

## **SECTION 4: CODE MAINTENANCE PROCEDURES**

### **4.1 Code Maintenance Request (CMR)**

Code lists associated with X12 Standards are placed in maintenance status after approval for publication by the PRB. Individuals or organizations may propose revisions to the code lists according to the procedures in this section.

4.1.1 A CMR may be submitted by anyone ("submitter"), using the CMR form on the X12 web site. The submitter prepares and submits the CMR according to instructions on the web site. Following submission a CMR number is assigned and the submitter receives a confirmation that the request has been submitted.

4.1.2 The Secretariat reviews and processes the CMR.

- A. If the CMR is not clear or not complete, contacts the submitter for clarification or returns the CMR to the submitter explaining the reasons for returning it.
- B. When the CMR is clear and complete, queues the CMR for the next X12 member comment period.

### **4.2 X12 Member Comment**

4.2.1 The Secretariat posts the CMRs to the X12 web site and notifies X12 voting members via email of a 21-day CMR comment period.

**NOTE:** TAS establishes a cutoff date for CMRs to be included on the agenda of the next TAS meeting. The CMR is logged for the next TAS meeting for which the cutoff date is met.

4.2.2 An X12 member submits comments via the X12 web site concerning the CMR comment package.

**NOTE:** Comments received are membership input into the TAS process for resolving code maintenance requests. This is not a member ballot.

4.2.3 After the comment period the Secretariat compiles a file of all comments and forwards this file to the TAS Chair for processing at the next TAS meeting.

### **4.3 Resolution of CMRs**

4.3.1 CMR's are referred to TAS.

**NOTE:** TAS has responsibility for coordinating all CMRs with other SCs and has specific responsibility for the disposition of CMRs. Other SCs may be consulted on specific

CMRs affecting the standards for which TAS is responsible, but TAS retains disposition authority. A CMR may be referred to more than one SC; in such cases, all SCs report to TAS on the CMR before TAS disposes of the CMR. CMRs (or portions of CMRs) which affect the standards for which another SC has maintenance responsibility are referred to that SC for decision prior to TAS action on the item.

4.3.2 TAS reviews each CMR and takes one of the following actions:

- A. Approves the CMR as submitted.
- B. Approves the CMR with modifications.
- C. Defers the CMR to the next meeting.
- D. Accepts withdrawal from the submitter and closes the CMR.
- E. Disapproves the CMR with reasons and closes the CMR.
- F. Refers the CMR to another SC.

4.3.3 The Secretariat

- A. Records TAS action in the minutes and distributes minutes to TAS members and X12 SC chairs.
- B. Records the status of each CMR in the standards database.
- C. If the CMR is approved or approved with modification by TAS, proceed to II:4.3.4.
- D. Forwards referred CMR to the assigned SC.
- E. If the CMR is disapproved, notifies the submitter of its disposition.

4.3.4 If a CMR is referred, the assigned SC evaluates the CMR and reports its input at the next TAS meeting (revert to II:4.3.1).

4.3.5 The Secretariat prepares the CMR Status Report which lists TAS-approved CMRs, schedules the item on the next PRB meeting agenda, and coordinates with TAS for distribution of copies to the PRB.

## 4.4 PRB APPROVAL TO PUBLISH

4.4.1 The PRB reviews the CMR Status Report and for each CMR takes one of the following actions:

**NOTE:** If there is disagreement on any procedural aspect of a CMR the objecting party shall convey this objection to the PRB for resolution.

- A. Approves the CMR for publication.
- B. Disapproves the CMR for publication for procedural issues and directs TAS to resolve the objections before returning to the PRB.

4.4.2 The Secretariat:

- A. Records disposition of the CMR in the PRB meeting minutes and distributes the minutes to PRB members and SC Chairs as notice of action.
- B. If the PRB disapproves a CMR for publication, processing reverts to II:4.3.1.
- C. If the PRB approves a CMR for publication, publishes the updated standards as part of the next release.
- D. Notifies the submitter of the CMR number and the disposition of the CMR.