X12M SUPPLY CHAIN SUBCOMMITTEE

January Minutes

- Tuesday, January 16 – 2 – 3:30 PM ET; VIRTUAL MEETING – Trimester Kickoff Meeting
  1. Call to Order – by Chair, Steve Rosenberg
  2. X12 Anti-Trust Caution – announced
  3. Opening Remarks by Chair
  4. Administrative Issues
     - Membership Review / attendance taken
     - January Agenda Approval by membership
     - Approval of September Minutes / Motion
       - Rita_ and Hussam E. ___ offered and seconded a motion to approve the September 2017 minutes. The motion was approved unanimously.
  5. Review/Discuss open Code Maintenance Requests (CMRs).
     - X12J Approved for Publication at December 2017 X12J Meeting; in version 7050
       - C17927 – The following were submitted by Steve Rosenberg
         - C17937
         - C17947
         - C17957
         - C17967
         - C17977
         - C17987
         - C17997
         - C18007
         - C18017
         - C18027
         - C18057
       - C18097 – The following were submitted by Rita Laur
         - C18107
         - C18117
         - C18127
         - C18137
         - C18147
         - C18157
         - C18167
         - C18177
         - C18187
         - C18197
         - C18207
         - C18217
6. Review/Discuss open Data Maintenance and X12M decisions.

- **049107 Code Set Split**  
  X12M DISAPPROVE
  - Several subcommittees want this to occur. With changes offered by 003112, this DM should be able to proceed with additional X12C input.
  - X12M Disapprove (but subject to change based on a pending proposal). The DM was disapproved because of its age and no solutions were forthcoming from X12C. As of 1/2017, X12C is working on a solution under this DM and DM 020117.
  - Many in X12M are interested in this DM progressing as there are constituencies that need this capability.
    - Steve R will bring this topic up at the Steering Session as to why we have not had any response from X12C.
  - X12C presented a response on 1/31/2017.
  - X12 Staff is preparing a solution; to be discussed in San Antonio.
    - As raised by the X12M team, how do we get this moving for the membership? Community is frustrated. Healthcare needs it. This topic is on the Steering agenda.
    - A draft proposal has been submitted by X12C. To be discussed in Pittsburgh.
  - X12C submitted a revision to their recommendation for forward codes mid-week, which includes a revision to the ISX segment with a new data element I71.
    - I71 would be similar to GS08, but defines the code set that is being applied to the transaction.
    - The update will be placed on X12M’s agenda for the next meeting.

- **006114 Rita Laur: 832 PID loop change**  
  X12M DEFER
  - X12M Defer; The segment additions are in the current DM book, including changes to the TRT and TRD loops.
  - **DM 006114 Revisions from September 2016**
    - Add 1681 QTY 10 occurrences; Optional.
• Add 1682 PKD 10 occurrences; Optional
• Add 1683 ING >1 occurrences; Optional
• Add 1684 YNQ >1 occurrences; Optional
• Add 1685 REG 10 occurrences; Optional
• Add ALG Loop 2750 at 3480; Loop Repeat >1
  o ALG; Optional
  o N1; >1; Optional
  o REF; >1 Optional
  o COM; >1 Optional
• TRT loop modification; revised loop below; adds TC2, REF, PDH segments to existing loop
  • Loop ID 2100 at 1695 >1
    o TRT; optional 1
    o TC2; optional >1
    o REF; optional >1
    o PDH; optional >1
    o TRD; optional >1
• A Motion was offered by Hussam El-Leithy and Phil Z to accept the QTY, PDK, ING, YNQ, REG, ALG loop, and revised TRT loop changes to the 832 transaction set. The motion was approved unanimously.
• Work on this DM is deferred until the 897 work is completed

• 007114 Rita Laur: 832 PKG loop with YNQ and COM

• X12M Defer
• From September 2016
  • Change segment PKG to a PKG loop; Move PKG to after Loop 2800 (preferred) if PKG cannot stay in current location; PKG loop, stays at 25 occurrences; Optional
  • Add PKG segment to loop; 1; Optional
  • Add YNQ segment to >1; Optional
  • Add COM segment to >1; Optional
  • A motion was offered by Peter R and seconded by Hussam El-Leithy to approve the changes above. Peter R abstained; remaining members approved. The motion was approved.
  • Changes approved in September are reflected in the DM. Work is still in-process.
  • 1/17/2017 – Any additional revisions will be submitted at same time for a single X12 vote process.
• Work on this DM is deferred until the 897 DM is completed

• 010114 Rita Laur: 143 transaction set; add segments

• X12M Defer;
• Work began in the September 2016 session

• 025116 – Rita Laur: 897 Data Synchronization

• X12M Defer; DM continues in process
• From September 2016
  • Group agreed to leave the 897 segment structure stays as-is.
  • A motion was offered to approve the 897 Data Synchronization transaction set, as is, by Peter R and seconded by Phil Z. The motion was approved.
  • The group discussed how to handle possible revisions by the other subcommittees. A motion was offered by Brenda M and Hussam El-Leithy to allow X12M and the X12 Chair to accept changes offered by other subcommittees, if deemed appropriate by X12 M and/or X12M Chair, to the 897 transaction, and present a revised 897 -transaction to TAS for member ballot. The motion was approved.
• The DM submitter noted that additional segments are needed to the SLN loop to support product components and product kits. Additional segments to be added to Detail SLN 3300 Loop at position 7900 of 897.
• A new DM will be submitted after approval of DM 025116.
  o Add the following segments to the SLN loop:
    o 8200 DTM, optional; 10 occurrences
    o 8300 CTP, optional; 1 occurrence
    o 8400 SAC; optional; >1 occurrences
    o 8500 TXI, optional; >1 occurrences
    o 8600 PO4, optional; >1 occurrences
    o 8700 PKG, optional; 25 occurrences
    o 8800 QTY, optional; >1 occurrences
    o 8900 MTX, optional; 1 occurrences
    o 9000 YNQ, optional; 10 occurrences
    o 9100 REF; optional >1 occurrences
  1/19/2017 – SLN and other enhancements will be included in current DM. All revisions will be submitted at 1 time for a single X12 vote process.
• 5/23/2017 - Work continues on the DM.
• 9/18/2017 – Work continues on the DM.
• 1/208 – Work continues on the DM.

| 042316 – Gary Beatty; Revise character data type (X12C Primary, All subcommittees) - |
| X12M DISAPPROVE; requires new review with revisions |
| 5/23/2017 | X12M APPROVE as modified |
| 9/18/2017 | X12M Re-Approved as modified |

• X12M – Defer; space and other characters allowed in X12 are not included;
• Requires a discussion about ID vs String/Text
• Awaiting recommendation and determination of impact from X12C, hopefully available for the Seattle sessions
• X12J Status 2/1/2017 : Remains Deferred;
• X12J April – recommendation provided from X12C with update to X12.6; see page 12 for change
• 5/23/2017 Discussion
  X12M reviewed the proposal. Requesting inclusion of the national characters (#, $).
Motion to approve as modified – Hussam E, Phil Z – Motion Approved. Still in review with other subcommittees

- 8/2017 – X12C is creating a new data type – Revote needed
- [http://members.x12.org/technical-assessment/x12-6-dm-042316.htm](http://members.x12.org/technical-assessment/x12-6-dm-042316.htm)
- 9/18/2017 – Discussed;

- 003117 Steve Rosenberg/X12M  AIA 820 Implementation Guideline TR3 – X12M DEFER
  - Revised AIA implementation guideline; not ready at this time
- 004117 Steve Rosenberg/X12M  AIA 824 Implementation Guideline TR3 – X12M DEFER
  - Revised AIA implementation guideline; not ready at this time
- 005117 Steve Rosenberg/X12M  AIA 830 Implementation Guideline TR3 - X12M DEFER
  - Revised AIA implementation guideline; not ready at this time
- 006117 Steve Rosenberg/X12M  AIA 831 Implementation Guideline TR3 – X12M DEFER
  - Revised AIA implementation guideline; not ready at this time
- 007117 Steve Rosenberg/X12M  AIA 832 Implementation Guideline TR3 – X12M DEFER
  - Revised AIA implementation guideline; not ready at this time
- 009117 Steve Rosenberg/X12M  AIA 843 Implementation Guideline TR3 – X12M DEFER
  - Revised AIA implementation guideline; not ready at this time
- 010117 Steve Rosenberg/X12M  AIA 846 Implementation Guideline TR3 – X12M DEFER
  - Revised AIA implementation guideline; not ready at this time
- 011117 Steve Rosenberg/X12M  AIA 850 Implementation Guideline TR3 – X12M APPROVED
  - 9/26/2017 Approved for publication by X12J
  - Revised AIA implementation guideline; work in process; approved 9/26/2017
- 012117 Steve Rosenberg/X12M  AIA 855 Implementation Guideline TR3 – X12M DEFER
  - Revised AIA implementation guideline; not ready at this time
- 013117 Steve Rosenberg/X12M-X12I  AIA 857 Implementation Guideline TR3 – X12M DEFER
  - Revised AIA implementation guideline; not ready at this time
- 014117 Steve Rosenberg/X12M  AIA 860 Implementation guideline TR3 – X12M DEFER
  - Revised AIA implementation guideline; not ready at this time
- 015117 Steve Rosenberg/X12M  AIA 865 Implementation Guideline TR3 – X12M DEFER
  - Revised AIA implementation guideline; not ready at this time
- 016117 Steve Rosenberg/X12M/X12C  AIA 997 Implementation Guideline TR3 – X12M DEFER
  - Revised AIA implementation guideline; not ready at this time
- 018117 Jim Taylor/All subcommittees
  - Guidance document on TR4; awaiting guidance from X12C
- 020117 Jim Taylor/All subcommittees
  - Guidance on code set usage; awaiting guidance from X12C
    - Submitted to get X12C which is working on the code set issue (tied to 049117).
    - Several possible solutions were presented at the January meeting, but we ran out of time.
    - X12C code set meeting – options discussed; X12C prefers to be able to offer several options for implementation
1. Add a short identification string at the beginning of the interchange to let the translator know that which code set version to be used with the interchange. The standards version will be identified inside the interchange as usually.

2. Branch approach. Allow for branching out for older versions, e.g. create “new 4010” which would have the structure of 4010 but the code set of 7040.

3. Code Set reference. Creating a standalone versioned code set which could be referenced out of the interchange but still posting regular versions which will include a code set. This would allow companies to either use the standards as is or to use an older message structure with newer code sets. Multiple ways to reference the code sets were discussed.

- 6/12/2017 – Steve R brought this DM up to X12J and stated that there is an urgent need to get one or more solutions presented by August X12J or for the September meeting. X12J/X12C Peter P. stated that they will work on stating the business case and business requirements.

- 9/27/2017 X12J Next revision: While compliant code values for each version of X12 are documented in the published standard, new emerging business requirements often necessitate that trading partners exchange code values that are published in versions of the X12 standard other than what is specified in the GS08 of the transmission. X12 recognizes that this business requirement is met by specifying those codes in an industry-approved implementation guide or by mutual trading partner agreement prior to use.

- 9/27/2017 - X12M reviewed the above. Motion to approve the paragraph above which replaces the prior approved changes. X12M Approved. WE HOWEVER strongly recommend that when this goes out to vote to the full X12 membership, a clarifying statement be provided to ensure the reader / voter an X12 Technical Solution for the Separation of Code Lists from a published version is being worked on and will be communicated soon.

- **031217 X12N Submission**
  - X12M APPROVED
  - Expand DE 554 from 6 to 9 numeric; used in LX
  - X12N has exceeded the LX count and needs its expanded to 9 numeric
  - The proposed changes to the data element were discussed.
  - A motion was offered by Rita L. and seconded by Mary S.
  - The motion was approved unanimously.

- **033317 Steve Rosenberg / GS1 US**
  - Approved X12M & X12 Ballot
  - To the 850 PO and 855 PO Acknowledgment transactions add the YNQ segment in the Detail
  - 9/18/2017 – Motion to approve made by Mary S and seconded by Peter R: Approved
  - 9/25/2017 - Approved by X12J to go to PRB for ballot
  - 12/2017 – Member ballot approved

- **034317 Steve Rosenberg / GS1 US**
  - Approved X12M & X12 Ballot
  - Revise Sections 3.3.1 thru 3.3.6 of X12.6 by enumerating the X12 approved characters
  - [http://members.x12.org/technical-assessment/x12-6-dm-034317.htm](http://members.x12.org/technical-assessment/x12-6-dm-034317.htm)
• 9/18/2017 - Motion to approve made by Peter R and seconded by Mary S – Approved
• December 2017 – Ballot approved

- 035317 Steve Rosenberg / GS1 US
  Approved X12M & X12 Ballot
  • 832 Price/Sales Catalog – Change YNQ occurrences in Header and Detail to 200 repeats
  • Needed to support additional yes/no questions for Global Data Synchronization Network processes
  • 9/18/2017 – Motion: Mary, Rita - Approved;
  • 9/25/2017 - Approved by X12J to go to PRB
  • December 2017 – Ballot approved

- 036317 Steve Rosenberg / GS1 US
  Approved X12M & X12 Ballot
  • 832 Price/Sales Catalog – Add REF segment to Detail position 4610; optional; repeat >1
  • No ability to send reference information tied to the SLN loop in current structure
  • See attachment; reviewed by X12M
  • 9/18/2017 - Motion made by Peter R and seconded by Rita L - Approved
  • 9/25/2017 - Approved by X12J to go to PRB for ballot
  • December 2017 - Ballot approved

- 001118 Steve Rosenberg / GS1 US
  Approved - X12M APPROVED
  • 894 and 895 DSD transaction sets
  • Modify G72 segment with addition of DE 352 Description to G7212
  • Include semantic note on use of DE 352
  • Remove Comment 00 referring to the G73 segment
  • X12M Approved 1/16/2018

Meeting recessed at 3:15 PM ET on Tuesday, January 16th.

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Guests: Dollar General - Joe Lozier
2018 Portland Trimester Meeting
Quick-Guide to X12M Daily Activity

- **Monday, January 22 – 8 AM – 5 PM PT**
  1. Call to order –
  2. Scan-in of attendees - new attendee Ronald Sommer, VA
  3. Un-recess meeting – 8:05 AM
  4. Agenda review
  5. 897 Discussion continuation –
     - ING at 2400 needs Transaction Set note
     - 2/1600 Remove ‘N’ and remove 2/1600 PO4 note
     - Add COM segment to 2450; repeats 20; add DE 350 to COM and C057; add Semantic Note that COM05 has a value of 1 when COM03 is used, and is only used when COM03 is used
     - Mary has additional codes for COM/DE 365 – thumbnail images, etc. mshaw@idea4industry.com
     - New segment for Target Market
     - Ronald Sommer joined the meeting to discuss a supply chain project at the VA
     - The group discussed the use of product identification and how the various EDI transactions would support product movement amongst various trading partners.
  6. Recess
  7. 3 PM – X12J Meeting
     - DM 049107 X12C Update to be reviewed
     - Open CMRs approved for publication by X12J
       - C18037
       - C18087
  8. 5 PM - X12 General Meeting & Reception

- **Tuesday, January 23 – 8 AM – 5 PM PT**
  1. Un-recess meeting - 8:06 am
  2. Agenda review
  3. Attendance taken
  4. Retailer Summit – tentative; deferred to next time; not attended this time
  5. Continue with open work items; Call-in webinar held from 10 AM – 11:30 AM PT
     - Review ISX – w/ recommendations back to X12C
     - DM Report Out - reviewed
     - Dollar General
       - Discussed business requirements for the ability for the Vendor to advise the Retailer as to when deliveries will be made
       - Recommendation is to use the 816 transaction
     - X12F Constitution – approved; need to fix the bookmark notices on the table of contents, grammar and typos (Standing meetings vs standing Meetings)
  6. Resume Retailer Summit – tentative; deferred to next time
  7. Lunch - Recess
  8. Re-scan of attendees
9. 3 PM – X12J Meeting
   • Provided X12J report back on DMs
     • X12M Report out Summary
     • 001118 – Approved for ballot (changes to the G72 segment)
     • C18037 – Approved for publication (X12J)
     • C18087 – Approved for publication (X12J)
   • X12C Report out
     • 037317 – Approved for ballot – XML
     • 018117 – Deferred – Jim Taylor TR4
     • 055312 – Withdrawn by submitter
   • X12J Action
     • C18418 – Disapproved code request for in DE 355; recommended that MEA02 is appropriate, not MEA04
10. Work Assignments
    • The following assignments were made:
      • Hussam E will become the X12M TAS Representative with Zubair N as his back-up
      • Zubair N will become the X12M PRB Representative, with Hussam E as his back-up
      • Either Rita L or Steve R will attend the TAS or PRB sessions to assist through the end of 2018

11. Recess for the day

• **Wednesday, January 24 – 8 AM – 5 PM PT**
  1. Scan-in of attendees
  2. X12J cancelled
  3. Un-recess meeting 8:10 AM PT
  4. Agenda review
   • 897 NFT loop Review
     • Work on COM loop;
       • Added 2/2450 COM
       • Added 2/2460 TAR
       • Fixed COM segment data elements
   • 897 TRT loop – on agenda
   • Mary Shaw IDEA updates
     • New URLs for COM segment
     • Certification code agencies are still needed
     • Add TAR segment for Target Market; for discussion
       • Country
       • Sub-division
       • City
       • Region Location Type
       • Description

  5. Recess
Thursday, January 25 - 10 AM – 12 Noon PT
1. Scan-in of attendees
2. Un-recess meeting
3. Agenda review
4. 9-10 AM Steering Meeting
5. Continued with 897 and TAR discussion
6. Having completed its work, the meeting adjourned at 12 Noon.

Monday, January 29 - VIRTUAL MEETING - 12 PM – 1 PM ET –
1. CANCELLED

PRB meeting scheduled for Wednesday, January 31st.