X12N MAINTENANCE REQUEST PROCESS REVIEW

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DISCLAIMER

→ This presentation is for informational purposes only

→ This presentation is not intended to represent legal advice

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

→ If you have questions regarding specific information, please send them to info@x12.org

→ Visit www.x12.org for additional details about X12

HOUSEKEEPING

→ Feel free to enter comments and questions relevant to this presentation in the "questions" section of GTW during this session

- We will respond to questions related to the GTW session or other logistics as the questions are posted

- If time permits and the comments/questions are pertinent to the information presented in the session, we will entertain them at the end of the planned agenda

- If time doesn't permit or the comments/questions pertain to other matters, we will review them after the session and determine how best to respond

AGENDA

TUESDAY 6/28/2022
10:00 TO 11:00 A.M. ET

→ Call to Order / Introduction

→ Acronyms

→ MR Process Lifecycles

→ Roles Supporting the MR Process

→ MR Process Timelines and Statues

→ MR Escalations

→ MR Process BETA

→ MR Process Improvement Suggestions

→ Questions (if time permits)

ACRONYMS

→ MR = Maintenance Request

→ MRC = Maintenance Request Coordinator

→ MRP = Maintenance Request Process

→ PD = Project Delegate

→ MRDG = Maintenance Request Development Group
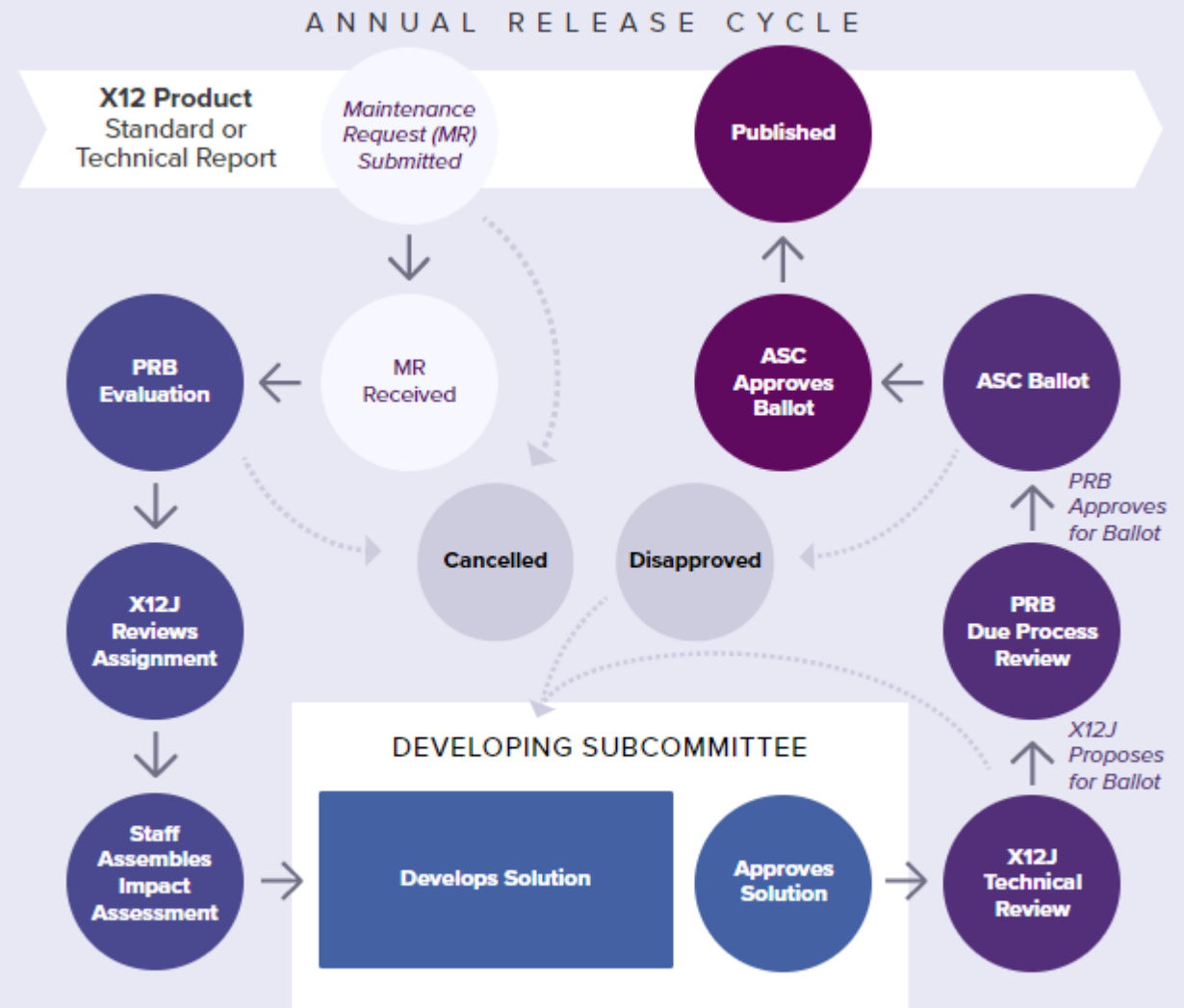
→ IA = Impact Assessment

→ SME = Subject Matter Expert

ARC AND X12N MR PROCESS LIFECYCLES

ARC MR PROCESS WORKFLOW

ANNUAL RELEASE CYCLE

X12 Product Standard or Technical Report

Maintenance Request (MR) Submitted

Published

MR Received

PRB Evaluation

ASC Approves Ballot

ASC Ballot

Cancelled

Disapproved

PRB Approves for Ballot

X12J Reviews Assignment

PRB Due Process Review

DEVELOPING SUBCOMMITTEE

X12J Proposes for Ballot

Staff Assembles Impact Assessment

Develops Solution

Approves Solution

X12J Technical Review

TRANSITIONAL MR PROCESS

→ MR submitted

→ ASC Procedures Review Board (PRB) reviews the MR

→ X12J Technical Assessment subcommittee (TAS) concurs with PRB's developing subcommittee assignment or asks for additional PRB discussion

→ Staff creates initial Impact Assessment (IA)

→ X12J (TAS) representative assigns the MR to the appropriate workgroup(s) within X12N

X12N MR PROCESS WORKFLOW
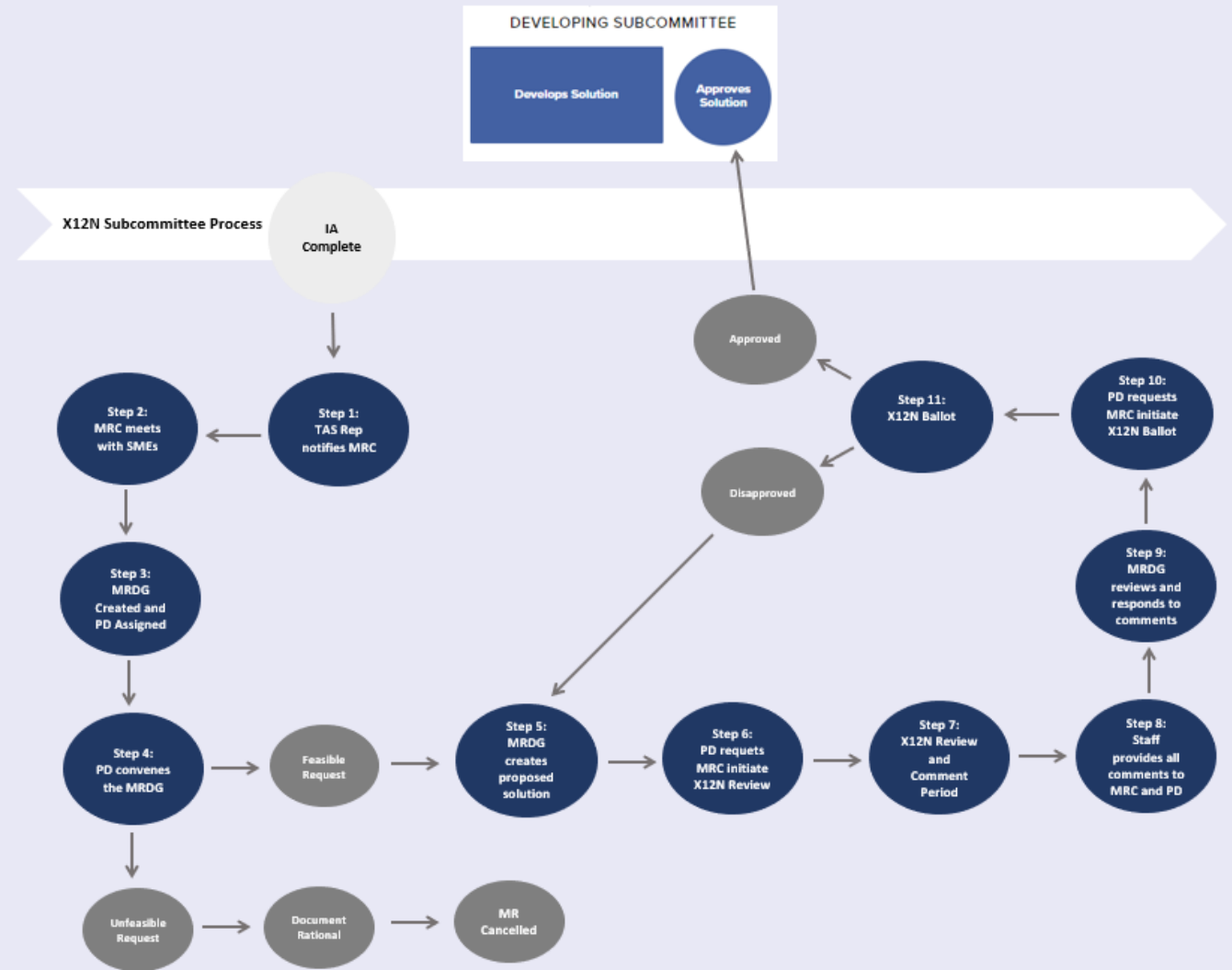
Roles Supporting the MR Process

MR COORDINATOR

→ The X12N Chair appoints the MRC, and they cannot hold any elected position in the subcommittee

→ The MRC organizes MR assignments and inventory

→ Ensures adherence to process requirements

→ Reports MR statuses to X12N Chair

→ Maintains a list and assigns PDs for each MRDG

→ Maintains and presents training materials to PDs

→ Works directly with X12N officers, primary X12J rep, and PDs

→ Works with the impacted work group chair or co-chairs to assign appropriate participants to the MRDG and ensures that all materially interested X12N groups are represented

PROJECT DELEGATE

→ PDs are part of an established pool of X12N constituents

→ The person must be qualified and willing to serve as the PD

→ The PD chairs the MRDG

→ Responsible for steering a specific MR through its development cycle

→ X12N task group and work group chair or co-chairs serve as a PD when another PD needs to step down before the work is complete

MR DEVELOPMENT GROUP

→ The MRC establishes the ad hoc group of SMEs for developing a proposed solution for an MR

→ The group SMEs must be constituents in the subject matter task group or work group whose interest they are representing

→ The MRC determines the voting constituents based on balanced representation of the transaction sets and technical reports impacted by the MR and X12N Harmonization and EDI Standard Experts

→ Other X12N constituents may observe

MR DEVELOPMENT GROUP SME

→ SMEs represent the X12N task and work groups impacted by the request, this includes the Technical and Harmonization Task Groups

→ SMEs must have an acute understanding of the business functions represented in the MR, harmonization within X12N-maintained products, or X12 syntax and semantic rules

→ SMEs need to have a solid understanding of both the technical reports and the EDI Standard

→ SMEs must actively and consistently participate in the MRDG's collaborations, X12N task or work group they are representing

→ SMEs present the proposed solution to the X12N task or work groups and return to the MRDG with feedback

MR DEVELOPMENT GROUP OBSERVER

→ Any X12N constituent can be an observer

→ Observers do not have voting rights in the MRDG

→ The PD may ask the observers to provide input

MR DEVELOPMENT GROUP RESPONSIBILITIES

→ Evaluates the request

→ Evaluates the initial impact assessment (IA) to confirm completeness and update as needed

→ Develops a proposed solution or response to the MR

→ Approves the proposed solution for review by X12N

→ Reviews any comments submitted during X12N comment period and takes action as necessary

MR Process Timelines & Statuses

PROCESS TIMELINES

→ These timelines apply only once the MR is assigned to the MRDG

→ MRDG workflow should accommodate 6-month timeline, 9 months for more complex issues

→ X12N comment period on proposed solutions is 14 calendar days

→ MRDG will review comments and revise the solution, if necessary, within 30 calendar days of receipt from staff

→ Each MR will have a 14-calendar day ballot within X12N

→ MRs approved for publication by PRB in a calendar year will be in the next version

MR STATUSES

Status	Status Description
New	MR has been received by the system, but no action has been taken.
On Hold	MR is on hold until a precondition is met. The condition is noted on the MR's detail page.
PRB Review Period	PRB is reviewing and voting on whether to accept the MR and its initial subcommittee assignment.
X12J Initial Review	X12J is reviewing the MR to verif agreement with the developing subcommittee assignment.
Assemble Initial Impact Assessment	Staff are assessing and documenting the MR's impact on the EDI Standard and associated technical reports.
In Development	Developing subcommittee is defining the proposed MR solution.
Work Group Approved	A developing subcomittee's work group or ad hoc group has finished its development and submitted it for subcommitee ballot
Subcommittee Ballot in	Developing subcommittee is reviewing and oting to move the proposed MR solution forward for technical review.
X12J Technical Review	X12J is reviewing the proposed MR solution for technical compliance.
Proposed for Ballot	X12J recommended PRB approve an ASC balot on the proposed MR solution.
Ballot in	An ASC ballot is in process.
Approved by ASC	The proposed solution has been approved by the ASC and the revisions identified in the MR's Impact Assessment will be applied to the next version of the appropriate X12 product(s).
Disapproved by ASC	The proposed solution has been disapproved by the ASC and the submitter will be notified.
Cancelled	The MR has been cancelled by PRB based on a determination that the request is not under X12's purview, is not a viable request to revise an X12 product, as been withdrawn by the submitter, or otherwise doesn't conform to X12's definition of an appropriate maintenance request. The submitter will be notified and no further action will be taken.
MR Applied	The revisions identified in the MR's Impact Assessment have been applied to the appropriate X12 product(s) in the version noted in the MR details.

MR Escalations

CRITERIA FOR ESCALATION

→ Escalations are initiated by a materially interested work group chair or co-chairs

→ An MR pending initial IA development is eligible for escalation

→ Reason for escalation examples:

- *Final legislation with an implementation date of less than one year*

- *An MR on track for ballot in the next calendar year that needs an ASC ballot by the end of this calendar year*

ESCALATION PROCESS

→ Proposed Current State

- *Email X12N Chair, copying the Vice-Chair, including the MR number and a detailed reason for escalation*

- *X12N Officers reviews the merits of the request*

- *The X12N Chair notifies the ASC Chair of the request, the ASC Chair has the right to object to the escalation*

- *If approved, the MR is included in the next batch for PRB*

- *The X12N Chair responds to the escalation request*

ESCALATION PROCESS

→ Proposed Future State

- *Email MRC, including the MR number and a detailed reason for escalation*

- *The MRC reviews the escalation request*

- *The MRC reviews with the X12N Officers*

- *The X12N Chair notifies the ASC Chair of the request, the ASC Chair has the right to object to the escalation*

- *If approved, the MR is included in the next batch for PRB*

- *The X12N Chair responds to the MRC about escalation request*

- *The MRC responds to the escalation request*

MR Process BETA

MR PROCESS BETA

→ MR244 – Change the HI01 to a repeating data element

→ 8020 Transactions impacted: X332 (270/271), X341 (275), X326 (278), X327 (278), X328 (278), X342 (278), X346 (834), X298 (837), X299 (837), X300 (837), X323 (837), X324 (837), and X325 (837)

→ The X12N Chair is acting as the PD for this MRDG

→ Current status: Reviewing the IA with the MRDG

MR Process Improvement Suggestions

HAVE AN MR PROCESS SUGGESTION?

→ Any materially interested X12 member representative or member of the public may submit an MR for a policy change

→ To submit an MR process suggestion, please use the new dropdown category "ASC95 – Maintenance Request" on the feedback form: x12.org/feedback

WRAP-UP

→ Post questions, suggestions, or feedback in the GTW questions section
or
use the online form at
X12.org/feedback

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