

**X12 Insurance Subcommittee
Minutes
Fall Standing Meeting 2024
Pittsburgh, PA**

Chair(s) Name	Company	Term End Date	Phone	Email
Tara Rose	Optum	Winter 2025		X12N-Chair@x12.org
Michelle Barry	Availity	Winter 2025		X12N-Vice-Chair@x12.org

Secretary(s) Name	Company	Term End Date	Phone	Email
Gail Kocher	BCBSA	Appointed (Thru Fall 2024)		X12N-Secretary@x12.org

Monday September 16, 2024

- I. Administrative/Logistics
 - A. Call to order 09:02 a.m. ET
 - B. Welcome to first-time attendees
 - C. Antitrust, recording, photography and screen capture policies reviewed
 - D. Session tracking available via Excel downloaded from the X12 website or through the Whova app
 1. There are no restrictions on the number of devices Whova is downloaded to per person
 2. Reminder to provide any schedule updates to the Registration desk so Whova can be updated
 - E. Meeting logistics
 1. Room block
 - Stop by the Registration desk if you are staying at the hotel but booked through your company or another entity so X12 gets credit against the room block
 2. Minutes and report out due dates
 - Report outs Wednesday Sept. 18th 5 p.m. ET
 - Minutes – Post to iMeet subordinate group space
 - a. Draft Friday Sept. 27th
 - b. Review and approval 7 days through October 4th
 - c. Final Friday Oct. 11th
 - F. Observers
 1. X12 Wordbook definition: *An X12 member representative or a non-member participant with a material interest in a certain X12 group who does not meet the requirements for constituent privileges with that group but is allowed to be an onlooker. Observers do not have voting or speaking privileges, are not eligible to hold office, and are not entitled to participate in online collaborations.*

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II. Activities & Milestones

A. MR update

1. Voting

- Subcommittee ballot will occur via electronic ballot
- Tuesday Sept 17th 12:00 a.m. through 11:59 p.m. ET
- 17 MRs: 202, 251, 253, 276, 297, 301, 304, 307, 310, 311, 312, 316, 345, 414, 447, 466, 521

III. X12N Subordinate Group Elections

Subcommittee/Work Group	Position	Candidate	Term
TGB WG3 – Payment Information	Co-chair	Meg Kutz	Fall 2024-Fall 2026
TGC WG2 – RFI	Co-chair	Jo Steinert	Fall 2024-Fall 2026

IV. X12N Appointments

Liaison/Representative	Appointee	Appointed Term
X12N Secretary	Gail Kocher	Fall 2024-Fall 2026
TAS Primary	LuAnn Hetherington	Fall 2024-Fall 2026

V. X12N Subordinate Group Plans

A. Details available in posted presentation deck

VI. Recessed at 09:25 a.m. ET

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Wednesday September 18, 2024

- I. Administrative/Logistics
 - A. Call to order 9:03 a.m. ET
- II. Development Group Updates
 - A. MR 438 Race & Ethnicity
 - 1. Met Tuesday Sept. 17th 1:30 – 3:00 p.m. ET
 - 2. Subcommittee comment period comments reviewed and responded to
 - 3. MR is ready for next 14-day vote starting Oct. 17th
 - B. MR 154 Sex and Gender
 - 1. Project Delegate: Gary Beatty, I.M.
 - 2. Met Tuesday Sept. 17th 1:00 ET
 - 3. Began Impact Assessment review
 - 4. Meeting today Wednesday Sept. 18th 12:30 – 2:00 p.m. E.T.
 - C. MR 520 ADA 270/271 Companion Guide
 - 1. Project Delegate: Donna Campbell
 - 2. Meeting today Wednesday Sept. 18th 12:30 – 2:00 p.m. E.T.
- III. X12N Subcommittee MR Vote
 - A. Results
 - 1. Quorum met

MR	Description	Result
202	X323 (837P) – Support weight in metric units	Approved
251	TGH – Multiple Guides – Revise the shared situational rule and component note in SV101-07 and SV202-07	Approved
253	X342, X328, X343 (278) – match the characteristics match for the TRN02 and PWK06	Approved
276	X298, X299, X300 (PACDR) – Remove provider definitions	Approved
297	X323, X324, X325 (837P/I/D) – Revise 2300 CLM01	Approved
301	Multiple IGs – Update all notes that refer to SSN across all X12N-maintained	Approved
304	X299 (PACDR 837I) – Add a 2400 REF to support Investigational Device Exemption Number	Approved
307	X299 (PACDR 837I) – Decrease the repetitions of the 2420D REF	Approved
310	X298, X299 X300 (PACDR 837 P/I/D) – Remove the code note “Use to report Tricare identifier” and code 1H from the 2010BA and 2010CA	Approved
311	X298, X299 X300 (PACDR 837 P/I/D) – Make CLM16 ‘situational’ to be consistent with the claims 837s	Approved
312	X299 (PACDR 837I) – Revise the Industry Name in the 2300 DTP03 to ‘Statement From and Through Date’	Approved
316	X323, X324, X325 (837 P/I/D) – Revise section 1.4.2.1.2 to ‘Loop ID-2430 is a situational loop that can occur up to 25 times for each service line’	Approved

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345	X328 (278) - Revise the 2000F REF situational rule to 'Required when errors have been identified on the notification at the Service Level. If not required by this implementation guide, do not send'	Approved
414	X327, X328 and X342 (278) – Make NM110 'Situational'	Approved
447	X325 (837D) – Update EDI Standard and IG to support new ADA form requirements – add locum tenens, SRP date, and payer ids	Approved
466	X333 (834) – DE 1250 Add code that includes milliseconds – Add DTT to the EDI Standard for DE 1250, Remove UN and add DTT to the 2000/2300 DTP02, update TR3 examples	Approved
521	X321 (824) – Add the DTM and Revise the REF, OOI, and BDS segments in the TED loop	Approved

B. Discussion

1. Ballot started at midnight but email not received until 5:00 a.m. ET
2. Concern that no comments allowed, specific to MR 253
3. Will there be follow up on the timing issues?
4. Suggestion that only 24 hrs. during a Standing Meeting is insufficient given people are in meetings all day
5. Concerns raised that links did not work
6. Question on the time ballot is open, some thought it was longer than one day and didn't even look at it
7. Another report did not even receive email as primary – names provided to Tara for follow-up with X12 staff
8. Another concern raised about the 24 hr. timing especially when onsite at Standing Meeting, difficult enough to do 24 hr. when not at a Standing Meeting

IV. General session highlights

- A. ASC Ballots: 4 ballots each year
- B. MR Public Comment Period added to the beginning of the process
- C. 008060: Plan to publish in Glass in 2025
- D. 008050: No plan to publish in Glass unless there is a specific need on a case-by-case basis
- E. Request for implementation and use of the 834
- F. The presentation is posted on X12.org|members

V. Recessed at 9:13 a.m. ET

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Thursday September 19, 2024

- I. Administrative/Logistics
 - A. Call to order 12:01 p.m. ET
- II. Subordinate group report outs see slides
- III. Winter Standing 2025 Elections

Subcommittee/Work Group	Position	Term
X12N	Chair	Winter 2025- Winter 2027
X12N	Vice Chair	Winter 2025- Winter 2027
TGB WG1 – Benefit Information	Co-Chair	Winter 2025- Winter 2027
TGB WG2 – Claims, Encounters, and Attachments	Co-Chair	Winter 2025- Winter 2027
TGB WG5 – Claim Status and Claim Acknowledgment	Chair	Winter 2025- Winter 2027
TGB WG7 – Property & Casualty	Co-Chair	Winter 2025- Winter 2027
TGB WG10 – Services Review	Co-Chair	Winter 2025- Winter 2027
TGB WG15 – Provider Information	Co-Chair	Winter 2025- Winter 2027
TGB WG16 – Enrollment and Premium Payment	Chair	Winter 2025- Winter 2027
TGC WG2 – RFI	Co-Chair	Winter 2025- Winter 2027

- IV. MR 520
 - A. Is mostly done
 - B. Needs one additional review with WG1
 - C. Needs some clarification from the Registered Standards Committee (RSC) External Code List Oversight (ECO) and the Insurance Payment and Status Code Maintenance Group (CMG03)
- V. Agenda Survey
 - A. Question about the survey that was sent out and the results
 - B. Tara just received the results so it will be shared at the Winter 2025 Standing Meeting
- VI. Adjourned at 12:16 p.m. ET