**X12 Administrative
Policy and Procedure**

CAP15 - Organizational Lingo

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X12 Lingo
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 requires the establishment of corporate rules which define overall corporate policies and procedures. X12 Committees are permitted to establish supplemental rules reflecting more detailed or more restrictive policies that apply only to that committee. A committee's subordinate groups may be permitted to establish additional group rules, which shall also be more detailed or more restrictive, to supplement the committee rules. However, a committee's supplemental rules shall not duplicate, supersede, contradict, countermand, or overrule the corporate rules, or the committee's operating manual. In turn, a subordinate group's supplemental rules shall not duplicate, supersede, contradict, countermand, or overrule the establishing committee's rules. No accommodation is intended or provided to allow a committee or subordinate rule to override a higher-level policy or procedure with a more permissive requirement. In the case of any inconsistency between corporate, committee, and subordinate group rules, the higher-level policy shall always prevail.

X12's primary organizational policies are defined in *CAP01 - X12 Bylaws*. The governance established herein supplements the *X12 Bylaws* and may be augmented by supplemental rules as described above.

3 Background

Consistent vocabulary, including terms and definitions, is necessary for effective and efficient communication within the organization as well as between the organization, implementers, and stakeholders. As such, vocabulary is an important component in X12's activities and work products, including individual words, stand-alone phrases, and related sets of words and phrases that need to be understood in context with each other. Within X12, the term "lingo" represents this vocabulary. The word "term" herein shall include both individual words and phrases defined in X12 lingo.

4 Lingo Policies

X12 lingo shall be housed in the Wordbook, a repository which shall be the definitive lingo source for the organization. The Wordbook shall be available as an online resource to X12 members and the public.

The Board delegated responsibility for the X12 lingo to the Governance Panel. The Governance Panel shall be responsible for maintaining the X12 lingo in accordance with the following:

1. The Wordbook shall not be modified or revised except as described herein.
2. Any member representative or materially-interested member of the public may request revisions to the Wordbook via the X12 Maintenance Request System.
3. All maintenance requests shall be considered equally.
4. The Governance Panel chair is responsible for ensuring timely consideration and determination of all lingo maintenance requests.

The Governance Panel shall be directly responsible for maintaining all terms that:

1. Apply across the organization
2. Describe an external organization
3. Are adopted from an external authority
4. Are negotiated, or otherwise jointly agreed upon, with an external entity
5. Support policies and procedure
6. Represent common word use
7. Are not specifically assigned to a committee lingo maintenance group

Committees may establish a lingo maintenance group which shall be advisory to the Governance Panel. Such a group shall operate under committee policies approved by the Governance Panel. All actions of the committee-level group shall be presented as recommendations to the Governance Panel which shall make the final determination.

With the consent of the Governance Panel, a committee's lingo maintenance group may relinquish responsibility for some or all their Wordbook terms to one or more subordinate groups. In such cases, the actions of the subordinate group shall be presented directly to the Governance Panel as recommendations. The Governance Panel shall make the final determination.

If a committee has formed a separate lingo maintenance group, the Governance Panel may formally delegate to the group the responsibility for evaluating maintenance requests for a specific term or set of terms. A term may be delegated in such a manner if it meets all the following conditions.

1. The term or definition is X12 specific.
2. The term applies to or is used by one and only one committee.
3. The term is not defined by an external group with recognized or implied authority over the subject matter.

Staff shall be responsible for the technical aspects of maintaining the Wordbook, including correcting grammar, punctuation, typographical errors, and other general inaccuracies. Staff shall also be responsible for all aspects of publishing the lingo, including style, presentation, and medium.

The publisher shall ensure that X12 products contain a common lingo section populated with the lingo applicable to the individual published work. All terms documented in such a lingo section must exist in the Wordbook repository. This section may, but is not required to be, labeled as the lingo section in the published work.

4.1 Specific Policies

Lingo shall be used consistently in all X12 collaborations, documents, work products and activities.

Inclusion of more than one Wordbook term with the same or materially the same definition or purpose is not permitted.

Terms in the Wordbook shall be singular.

Terms may be included in the Wordbook for the purpose of:
- Expressing an X12 specific term or definition
- Clarifying X12's acceptance of the usual and customary definition of a term
- Adding an X12 nuance to the usual and customary definition of a term
- Documenting synonyms for a term
- Defining an acronym for a term

Terms shall be qualified by one or more of the following:
- A definition which explains X12's use of the term
- A definition which explains a specific industry's generally accepted use of the term
- A definition describing the generally accepted use of the term
- A definition quoted from an authoritative external source
- A description of an external organization as approved or published by the external organization itself
- An acronym
- A synonym
- Identification of the assigned maintenance group(s)
- A citation linking the term to an X12 policy or procedure

Terms adopted from an external reference or cooperatively negotiated with an external entity shall be appropriately cited.

Terms shall be defined at the simplest level possible. Unless a phrase has a substantially different definition than the individual words in the phrase would have when considered as a unit, the phrase shall not be entered as a separate Wordbook term.

Terms may define synonyms and alternate terms used within X12 work products and synonyms and alternate terms that are explicitly restricted from use within X12 work products.

A term defined as a synonym of another term shall be considered subordinate to that term, which shall be considered the parent. Subordinate terms shall not have a separate definition or any clarification differentiating it from the parent term.

X12 shall permit only definitions maintained by an authoritative source. X12 shall not permit definitions from online sources that are maintained by user contribution or updatable by the public or registered users. For example, Wikipedia posts this disclaimer about itself. "Wikipedia is not a reliable source. Wikipedia can be edited by anyone at any time. This means that any information it contains at any particular time could be vandalism, a work in progress, or just plain wrong….. Wikipedia should *not* be considered a definitive source in and of itself." https://en.wikipedia.org/wiki/Wikipedia:Wikipedia_is_not_a_reliable_source

5 Lingo-Related Processes

The Governance Panel maintains the following process to accomplish its responsibilities and assignments.

5.1 Considering a Lingo Maintenance Request

The Governance Panel shall adhere to this maintenance process when considering Wordbook maintenance requests and shall strive to decide on all maintenance requests within four (4) weeks of submission.

The lingo maintenance process shall be:
1. Any individual submits a request for lingo maintenance via X12's online form at x12.org/maintenance-requests.
2. Staff evaluates the request to ensure necessary information is included and clearly presented. This may include contacting the submitter for clarifications.
3. If a request pertains to a simple correction, such as spelling errors or grammar issues, Staff handles the revision and continues to step #10.
4. Staff assigns the request to the Governance Panel chair.
5. The chair evaluates the request and either retains responsibility for processing the request or assigns it to a subordinate maintenance group.
6. The responsible maintenance group discusses the matter and reaches consensus regarding a recommendation to approve or disapprove the request.

7. If the Governance Panel was the responsible maintenance group, continue to step #10.

8. If the Governance Panel was not the responsible maintenance group, the responsible group chair notifies the Governance Panel chair of the group's recommendation regarding the request.

9. The Governance Panel considers the request and the recommendation and reaches consensus regarding the request.
    Note: The Governance Panel is not obligated to accept an advisory group's recommendation.

10. Staff closes the request, revises the Wordbook if appropriate, and notifies the submitter of the determination.

5.2 Committee or Subordinate Group Approval

A committee considering the establishment of a lingo maintenance group must take the following steps. The steps may be iterative if necessary to achieve agreement between the groups.

1. A committee chair notifies the Governance Panel chair of its intention to establish a lingo maintenance group and designates an internal liaison to facilitate between the committee and the Governance Panel.

2. The Governance Panel chair, or a designee, and the internal liaison develop draft policies and procedures for the proposed lingo maintenance group.

3. The internal liaison obtains the committee's approval of the draft policies and procedures or its feedback for additional discussion with the Governance Panel chair.

4. The Governance Panel reviews and approves the draft policies and procedures or remands them for revisions.

5. Upon approval of the policies and procedures, the committee is free to establish and operationalize the lingo maintenance group.

5.3 Requesting Responsibility Delegation

Once a committee's lingo maintenance group is established and operational, the group's chair may formally request that the Governance Panel delegate the group responsibility for one or more specific Wordbook terms. Additional requests can be submitted and considered over time based on the addition of new Wordbook terms of particular interest to the committee.

1. The committee's lingo maintenance group chair notifies the Governance Panel chair of the group's interest in evaluating maintenance requests for a specific term or set of terms and provides the reasoning for the request.

2. The Governance Panel considers the request based on the policies and procedures herein and either approves or disapproves the request, providing the reasoning for any disapproval. The Governance Panel shall make an individual determination for each specific term, not one determination for the set of terms included in the request.

3. The Governance Panel chair notifies the committee's lingo maintenance group chair of the Governance Panel's decision(s) and clarifies any next steps based on the decision(s).

4. The Governance Panel chair notifies staff of any terms approved for delegation to the committee's lingo maintenance group.

5. Staff updates the Wordbook to reflect the Governance Panel delegation decisions.

6. Future maintenance requests for delegated terms are processed by the lingo maintenance group, subject to approval by the Governance Panel.

7. The Governance Panel may reassign maintenance responsibility for any term over time as it deems necessary.

5.4 Committee Relinquishes to Subordinate Group

At any time, a committee's lingo maintenance group may elect to relinquish responsibility for some or all their Wordbook terms to one or more subordinate lingo maintenance groups.

1. The committee's lingo maintenance group chair notifies the Governance Panel chair of the group's desire to relinquish responsibility for one or more of its term(s) to a subordinate group and provides the reasoning.

2. The Governance Panel considers the request based on the policies and procedures herein and either approves or disapproves the request, providing the reasoning for any disapproval. The Governance Panel shall make an individual determination for each specific term, not one determination for the set of terms included in the request.

3. The Governance Panel chair notifies the committee's lingo maintenance group chair of the Governance Panel's decision(s) and clarifies any next steps based on the decision(s).

4. The Governance Panel chair notifies staff of any terms approved for delegation to the subordinate lingo maintenance group.

5. Staff updates the Wordbook to reflect the Governance Panel delegation decisions.

6. Future maintenance requests for relinquished terms are processed by the subordinate lingo maintenance group, subject to approval by the Governance Panel.

8. The Governance Panel may reassign maintenance responsibility for any term over time as it deems necessary.

5.5 Committee Relinquishes to Governance Panel

At any time, a committee's lingo maintenance group may elect to return responsibility for some or all their Wordbook terms to the Governance Panel.

1. The committee's lingo maintenance group chair notifies the Governance Panel chair of the group's desire to return responsibility for one or more of its term(s) to the Governance Panel and may provide the reasoning.

2. The Governance Panel shall accept the return of responsibility without debate.
3. The Governance Panel chair notifies staff of the terms for which the Governance Panel is resuming responsibility.
4. Staff updates the Wordbook to reflect the decision(s).
5. Future maintenance requests for relinquished terms are processed by the by the Governance Panel.

6 Terminology

To ensure consistent terminology and definitions across X12 activities and products, X12 maintains the Wordbook, an online comprehensive corporate glossary at wordbook.x12.org. Some of the included definitions are proprietary to X12 while others cite definitions published by another organization or authority, such as Robert's Rules of Order. The terms and definitions defined in the Wordbook must be used in X12 work products when applicable, without modification or revision.

7 Document History

New versions of this document are effective on the approval date, unless otherwise stated in the approval.

Approved	Description
04/15/19	V5: Corrected grammatical issues and revised wording for clarity.
04/31/18	V4: Revised to include delegation process steps with other non-substantive revisions to improve clarity.
12/15/17	V3: Revised to accommodate the RSC.
09/22/16	V2: Revised to reflect the organization's name change and other minor revisions.
05/10/16	CAP15 - initial version approved by the X12 Board.