Minutes for an X12 standards development group	An X12 group's chair	The group's constituents	iMeet® Central	Following a standing or interim meeting	N/A
Attendance Records	X12 staff	X12 chairs, vice-chairs, and co-chairs	Direct email iMeet® Central	Following a standing meeting	N/A
Draft work in process within one subcommittee	X12 staff	Subcommittee constituents	Reviewer™ Commenter™	As appropriate	N/A
Draft work in process across subcommittees	X12 staff	Subcommittee constituents	Reviewer™, Commenter™	As appropriate	N/A
Draft product for internal review	X12 staff	Members	Reviewer™, Commenter™	As appropriate	N/A
Draft product for public review	X12 staff	Members Non-members	Reviewer™, Commenter™	As appropriate	Permitted
Ballot comment (X12 or committee-level ballots)	X12 staff	Member representatives with specific responsibilities	iMeet® Central	Following an X12 or committee-level ballot	N/A
Ballot response (X12 or committee-level ballots)	X12 staff	The commenter Member representatives with specific responsibilities	Direct email iMeet® Central	Following an X12 or committee-level ballot	N/A
Internal training or presentation	X12 staff	Members	Members web page	As appropriate	N/A
External training or presentation	X12 staff	Members Non-members	X12.org	As appropriate	N/A
X12 Policy	X12 staff	Members Non-members	X12.org	Latest version is always available	N/A
External information *Originates outside of X12 and is of interest to X12 members or the public. **as permitted by the information owner	X12 staff	Members Non-members	Direct email X12.org Members web page iMeet® Central social media accounts	As appropriate	N/A

Material Type	Distributed By*	Permitted Audience	Distribution Mechanisms**	Distribution Schedule	Fees
Final versions of the EDI Standard approved by the ASC	X12 staff	Licensees	X12 Store X12 Glass™	Published annually	License Fees apply
Final versions of X12 Tutorials (Technical Report Type 1) approved by the ASC	X12 staff	Members Non-members	X12 Glass™	Published annually	Permitted
Final versions of X12 Reference Models (Technical Report Type 2) approved by the ASC	X12 staff	Members Non-members	X12 Glass™	Published annually	Permitted
Final versions of X12 Implementation Guides (Technical Report Type 3) approved by the ASC	X12 staff	Licensees	X12 Glass™	Published annually	License Fees apply
Final versions of X12 Clarification Papers (Technical Report Type 4) approved by the ASC	X12 staff	Members Non-members	X12 Glass™	Published annually	Permitted
Final versions of X12 Code Lists approved by the RSC	X12 staff	Licensees	X12.org X12 Glass™	Published annually	License Fees may apply
Final versions of implementation instructions approved by the RSC	X12 staff	Licensees	X12 Glass™	Published annually	License Fees may apply
Final versions of best practice guidance approved by the RSC	X12 staff	Licensees	X12 Glass™	Published annually	License Fees may apply
Final versions of white papers approved by the RSC	X12 staff	Licensees	X12 Glass™	Published annually	License Fees may apply
Derivative products based on X12's intellectual property	X12 staff	Licensees	X12 Glass™	Published annually	License Fees apply