Common Database Maintenance Procedure

Policies, Procedures, and Conventions for Using the Common Database to Ensure Consistency in X12N Work Products

X12N Implementation Guides Task Group
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The X12N Implementation Guides Task Group (TG4) developed these policies, procedures, and conventions to improve consistency in X12N work products. This document will be used by authors as a supplement to other X12N processes, including the X12N Implementation Guide Handbook.

**Section 1: Policies**

The current published version of this document is used for all maintenance activities. If a new version of this document is published after a maintenance activity commences but before it is completed, the Delegate and the TG4 co-chairs will determine which version will be followed for the maintenance task.

Common Database:
- All Common Database items are either unique or shared.
  - Unique – used in only one IG; modification to the text is at the discretion of the WG Delegate.
  - Shared – used in multiple IGs; modification to the text must be accepted by all affected WG Delegates.

Common Database Items:
- The same loop will be used to meet the same business requirement in all Implementation Guides (IGs).
- The same segment(s) will be used to meet the same business requirement in all Implementation Guides (IGs).
- The same element(s) will be used to meet the same business requirement in all IGs.
- The same industry names and their attendant definitions will be used to meet the same business requirement in all IGs.
- The same code subset will be used to meet the same business requirement in all IGs. Code notes will also be consistent within each code subset.
- The same situational rule(s) will be used to meet the same business requirement in all IGs.

**Section 2: Tool Functionality**

**Revising an existing Common Database Item:**

- During the IG development cycle the Delegate will note the desire to modify the content of Common Database item in the tool.
  - If the item is unique and occurs only once in the IG, the modification will be allowed immediately.
  - If the item is unique and occurs multiple times in the IG, the tool will display a warning and the Delegate will be asked to confirm that the modification applies in all instances.
  - If the item is shared
* The tool will display a warning that the item is shared and that the modification must be accepted by all the other Delegates for current IGs that use the item.
* The tool will notify TG4 that coordination is needed.
* The tool will notify all other Delegates for current IGs (refer to the Glossary) that use the item that a change has been proposed and an approval/disapproval vote is required within 15 business days.
* The tool will include a voting process that gives each Delegate in the sharing pool one vote.
  - Abstention votes are not allowed.
  - Disapproval votes must include a detailed reason for the disapproval.
* TG4 will be notified if there are any disapproval votes or if any Delegate doesn’t register a vote within the response period. TG4 will then invoke the procedure outlined in the Resolution section below.

**Creating a new Common Database Item:**

- During the IG development cycle the Delegate will note the desire to create a new Common Database item in the tool.
  - The tool will display all applicable existing Common Database items and force the Delegate to review the entire list for an appropriate item.
  - If no existing entry meets the business need:
    - The tool will allow the Delegate to enter the text for the new entry.
    - The tool will notify TG4 that a new entry has been requested and a review is needed.
  - A TG4 assignee will review the proposed entry against the existing entries.
    - If the TG4 assignee believes that the new entry is appropriate:
      - The TG4 assignee will enter an approval for the addition.
      - The tool will notify all other Delegates for current IGs that a new item has been approved and is available for use in all Implementation Guides.
    - If the TG4 assignee believes the new entry is, or could be, duplicative of an existing entry, TG4 will invoke the procedure outlined in the Resolution section below.

**Section 3: Resolution Procedure**

**Revising a Common Database Item:**

- The TG4 assignee will contact disapprovers and non-voters to discuss the issue(s) individually.
- If necessary, the TG4 assignee will convene a meeting, or meetings, with all affected Delegates. Discussion will continue until all parties agree with a resolution.
  - If the determination is that the new text is approved, the TG4 assignee will enter an approval for the change.
  - If the determination is that the new text is not appropriate for all users
* The initiating Delegate will determine their next action:
  - If the determination is that they will use the existing text, the Delegate will update the document to so indicate.
  - If the determination is that a new entry is needed, the Delegate will follow the process to request a new entry.

**Creating a new Common Database Item:**

- The Delegate will notify the TG4 assignee that a new common database entry is needed and will include all information necessary to support the request.
- The TG4 assignee will review the request and will contact the Delegate to discuss any existing common database entries that might satisfy the business need.
- The TG4 assignee and the Delegate will continue working on the issue until both parties agree on a resolution.
  - If the determination is that the new entry is appropriate, the TG4 assignee will enter an approval for the addition.
  - If the determination is that the new entry is not needed, the Delegate will update the document in the tool appropriately.

**Glossary**

Current IG – the latest version of an Implementation Guide, either published or in development, for each unique business purpose.