

# WINTER CORPORATE MEETING

January 25, 2021



# DISCLAIMER

- This presentation is for informational purposes only
- The content is point-in-time information, subject to revision



# CORPORATE REPORT

Steph Fetzer  
X12 Board Chair



# 2021 ANNUAL CORPORATE MEETING

- Call to Order
- Welcome to the second all-virtual X12 Standing Meeting
- The Anti-Trust, Recording, and Photo policies are in effect for all the sessions of this meeting

X12





# 2021 ANNUAL CORPORATE MEETING

- Thanks for being flexible with us over the past few weeks as we worked through the challenges of coordinating and managing a virtual meeting
- 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 294 attendees registered to participate in this Standing Meeting*
  - *38 are first-timers*

X12



# 2021 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 during this Standing meeting
- If you have any issues accessing the sessions you pre-registered for, email us at [meetings@x12.org](mailto:meetings@x12.org)
- Attendance for this meeting will be captured using GoToWebinar records, so be sure you are connected to each session via your assigned credentials

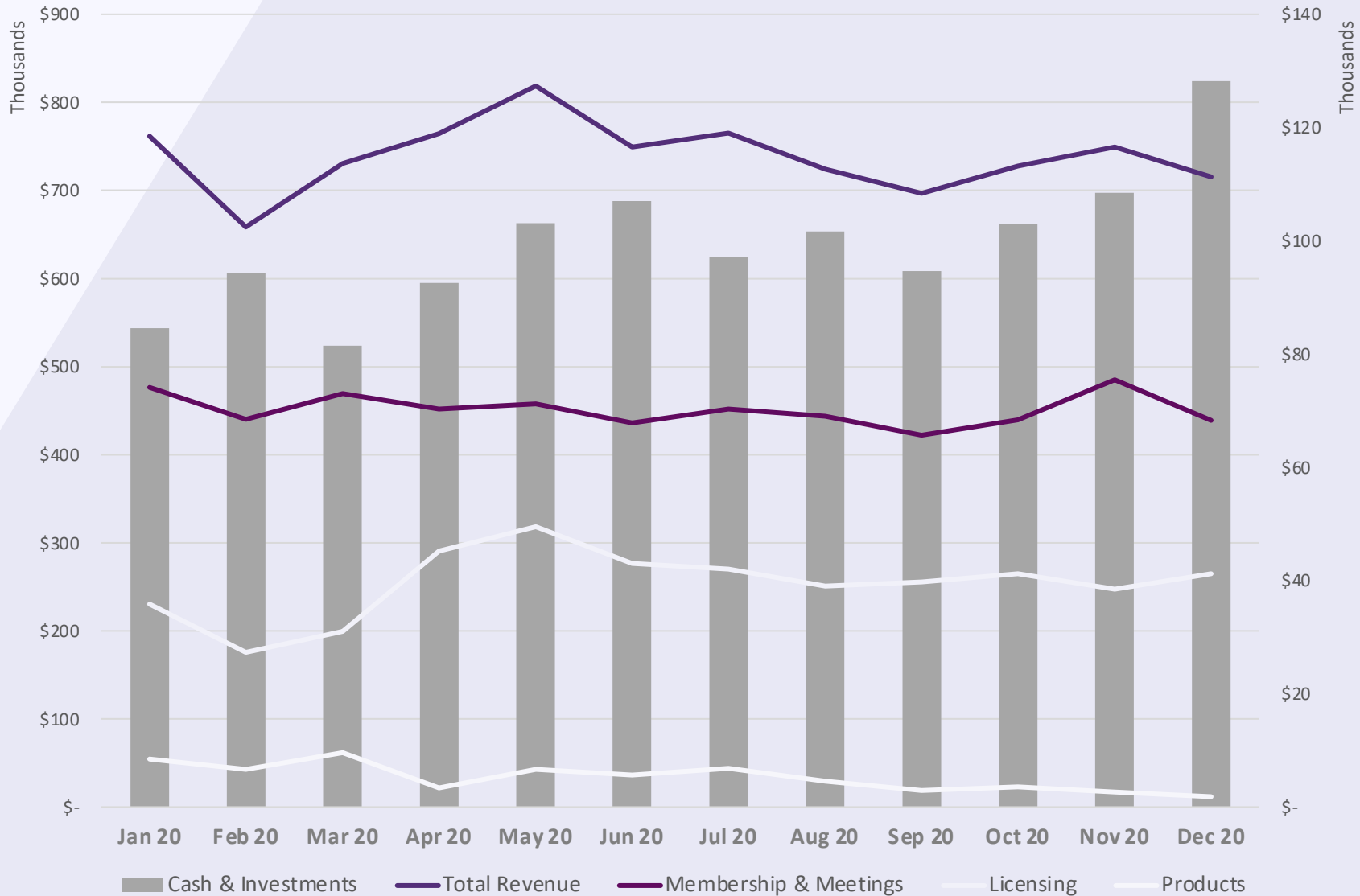


# 2021 PRIORITIES

- Maintaining 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



# FISCAL YEAR 2020 (DRAFT) MONTHLY FINANCIALS



# BOARD ELECTION RESULTS

→ Elected for a 2021-2023 Board of Directors term:

- *Jim Taylor*
- *Todd Gould*



# OPERATIONS REPORT

Cathy Sheppard  
X12 Executive  
Director



# RESPECT THE DEADLINES

- Timely standing meeting registration is important, register early for the Summer 2021 meeting instead of waiting until the last minute
- Electronic voting during this standing meeting will start and end as announced, if you miss the deadline you will not be able to cast a ballot
- Considering joining standing meeting sessions a few minutes early, in case you have any difficulties accessing GoToWebinar with your credentials

# WEBSITE ENHANCEMENTS

- We continue to enhance the new website regularly, with new content and new functionality
- Soon we will add self-service functionality that lets you manage:
  - *X12 Membership and Representative Rosters*
  - *Licensing renewals*
  - *Product downloads*
  - *Code list subscriptions*

# GLASS: MAKING ACCESS EASIER

- X12's continues to enhance this online viewer with additional content and functionality
- Most 008010 technical reports are now available in Glass
- The 008020 version of the EDI Standard is now available in Glass
- 008020 Technical Reports are coming soon

X12



# ANNUAL PUBLICATION

≡ Glass | X12 PRODUCTS

Expand / Collapse All

Versioned Technical Reports

Implementation Guides (TR3)

005010 Version

X12C - Communications & Controls

X12F - Finance

X12N - Insurance

X210 - Additional Information to Support a Health Care Claim or Encounter (275)\*

X212 - Health Care Claim Status Request and Response (276/277)\*

X213 - Health Care Claim Request for Additional Information (277)\*

X214 - Health Care Claim Acknowledgment (277)\*

X217 - Health Care Services Review Request and Response (278)\*

X220 - Health Care Benefits Enrollment and Maintenance (834)\*

X221 - Health Care Claim Payment/Advice (835)\*

X222 - Health Care Claim: Professional (837)\*

X223 - Health Care Claim: Institutional (837)\*

X224 - Health Care Claim: Dental (837)\*

X279 - Health Care Eligibility/Benefit Inquiry and Information Response (270/271)\*

007030 Version

007060 Version (2019)

008010 Version (2020)

X12F - Finance

X12N - Insurance

X291 - Health Care Predetermination: Professional (837)\*

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 - Inquiry and Response (278)\*

X328 - Health Care Services Review Notification and Acknowledgment (278)\*

X333 - Benefit Enrollment and Maintenance (834)\*

X340 - Health Care Claim Request for Additional Information (277)\*

X341 - Additional Information to Support a Health Care Claim or Encounter (275)\*

X342 - Health Care Services Review - Request for Review and Response (278)\*

X343 - Additional Information to Support a Health Care Services Review (275)\*

X346 - Health Insurance Exchange: Enrollment (834)\*

X12M - Supply Chain

X12 Products

Technical Report Library

Documents that facilitate consistency across EDI implementations. X12 produces four types of technical reports.

This page is for information only. Select an individual Technical Report to read that Technical Report.



# WE HAVE A 2021 PUBLIC RELATIONS PLAN

You'll start seeing more articles and posts, along the lines of:

- December 2020  
Importance of Consensus Building  
(on X12.org and Social Media)



A stage spotlight is positioned in the upper left corner, casting a wide, conical beam of light onto a dark surface. The beam transitions from a deep purple at the edges to a bright white center. The text "IN THE SPOTLIGHT" is centered within the beam in a white, sans-serif font.

IN THE SPOTLIGHT

# IN THE SPOTLIGHT

## Policies and Procedures

- X12's policies and procedures are available online in the **Resources** section on x12.org\*  
[x12.org/resources/policies-and-procedures](https://x12.org/resources/policies-and-procedures)
- X12's policies and procedures are consistently named and formatted\*
- X12's policies and procedures are hierarchical, corresponding with the organizational structure
- Corporate policies and procedures are overarching, they apply to all X12 committees, subcommittees, and other subordinate groups
- Corporate policies and procedures begin with "CAP"

# IN THE SPOTLIGHT

## Policies and Procedures

- Committee policies and procedures apply to all the subcommittees and other subordinate groups within the committee
- Committee policies and procedures begin with “ASC” or “RSC”
- Subcommittee policies and procedures apply to all subordinate groups within the subcommittee
- Subcommittee policies and procedures begin with the committee’s prefix with each subcommittee having a specific numeric range



# IN THE SPOTLIGHT

## Policies and Procedures

- Subordinate group policies apply only to one specific subordinate group
- Subordinate group policies begin with the committee's prefix and are numbered within the subcommittee's specific numeric range
- A lower-level policy supplements a higher-level policy for a particular X12 group
- A lower-level policy cannot countermand, contradict, or overrule a higher-level policy
- A lower-level policy can be more restrictive than the associated higher-level policy but not more permissive
- Some policies explicitly forbid lower-level policies





# IN THE SPOTLIGHT

## Policies and Procedures

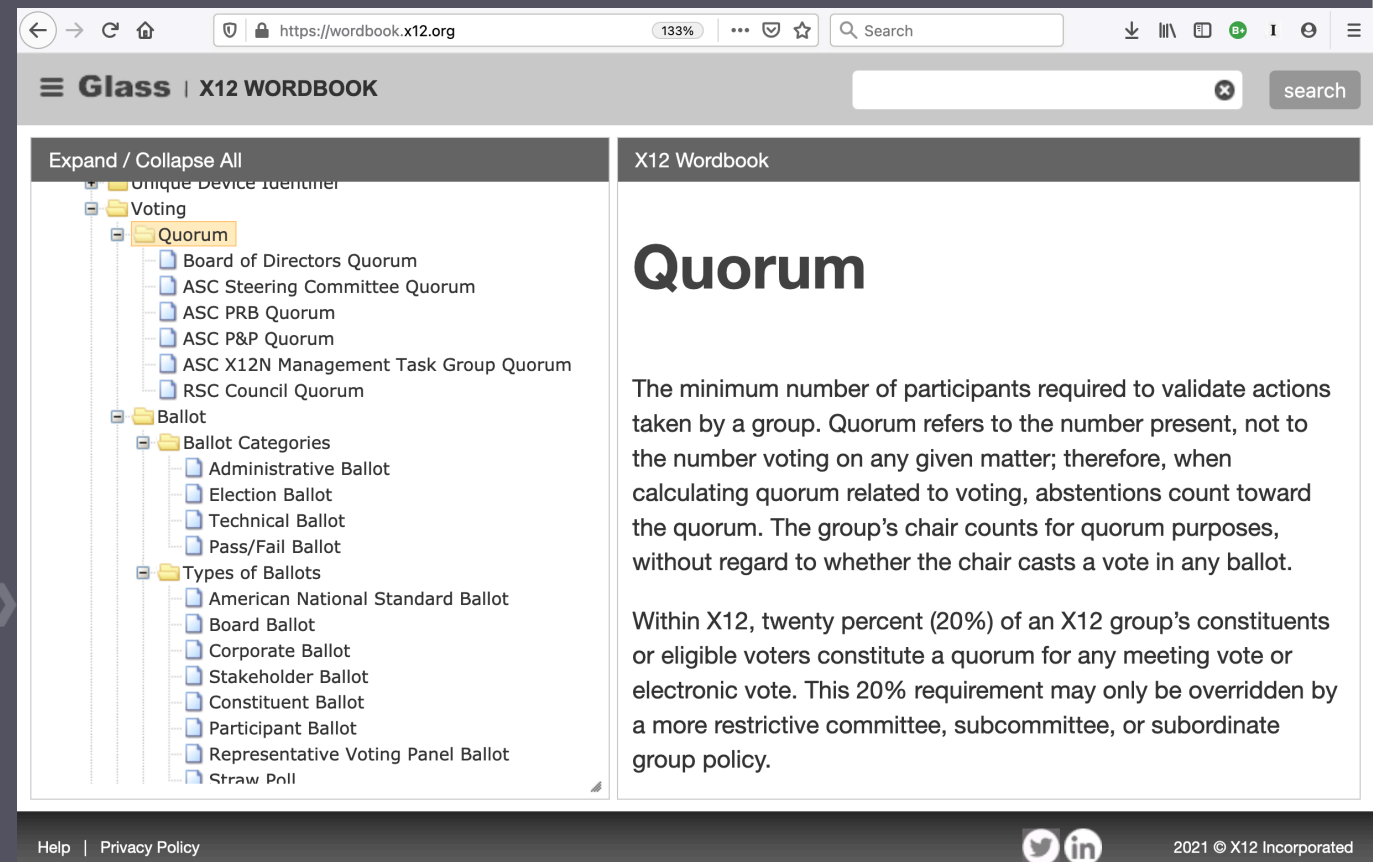
- The Board established the Governance Panel to assist with maintenance of the corporate policies and procedures
- The ASC and RSC committees have established policy and procedure subordinate groups  
ASC - the Policies and Procedures Task Group (P&P)  
RSC - the Parliamentary subcommittee
- Requests for revisions to X12 policies and procedures are submitted online via [x12.org/resources/forms/maintenance-requests](https://x12.org/resources/forms/maintenance-requests)



# IN THE SPOTLIGHT

## Policies and Procedures

→ Some policies can be found in the X12 Wordbook, providing an easy quick reference



The screenshot shows a web browser displaying the X12 Wordbook website. The address bar shows the URL <https://wordbook.x12.org>. The page title is "Glass | X12 WORDBOOK". A search bar is visible in the top right corner. The left sidebar contains a tree view of the wordbook structure, with "Quorum" selected under the "Voting" category. The main content area displays the "Quorum" page, which includes a definition and a specific policy for X12 groups.

**Expand / Collapse All**

- Unique Device Identifier
- Voting
  - Quorum**
    - Board of Directors Quorum
    - ASC Steering Committee Quorum
    - ASC PRB Quorum
    - ASC P&P Quorum
    - ASC X12N Management Task Group Quorum
    - RSC Council Quorum
  - Ballot
    - Ballot Categories
      - Administrative Ballot
      - Election Ballot
      - Technical Ballot
      - Pass/Fail Ballot
    - Types of Ballots
      - American National Standard Ballot
      - Board Ballot
      - Corporate Ballot
      - Stakeholder Ballot
      - Constituent Ballot
      - Participant Ballot
      - Representative Voting Panel Ballot
      - Straw Poll

**X12 Wordbook**

## Quorum

The minimum number of participants required to validate actions taken by a group. Quorum refers to the number present, not to the number voting on any given matter; therefore, when calculating quorum related to voting, abstentions count toward the quorum. The group's chair counts for quorum purposes, without regard to whether the chair casts a vote in any ballot.

Within X12, twenty percent (20%) of an X12 group's constituents or eligible voters constitute a quorum for any meeting vote or electronic vote. This 20% requirement may only be overridden by a more restrictive committee, subcommittee, or subordinate group policy.

Help | Privacy Policy

2021 © X12 Incorporated

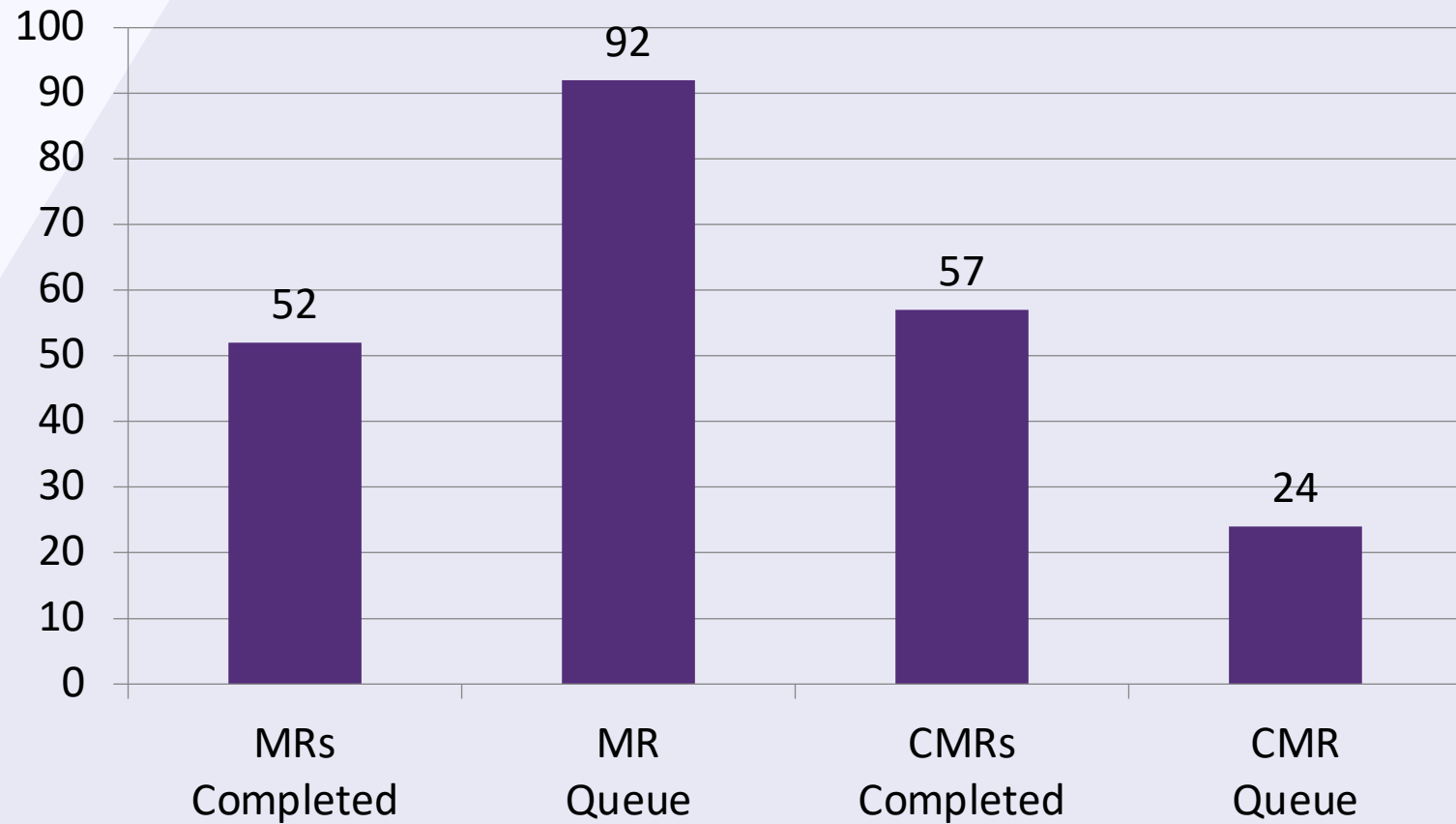
# ASC COMMITTEE REPORT

Gary Beatty  
ASC Chair



# MR AND CMR REQUESTS

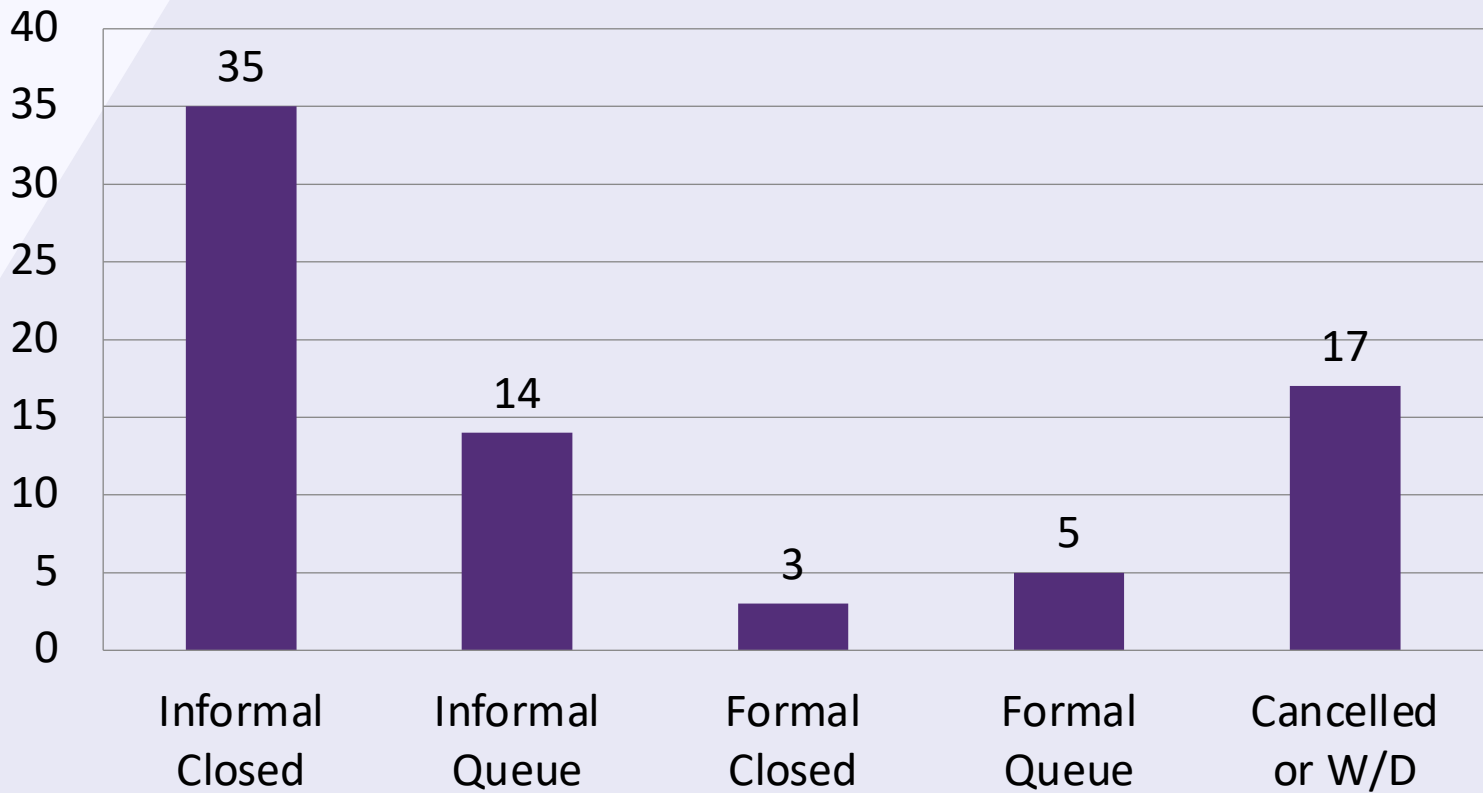
1/1/2020 - 12/31/2020





# REQUESTS FOR INTERPRETATION

1/1/2020 – 12/31/2020



# STATUS OF X12N 007030 IMPLEMENTATION GUIDES

## → In Development

- *Recently Completed Public Review and Comment Period:*
  - X332 - Health Care Eligibility/Benefit Inquiry and Information Response (270/271)
- *Current Public Review and Comment Period:*
  - X321 - Application Reporting For Insurance (824)
  - X335 - Implementation Acknowledgment for Health Care Insurance (999)



# RECOMMENDING A NEW MANDATED VERSION

- We plan to move forward recommendations to advance to a new version of many of the mandated 005010 implementation guides
- Based on the new federal administration transition, we may need to adjust our plan

# LEVERAGING METADATA STANDARDS AND ARTIFICIAL INTELLIGENCE

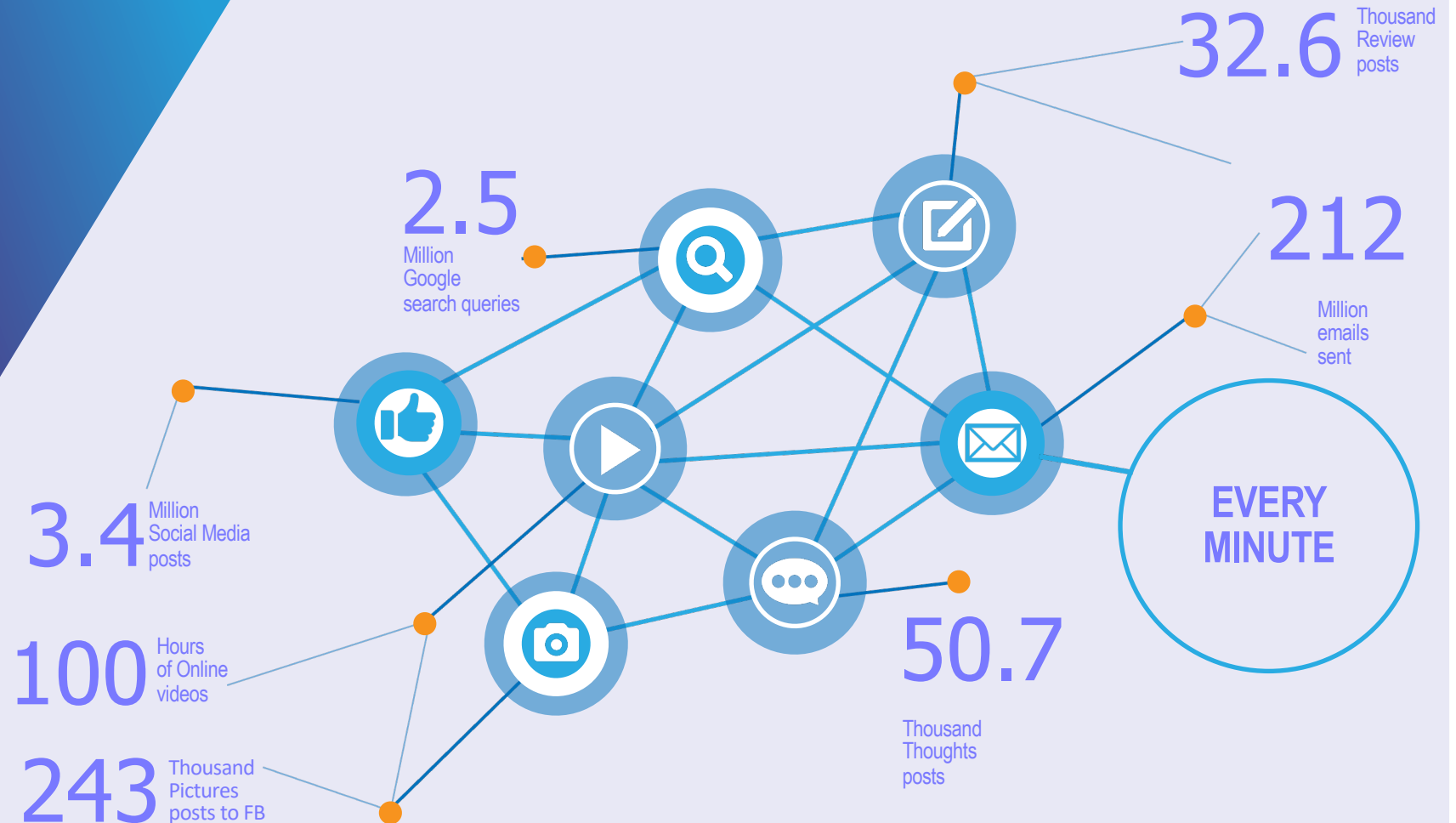
Dan Kazzaz and Jim Taylor  
X12 Board Members



# ALL ABOUT THE DATA

102MB of data is created every minute by every individual throughout 2020.

2.5 quintillion bytes of data are produced by humans every day.



# PREFACE

DATA IN SOME FORM UNDERPINS  
ALMOST EVERY ACTION OR PROCESS  
IN TODAY'S MODERN WORLD.

Consider that even farming, the world's oldest industry, is on the verge of a digital revolution, with AI, drones, sensors, and blockchain technology promising to boost efficiencies. The market value of an apple will increasingly reflect not only traditional farming inputs but also some value of modern data, such as weather patterns, soil acidity levels and agri-supply-chain information. By 2022 more than 60% of global GDP will be digitized, according to IDC.

(MIT Technology Review Insights, July 9, 2019)

# DEFINITIONS

## → Artificial Intelligence Technologies

- *Pattern recognition*
- *Machine learning*
- *Natural language processing*
- *Fuzzy logic*
- *Neural networks*

## → Semantic Metadata Standards

- *Purchase Order*

Buyer part number

Seller part number

- *Health Care Claim*

Patient name

Physician name

# SENDER ↔ RECEIVER MODES

## → Application to Application

- *Everyone agrees to exact format and communication protocol*

However, senders and receivers have differing needs and capabilities

- *Typical solutions*

Tailoring at one end – i.e. smallish seller tailoring to buyer – providers tailoring to each payer for administrative – payers tailoring EMR for clinical data

## → Application to Human

- *Web-forms and applications (apps)*
- *Convert Semantic metadata to human readable print or form*



# EVERDAY AI

- Web search
- OCR
- Voice response
- Home / personal speakers



# PRESUMPTION & QUESTION

- All industries and governmental agencies are amid a digital revolution.
- How can we – X12, harness the value of emerging technologies such as Machine Learning?



# CURRENT DATA ENVIRONMENT

- Data in many silos
- Many requirements for data – Human to Machine & Machine to Machine
- Many ways to share data
- Many ways to interpret data
- Many formats to share the data
- No standard vernacular of data – no common data dictionary
- Multiple “Best Practices”



# USE CASE: USING X12 STANDARDS FOR RIVER LOCK MAINTENANCE SCHEDULING

## Current Process

→ River Lock maintenance scheduling is currently done manually with limited situational awareness of upcoming lockage and impact on commodity supply chain as result of disruptions river traffic and intermodal transportation.



# USE CASE: USING X12 STANDARDS FOR RIVER LOCK MAINTENANCE SCHEDULING

## Proposed Process

- Develop Standardized Meta-data Dictionary
- Use the X12 standards (Barge Status and Tow Status XML Document) for data sharing between commercial and governmental organizations (Barging, USACE, USCG, NOAA, DOT, etc.)



# USE CASE: USING X12 STANDARDS FOR RIVER LOCK MAINTENANCE SCHEDULING

## Proposed Process (continued)

- Utilize Microservices Architecture to facilitate data sharing between all organizations
- Base on the data shared, apply AI and machine learning to identify and schedule optimal lock maintenance windows which present the least impact on commodity supply chain



# COMBINING AI AND STANDARDS USE CASES

- Transaction capability exists at one end, eg X12 278 or HL7 CCD
  - *Prior authorization request comes in via Fax – convert to 278*
  - *Fax goes to provider – convert to CCD for automated linkage to medical record*
  - *Appropriate Use Criteria - evaluation of clinical data (MRI or CT)*
- Data analytics
  - *Routing – look at the descriptions, ICD and SNOMED codes to pick out diagnosis*
  - *Examine large amounts of data for correlation*

# OTHER POSSIBILITIES

- Respond to request for quotes
- Personal shoppers
- 21<sup>st</sup> century cures offshoots
  - *72 hour turn around on prior authorization – AI engines will make initial decisions*
  - *Electronic Health Information (EHI) requirement*



# ARE THERE SIMILAR ISSUES WITHIN OTHER AREAS?

- Data – it is there and there is a lot of it, but...
  - *No single version of the truth – no definite source*
  - *No standard vernacular or “dictionary”*
- Process – there is an outage
  - *Many standards – many “best practices” – too many to implement*



# ARE THERE SIMILAR ISSUES WITHIN OTHER AREAS?

- Interpretation – Who's saying "it" and what was said before
- Technology – Can we get our arms around the opportunity and provide tools, guides and standards to help in implementation



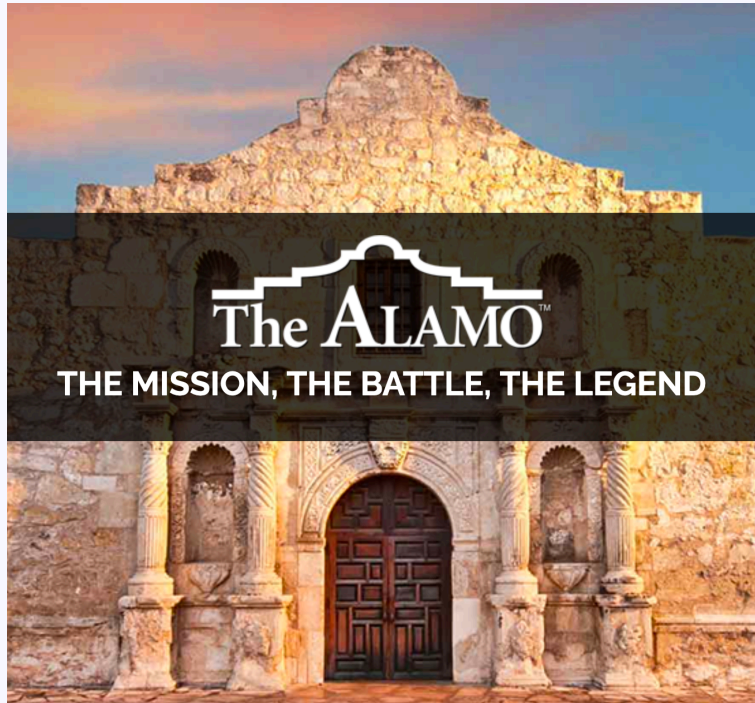
# CONCLUDING THOUGHTS

- The utilization of emerging technologies presents X12 with a unique opportunity to identify data, process and interpretation challenges and become a source that provides organizations the tools to help, the standards, context, and the best practices to meet these informational needs.
- Future research and study are essential to address the challenges faced by these organizations, in order to determine how X12 can provide and publish guidance on how this technology can be implemented and meaningfully used to improve information and decision making.

# Wrap up



## NEXT MEETINGS



→ Standing Meeting  
June 6<sup>th</sup> to 16<sup>th</sup>, 2021

- *Onsite scheduled for 6/6 to 6/10  
San Antonio, TX – Final Decision pending*





# FEEDBACK. IDEAS. QUESTIONS?

WE WANT TO HEAR IT ALL,  
TELL US AT  
[X12.ORG/FEEDBACK](https://x12.org/feedback)

X12



# STAY CONNECTED

→ Learn more about X12 at [X12.org](https://x12.org)

→ Stay informed by following X12



*@x12standards on Twitter*



*#X12 on LinkedIn*

