Developing a Central Registry Edits Metafile

NAACCR Edits Work Group
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NOTE: This manual was prepared prior to required XML data transmission for NAACCR submission files and the accommodation of XML-related changes within edit processing. Anticipated changes may affect the properties of data fields and the layout structure within EditWriter 5, for both the standard NAACCR metafile and customized edit objects developed by central registries. An addendum to the manual will be released when information becomes available and any changes to EditWriter 5 procedures are developed.

DEVELOPING A CENTRAL REGISTRY METAFILE

Whenever a new Edits metafile is released, every central or state registry must determine its approach to integrating changes into its internal operations and instructions to reporting facilities. EditWriter 5 documentation distinguishes between major metafile changes, related to significant changes in the NAACCR Data Dictionary, and minor changes, or corrections to edit descriptions and/or logic from a prior major or minor metafile release.

Section I, METAFILE DOCUMENTATION, describes the documentation that is posted with a new metafile. This documentation is critical to the registry's review of the metafile and decision-making about bringing forward any customized or registry-specific edit objects from a previous metafile. (Edit objects, the components of the program, are identified by the tab headings on the main screen of EditWriter 5: Agencies, Edits, edit sets, fields, layouts, messages, tables.) Section II, MAJOR METAFILE VERSION, discusses and demonstrates with EditWriter 5 examples how to move the state metafile to a new major version of the standard metafile, including developing new customized edits. Section III, MINOR METAFILE VERSION, discusses updating a state metafile with minor changes. Section IV, METAFILE VERSION DOCUMENTATION, is a short reminder to label the new metafile with version number and date.

There is an extensive Help section in EditWriter 5 which contains much useful information about the program. "Navigator" in the Index references all the edit objects, and the "Forms" and "Filters" tabs in particular should be carefully reviewed before working extensively with the metafile. This document highlights some procedures in developing a state metafile; it supplements but does not replace the information in EditWriter 5 Help.
Navigator

All of the Metafile Constituent Objects of the open metafile are listed on the pages of the Navigator:

- Agencies List
- Edits List
- Edit Sets List
- Fields List
- Layouts List
- Messages List
- Tables List
- Edits

Edit Form

The Edit Form is a workspace where the user can build a set of rules to evaluate the contents of one or more Field objects. An Edit object may also be designed without reference to any Field objects.

The evaluation may include lookup up data in a Table object.

The Edit may display one or more Message objects. These Messages may indicate an error condition, or may warn that an unusual (although still legitimate) condition exists. A Message may also be purely informational.

The Edit Engine can run an Edit individually, or within an Edit Set. An Edit may be a member of one or several Edit Sets, or no Edit Set at all.

The Edit Form is made up of these sub-forms:

- Cross-References
- Description
I. METAFILE DOCUMENTATION

The metafiles are posted for downloading on the NAACCR website, [www.naaccr.org/standard-data-edits/](http://www.naaccr.org/standard-data-edits/). Posted along with any metafile are a change spreadsheet, detailing changes in the new metafile from the last posted metafile, and an edit set spreadsheet identifying edit sets and all included edits by standard setter: (National Program of Cancer Registries [NPCR], Commission on Cancer [CoC], Surveillance, Epidemiology, and End Results [SEER], and Canadian Council on Cancer Registries [CCCR]). An edit detail report is also posted on the NAACCR site, containing a description of each edit in the metafile; this is a lengthy report, pulled from all the edits in the metafile.

The change spreadsheet for a new major version of the metafile will detail any changes from the last posted metafile (usually a minor version of the metafile associated with the preceding version of the NAACCR Data Dictionary). The change spreadsheet for a new major version will document changes in edits, tables, and field names if an existing data item is renamed. The change spreadsheet for a new minor version will document changes in Edits, edit sets, fields, layout, some messages, and tables. The edit documentation will identify both new and deleted edits. The documentation on the change spreadsheet is generally not cumulative. For example, if there were five minor versions of the preceding metafile, the change spreadsheet for the new major version would only show changes from the fifth minor version to the new major version.

Changes for Edits and tables are also documented within the EditWriter5 software, and the documentation should match what is on change spreadsheets. Documentation is included in the Administrative Notes tab for Edits (excluding deleted edits), and in the Properties tab for tables. These
tabs in many cases will identify the first metafile version in which the edit or table was added, and will maintain a cumulative log of changes across metafiles. Changes for other edit objects, such as edit sets, fields, layouts, and messages, are not routinely documented within EditWriter5.

II. MAJOR METAFILE VERSION

The revision of the Edits metafile to a new major version begins with review of the NAACCR Data Dictionary and particularly the Required Status table, http://datadictionary.naaccr.org/?c=8. Practically, the central registry will be aware of pending changes to the Data Dictionary and will have decided on data items to require from reporting facilities before the final publication of the Required Status table. The NAACCR Record layout in the metafile replicates the item numbers and names in the Required Status table. The edit sets for the standard setters in the metafile are tied to the standard setter requirements in the Required Status table. Generally there will be an edit checking required values for each data item, an edit checking that the value is reported for each standard setter requiring the data item, and additional edits which compare reported values across related data items. The valid value and required status edits will most likely be included in the first version of a new metafile; edits across related data items may be included in the first or later versions of a new metafile.

When moving to a new major version of the metafile, the edit set spreadsheet should be reviewed to determine if a standard edit set will satisfy registry reporting requirements, or if a customized edit set will be necessary to edit all required data items. The edit detail report could be reviewed for specific information on each edit which the registry is considering; the same information is also available for inspection within the metafile itself.

In addition to reviewing any new edits which may have been added to a standard edit set, the registry should review the edit set spreadsheet for existing edits which may have been moved into or out of standard edit sets. If the registry has based a customized edit set on a standard edit set that has been revised, the registry must decide whether to remain in synch with the standard edit set in this regard. An edit may have been removed from an edit set because the standard setter no longer requires editing of an older data item, or has decided that an edit does not serve its desired purpose, or the edit can be replaced by a similar edit from another standard setter.

A registry may have developed, or customized, edits for its own use in the currently used version of the metafile. The registry must review these edits to determine if they should be kept; and if the edits are kept, the registry should also review the change spreadsheet for any suggestions for modifying the existing customized edits. For example, if new data items are linked to a diagnosis date, an existing edit may have an open-ended diagnosis date that needs to be closed if the data item is no longer required after a certain date.

The change spreadsheet should be reviewed for any edits which may have been deleted from the standard metafile. The registry should determine if there is a reason to keep any deleted edits, or customized edits based on deleted edits. The change spreadsheet should provide specific information about why an edit was deleted. Generally edits are deleted because they are replaced by other edits, or
because unresolvable problems have been identified in how the edits have been applied to registry data, or edits are in conflict with each other.

If a registry has missed or not implemented the first version of a new major version of the metafile before a subsequent version is released, the registry may go directly to the subsequent version without first implementing the initial version. As an example, the v18 metafile contained edits for multiple new fields and a significantly changed record layout, and problems with edits were identified shortly after release. Corrected minor versions of the metafile, v18A and v18B, were released within two months, and a v18C with additional edits for the subsequent year was released within another seven months. Each of these metafiles contains the full complement of edits available at the time of release, they are not supplemental, so a registry would be best served by starting with the current version of the metafile at the time when upgrading from the last major version number (v16E for the v18 example). As noted in Section I, the change spreadsheets are generally not cumulative, so the registry would have to review all change spreadsheets detailing changes from the existing metafile (for v18, v18A, v18B in the example) to the metafile being installed as the new major version (v18C in the example).

A. NO CHANGES TO METAFILE
After the registry has done the initial work of downloading the metafile and accompanying documents from the NAACCR website, identifying the data items to be collected and edited, and reviewing edit set contents, if the registry can use a standard edit set and has no customized edits to bring forward from the previous metafile, the metafile is ready for use.

B. CHANGES TO METAFILE
  1. Agency username and password.

An agency code is identified for all objects in the standard metafile, with perhaps a few exceptions. The agency code identifies the standard setter responsible for the edit object: CoC, NPCR, SEER, and CCCR. Any registry wishing to customize an edit metafile can either do so using the agency NONE available within the standard metafile, or by adding and defining its own agency with an agency username and password. Adding a custom agency and assigning it to other customized edit objects is not mandatory for developing a customized metafile; the registry can use all the functionality of EditWriter 5 operating as agency NONE.

However, adding a custom agency allows for easy identification of objects created or modified by the registry, distinguishing them from other objects in the standard metafile that may have agency NONE; it provides a control mechanism over who can modify a metafile within a registry; and it allows registries to potentially share metafiles or edit objects without changes being introduced into their own edit objects. If a registry is going to add an agency object to the metafile, with an agency code and password, it should assign the agency to all customized objects in the metafile that it creates or owns.

To add an agency, open the new metafile and click OK on the opening screen.
This will bring up a window, notifying:

Agency code "NONE" can create a new agency and also modify any objects with the agency assigned as NONE.

Add an agency and provide username and password:
After the agency is added, save the metafile with a new name reflecting the agency name and date metafile was created. After the metafile is saved, click on "File" on the top menu, select "Login", and enter the newly created username and password.

The agency will be able to copy existing objects in the metafile, assign them new names and agency, and modify those objects in future. Any agency can only modify existing objects in the metafile that have an agency code identified by "NONE" or the agency code used to login to the metafile. To modify or change any object in the metafile with another agency code, the user is required to copy the existing object, give it a new name (and a new tag for edits and edit sets), and save it in the metafile. For edits based closely on standard edits, it is probably most useful to use the standard edit name including the new agency within the name, for example: Addr at DX--City (COC), tag N0037, modified as Addr at DX—City (MYSTATE), tag MYS0001. (An identifying registry label can be added to the edit name, even if the agency is retained as NONE.) A customized edit may not have the exact same name as a standard edit.

2. Edit and Edit Set Tags

If the registry is going to add any customized edit sets or edits to a metafile, the registry must also add tags to these objects. The standard NAACCR tags are identified by "N" and currently include numbers from N0001 through N6130 for edits and NES0001 through NES0501 for edit sets. The registry should develop a system of numbering for its tags that will not run into NAACCR tag numbers. The fields are also numbered, 10 through 9981; these numbers are not prefaced with "N". The registry can add and number fields, but should stay away from NAACCR numbers, perhaps starting with a large value such as 20000. The registry can also add messages; the standard numbers are 252 through 9007. Again the registry should avoid NAACCR numbers, perhaps starting with a large value such as 50000, as the NAACCR numbers tend to increase rapidly.

3. Changes to Edit Sets

There are two standard edit sets for registries reporting to NPCR: Central: Vs18 NPCR Required - Consol-All Edits, intended for internal central registry use on consolidated records; and Central: Vs18 State Example - Incoming Abstracts, intended as a starting place for registries to develop their own customized edit sets. A registry could use this edit set as is, but also customize the edit set with additional edits, or changes to included edits. (The v18D metafile, though not a major revision, is used for examples in the following sections.) To add a new edit set, copy the existing edit set that is most like
the final version the registry wants to use. Rename the edit set, identify the agency for the edit set, and give it a new tag using a numbering system devised for the registry that distinguishes it from the tags used in the standard metafile.

The registry can identify potential edits for use through inspection of the edit set spreadsheet. For this example, note that the Site-Specific Data Items (SSDI) new in 2018, generally have two edits, one identified by "Date DX" (valid value edit, blank for pre-2018), and one identified by "Required" (field may not be blank 2018+). The NPCR edit sets generally include the "Date DX" edits but very few of the "Required" edits.
The registry has decided to add "HER2 IHC Summary, Schema ID, Required (NAACCR) to its edit set.

To add an edit, in this case an edit requiring the completion of a data item not included in the NPCR standard edit set, open the edit, and on the "Cross-References" tab click in the box next to the selected edit set, then click on "Save". In the "edit sets" screen, the edit set will be listed in red, showing that it has been modified, but it is not necessary to specifically open or save the edit set. This approach is very efficient for modifying edit sets, particularly if the registry wants to add the same edit to multiple edit sets.
An alternative way is to open the edit set, click on the edit in the left-hand section of the screen, "Available edits in this metafile", click on the right-pointing arrow to move the edit to the right-hand section of the screen, "Edits in this edit set", and click on "Save". This method may be more efficient if a lot of edits are being added to one or two edit sets.
This change, by either method, has added a standard edit to a customized edit set.

NOTE: If a registry has created multiple edit sets within a single metafile, the edit sets to be used for editing any data file must be specified by the calling program outside the metafile itself. GenEdits Plus, a stand-alone program developed by and available from NPCR, which applies an edit metafile to a data file, allows the selection of multiple edit sets for a single processing run. Other central registry systems which integrate editing with processing incoming data files must specify the edit sets to be used.

4. Changes to Edits

The registry may also customize existing edits. This metafile includes some edits new in 2019 for data items new in 2018; the registry has decided to apply the edits to 2018 diagnosis date as well. The registry can use the Edits Filter option to identify edits applicable to 2019 diagnosis date.

Brain Molecular Markers is an SSDI required by NPCR, and there is a standard edit, Brain Molecular Markers, Summary Stage 2018 (NAACCR) in the NPCR edit set. This edit checks for consistency between Brain Molecular Markers and Summary Stage 2018, but for diagnoses starting in 2019. The registry for this example has decided to start this edit with 2018 diagnoses.
The edit needs to be copied, assigned a new name, new edit tag, and new agency.
Then both the description and edit logic should be updated to reflect 2018 rather than 2019, the edit tested to verify that it is applied to a 2018 diagnosis date, and the Administrative Note updated.
Appropriate standard error messages can be used for customized edits, either newly written or based on an existing edit. The agency on an error message is not required to match the agency on the edit. However, if an appropriate standard error message is not located, an error message can be added, with the agency identified as either NONE or the registry agency code. If an error message is added, it should be given a number starting with a high value, perhaps 50000, to avoid potential conflict with the almost 10000 message numbers in the standard metafile.

Any customized edit should be moved into the desired edit set, and any standard edit being replaced should be moved out of the edit set.

5. Changes to Fields

The registry may decide to add new fields for non-standard data items that it wishes to collect from reporting facilities. For an example, the registry has decided to collect chemotherapy information in two custom fields. A ChemReg1 field, field number 20000, field length 3, and Chem Reg2 field, field number 20001, field length 3 are added. Note that if custom data fields are added to the metafile, a custom layout must also be created; the new data fields, and any edits using them, will not be available in the standard NAACCR metafile.
6. Changes to Layout

When the registry creates custom fields, with accompanying edits, the registry must also create a custom layout to access these fields for editing. The registry may create an entirely new layout with a limited number of standard and/or custom data fields, for a special project for example; or the registry may copy the standard NAACCR layout, give it a new name and agency code, and add custom fields to that layout.

NOTE: With either approach, an entirely new layout or a modified layout based on the NAACCR layout, the registry must inform the data reporters about the positions of the fields within the report layout. The reporters must match the positions of their data items to the designated positions within the layout for edits to be correctly applied.

To create a special purpose layout with a limited number of data fields, click on "layouts" tab at the bottom of the main screen, then "layouts" on the top menu, and "Add". The layout screen will open with all the available data fields in the data dictionary on the left, and a blank screen on the right. Select the data fields to be collected and edited for the special project, and click on the right-pointing arrow to move each desired field into the layout. Click on the up- and down-pointing arrows to move the fields into the desired position within the layout.

The next screen shows an example of a new special-purpose layout for collecting chemotherapy information using a combination of standard NAACCR data items and the two ChemReg fields added to the customized registry metafile.
If the registry is adding fields to the standard NAACCR layout, rather than creating a special purpose layout, the registry must first copy the NAACCR layout, rename it, and assign a new agency code.
Custom fields for central registries are generally placed in the State/Requestor area of the copied and renamed NAACCR layout, which occupies 1000 characters. The custom fields could either be added as a replacement for the State/Requestor field, or added to the State/Requestor field as an overlay block.

If the custom fields are added as a replacement for the State/Requestor area, the total length of all the new fields must sum to 1000 (custom field lengths plus "filler" field length). The first custom field would start at the same position as the State/Requestor data item, but that item would be moved out of the layout. ChemoReg1, 3 character lengths, and ChemoReg2, 3 character lengths, have already been created for the MYSTATE metafile. A MYSTATERequestor filler field of 994 characters is required to fill out the 1000 characters (3+3+994).
The StateRequester Items at position 3049 is moved to the left, and the three new items are moved into its place in the new layout as shown.
If the custom fields are added as an overlay block, a "filler" field to complete the 1000 characters is not required. For the overlay block, the State/Requestor field remains in the layout and the first custom field starts at the same position in the layout. See an example of an overlay block from the NAACCR v18 layout. The "NPCR Specific field" at position 1647 starts the block, which is 75 characters long. The first specific field in the block, "EDP MDE link", starts at the same position, 1647, and is only 1 character in length. The total length of the fields in the block is 19 characters, but the 75 characters assigned to the overlay determines the location of the first field after the block at position 1722 (1647 + 75 = 1722).

Right-clicking on any field in the layout brings up the overlay block menu.
Overlay blocks can be challenging to work with. Consulting EditWriter 5 Help particularly for this topic is well advised.

NOTE: If a registry has created multiple layouts within a single metafile, the layout to be used for editing any data file must be specified by the calling program outside the metafile itself. GenEdits Plus will
identify layouts within the metafile; select the layout if there is only one; or provide a selection option if more than one layout is identified. Other central registry systems which integrate editing with processing incoming data files must specify the layout or layouts to be used.

C. BRINGING FORWARD CHANGES FROM PREVIOUS METAFILE
If the registry has customized objects in the metafile currently in use and wishes to retain them, for a change to a major version of the metafile, the current customized objects should be imported into the new metafile. The Help section in EditWriter 5 provides detailed information about importing when changing to a major version of the metafile:

The import order of objects is discussed in this section, and highly recommended: agencies; then fields, messages, and tables; then edits; and finally edit sets and layouts.
For a major change, it is probably easier to update edit sets in the new metafile with imported customized Edits, rather than to import the edit sets and add the new Edits to the existing edit sets. It is also best to create a new custom layout in the new metafile with imported fields, rather than to import the layout and add fields from the new metafile into the old layout. The new layout may have changed significantly, depending on the changes in data items reflected in the NAACCR Data Dictionary.

2. Username and password

If the registry identifies its customized edit objects with an agency code other than NONE, before the import process is begun, the registry should determine that it has the username and password for the existing metafile. The username and password for the metafile will be brought forward with the agency object. If the registry does not have the existing password, a new agency may be created in the new downloaded metafile using the same code as in the existing metafile, a new password generated (as described in B.1. above), the metafile saved with a new name for the registry, and then the new metafile logged in with the recreated username and password.

If the registry goes through the import process and then discovers that the password is lost or does not work, the registry can delete the agency, which will cause all the assigned codes for that agency to be converted to NONE. The registry can then recreate the agency with a new code and password, save and close the metafile, and reenter the metafile with the new agency code and password. At this point all the edit objects that were previously assigned the agency code will show the agency as NONE. Each of these objects can now be updated with the recreated agency code. See the following under "Lost passwords" in EditWriter 5 Help for a description of this process.
III. MINOR METAFILE VERSION

Minor versions of a metafile are generally released to correct problems discovered when the metafile is put into use and applied to thousands of cancer records. Errors may be found in edit logic, interpretations of new coding and staging rules may not have been foreseen when edits were written, standard setters may not have determined all their requirements by the initial release. As discussed above, a central registry may move directly into the most current minor version of a metafile from the previous major version, treating it as a major version (for example, moving from NAACCR version 16E to NAACCR version 18C without moving to NAACCR version 18 and then updating to 18A and 18B).

However, if a registry has already made the update to a new major version and a minor version is subsequently released, the registry should update to the minor version. The Help section in EditWriter 5 also discusses importing between metafiles when the change is to a minor version:
As discussed in the Help section, depending on the extent of changes and the amount of customization that has been done on the metafile in use, particularly in edit sets and record layout, it may be most efficient to import from the changed (new, minor) version of the metafile into the existing metafile. Review of the documented changes in the change spreadsheet for the new metafile is critical with the minor version update, as changes may have been made to a standard edit that was copied and customized for the registry use. Any changes to the standard edits should be carefully reviewed, to determine if similar changes should be made to the customized edits.

The changed objects are identified in the import process and could be accepted as a group, or the changes between the import (new) object and the existing (target) object could be reviewed one by one through the Diff function available in the import tool.
IV. METAFILE VERSION DOCUMENTATION.
The last metafile task before implementation in central registry software or distribution to reporting facilities is to update information about the metafile within EditWriter 5. Within the Tools menu, there is a feature for Metafile Version and Comment. Updating this information with metafile name and date and relation to NAACCR metafile will facilitate communication among reporting facilities, the central registry, vendors, and edits staff who respond to queries and concerns about edit content and/or results.