FALL CORPORATE MEETING

October 5, 2020

DISCLAIMER

→ This presentation is for informational purposes only

→ The content is point-in-time information, subject to revision

CORPORATE REPORT

Stephanie Fetzer

X12 Board Chair

2020 ANNUAL CORPORATE MEETING

→ Call to Order

→ Welcome to the first ever all-virtual X12 Standing Meeting

→ The Anti-Trust, Recording, and Photo policies are in effect for all the sessions of this meeting

→ According to Institutional Shareholder Services (ISS), more than 1,000 US companies conducted their annual meeting virtually from January through April of 2020, compared to 300 virtual-only annual meetings in all of 2019

2020 ANNUAL CORPORATE MEETING

→ Thanks for being flexible with us over the past few weeks as we shifted from an in-person meeting plan to a virtual meeting plan

→ We appreciate your cooperation in pre-registering for the groups you will participate with during the meeting, this helped ensure a smooth experience for all attendees

- *There are 336 attendees registered to participate in this Standing Meeting*

- *78 are first-timers*

2020 ANNUAL CORPORATE MEETING

→ We hope you will be patient as your chairs, vice-chairs, and co-chairs work with the attendees and staff to ensure successful sessions and events during this Standing meeting

→ If you have any issues accessing the sessions you pre-registered for, email us at meetings@x12.org

→ Attendance for this meeting will be captured using GoToWebinar records, so please be sure you are connected to each session via your assigned credentials

CONDOLENCES

→ It's with heavy hearts we announce the passing of former X12 innovator and leader, **Hans Wieting** on September 28th at the age of 92

→ Hans contributed much to X12 in his years of participation and was recognized with tow of X12's top awards:

- *1996 Edward A. Guilbert Award*

- *2004 X12 Member Emeritus*

→ Our deepest condolences to family and friends

STRONG & PROGRESSING

→ X12 standards are the workhorse for business to business exchanges

→ Billions of transactions based on X12 standards are utilized daily across various industries including finance, government, health care, insurance, supply chain, transportation, and others

→ Millions of entities around the world have an established infrastructure that supports X12 transactions, representing a significant investment in a stable and effective infrastructure

STRONG & PROGRESSING

→ X12's standards have proven reliable, efficient, & effective in supporting organizations and industries for 40+ years

→ The data exchanged in X12 transactions is well-defined and has been use-tested in millions of production systems

→ X12 is comprised of a handful of staff, hundreds of members, and more than a thousand member representatives

→ Members include corporations, associations, organizations, government entities, and individuals

STRONG & PROGRESSING

→ X12's product library is constantly evolving, available in various mediums, and includes:

- *The EDI Standard which is comprised of hundreds of transactions and internal code lists*

- *Technical reports, including implementation guides, describing various uses of the EDI Standard*

- *External code lists, aka terminology or vocabulary resources*

- *Schema based on the EDI Standard and implementation guides*

- *Best Practice Guidelines*

MINDSET

→ Open-minded, with vision and insight related to both current and developing technologies

→ Responsive to business requirements from members and other organizations

→ Respectful of varying viewpoints and diverse perspectives

→ Collaborative with other SDOs, industry groups, government, and business-focused entities

→ Led by a strong group of enablers and facilitators

OUR MESSAGING

→ X12 shifts as necessary to accommodate changing needs and opportunities, continuing to evolve because there is always more to do & new ways to do it

→ X12 syntax is scalable, supporting both small and extremely large transmissions

→ X12 products simplify communication, enhance business processes, improve efficiency, reduce costs, and expand organizational reach

→ X12 is committed to ensuring this never changes

2020 PRIORITIES

→ Continuing the positive financial trend

→ Ensuring the health of our member representatives and staff

→ Balancing the diverse needs of many different stakeholders

→ Growing our licensee base, product line, and consumption options

→ Building and strengthening strategic alliances

→ Increasing staff resources to support committee and subcommittee activities

FINANCIALS – MONTHLY YTD 2020

Legend:
- Cash & Investments
- Total Revenue
- Membership & Meetings
- Licensing
- Products

* Note: '20Q3 is Draft and Not Final
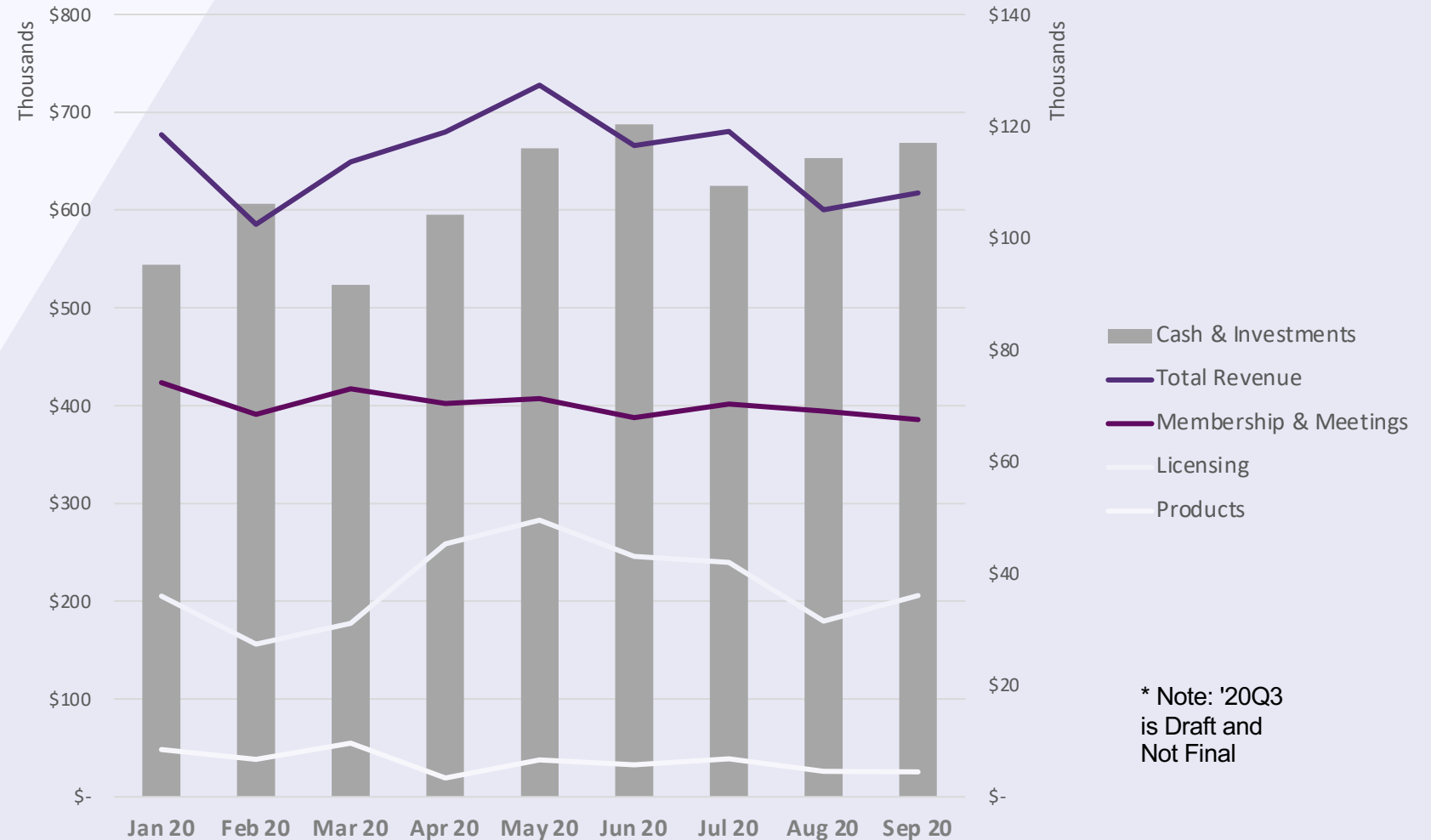
ANNUAL AWARD NOMINATIONS

→ Nominations for X12's annual awards are open year-round

→ Go to x12.org/resources/forms/x12-awards-nomination to review the criteria and submit a nomination for the Guilbert, Bass, or Distinguished Service award

→ These awards are presented at the Winter Standing Meeting annually

BOARD NOMINATIONS OPENING SOON

→ Applications for candidates for the 2021-2023 term Board seats will be accepted from November 2nd through December 4th, 2020

→ Candidates will be announced and the election ballot will open on December 14th, 2020 and close on January 15th, 2021

→ The results will be announced at the Corporate Meeting on January 25th, 2021

OPERATIONS REPORT

Cathy Sheppard

X12 Executive Director

2020 INITIATIVES

→ Strengthening our simplified processes

→ Delivering products annually

→ Rebuilding and improving our web infrastructure, presence, and services

→ Listening and responding to internal and external feedback

→ Distributing mission-critical data, using technology that meets the needs of implementers

→ Standardizing data content and delivering it in both trusted and emerging syntaxes

WEBSITE REDESIGN

→ X12 recently redesigned its website and the new look and feel is a hit!

→ The site's new infrastructure is secure, built for fast access, and ensures there are no barriers related to physical disabilities

→ The new design offers a clean, refined style that improves readability and functionality on desktops, tablets, and mobile devices

→ The website features simplified navigation, richer content, and a more evolved site structure
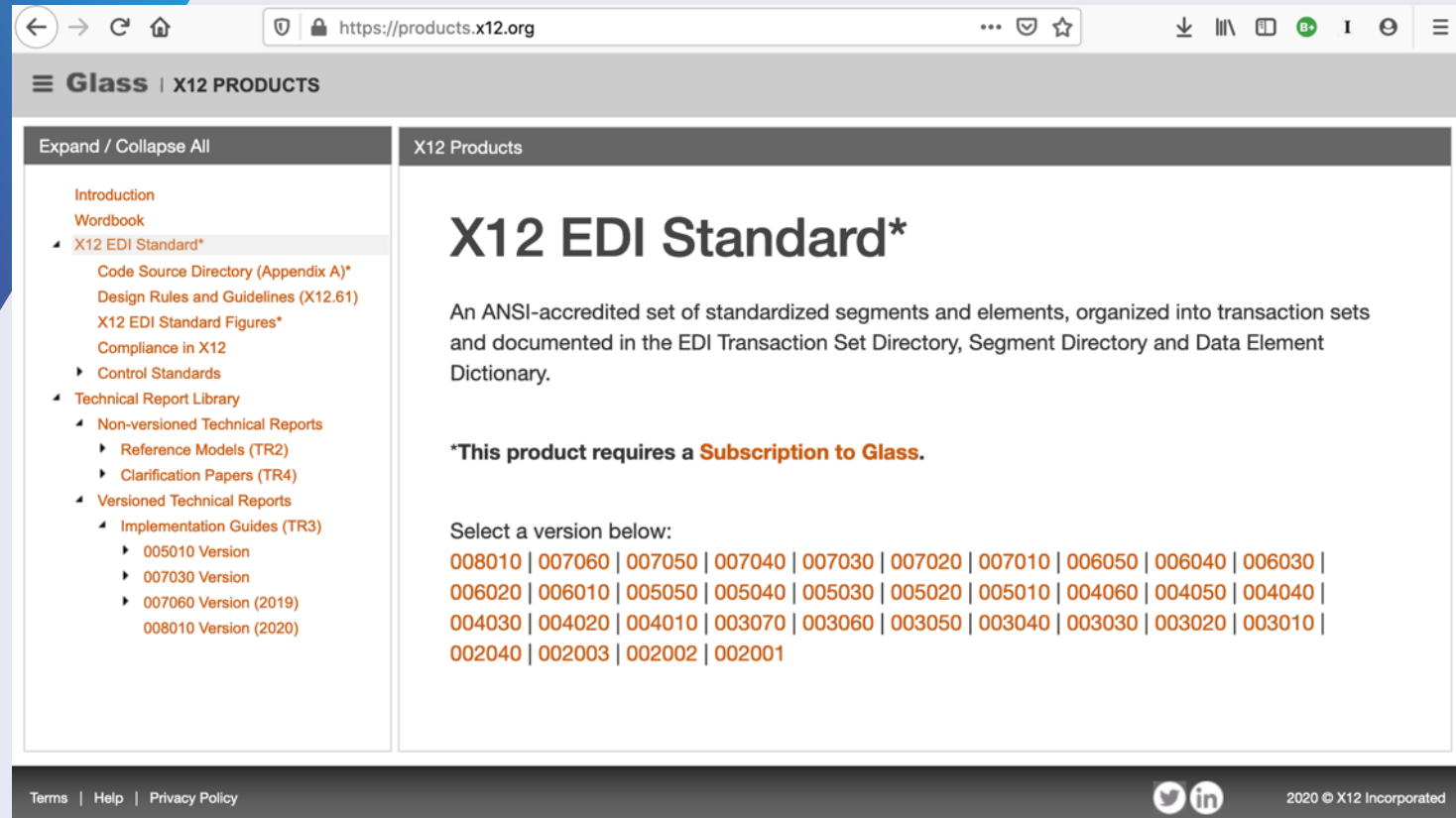
GLASS: MAKING ACCESS EASIER

→ X12's online viewer is a powerful and convenient reference tool providing low-cost, easy access to published X12 products

→ It includes all versions of the EDI Standard and many versions of implementation guides, technical reports, design rules and other reference information

→ Feedback has been overwhelmingly positive, and the number of subscribers is growing steadily, with new licensees daily

→ We've had approximately 700 active users viewing close to 100,000 pages this year

GLASS: MAKING ACCESS EASIER

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ARC: MAKING REVISIONS EASIER

→ X12 is transitioning to a simplified and faster maintenance process, known as the Annual Release Cycle (ARC)

- *ARC was developed based on internal and external feedback*
- *ARC streamlines X12's development and maintenance processes*
- *ARC supports a reliable annual publication schedule for X12's products*
- *ARC answers external calls for public input early in our maintenance process, before significant decisions are made by X12 groups*
- *ARC reduces the burden on X12 member representatives who are doing a herculean task today*

ARC:
LIFE OF
A REQUEST

SUGGESTION

1

PUBLIC INPUT

2

IMPACT
ASSESSMENT

3

CONSENSUS-
DEVELOPED
SOLUTION

4

MULTI-LEVEL
APPROVALS

5

PUBLISH UPDATED
X12 STANDARD

6

PUBLISH UPDATED
TECHNICAL REPORT

7

ARC
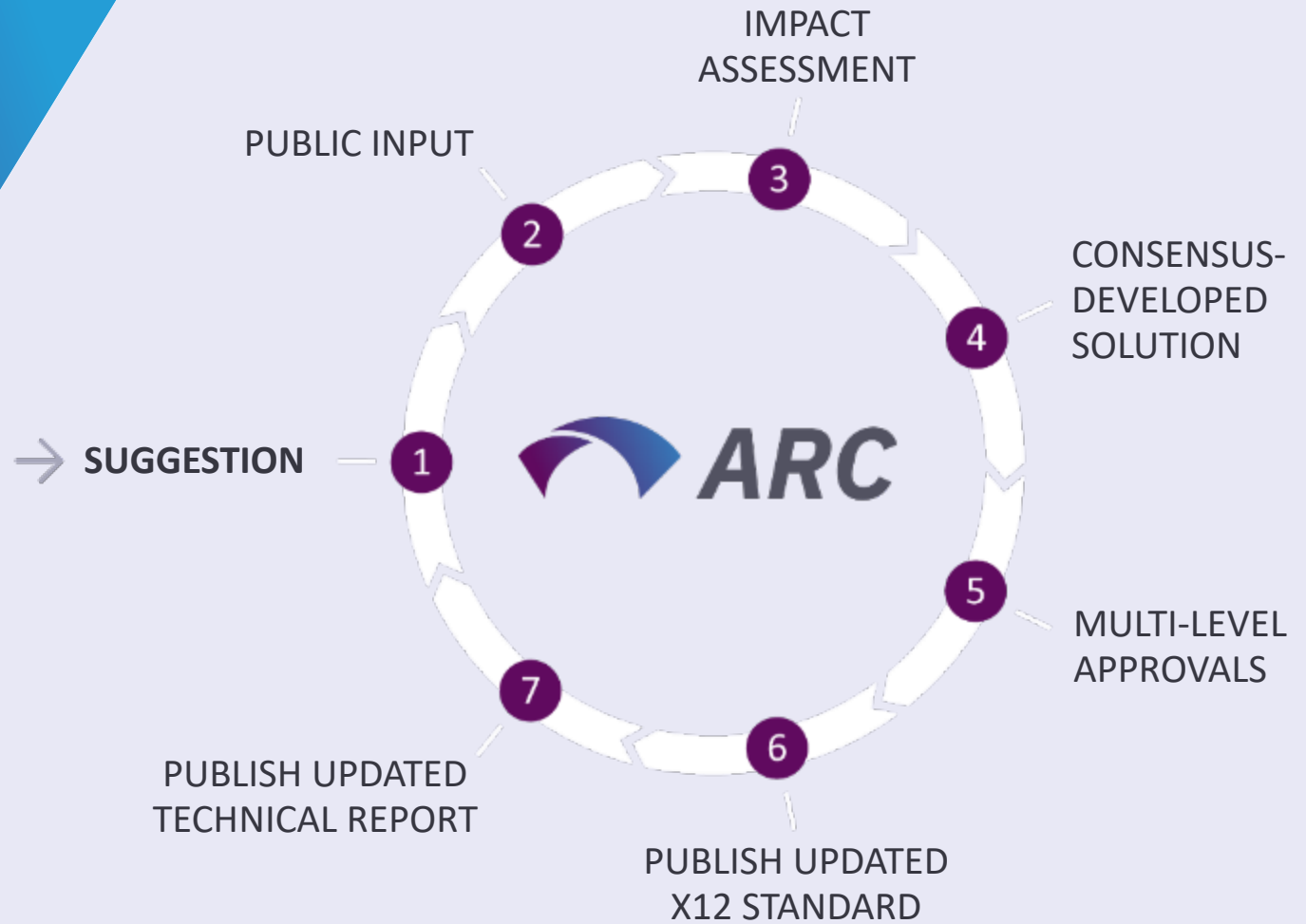
ARC: MAKING REVISIONS EASIER

→ To ensure the ARC transition doesn't impact in-process MRs for 007030 health care guides, X12 is utilizing two separate maintenance processes until those maintenance requests (MRs) are complete

- *All new MRs are processed under ARC*
- *All MRs for post-007030 revisions are processed under ARC*
- *MRs for 007030 health care implementation guides still in development are administered under X12N's previous maintenance process*

ANNUAL PUBLICATION

METADATA VS SYNTAX

→ Standardized syntax is not enough, data content must be standardized to achieve efficiencies and maximize seamless exchanges across various ecosystems

→ X12's definitions of necessary and relevant content for specific business purposes (X12 metadata) have been developed and use-tested for 40+ years and can be presented in many formats and syntaxes, not just in the traditional X12 EDI Standard format that many people refer to simply as "X12"

X12 BEDROCK – METADATA

→ X12's metadata repository is an expansive standardized vocabulary that defines data content and describes data relationships for particular business uses

→ X12's body of work is based on this approved metadata which enables consistent use within X12 products

→ The X12 metadata can be mapped, or cross-walked, to related standards or applications without syntax restrictions, enhancing interoperability

BRIDGE – SUPPORTING NEW TECHNOLOGIES WITH STANDARD CONTENT

→ Standardized and well-understood metadata is the foundation that enables the successful and interoperable use of various syntaxes and delivery systems

→ Pairing emerging and existing technologies in new ways presents opportunities for health care entities to better leverage the technology investments they've already made

BRIDGE: MAKING IT EASIER TO ACCESS THE METADATA

A new web resource providing a view of X12's extensive standardized metadata vocabulary in a syntax neutral form
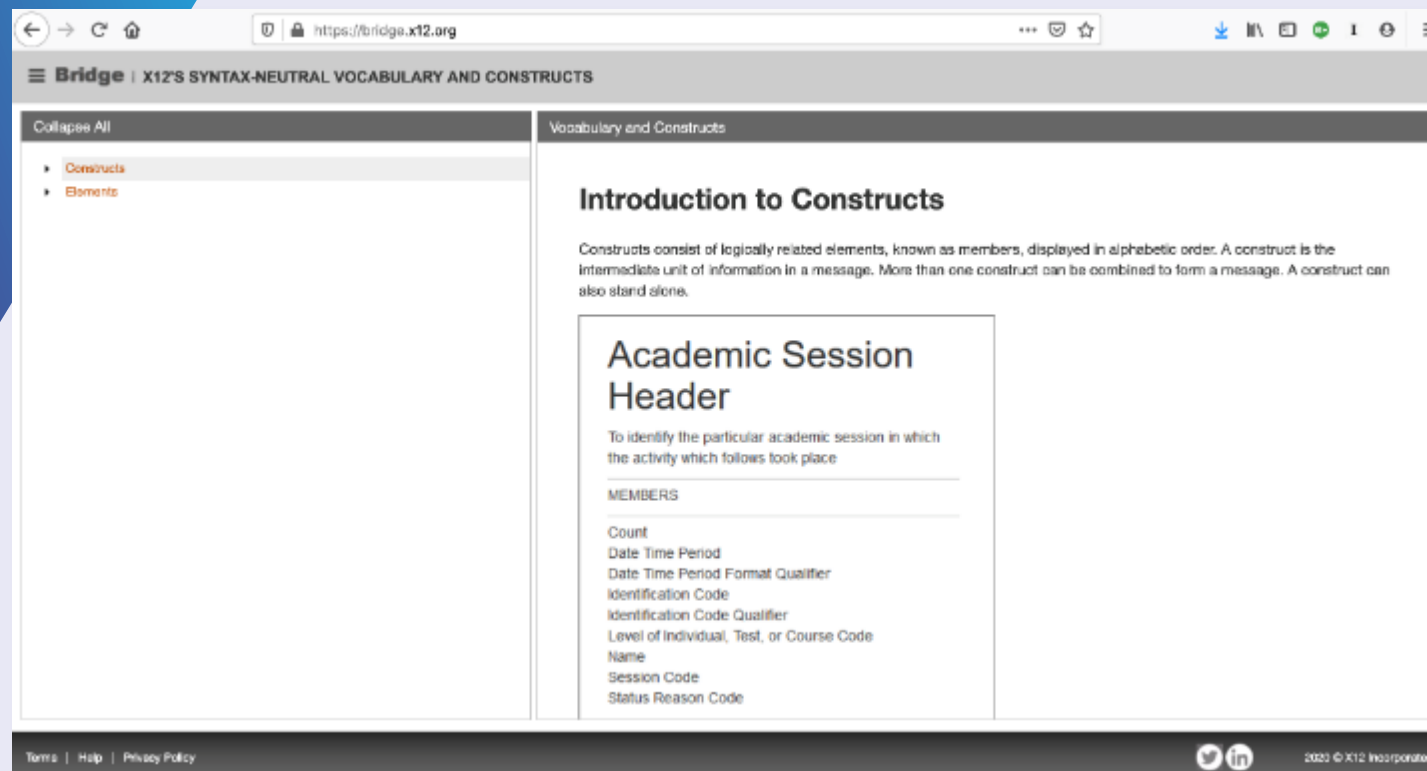
COLLABORATIONS: X12 IS COMMITTED TO PARTNERSHIPS

→ AIA
→ CAQH CORE
→ CARIN Alliance
→ Ciitizen Corp
→ Cooperative Exchange
→ Da Vinci
→ Edifecs
→ GenRocket
→ GS1 Canada
→ HCL
→ HL7
→ IAIABC

→ IBM
→ Mulesoft
→ NCPDP
→ NDEDIC
→ NEECOM
→ OpenText
→ Pilotfish
→ Salesforce
→ SAP
→ TIBCO
→ Wolters Kluwer
→ WEDI

HEALTHCARE-FOCUSED INITIATIVES

→ Da Vinci ⬌ X12: Data Crosswalks
- *Facilitating consistent data use between Da Vinci Project pre-processes related to authorizations and the associated X12 transaction sets*
- *Supporting inclusion of X12 transactions and code lists in Da Vinci Connectathons*

→ NCPDP ⬌ X12: Implementation Guides
- *Creating X12 implementation guides that standardize use of X12 transactions for specialty pharmacy functions*

→ HL7 ⬌ X12
- *Focusing on cross-utilization of code lists to improve interoperability and reduce inconsistency & duplication*
- *Supporting inclusion of X12 transactions and code lists in HL7 Connectathons*

HEALTHCARE FOCUSED INITIATIVES

→ CAQH CORE ⇔ X12

- *Providing industry education via regular and comprehensive joint webinars*

- *Enhancing the implementation experience by more closely integrating the implementation guide instructions and related operating rules*

OTHER INITIATIVES

→ Aerospace Industries Association (AIA)

- *Updating and refreshing 18 implementation guides that standardize use of X12 transactions for the Aerospace industry*

→ New England Electronic Commerce Users' Group (NEECOM)

- *Providing industry education and exploring innovative uses for well-established and reliable X12 transactions*

RECENT AND UPCOMING OUTREACH

→ August 6th – WEDI Summer Forum Presentation: "What's Happening at X12 in 2020 – X12 in a Changing Healthcare Landscape"

→ August 25 & 26th – NCVHS Testimony on Proposed Operating Rules

→ October 21st – NEECOM Presentation: Introducing New Efficiencies: ISX, Bridge, & Glass

IN THE SPOTLIGHT

IN THE SPOTLIGHT

Online Transaction Set List

→   x12.org/products/transaction-sets

→   The transaction sets are listed under the subcommittee that is assigned maintenance responsibility

→   Each transaction set entry can be expanded to display its purpose

→   If you'd like to include an informational link to this page on your organization's website, send a request to ip@x12.org and we'll be happy to work with you

IN THE SPOTLIGHT

X12I - Transportation

104 Air Shipment Information

This X12 Transaction Set contains the format and establishes the data contents of the Air Shipment Information Transaction Set (104) for use within the context of an Electronic Data Interchange (EDI) environment. The transaction set can be used to provide the sender with the capability to transmit detailed bill of lading and rating information pertinent to an air carrier shipment.

This transaction set provides shipment detail information for the air carrier in terms of 1) sender information, 2) shipment detail for multiple and single piece shipments, 3) consignee and third-party information, 4) detail and charges for each shipment, and 5) shipment totals.
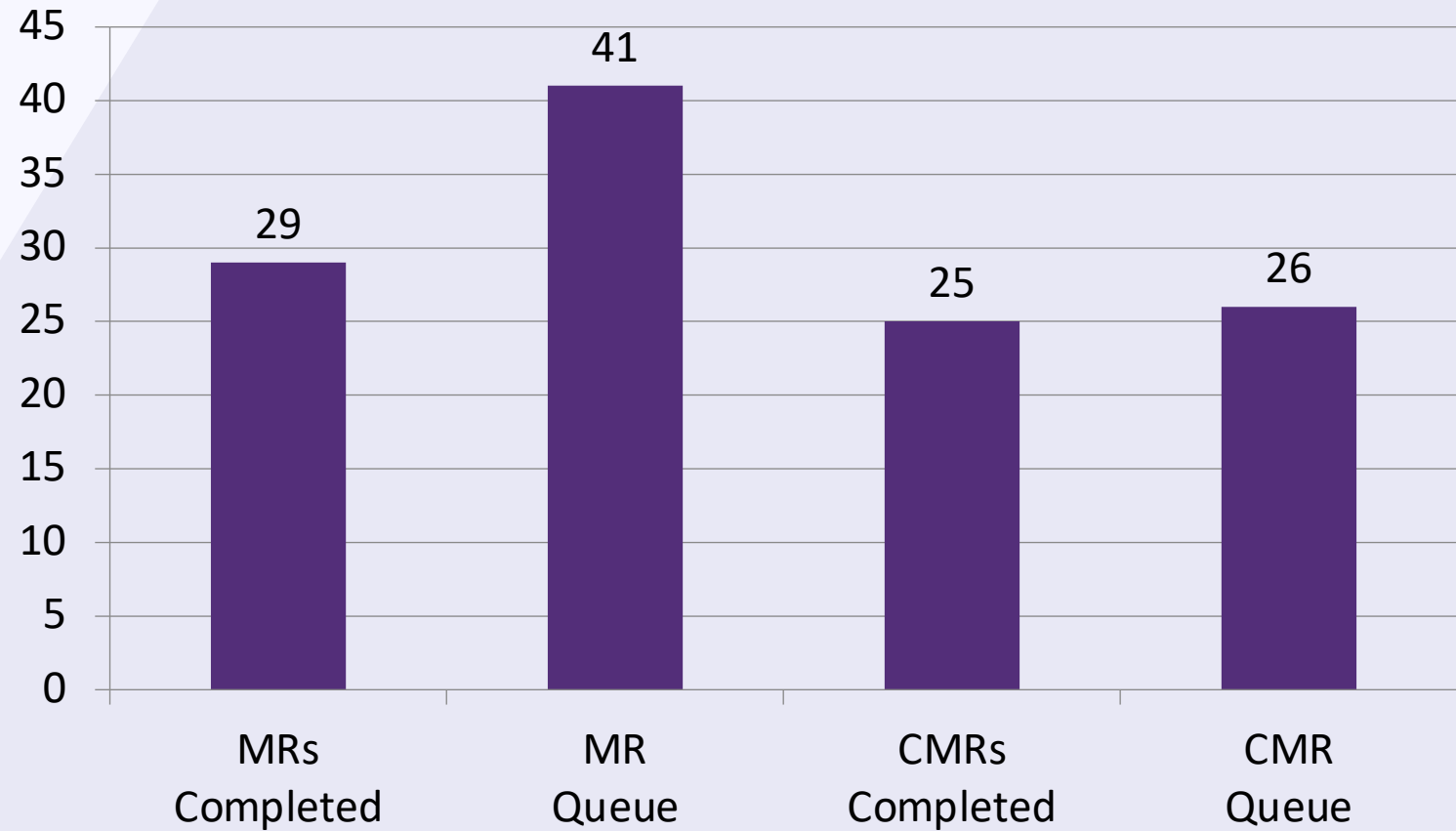
X12 RECOGNITIONS

X12 ANNUAL PINS

ASC COMMITTEE REPORT

Gary Beatty

ASC Chair
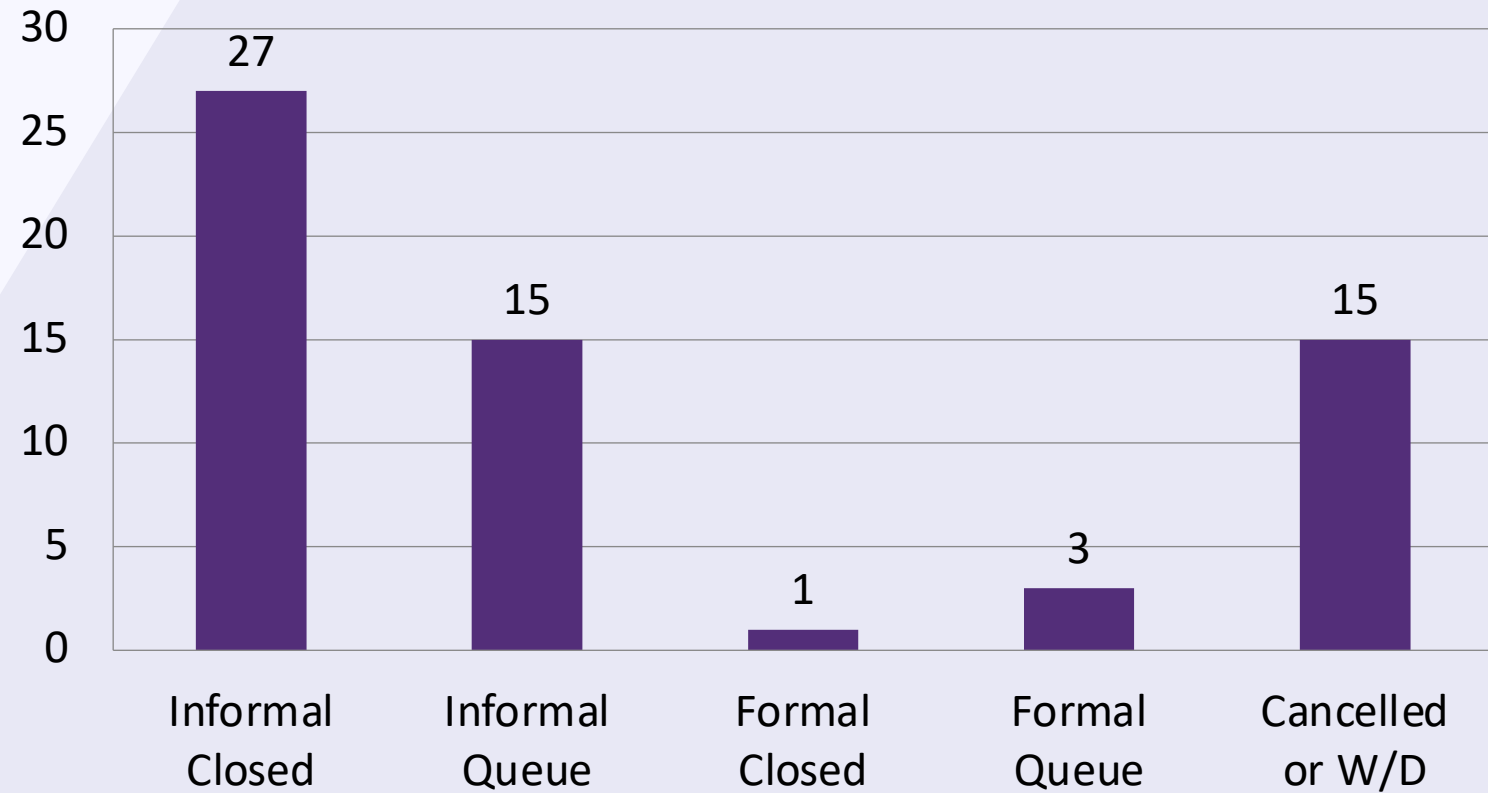
MR AND CMR REQUESTS

1/27/2020 - 9/25/2020

REQUESTS FOR INTERPRETATION

1/1/2020 - 9/25/2020

STATUS OF THE X12N 007030 IMPLEMENTATION GUIDES

→ Published

- *X322 - Health Care Claim Payment/Advice (835)*
- *X323 – Health Care Claim: Professional (837)*
- *X324 – Health Care Claim Institutional (837)*
- *X325 – Health Care Claim Dental (837)*
- *X326 – Health Care Service: Data Reporting (837)*
- *X327 – Health Care Services Review: Inq & Resp (278)*
- *X328 – Health Care Services Review: Notice & Ack (278)*
- *X329 - Health Care Claim Status Req & Resp (276/277)*
- *X330 - Health Care Claim Acknowledgement (277)*
- *X331 - Health Care Claim Pending Status Info (277)*
- *X333 - Benefit Enrollment and Maintenance (834)*
- *X334 – Payroll Deducted & Other Grp Prem Pmts (820)*

STATUS OF THE X12N 007030 IMPLEMENTATION GUIDES

→ Published

- *X340 - Health Care Claim Request for Add'l Info (277)*
- *X341 – Add'l Info to Support a Claim or Encounter (275)*
- *X342 – Health Care Services Review: Req for Rvw (278)*
- *X343 – Add'l Info to Support a Services Review (275)*
- *X344 - Premium Payment Grace Period Notice (271)*
- *X345 - Health Insurance Exchange Related Pmt (820)*
- *X346 - Health Insurance Exchange: Enrollment (834)*

STATUS OF THE X12N 007030 IMPLEMENTATION GUIDES

→ In Development

- *X321 - Application Reporting For Insurance (824)*
- *X332 - Health Care Eligibility/Benefit Inquiry and Information Response (270/271)*
- *X335 - Implementation Acknowledgment for Health Care Insurance (999)*

8010 IMPLEMENTATION GUIDES

→ 2020 is a transition year, with some X12 products on the annual release schedule and some on the previous cyclic release schedule

→ To facilitate the changeover, X12 is republishing each version 007030 implementation guide approved in 2020 as a version 008010 implementation guide

- *Thereafter each implementation guide will be published once a year per the annual release cycle schedule*

ROLL FORWARD FAQS

→ Why are we doing this?

- *It move us quickly to the latest version of the EDI Standard, positioning the work groups to apply the next revisions to the most current version efficiently. It is also a visible assurance to the health care industry and the federal oversight groups that X12 is serious about our commitment to be nimbler, to publish on a consistent known schedule, and to provide incremental value to implementers in a much timelier fashion.*

→ Does this mean the 007030 work was wasted?

- *Not at all. X12N work groups have worked very hard on the 007030 guides and all the enhancements, improvements, and polishing that went into the 007030 version are reflected in the corresponding 008010 version.*

ROLL FORWARD FAQS

→ What are the differences between the 007030 and 008010 versions of each implementation guide?

- *The only differences between the versions will be minor changes to the underlying EDI Standard that don't change the transmitted data content and some "housekeeping". "Housekeeping" revisions are things like identifying the version of the EDI Standard used as the basis for the implementation guide.*

→ Who is going to approve the revisions based on the maintenance requests?

- *Those revisions were balloted and approved by the X12 membership as part of the Maintenance Package ballots that have been executed since 007030 was published.*

RECOMMENDING A NEW MANDATED VERSION

→ X12 has been fielding a lot of questions about our plans for requesting consideration of a new mandated version

→ We plan to move forward recommendations to advance to a new version of many of the mandated 005010 implementation guides, perhaps as soon as Q1 2021

→ X12N work groups prepared initial change summary documents identifying the major revisions in the latest versions

→ Staff is working on functional improvement summaries & technical impact statements based on the initial change summary documents

RECOMMENDING A NEW MANDATED VERSION

→ The functional improvement summaries & technical impact statements will be the basis of any X12 recommendations

→ Any recommendation to advance to a more recent version will be based on functional improvements and industry business need

→ Decisions related to the timing or version of a recommendation will be based on the specific enhancements applied to each implementation guide in 007030 and the pending maintenance requests

→ More information will be made available as decisions are considered or finalized

GET GUIDEBOOK

October 5, 2020

HOW TO KEEP TRACK OF ALL THE HAPPENINGS THIS WEEK?

GO TO YOUR MOBILE DEVICE APP STORE AND DOWNLOAD THE GUIDEBOOK APP
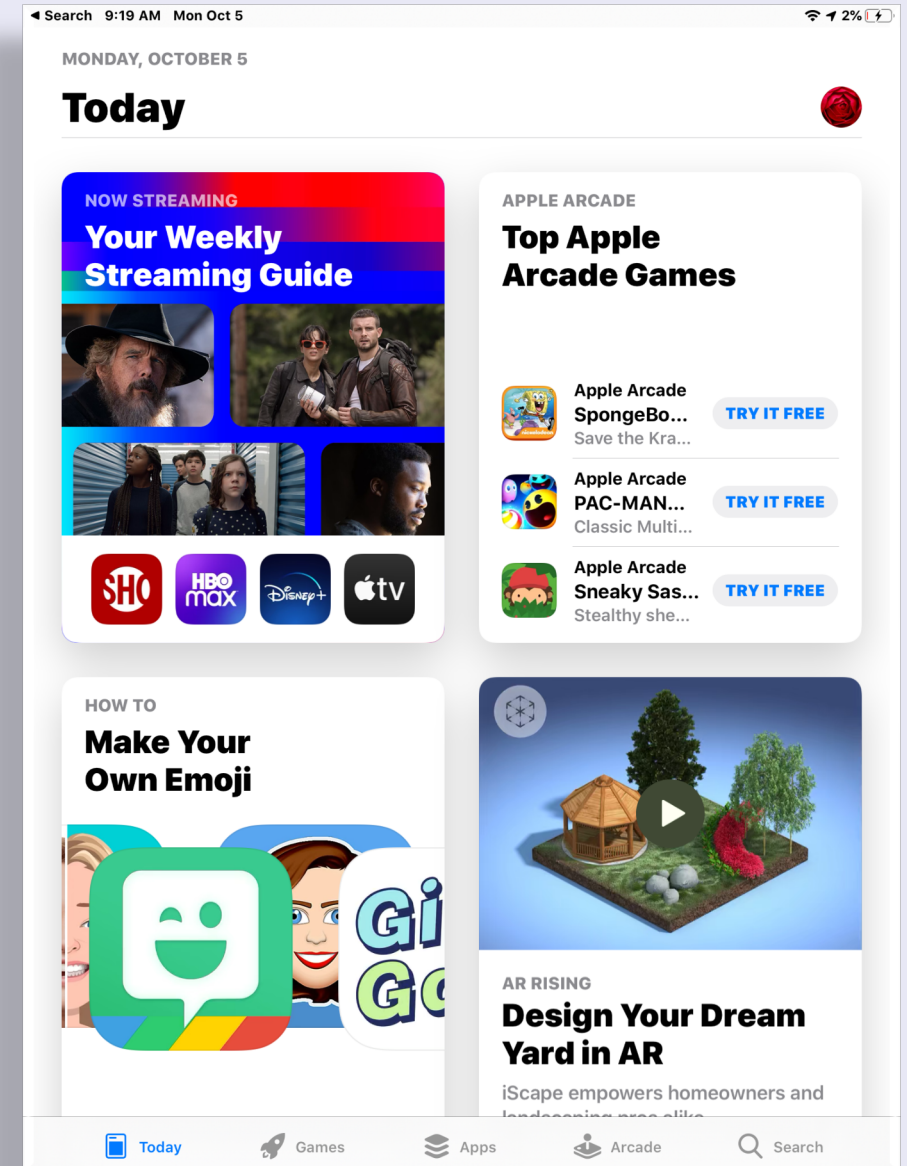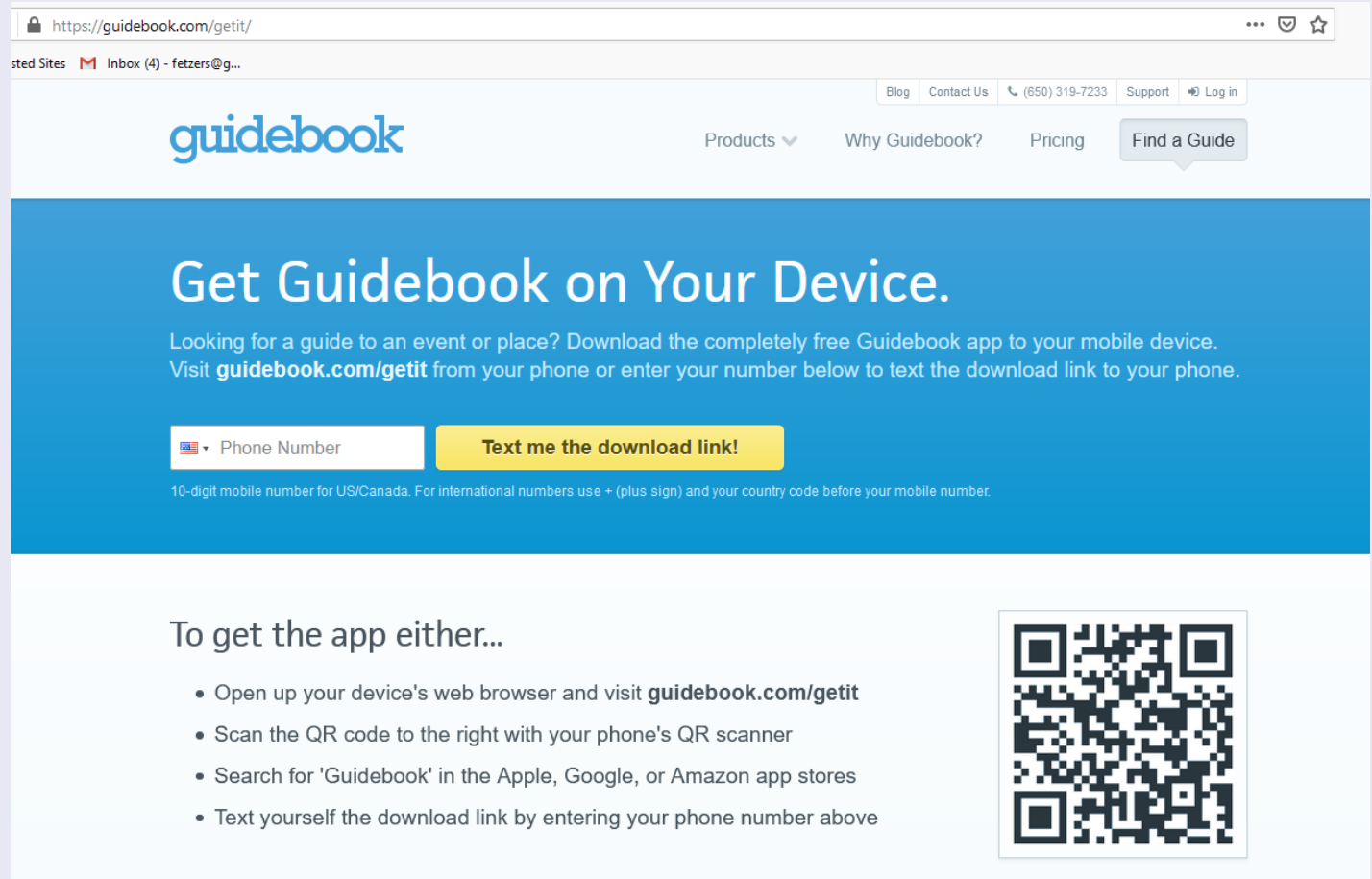
OR GO TO

GUIDEBOOK.COM AND GETIT

GUIDEBOOK.COM/GETIT

OPEN THE GUIDEBOOK APP AND FIND THE X12 VIRTUAL STANDING MEETING
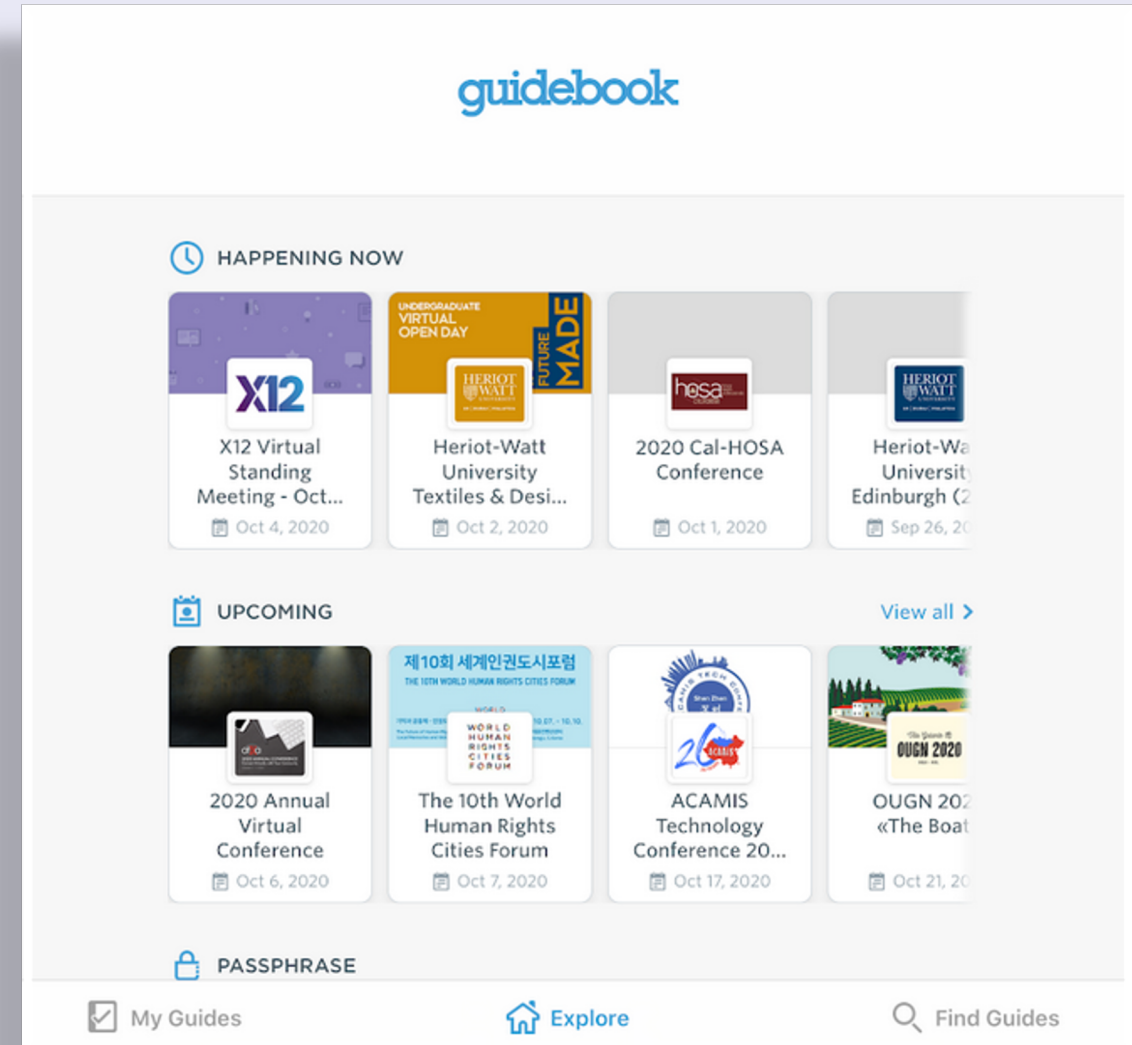
DOWNLOAD THE X12 GUIDE
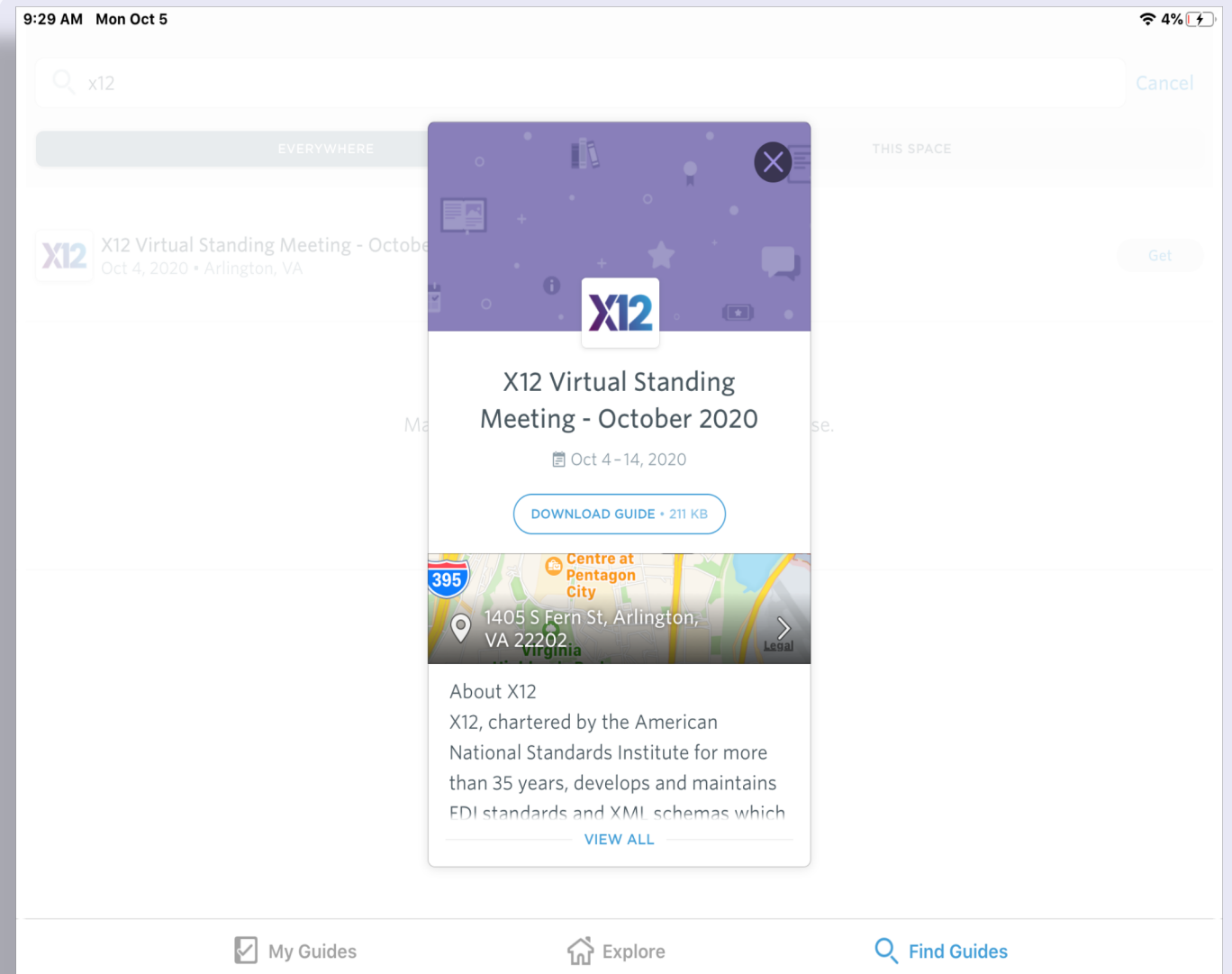
BROWSE THROUGH THE SESSION SCHEDULE TO BUILD OUT YOUR WEEK

FOLLOW YOUR SCHEDULE ONCE IT IS ALL BUILT

IMEET CENTRAL

Wrap up

NEXT MEETINGS

→ Standing Meeting
January 24, 2021 to February 3, 2021

- *Onsite scheduled for 1/24 to 1/28 Westminster, CO – Final Decision pending*

→ Corporate Meeting
January 25, 2021

FEEDBACK. IDEAS. QUESTIONS?

WE WANT TO HEAR IT ALL,

TELL US AT

X12.ORG/FEEDBACK

STAY CONNECTED

→ Learn more about X12 at X12.org

→ Stay informed by following X12

@x12standards on Twitter

#X12 on LinkedIn