X12 Standards for Electronic Data Interchange
Technical Report Type 3

Payroll Deducted and Other Group Premium Payment for Insurance Products (820)

Change Log : 005010 - 007030

MARCH 2018

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New Loops/Segments

For new loops, the change log will only reflect the new loop identifier and name and associated segments. For new segments added to existing loops, the change log will only reflect the segment name.

Non-substantive Changes

Changes considered by the work group to be non-substantive in nature will not appear in the change log. This includes changes to correct typographical or grammatical errors, updated examples, reformatted text, updated industry names, and modifications to rules and notes either for consistency across TR3s or for proper textual construct that did not change the note's original intent.

Location	X334	Payroll Deducted and Other Group Premium Payment for Insurance Products Chapter 1. Purpose and Business Information
Action	**Modify Chapter 1** Front matter section 1.1 Implementation Purpose and Scope Revised for clarity.
CR 1225	Add information in the front matter of the TR3 describing how the 834 and 820 transactions work together.

Location	X334	Payroll Deducted and Other Group Premium Payment for Insurance Products 1.4 Business Usage
Action	**Modify Chapter 1** Front matter section 1.4.2 Information Flows (previously 1.4.1), Bulleted List Reworded #2 and #3 with consistent terminology.
CR 1666	As a result of the public comments received, the HIPAA 820 TR3 front matter needs revision.

Location	X334	Payroll Deducted and Other Group Premium Payment for Insurance Products 1.10 Data Overview
Action	**Modify Chapter 1** Front matter section 1.10.1 Note Revised for clarity.
CR 1666	As a result of the public comments received, the HIPAA 820 TR3 front matter needs revision.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products 1.10 Data Overview
Action	**Modify Chapter 1** Front matter section 1.10.1.1 title Revised section title to include "payment."
CR 1443	Revise the front matter to address reassociation challenges by specifying one 820 corresponds to one EFT or check.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products 1.10 Data Overview
Action	**Add Chapter 1** Section 1.10.1.1, The Reporting and Payment Process, add the following 3rd paragraph: One 820 transaction set reflects a single payment device.
CR 1443	Revise the front matter to address reassociation challenges by specifying one 820 corresponds to one EFT or check.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products 1.10 Data Overview
Action	**Modify Chapter 1** Front matter section 1.10.1 Overall Data Architecture Note Revised for clarity. Added reference to Control Structure X12.6.
CR 1666	As a result of the public comments received, the HIPAA 820 TR3 front matter needs revision.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products 1.10 Data Overview
Action	**Modify Chapter 1** Front matter section 1.10.2.2 Detail Revised to include that Table 2 can be structured in 3 ways rather 2, and for clarity and consistency.
CR 1666	As a result of the public comments received, the HIPAA 820 TR3 front matter needs revision.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products 1.10 Data Overview
Action	**Modify Chapter 1** Front matter section 1.10.2.4 Balancing Revised section for clarity and consistency, and to accommodate balancing when payment information is reported at the organizational level, member level, or both.
CR 1666	As a result of the public comments received, the HIPAA 820 TR3 front matter needs revision.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products 1.10 Data Overview
Action	**Modify Chapter 1** Front matter section 1.10.2.5 Revised for clarity and consistency, including section name.
CR 1666	As a result of the public comments received, the HIPAA 820 TR3 front matter needs revision.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products 1.10 Data Overview
Action	**Modify Chapter 1** Front matter section 1.10.2.6 Reassociation of Dollars and Data Revised section for clarity and consistency.
CR 1666	As a result of the public comments received, the HIPAA 820 TR3 front matter needs revision.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products 1.10 Data Overview
Action	**Modify Chapter 1** Front matter section 1.10.2 Data Use by Business Use Updated loop and segment names.
CR 1666	As a result of the public comments received, the HIPAA 820 TR3 front matter needs revision.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products 1.10 Data Overview
Action	**Modify Chapter 1** Front matter section 1.10.2.2.1 Revised for clarity and consistency, including section name and references to the updated loops and segments in Figure 1.5.
CR 1666	As a result of the public comments received, the HIPAA 820 TR3 front matter needs revision.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products 1.10 Data Overview
Action	**Add Chapter 1** Chapter 1, Subsection 1.10.2.2.2.1 was added to explain the relationship between the 820 and the 834.
CR 1225	Add information in the front matter of the TR3 describing how the 834 and 820 transactions work together.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products 1.10 Data Overview
Action	**Modify Chapter 1** Front matter section 1.10.2.2.2 Revised for clarity and consistency, including section name and references to the correct loops and segments in Figure 1.6.
CR 1666	As a result of the public comments received, the HIPAA 820 TR3 front matter needs revision.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0200 BPR - Financial Information
Action	**Add Data Element Code Value** BPR01 Added code value 'H' (Notification Only) and code note.
CR 1228	The 835 and 820 should be consistent when appropriate.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0200 BPR - Financial Information

Action	**Modify Data Element Note**
	Header BPR02
	Modified data element note 1 for clarity.
CR 1672	Some data elements need to be revised for consistency and to clarify the workgroup's intent, including the names, usage, situational rules, Implementation/Industry names and data element notes.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0200
	BPR - Financial Information
Action	**Delete Data Element Code Value**
	BPR04
	Deleted code value SWT.
CR 1228	The 835 and 820 should be consistent when appropriate.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0200
	BPR - Financial Information
Action	**Modify Data Element Note**
	Header BPR13
	Modified data element note for clarity.
CR 1672	Some data elements need to be revised for consistency and to clarify the workgroup's intent, including the names, usage, situational rules, Implementation/Industry names and data element notes.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0200
	BPR - Financial Information
Action	**Add Data Element Note**
	Added note to BPR08 "Use this code to identify the type of account in BPR09."
CR 1228	The 835 and 820 should be consistent when appropriate.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0200
	BPR - Financial Information
Action	**Delete Data Element Code Value**
	Removed code value 'ALC' in BPR08.
CR 1228	The 835 and 820 should be consistent when appropriate.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0200 BPR - Financial Information
Action	**Modify Data Element Usage** Changed BPR10 usage from Required to Situational to reflect industry usage, and added a situational rule.
CR 1229	Data element usage change is required to meet industry needs.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0200 BPR - Financial Information
Action	**Delete Data Element Code Value** BPR12 Deleted code value '02' Swift Identification (8 or 11 characters)
CR 1228	The 835 and 820 should be consistent when appropriate.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0200 BPR - Financial Information
Action	**Modify Data Element Note** Header BPR07 Modified data element note for clarity.
CR 1672	Some data elements need to be revised for consistency and to clarify the workgroup's intent, including the names, usage, situational rules, Implementation/Industry names and data element notes.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0200 BPR - Financial Information
Action	**Modify Data Element Note** Header BPR16 Modified data element note for clarity.
CR 1672	Some data elements need to be revised for consistency and to clarify the workgroup's intent, including the names, usage, situational rules, Implementation/Industry names and data element notes.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0200 BPR - Financial Information
Action	**Delete Data Element Code Value** Deleted code value '02' from BPR06 to align with the 835.

CR 1228	The 835 and 820 should be consistent when appropriate.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0350 TRN - Reassociation Trace Number
Action	**Delete Data Element Code Value** TRN01 Deleted code value '3' Financial Reassociation Identification Number

CR 1228	The 835 and 820 should be consistent when appropriate.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0350 TRN - Reassociation Trace Number
Action	**Modify Segment Example** TRN Segment Example Modified TRN04 to match BPR11 of the BPR example.

CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0350 TRN - Reassociation Trace Number
Action	**Modify Data Element Usage** Modified TRN03 usage from Situational to Required to align with the 835.

CR 1228	The 835 and 820 should be consistent when appropriate.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0350 TRN - Reassociation Trace Number
Action	**Add Data Element Note** TRN03 Added note: This must be a 1 followed by the payer's EIN (or TIN).

CR 1228	The 835 and 820 should be consistent when appropriate.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0350 TRN - Reassociation Trace Number
Action	**Modify Data Element Note** Header TRN04 Modified data element note for clarity.

CR 1672	Some data elements need to be revised for consistency and to clarify the workgroup's intent, including the names, usage, situational rules, Implementation/Industry names and data element notes.
Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0350 TRN - Reassociation Trace Number
Action	**Modify Data Element Situational Rule** Modified TRN04 situational rule to align with the 835
CR 1228	The 835 and 820 should be consistent when appropriate.
Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0600 DTM - Delivery Date
Action	**Modify Segment Note** Header DTM - Delivery Date Modified segment note for clarity.
CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.
Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0600 DTM - Coverage Period
Action	**Modify Segment Note** Modified the TR3 note for the DTM (Coverage Period) segment to better explain usage.
CR 1163	New rule/note is needed to clarify intended usage
Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0600 DTM - Coverage Period
Action	**Add Segment Note** Header DTM - Coverage Period Added segment note #2.
CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.
Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0700 | 1000A N1 - Premium Receiver's Name

Action	**Add Segment Note** Loop 1000A Premium Receiver's Name N1 Segment Added the following TR3 note: Use this N1 loop to provide the name/address information of the payee. The identifying reference number is provided in N104.
CR 1228	The 835 and 820 should be consistent when appropriate.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0700 | 1000A N1 - Premium Receiver's Name
Action	**Modify Segment Example** Loop ID 1000A N1 Modified segment example to be compliant with N103 situational rule.
CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0700 | 1000A N1 - Premium Receiver's Name
Action	**Modify Data Element Industry Name** Loop 1000A N102 Modified industry name for clarity.
CR 1672	Some data elements need to be revised for consistency and to clarify the workgroup's intent, including the names, usage, situational rules, Implementation/Industry names and data element notes.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0700 | 1000A N1 - Premium Receiver's Name
Action	**Modify Data Element Situational Rule** 1000A, N103 Revised situational rule for clarity.
CR 1477	Re-evaluate usage requirements in the 1000A and 1000B loops of the 820 TR3. This may be a situation when the 820 requirements should not align with the corresponding 835 requirements.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0700 | 1000A N1 - Premium Receiver's Name

Action	**Modify Data Element Code Note** Loop ID 1000A N103 Modified code note XV (Standard Unique Health Plan Identifier) for clarity.
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.

Location	X334	Payroll Deducted and Other Group Premium Payment for Insurance Products	820	0700	1000A N1 - Premium Receiver's Name
Action	**Modify Data Element Situational Rule** N103 Identification Code Qualifier - Update note to reflect relationship to N104.
CR 1478	Remove duplication of situational rules between the element and the code qualifier across the TR3.

Location	X334	Payroll Deducted and Other Group Premium Payment for Insurance Products	820	0900	1000A N3 - Premium Receiver's Address
Action	**Modify Multiple Locations** Modified segment situational rule for clarity.
CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.

Location	X334	Payroll Deducted and Other Group Premium Payment for Insurance Products	820	1000	1000A N4 - Premium Receiver's City, State, and ZIP Code
Action	**Modify Multiple Locations** Modified segment situational rule for clarity.
CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.

Location	X334	Payroll Deducted and Other Group Premium Payment for Insurance Products	820	1000	1000A N4 - Premium Receiver's City, State, and ZIP Code
Action	**Modify Data Element Usage** Modify the N402 element usage from Situational to Required to align with the 835.
CR 1228	The 835 and 820 should be consistent when appropriate.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 1300 | 1000A RDM - Premium Receiver's Remittance Delivery Method
Action	**Modify Segment Situational Rule** Loop ID 1000A RDM Modified segment situational rule for clarity.
CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.
Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 1300 | 1000A RDM - Premium Receiver's Remittance Delivery Method
Action	**Modify Segment Example** Loop ID 1000A RDM Modified segment example so that it does not violate the RDM03 situational rule.
CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.
Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 1300 | 1000A RDM - Premium Receiver's Remittance Delivery Method
Action	**Delete Data Element Code Value** Loop ID 1000A RDM01 Removed Code Value IA (Electronic Image).
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.
Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0700 | 1000B N1 - Premium Payer's Name
Action	**Modify Segment Example** Loop ID 1000B N1 Modified segment example so that it does not violate the N102 situational rule.
CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and

examples.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0700 | 1000B N1 - Premium Payer's Name
Action	**Modify Data Element Situational Rule** 1000B, N103 Revised situational rule for clarity.
CR 1477	Re-evaluate usage requirements in the 1000A and 1000B loops of the 820 TR3. This may be a situation when the 820 requirements should not align with the corresponding 835 requirements.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0700 | 1000B N1 - Premium Payer's Name
Action	**Modify Data Element Situational Rule** N103 Identification Code Qualifier - Update note to reflect relationship to N104.
CR 1478	Remove duplication of situational rules between the element and the code qualifier across the TR3.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0900 | 1000B N3 - Premium Payer's Address
Action	**Modify Multiple Locations** Modified segment situational rule for clarity.
CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 1000 | 1000B N4 - Premium Payer's City, State, ZIP Code
Action	**Modify Multiple Locations** Modified segment situational rule for clarity.
CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0700 | 1000C N1 - Intermediary Bank Information

Action	**Delete Loop** Loop ID 1000C Intermediary Bank Information Removed Loop ID 1000C (Intermediary Bank Information) from TR3 820 Payroll Deducted and Other Group Premium Payment for Insurance Products (007030X334).
CR 1667	Loop IDs are inconsistent with the standard, and some segment names are incorrect.

Location	X334	Payroll Deducted and Other Group Premium Payment for Insurance Products	820	0100	2000 ENT - Organization Level Detail
Action	**Modify Segment Name** Loop ID 2000 / ENT Segment Name From: Organization Summary Remittance To: Organization Level Detail
CR 1667	Loop IDs are inconsistent with the standard, and some segment names are incorrect.

Location	X334	Payroll Deducted and Other Group Premium Payment for Insurance Products	820	0100	2000 ENT - Organization Level Detail
Action	**Add Segment Note** Loop ID 2000 ENT Added segment note to indicate the segment is used to identify the sending organization.
CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.

Location	X334	Payroll Deducted and Other Group Premium Payment for Insurance Products	820	0100	2000 ENT - Organization Level Detail
Action	**Delete Data Element Code Note** Loop ID 2000 ENT02 Removed code note from code value 2L (Corporation).

CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0100 | 2000 ENT - Organization Level Detail
Action	**Modify Data Element Code Note** Loop ID 2000 ENT03 Modified code value 24 (Employer's Identification Number) for clarity.
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0800 | 2300 ADX - Organization Level Adjustment for Previous Payment
Action	**Modify Segment Name** Loop ID 2300 / ADX Segment Name From: Organization Summary Remittance Level Adjustment for Previous Payment To: Organization Level Adjustment for Previous Payment
CR 1667	Loop IDs are inconsistent with the standard, and some segment names are incorrect.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0800 | 2300 ADX - Organization Level Adjustment for Previous Payment
Action	**Modify Multiple Locations** Modified segment example to reflect an overpayment credit that results in a reduction in payment.
CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0800 | 2300 ADX - Organization Level Adjustment for Previous Payment

Action	**Add Data Element Code Note** Loop ID 2300 ADX02 Added code note to code value 52 (Credit for Overpayment).
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0800 | 2300 ADX - Organization Level Adjustment for Previous Payment
Action	**Modify Data Element Usage** Loop 2300, ADX segment Changed ADX03 from Not Used to Situational and added Situational Rule.
CR 489	Revise to allow for an identification number that further links to an adjustment from a prior month.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0800 | 2300 ADX - Organization Level Adjustment for Previous Payment
Action	**Add Data Element Code Value** Code value '1X' added to ADX03
CR 489	Revise to allow for an identification number that further links to an adjustment from a prior month.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0800 | 2300 ADX - Organization Level Adjustment for Previous Payment
Action	**Modify Data Element Usage** Loop 2300, ADX segment Changed ADX04 from Not Used to Situational and added situational rule.
CR 489	Revise to allow for an identification number that further links to an adjustment from a prior month.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0800 | 2300 ADX - Organization Level Adjustment for Previous Payment
Action	**Delete Data Element Code Value** Loop ID 2300 ADX02 Removed Code Value 80 (Overpayment).

CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.
Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0800 | 2300 ADX - Organization Level Adjustment for Previous Payment
Action	**Add Data Element Code Note** Loop ID 2300 ADX02 Added code note to code value WO (Overpayment Recovery).
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.
Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0800 | 2300 ADX - Organization Level Adjustment for Previous Payment
Action	**Delete Data Element Code Value** Loop ID 2300 ADX02 Removed Code Value WW (Overpayment Credit).
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.
Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 1500 | 2400 RMR - Organization Premium Detail
Action	**Modify Segment Name** Loop ID 2400 / RMR Segment Name From: Organization Summary Remittance Detail To: Organization Premium Detail
CR 1667	Loop IDs are inconsistent with the standard, and some segment names are incorrect.
Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 1500 | 2400 RMR - Organization Premium Detail

Action	**Modify Data Element Code Note** Loop ID 2400 RMR01 Modified code note 1L (Group or Policy Number) for clarity.
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 1500 | 2400 RMR - Organization Premium Detail
Action	**Add Data Element Code Note** Loop ID 2400 RMR03 Added code note to code value PA (Payment in Advance).
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 1500 | 2400 RMR - Organization Premium Detail
Action	**Add Data Element Code Note** Loop ID 2400 RMR03 Added code note to code value PO (Payment on Account).
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 1500 | 2400 RMR - Organization Premium Detail
Action	**Add Data Element Code Note** Loop ID 2400 RMR03 Added code note to code value PP (Partial Payment).
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 1700 | 2400 REF - Reference Information

Action	**Add Data Element Code Note** Loop ID 2400 REF01 Added code note to code value ZZ (Mutually Defined).
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 1800 | 2400 DTM - Organizational Coverage Period
Action	**Modify Segment Usage** Modify Loop ID 2400, DTM Segment (Organizational Coverage Period) From: Situational To: Required
CR 1605	The 820 receiver needs the start and end date of the organizational coverage period.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 1900 | 2410 IT1 - Line Item
Action	**Modify Segment Name** Loop ID 2410 / IT1 Segment Name From: Summary Line Item To: Line Item
CR 1667	Loop IDs are inconsistent with the standard, and some segment names are incorrect.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 2040 | 2413 SLN - Member Count
Action	**Modify Data Element Code Note** Loop ID 2413 SLN05-01 Modified code note 10 (Group) for clarity.
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code

usage.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 2100 | 2420 ADX - Organization Premium Adjustment for Current Payment
Action	**Modify Segment Name** Modify Loop ID 2420 / ADX Segment Name From: Organization Summary Remittance Level Adjustment for Current Payment To: Organization Premium Adjustment for Current Payment
CR 1667	Loop IDs are inconsistent with the standard, and some segment names are incorrect.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 2100 | 2420 ADX - Organization Premium Adjustment for Current Payment
Action	**Add Data Element Code Note** Loop ID 2420 ADX02 Added code note to code value 52 (Credit for Overpayment).
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5600 | 8000 INS - Member Level Detail
Action	**Modify Loop** Replaced the 2000B loop (Individual Remittance Detail) with the 8000 loop (Member Level Detail) to align the 820 and 834.
CR 1330	Member detail information should be consistent between the 834 and 820 transactions.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5600 | 8000 INS - Member Level Detail
Action	**Modify Data Element Code Note** on INS02 code 23 (Sponsored Dependent): From Dependents age 19 and older; qualifications may vary depending on policy.

	To
	Use when the dependent is age 26 or older; qualifications may vary depending on policy.
CR 1396	Revise the code value notes for consistency.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5600 | 8000 INS - Member Level Detail
Action	**Modify Data Element Situational Rule** on INS12: From Required if the subscriber/dependent is deceased. If not required by this implementation guide, do not send. This is the date of death for the subscriber/dependent and does not replace the use of the termination date within the 2300 loop. To Required when the Insured is known to be deceased. If not required by this implementation guide, do not send.
CR 1541	Review the situational rules to ensure consistent formatting and wording, as applicable.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5600 | 8000 INS - Member Level Detail
Action	**Modify Data Element Code Note** on INS08 code FT (Full-time): From Full time active employee To Use when the subscriber is a full-time active employee.
CR 1396	Revise the code value notes for consistency.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5600 | 8000 INS - Member Level Detail
Action	**Modify Data Element Code Note** on INS08 code PT (Part-time): From Part time Active Employee To Use when the subscriber is a part-time active employee.

CR 1396	Revise the code value notes for consistency.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5600 | 8000 INS - Member Level Detail
Action	**Modify Data Element Situational Rule** on INS09: From Required when describing a non-spouse dependent whose age requires a qualifying condition for enrollment (e.g., being an active student). See the Plan contract for details of the age requirements for student status usage. If not required by this implementation guide, do not send. To Required when describing a non-spouse dependent whose age requires a qualifying condition for enrollment (e.g., being an active student). If not required by this implementation guide, do not send.
CR 1541	Review the situational rules to ensure consistent formatting and wording, as applicable.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5620 | 8000 NM1 - Member Name
Action	**Modify Multiple Locations** NM104 Modified situational rule for clarity.
CR 1672	Some data elements need to be revised for consistency and to clarify the workgroup's intent, including the names, usage, situational rules, Implementation/Industry names and data element notes.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5620 | 8000 NM1 - Member Name
Action	**Modify Data Element Usage** Loop ID 8000 NM108 Modified from Situational to Not Used. SSN should not be sent and other identifiers are not needed to make premium payments.
CR 1672	Some data elements need to be revised for consistency and to clarify the workgroup's intent, including the names, usage, situational rules, Implementation/Industry names and data element notes.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5620 | 8000 NM1 - Member Name
Action	**Modify Data Element Usage** Loop ID 8000 NM109 Modified from Situational to Not Used. SSN should not be sent and other identifiers are not needed to make premium payments.
CR 1672	Some data elements need to be revised for consistency and to clarify the workgroup's intent, including the names, usage, situational rules, Implementation/Industry names and data element notes.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5640 | 8000 REF - Subscriber Identifier
Action	**Modify Segment** Renamed and moved NM1 segment from 2000B to 8000 to align with the standard, changed to required, and revised segment example.
CR 1330	Member detail information should be consistent between the 834 and 820 transactions.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5660 | 8000 DTP - Member Level Dates
Action	**Add Data Element Code Value** Loop ID 2000B / DTP01 (Date/Time Qualifier) AEC (Medicare Part A Coverage Effective Date) AEG (Medicare Part B Coverage Effective Date) AFC (Medicare Part D Coverage Effective Date) AED (Medicare Part A Coverage Termination Date) AEH (Medicare Part B Coverage Termination Date) AFD (Medicare Part D Coverage Termination Date)
CR 1492	Need the capability to associate specific member-level dates and coverages (such as Part A or Part D) for enrollment purposes.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5660 | 8000 DTP - Member Level Dates
Action	**Add Data Element Code Note** Loop ID 8000 / DTP01 (Date Time Qualifier) Code Value 338 (Medicare Begin)

	Use when reporting the effective date for Medicare Part C (Medicare Advantage).
CR 1492	Need the capability to associate specific member-level dates and coverages (such as Part A or Part D) for enrollment purposes.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5660 | 8000 DTP - Member Level Dates
Action	**Add Data Element Code Note** Loop ID 8000 / DTP01 (Date Time Qualifier) 339 - Medicare End Use when reporting the termination date for Medicare Part C (Medicare Advantage).
CR 1492	Need the capability to associate specific member-level dates and coverages (such as Part A or Part D) for enrollment purposes.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5700 | 8100 ADX - Member Level Adjustment for Previous Payment
Action	**Modify Loop** Deleted the NM1 segment and added the ADX segment to loop 2100B
CR 1330	Member detail information should be consistent between the 834 and 820 transactions.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5700 | 8100 ADX - Member Level Adjustment for Previous Payment
Action	**Modify Segment Name** Loop ID 8100 / ADX Segment Name From: Individual Premium Adjustment for Previous Payment To: Member Level Adjustment for Previous Payment
CR 1667	Loop IDs are inconsistent with the standard, and some segment names are incorrect.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5700 | 8100 ADX - Member Level Adjustment for Previous Payment

Action	**Modify Multiple Locations**
	Modified segment example to reflect an overpayment credit that results in a reduction in payment.
CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5700 | 8100
	ADX - Member Level Adjustment for Previous Payment
Action	**Add Data Element Code Note**
	Loop ID 8100 ADX02
	Added code note to code value 52 (Credit for Overpayment).
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5700 | 8100
	ADX - Member Level Adjustment for Previous Payment
Action	**Modify Data Element Usage**
	Changed ADX03 from Not Used to Situational.
CR 489	Revise to allow for an identification number that further links to an adjustment from a prior month.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5700 | 8100
	ADX - Member Level Adjustment for Previous Payment
Action	**Modify Data Element Usage**
	Changed ADX04 from Not Used to Situational
CR 489	Revise to allow for an identification number that further links to an adjustment from a prior month.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5700 | 8100
	ADX - Member Level Adjustment for Previous Payment
Action	**Add Data Element Code Note**
	Loop ID 8100 ADX02
	Added code note to code value WO (Overpayment Recovery).
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code

usage.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5800 | 8200 HD - Health Coverage
Action	**Modify Loop** Moved ADX segment and added HD,DTP and REF segments to this loop.
CR 1330	Member detail information should be consistent between the 834 and 820 transactions.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5800 | 8200 HD - Health Coverage
Action	**Modify Segment Situational Rule** Loop ID 8200 Health Coverage Loop added to align the 820 with information reported in the 834.
CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5800 | 8200 HD - Health Coverage
Action	**Modify Segment Situational Rule** Loop ID 8300 Reporting Category Loop added to align the 820 with information reported in the 834.
CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5800 | 8200 HD - Health Coverage
Action	**Add Data Element Code Value** CDV (Combined Dental and Vision) to HD03 (Insurance Line Code).
CR 1453	An additional code is required in HD03 for ancillary products that do not required the same level of member identification as other health care products.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5800 | 8200 HD - Health Coverage

Action	**Add Data Element Code Value**
	COM (Combined insurance lines other than dental and vision) to HD03 (Insurance Line Code).
CR 1453	An additional code is required in HD03 for ancillary products that do not required the same level of member identification as other health care products.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5800 | 8200
	HD - Health Coverage
Action	**Add Data Element Code Note**
	HD03 Code Value COM (Combined insurance lines other than dental and vision)
	Use when identifying combined insurance lines other than dental and vision that are not QHP Products under Exchange business.
CR 1453	An additional code is required in HD03 for ancillary products that do not required the same level of member identification as other health care products.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5800 | 8200
	HD - Health Coverage
Action	**Modify Data Element Code Note**
	Loop ID 8200 HD01
	Modified code value 032 (Employee Information Not Applicable) for clarity.
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5850 | 8200
	DTP - Health Coverage Dates
Action	**Modify Segment Situational Rule**
	Change the Situational Rule at Loop ID 2200B (Health Coverage), DTP Segment (Health Coverage Dates)
	To (Unique Note Number 351752):
	Required when the information in this segment is being sent as a result of a premium payment and is needed to match the 834 enrollment information to the premium payment information, or when required by trading partner agreement. If not required by this implementation guide, do not send.

| CR 1606 | Review to ensure situational rules are shared, consistent, or similar, as appropriate. |

| Location | X334 \| Payroll Deducted and Other Group Premium Payment for Insurance Products \| 820 \| 5850 \| 8200
DTP - Health Coverage Dates |
| Action | **Modify Data Element Code Note**
on DTP01 code 695 (Previous Period):
From
This value is only to be used when reporting Previous Coverage Months.

To
Use when DTP01 is equal to 695 - Previous Period. |

| CR 1396 | Revise the code value notes for consistency. |

| Location | X334 \| Payroll Deducted and Other Group Premium Payment for Insurance Products \| 820 \| 5850 \| 8200
DTP - Health Coverage Dates |
| Action | **Modify Data Element Code Note**
Loop ID 8200 DTP01

Modified code value 695 (Previous Period) for clarity. |

| CR 1670 | Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage. |

| Location | X334 \| Payroll Deducted and Other Group Premium Payment for Insurance Products \| 820 \| 5870 \| 8200
REF - Health Coverage Numbers |
| Action | **Modify Multiple Locations**
REF Segment

Modified segment name to accurately reflect the business need. |

| CR 1671 | Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples. |

| Location | X334 \| Payroll Deducted and Other Group Premium Payment for Insurance Products \| 820 \| 5870 \| 8200
REF - Health Coverage Numbers |
| Action | **Modify Data Element Industry Name**
Loop ID 8200 REF02

Modified industry name for clarity. |

CR 1672	Some data elements need to be revised for consistency and to clarify the workgroup's intent, including the names, usage, situational rules, Implementation/Industry names and data element notes.
Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5870 | 8200 REF - Health Coverage Numbers
Action	**Modify Data Element Code Note** Loop ID 8200 REF01 Modified code note 1L (Group or Policy Number) for clarity.
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.
Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5900 | 8210 RMR - Member Premium Detail
Action	**Add Loop** Added loop with segments RMR, REF, and DTM.
CR 1330	Member detail information should be consistent between the 834 and 820 transactions.
Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5900 | 8210 RMR - Member Premium Detail
Action	**Modify Segment Name** Loop ID 8210 / RMR Segment Name From: Individual Premium Remittance Detail To: Member Premium Detail
CR 1667	Loop IDs are inconsistent with the standard, and some segment names are incorrect.
Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5900 | 8210 RMR - Member Premium Detail
Action	**Modify Segment Example** Loop ID 8210 RMR Modified segment example with a more relevant qualifier in RMR01.

CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5900 | 8210 RMR - Member Premium Detail
Action	**Modify Data Element Code Note** Loop ID 8210 RMR01 Modified code note AZ (Health Insurance Policy Number) for clarity.
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5900 | 8210 RMR - Member Premium Detail
Action	**Modify Data Element Code Note** Loop ID 8210 RMR01 Modified code note IK (Invoice Number) for clarity.
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5950 | 8210 REF - Reference Information
Action	**Modify Data Element Industry Name** Loop ID 8210 REF02 Modified industry name for clarity.
CR 1672	Some data elements need to be revised for consistency and to clarify the workgroup's intent, including the names, usage, situational rules, Implementation/Industry names and data element notes.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5950 | 8210 REF - Reference Information
Action	**Add Data Element Code Note** Loop ID 8210 REF01 Added code note to code value ZZ (Mutually Defined).

CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.
Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5970 | 8210 DTM - Individual Coverage Period
Action	**Modify Segment Usage** Modify DTM Individual Coverage Period From: Situational To: Required
CR 1605	The 820 receiver needs the start and end date of the organizational coverage period.
Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5970 | 8210 DTM - Individual Coverage Period
Action	**Modify Segment Note** Loop ID 8210 DTM Modified Note 1 to reference the correct loop number.
CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.
Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5980 | 8211 ADX - Member Premium Adjustment for Current Payment
Action	**Add Loop** Added loop 2215B with segment ADX
CR 1330	Member detail information should be consistent between the 834 and 820 transactions.
Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5980 | 8211 ADX - Member Premium Adjustment for Current Payment
Action	**Modify Segment Name** Loop ID 8211 / ADX Segment Name From: Individual Premium Adjustment for Current Payment

To:

Member Premium Adjustment for Current Payment

CR 1667	Loop IDs are inconsistent with the standard, and some segment names are incorrect.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5980 | 8211 ADX - Member Premium Adjustment for Current Payment
Action	**Modify Multiple Locations** Modified segment example to reflect an overpayment credit that results in a reduction in payment.
CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5980 | 8211 ADX - Member Premium Adjustment for Current Payment
Action	**Modify Segment Example** Loop ID 8211 ADX Modified segment example to reflect a reduction in payment.
CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5980 | 8211 ADX - Member Premium Adjustment for Current Payment
Action	**Modify Data Element Code Note** Loop ID 8211 ADX02 Modified code value AX (Person No Longer Employed) for clarity.
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 5980 | 8211 ADX - Member Premium Adjustment for Current Payment
Action	**Add Data Element Code Note** Loop ID 8211 ADX02

Added code note to code value 52 (Credit for Overpayment).

CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 6000 | 8300 N1 - Reporting Category
Action	**Modify Loop** Deleted RMR, REF and DTM segments from 2300B loop and added N1, REF and new DTM segments to the 2300B loop.
CR 1330	Member detail information should be consistent between the 834 and 820 transactions.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 6000 | 8300 N1 - Reporting Category
Action	**Modify Loop Repeat** Loop ID 8300 Modified loop repeat to '1' as there is only one qualifying code within the first segment that starts the loop.
CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 6000 | 8300 N1 - Reporting Category
Action	**Modify Segment Situational Rule** Loop ID 8200 Health Coverage Loop added to align the 820 with information reported in the 834.
CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 6000 | 8300 N1 - Reporting Category
Action	**Modify Segment Situational Rule** Loop ID 8300 Reporting Category

Loop added to align the 820 with information reported in the 834.

CR 1671	Some segments need to be revised for consistency and to clarify the workgroup's intent, including the usage, situational rules, TR3 Notes, and examples.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 6050 | 8300 REF - Reporting Category Reference
Action	**Add Data Element Code Note** Loop ID 8300 REF01 Added code note to code value ZZ (Mutually Defined).
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 6070 | 8300 DTM - Reporting Category Date
Action	**Modify Segment Situational Rule** Loop ID 2300B/DTM Segment Changed to "Required when specifying the reference identifier associated with the reporting category. If not required by this implementation guide, do not send"
CR 1541	Review the situational rules to ensure consistent formatting and wording, as applicable.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 6070 | 8300 DTM - Reporting Category Date
Action	**Modify Data Element Code Note** Loop ID 8300 DTM05 Modified code note RD8 (Range of Dates Expressed in Format CCYYMMDD-CCYYMMDD) for clarity.
CR 1670	Some codes are no longer needed while other codes need a code note. In addition, some code notes need to be revised in order to clarify the code usage.

Location	X334 | Payroll Deducted and Other Group Premium Payment for Insurance Products | 820 | 0100 SE - Transaction Set Trailer

Action	**Add Data Element Note**
	Transaction Set Trailer/SE02 Transaction Set Control Number
	The Transaction Set Control Numbers in ST02 and SE02 must be identical. The number is assigned by the originator and must be unique within a functional group (GS-GE). For example, start with the number 0001 and increment from there. The number also aids in error resolution research.
CR 999	Revise the ST02 notes across the TR3's to make them consistent.