



# FY 2023 Public Libraries Survey

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## PLS Web Portal User's Guide

Guide for Using the PLS Web Portal to Report FY 2023 Data

December 2023

Institute of Museum and Library Services

American Institutes for Research

# Contents

<b>1 Introduction.....</b>	<b>4</b>
1.1 Background of the Public Libraries Survey.....	4
1.2 Reporting Data: Administrative Entities and Outlets.....	5
1.3 PLS Web Portal Revisions.....	5
1.4 Data Element Changes.....	6
1.4.1 Revised Data Elements.....	6
1.4.2 Deleted Data Elements.....	6
1.4.3 Added Data Elements.....	6
<b>2 Getting Started.....</b>	<b>7</b>
2.1 Login.....	8
2.2 PLS Web Portal.....	10
2.2.1 Home.....	10
2.2.2 Survey Status.....	12
2.3 Web Instructions.....	13
2.4 Other Helpful Tools.....	15
2.4.1 Export Data.....	15
2.4.2 Tables.....	16
2.4.3 Help Menu Options.....	17
2.5 External Links.....	19
<b>3 Import.....</b>	<b>20</b>
3.1 Overview.....	20
3.2 Upload and Import Data Files.....	20
3.3 Uploading Annotation Files.....	22
3.4 Preparing Administrative Entity and Outlet Import Files.....	23
<b>4 User Options, Input Data, and Structure Changes.....</b>	<b>25</b>
4.1 User Options.....	25
4.1.1 Sort Order for Administrative Entities or Outlets in Input Data.....	26
4.1.2 Sort Order for Edit Report by Edit Number.....	26
4.1.3 Auto Save Data in Input Data.....	26

4.2 Input Data Through PLS Web Portal .....	26
4.2.1 State Characteristics .....	26
4.2.2 Administrative Entity .....	27
4.2.3 Outlets.....	27
4.3 Structure Changes .....	27
<b>5 Match Report.....</b>	<b>30</b>
5.1 Match Report Results.....	30
5.2 Resolving Unsuccessful Records .....	33
<b>6 Edit Report .....</b>	<b>35</b>
6.1 Edit Messages and Conditions .....	35
6.1.1 Critical Edits.....	35
6.1.2 Noncritical and Internal Edits.....	36
6.2 Annotations.....	36
<b>7 Lock Data.....</b>	<b>38</b>
7.1 Estimate of Burden .....	38
<b>8 Chief Officer Certification .....</b>	<b>40</b>
8.1 Chief Officer Web Instructions.....	40
<b>Appendix A1 Survey Instrument: Data Entry Screens.....</b>	<b>42</b>
<b>Appendix A2 Survey Instrument: Data Element Definitions .....</b>	<b>54</b>
<b>Appendix B Name, Address, and Structure Changes.....</b>	<b>93</b>
<b>Appendix C Resolving the Match Report.....</b>	<b>121</b>
<b>Appendix D Import File Specifications.....</b>	<b>145</b>
<b>Appendix E PLS Contacts .....</b>	<b>154</b>
<b>Appendix F Francis Keppel Award Criteria .....</b>	<b>155</b>
<b>Appendix G Standard Abbreviations.....</b>	<b>158</b>
<b>Appendix H Summed Data Elements .....</b>	<b>159</b>

## 1 Introduction

### 1.1 Background of the Public Libraries Survey

The Institute of Museum and Library Services (IMLS) has administered the Public Libraries Survey (PLS) since October 1, 2007. From its inception in 1989 until 2007, the survey was administered by the National Center for Education Statistics (NCES). PLS data are collected under the Museum and Library Services Act of 2018, as stated in 20 U.S.C. sec. 9108, which authorizes IMLS's director to conduct policy research, data collection, analysis and modeling, evaluation, and dissemination activities. Current, accurate, and ongoing collection of library data is an essential foundation for quality library services in the United States, and IMLS is committed to the continued excellence of this program.

The PLS first began to take shape in 1985, when NCES and the American Library Association conducted a pilot project in 15 states to assess the feasibility of a federal–state cooperative program for collecting public library data. NCES and the U.S. Department of Education's former Library Programs office jointly funded this project. In 1987, the project's final report recommended the development of a nationwide data collection system. The Hawkins-Stafford Elementary and Secondary School Improvement Amendments of 1988 (P.L. 100–297)<sup>1</sup> charged NCES with developing a voluntary federal–state cooperative system (FSCS) for the annual collection of public library data. NCES and the U.S. National Commission on Libraries and Information Science (NCLIS) formed a task force to carry out this mandate, establishing the FSCS in 1988.

The 1988 NCES–NCLIS task force evolved into the FSCS Steering Committee, a group that was integral to the design and conduct of the survey in its early stages. Its membership has included State Data Coordinators (SDCs), representatives of the Chief Officers of State Library Agencies, NCLIS, the American Library Association, IMLS, the U.S. Census Bureau (the former data collection agent), and NCES. With the transition of the collection from NCES to IMLS, the steering committee was renamed the Public Library Statistics Cooperative. Effective December 2008, this committee became part of the new Library Statistics Working Group (LSWG).

SDCs, appointed by Chief Officers of state library administrative agencies, submit data for the annual PLS for a universe of approximately 9,200 public libraries with about 17,400 individual public library outlets in the 50 states, the District of Columbia, and the outlying territories. IMLS releases the collection results in annual data files, which constitute the only national database on public libraries, as well as state-level statistics and other analyses based on the survey. Public officials at the federal, state, and local levels, professional associations, researchers, educators, local practitioners, and other interested parties use these data for planning, research, evaluation, and policymaking decisions.

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<sup>1</sup> This law was superseded by the National Education Statistics Act of 1994 (P.L. 103–382) and, more recently, by the Education Sciences Reform Act of 2002.

## 1.2 Reporting Data: Administrative Entities and Outlets

The PLS collects data on administrative entities and outlets.

The administrative entity (AE) is the legally established agency that provides library services to the population of a local jurisdiction. An AE must operate one or more direct public library service outlets. The AE's offices may be within one of the outlets (e.g., a single-outlet central library or a branch of a decentralized multi-outlet operation) or in separate quarters (e.g., an office adjacent to an independent bookmobile's garage). The data reported for each AE are the combined data for all its outlets. (See Appendix A2 to review the AE data elements included in the PLS.)

An outlet is a unit (i.e., central, branch, bookmobile, books-by-mail only) of an AE that provides direct public library services. A single-outlet central library should not be confused with the AE to which it belongs. Some data are reported for each outlet of an AE, such as the outlet's name, address, telephone number, type of outlet, and square footage. (See Appendix A2 to review the outlet data elements included in the PLS.)

## 1.3 PLS Web Portal Revisions

The fiscal year (FY) 2023 PLS Web Portal has retained structural revisions from FY 2022, in addition to implementing the functionality changes described below and the data element changes described in Section 1.4.

STATSTRUs 22 (Future AE/Outlet FSCS ID Request) and 23 (Temporary Closure) will be maintained on the data files until changed by an SDC. The change in behavior for these STATSTRUs is

1. Meant to allow SDCs to request FSCS IDs sooner for planned libraries and maintain the STATSTRU 22 for more than one year should funding issues or construction delays occur; and
2. Keep temporarily closed libraries on the data file as a counted part of the PLS universe. Recent temporary closures have lasted several years due to damage by natural disasters, but the library may still be providing some services as able.

How STATSTRUs 22 are initially added has not changed. They must be added to the data file for the first time using -3 for the FSCSKEY and/or FSCS\_SEQ. A successful Match Report must be received before the FSCSKEY and/or FSCS\_SEQ will be assigned. The following year, the library added with a STATSTRU 22 will maintain the 22 structure code until updated to STATSTRU 00 by the SDC.

For STATSTRU 23, the FSCSKEY and/or FSCS\_SEQ will be kept on the data file. The FSCSKEY and/or FSCS\_SEQ will no longer be set to -3 and the OLDID field will not require the entry of the FSCSKEY and/or FSCS\_SEQ. The following year, the library with a STATSTRU 23 will maintain the 23 structure code until updated to another STATSTRU (either 00 [No Change] or 03 [Permanent Closure]) by the SDC.

Please see Appendix B for more details on how these changes have affected the implementation of STATSTRUs 22 and 23.

## **1.4 Data Element Changes**

This section outlines changes to data elements for the FY 2023 data collection. For full details, please see the Import Specification File and the Change Memo available in the SDC Discussion Forum and under the Help menu of the PLS Web Portal.

### **1.4.1 Revised Data Elements**

No revisions were made to any of the FY 2023 PLS data element definitions.

### **1.4.2 Deleted Data Elements**

As of FY 2023, the PLS data collection no longer includes the following 10 data elements:

- Data Element 510, Closed Outlets Due to COVID-19 (C19CLOSE)
- Data Element 511, Public Services During COVID-19 (C19PUBSV)
- Data Element 514, Electronic Library Cards Issued During COVID-19 (C19ECD2)
- Data Element 515, Reference Service During COVID-19 (C19REFER)
- Data Element 516, Outside Service During COVID-19 (C19OUTSD)
- Data Element 520, External WiFi Access Added During COVID-19 (C19XWIF2)
- Data Element 521, External WiFi Access Increased During COVID-19 (C19XWIF3)
- Data Element 522, Staff Re-Assigned During COVID-19 (C19STOTH)
- Data Element 715, Number of Weeks an Outlet Closed Due to COVID-19 (C19WKSCL)
- Data Element 716, Number of Weeks an Outlet Had Limited Occupancy Due to COVID-19 (C19WKSLO)

### **1.4.3 Added Data Elements**

There are no new data elements for the FY 2023 data collection.

## 2 Getting Started

The data collection process begins when you first receive an e-mail from the American Institutes for Research (AIR). For new SDCs, this e-mail will include your login credentials (username and directions to create your password). If you are a returning SDC, the e-mail will only include a link to the PLS Web Portal because your login credentials are the same as they were for the FY 2022 PLS collection. If you do not remember your password or wish to reset it, select the Forgot Password button on the login page and follow the on-screen instructions.

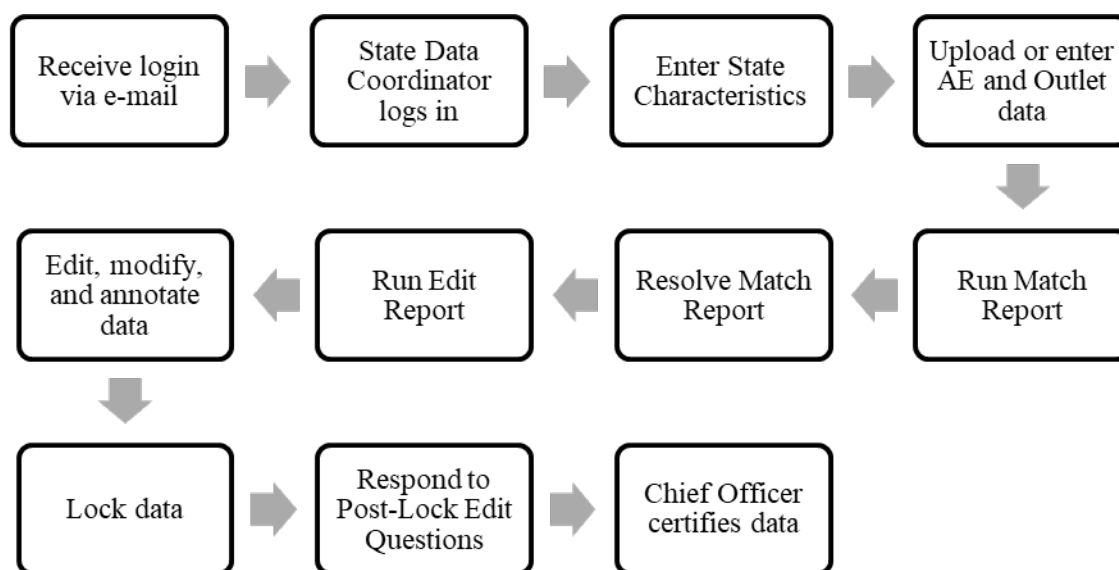
After you log in to the PLS Web Portal (<https://submitpls.imls.gov>), you must enter your State Characteristics data. **After you enter your State Characteristics data, the PLS Web Portal will use your FY 2022 data to prepopulate the current-year (FY 2023) data in the AE and outlet sections of the portal.** If you have minimal changes between the FY 2022 and FY 2023 collections, the prepopulation will help in updating your data. Please import or input your FY 2023 AE and outlet data to continue.

Different areas of the PLS Web Portal will become available to you as you progress through the collection process. After you input all data, perform a successful Match Report, and complete an Edit Report (i.e., no critical edits remain and all noncritical and internal edits have been annotated), you can lock your data. Your submission is complete when you lock your data. For detailed instructions on these steps, see Section 2.3.

**NOTE: You must enter data on the State Characteristics page before you can access the Import Data or Input Data features.**

Exhibit 2.1 shows the process for collecting the PLS data.

**Exhibit 2.1. PLS Data Collection Process**



## 2.1 Login

To access the PLS Web Portal, you will need a username and password. **Your username will be your e-mail address.** On the day the portal opens, you will receive login instructions via e-mail. If you have any trouble logging in to the portal, please reach out to [PLS@air.org](mailto:PLS@air.org) or 1-866-744-5746 on Monday through Friday, 9 a.m. to 5 p.m. Eastern Time.

The URL for logging in to the PLS Web Portal is <https://submitpls.imls.gov>. See Exhibit 2.2 for a screenshot of the PLS Web Portal login page.

If you have forgotten your password, click **Forgot Password** on the login page or go directly to <https://submitpls.imls.gov/Account/ForgotPassword>. On the **Forgot Password** page, enter your username (e-mail address) and click **Submit**. This action will automatically send you an e-mail with a temporary link to reset your password. The process will be the same as when you created your initial password.


**NOTE: Your password must contain at least eight characters, including one lowercase letter, one uppercase letter, one digit, and one special character. Valid special characters are @ ! # \$ % ^ & + =**

Use the following space to write your username and password:

Username (e-mail address):	
Password:	



**Exhibit 2.2 PLS Web Portal Login Page**



INSTITUTE of  
**Museum and Library**  
SERVICES

Public Libraries Survey Web Portal  
Fiscal Year

OMB No.  
Expires

Log in

## Welcome To The Public Libraries Survey

The Public Libraries Survey (PLS) provides statistics on the status of public libraries in the United States. These statistics include library visits, circulation, size of collections, public services hours, staffing, electronic resources, operating revenue and expenditures and number of service outlets. The Web-based Public Libraries Survey Web Portal (PLS Web Portal) is used to collect this data.

These data collected are useful to researchers, journalists, the public, and policymakers at the federal, state, and local levels. These data are used by federal, state and local officials, professional associations, and local practitioners for planning, evaluation, and policy making.

### MEET THE INSTITUTE OF MUSEUM AND LIBRARY SERVICES

The Institute of Museum and Library Services (IMLS) is the primary source of federal support for the nation's libraries and museums. Their mission is to inspire libraries and museums to advance innovation, lifelong learning, and cultural and civic engagement.

*This website is best supported in modern browsers. If you have an older version, please upgrade.*


### Login

Enter Username:

Enter Password:

SUBMIT

Forgot Password >



INSTITUTE of  
**Museum and Library**  
SERVICES

### Help Desk

Email: [PLS@air.org](mailto:PLS@air.org)  
Call: 1-866-744-5746  
9:00 am to 5:00 pm EST (Mon-Fri)

INSTITUTIONAL BURDEN STATEMENT | SDC DIRECTORY

## 2.2 PLS Web Portal


The first time you successfully enter the PLS Web Portal (<https://submitpls.imls.gov>), you will see step-by-step instructions for entering your data, which are the same as the Web Instructions in Section 2.3. You can access these instructions again, at any time, from the portal's Help menu at the top right of the page.

### 2.2.1 Home

The Home page (Exhibit 2.3) is the first page you will go to after you log in and after you close out the Web Instructions on your first login. This is a landing page where you can quickly view your survey status, access important documents, and view any important correspondence. This page includes the following tools and resources:

- **Survey Information:** This table provides an update of the status and next processing steps for your survey and is an abbreviated version of the Survey Status table (Exhibit 2.4). You can view the full table by clicking **Survey Status** in the dark green navigation bar at the top of the page.
- **Import a New File:** This link takes you directly to the Import Data page so that you can import additional files. You also can access Import Data from the Tools drop-down menu in the dark green navigation bar.
- **Helpful Links:** This section provides easy access to documents that will be useful during data collection, including the Web Instructions (see Section 2.3), this User's Guide, and the Match and Edit Report Terminology reference guide. These links will open in separate browser windows.
- **Latest Correspondence:** This section includes any updates we may need to convey to you during the data collection process or reminders of important deadlines.
- **Navigation Bar:** The dark green navigation bar at the top of the page provides links and drop-down menus to different pages of the survey. This navigation bar will be present throughout the survey.
- **Help Desk Information:** The contact information for the Help Desk is located at the bottom of every page.


Exhibit 2.3 PLS Web Portal Home Page



Public Libraries Survey  
Web Portal  
Fiscal Year

OMB No.  
Expires

Home Page | Home | Survey Status | Tools | Reports | Help | External Links

Welcome to the Public Libraries Survey (PLS)

### Survey Information

PLS FILES STATUS AND NEXT PROCESSING STEP		
DATA FILE	STATUS	NEXT STEP
State Characteristics	Has Data	-----
Administrative Entities	Has Data	-----
Outlets	Has Data	-----
All PLS Files	Edited - Critical Edit Warnings Found	Run Edit Report

### File Import

When you press the Import a New File button, you will be taken to the page to select and import your files.

Import A New File >

### Updates

#### HELPFUL LINKS

**Web Instructions**  
Step-by-step instructions on reporting data for the PLS.

**User's Guide**  
Guide For Reporting Data For The Public Libraries Survey, FY  Using The PLS Web Portal

**Match and Edit Report Terminology**  
Quick reference guide to understanding the match and edits reports.

**SDC Discussion Forum**  
A place for SDCs to discuss PLS related topics with a document repository to organize resources, and an event calendar.

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#### LATEST CORRESPONDENCE

**SURVEY CLOSEOUT DATES:**  
Group 1:   
Group 2:   
Group 3:

**UPDATED HELP DOCUMENTS**  
The User's Guide was updated on

### 2.2.2 Survey Status

In addition to the Survey Information table on the Home page, you can refer to the Survey Status page (Exhibit 2.4) at any time to see where your submission stands and what your next steps are in the data submission process.

**NOTE:** Once you have saved your State Characteristics data in the system, the Survey Status table will automatically indicate that you have data for your Administrative Entities and outlets.

This process will happen before you upload your AE or outlet data. The status reflects that your current-year data have been prepopulated with your prior-year data. **You will still need to import or input your current-year AE and outlet data.** The Survey Status will update to let you know when to run a Match or Edit report and if you need to make any changes to the data.

#### Exhibit 2.4 PLS Web Portal Survey Status Page

Survey Status			Home	Survey Status	Tools ▾	Reports ▾	Help ▾	External Links ▾
<h2>Survey Status</h2>								
PLS Files Status and Next Processing Step			File Status Description					
DATA FILE	STATUS	NEXT STEP						
State Characteristics	No Data	Input Data	No Data	No Data has been loaded for the file.				
Administrative Entities	----	----	Has Data	Data has been loaded for the file.				
Outlets	----	----	Have All Data Types	State Characteristic, Administrative Entity and Outlet Data has been loaded.				
All PLS Files	----	----	Matched - Discrepancies Found	Match Program has identified discrepancies which must be resolved.				
			Matched - No Problems	Match Program has identified no problems.				
			Edited - Critical Edit Warnings Found	Edit Program has identified critical edit warnings which must be reviewed.				
			Edited - NonCritical Edit Warnings Found	Edit Program has identified noncritical edit warnings which must be reviewed and annotated.				
			Edited - No Edit Warnings Found	Edit Program has identified no edit warnings.				
			Submission Locked - Edit Warnings Annotated	Data for all PLS files has been locked and noncritical edit warnings reviewed and annotated.				
			Submission Locked - No Edit Warnings Found	Data for all PLS files has been locked.				

## 2.3 Web Instructions

The following step-by-step instructions for SDCs are displayed when you first log in to the PLS Web Portal. After your initial login, these instructions are available under the **Help** menu. Instructions for Chief Officers are available in Section 8.1 of this User's Guide.

**STEP 1:** You must enter your *State Characteristics* data before you can input or import AE or outlet data.

- Select Tools then Input Data: State Char.
  - Enter data into the fields and press the **Save** button.
  - Press the **Print Page** button to print a copy of your state's data.

**STEP 2:** Import or manually enter *Administrative Entity (AE)* data.

- Option 1—Import Data Files:
  - Select Tools then Import Data
  - Select the **Browse** button to find your AE file.
  - Once you have selected your AE file, click the **Upload and Import File** button.
  - Select the **Administrative Entity** file type option in the pop-up window, and click the **Yes, Import File** button.
  - Once the file is uploaded, you will see a pop-up window indicating whether your upload was successful or had errors.
    - If you receive an import error, click the **Download Errors** link in the pop-up window to open or save the **Parser Errors** file. This file contains your import errors and should be downloaded and saved for further review.
  - Review all import errors, revise, and re-import the data files.
  - NOTE: You must correct all import errors before you can continue.
- Option 2—Manually Enter Data:
  - You can enter AE data manually by selecting **Tools** then **Input Data: AE**.
  - The top horizontal section, labeled **Administrative Entity**, allows you to navigate between AEs. Use the innermost arrows to navigate to the previous or next AE on the list. Use the outermost arrows (with a line) to navigate to the first or last AE. You can use the drop-down menu to navigate to a specific AE.
  - The left vertical menu, labeled **Section Navigation**, allows you to navigate to specific sections of questions for the AE and outlet data collection.

**STEP 3:** *Outlet data* are preloaded from the prior year's file.

- Option 1—Import Data Files: If there are major changes to the data, we suggest importing a new outlet file by selecting **Tools** then **Import Data**.

- You can make minor changes by selecting **Associated Outlet(s)** under **Selection Navigation** in **Input Data: AE** from the **Tools** menu.
- Option 2—Manually Enter Data: You can update outlet data manually by selecting **Tools** then **Input Data: Outlet**.

**STEP 4:** Select **Reports** then **Run Match Report** after all data have been imported or entered.

- The match process will run in the background. When the Match process is completed, select the **Download Match Report** button. AIR recommends saving the Excel workbook to your hard drive and using it as a reference when correcting any errors found in your AE and/or outlet files.
- All match errors must be resolved before you can run your Edit Report (Step 5).
  - We suggest that you correct your data file(s) and re-import the revised data. You can change only PARENTID, LINKID, and OLDID using this method.
  - You can manually correct the data using the **Input Data** or **Structure Changes** menus (under **Tools**). However, you can revise PARENTID, LINKID, and OLDID only by correcting and re-importing your data file.
- Check the **Restorable AE** and **Restorable Outlet** tabs on your Match Report.
  - These tabs provide a list of all closed, deleted, and temporarily closed entities for your state. We suggest checking these tabs to make sure that any AEs or outlets you are trying to open (02 – Birth) are truly new.
- NOTE: You must re-import your outlet file each time you import an AE file. If you do not re-import your outlet file, your outlet data will revert to the prior year's data.

**STEP 5:** Once your Match Report is resolved, select **Reports** then **Run Edit Report**.

- NOTE: All match errors must be resolved before you can run your Edit Report.
- The Edit Report process runs in the background and can take several minutes, depending on the amount of data. When the Edit Report process is completed, select the **Download Edit Report** button. Review all the Edit Report worksheets contained within the downloaded Excel file. AIR recommends saving the workbook to your hard drive in order to record your annotations during your review of the reports.
- All critical edits must be resolved, and noncritical edits annotated before you can lock your data (Step 6).
  - **Address Critical Edits.** We suggest that you correct your data file(s) and re-import the revised data. You also can manually correct the data using the **Input Data** menu (under **Tools**).
  - **Annotate Noncritical Edits.** You can annotate noncritical edits in the Edit Report Excel worksheets or as a separate Annotation File. Once all noncritical edits are annotated, you will import the annotations by selecting **Tools** then **Import Data** and uploading the annotated Edit Report Excel file (file type: **Edit Report**) or separate Annotation Excel file (file type: **Annotation**).

- **Rerun Match and Edit Reports.** Once you have addressed the critical edits, rerun your Match Report, correct any issues found, and then rerun the Edit Report.

**STEP 6:** Once you are satisfied with your data, select **Tools** then **Lock Data**.

- NOTE: After you have locked your PLS survey submission, you will not be allowed to change any data.
- If you need to make revisions, please contact us at [PLS@air.org](mailto:PLS@air.org) or 1-866-744-5746, and we will assist you in correcting your data submission.
- When you lock your data, you will be asked to estimate the number of hours it took for you to complete the survey.
- After your data are locked, you will receive an automated e-mail from the PLS Web Portal notifying you that the data are locked, and that AIR will conduct a post-lock data review. AIR may send you questions requesting clarification of your submission.
- Once the post-lock data review is completed, an e-mail will be sent to your Chief Officer requesting that they certify the data. You will be copied on the certification request e-mail.

## 2.4 Other Helpful Tools

### 2.4.1 Export Data

The Export Data page (Exhibit 2.5) is located under the **Tools** menu. Current-year and prior-year data are available for AEs, outlets, and state characteristics in either individual files or one collective file. AE and outlet records deleted in the prior-year data (i.e., closed or removed as an incorrect record) are available from the Export Data page should any of them need to be restored to the survey. AE and outlet records deleted in the current-year data are available only from the Match Report's restorable tabs. To export and re-import a file downloaded from the PLS Web Portal, select **Data ready to re-import** under **Select File Format(s)**. This file format keeps the FSCS ID assignments for re-import. It also allows you to export your file with the changes you made in the PLS Web Portal, make further revisions, and re-import the file.

To obtain the files:

1. Click Tools then Export Data.
2. Select the file format you would like to download.
  - a. For a file structured for import back into the PLS Web Portal (i.e., after editing the data), select **Excel file formatted for import**.
  - b. For a complete file, including auto-summed element #500 (HRS\_OPEN), select **Excel file includes summed element(s) for AEs (cannot be used as import file)**. Be aware that if you try to import this file type, you will receive an error message.
3. Select the dataset you would like to export.
4. Click Generate File Export.
5. Access the file according to your Web browser settings.

**NOTE: How you access downloaded files depends on your Web browser settings.** The file may download and save to a specific folder automatically, it may remain in your browser downloads until you click on it, or you may be asked where you would like to save the file.

To export all current-year and prior-year data in one Excel file, you can click **Export All Datasets in 1 Excel File**. This file will include all datasets, including HRS\_OPEN in the AE sets, plus the restorable AE and outlets.

### Exhibit 2.5 PLS Web Portal Export Data Page

*Export Data Page*

Home Survey Status Tools Reports Help External Links

Admin Links

*Select File Format(s)*

☒ Excel file formatted for import

☐ Excel file includes summed element(s) for AEs (cannot be used as import file)

☐ Fixed Length Text File

☐ CSV

*Select Data Set*

☒ State characteristics, current year (most recently saved version)

☐ State characteristics, prior year

☐ Administrative Entities, current year (most recently saved version)

☐ Administrative Entities, prior year

☐ Outlets, current year (most recently saved version)

☐ Outlets, prior year

Generate File Export >

*Export All Datasets in 1 Excel File*

Includes all the datasets, plus restorable admin entities and restorable outlets.

Export All Datasets - 1 Excel File >

### 2.4.2 Tables

The **Run Tables** feature is located under the **Reports** menu and creates an Excel workbook that contains 20 tables. You will be able to save the Tables Report to your hard drive. There are two summary tables and 18 individual library tables. The two summary tables are a 2-year comparison of the state totals for each survey item and a 2-year comparison of the item response rates for the state. The individual library tables list each library in the state, and some tables report the per capita and percent distributions for those individual libraries.

The two summary tables provide a macro view of the state's library data. The individual library tables provide a micro view of the individual libraries.

To run and save your tables:

1. Click Reports then Run Tables.
2. Click the Download Tables Report button.
3. Access the file according to your Web browser settings.



**NOTE: The time stamp on the Reports table is in Eastern Time.** You may use the following chart to convert the time:

<b>Time Zone</b>	<b>Time Difference from Eastern Time</b>	<b>Time in Time Zone (if time in Eastern Time is 12 p.m. Monday)</b>
Atlantic	+ 1 hour	1 p.m. Monday
Eastern	0 hour	12 p.m. Monday
Central	-1 hour	11 a.m. Monday
Mountain	-2 hours	10 a.m. Monday
Pacific	-3 hours	9 a.m. Monday
Alaska	-4 hours	8 a.m. Monday
Hawaii–Aleutian	-5 hours	7 a.m. Monday
Samoa	-6 hours	6 a.m. Monday
Chamorro	+15 hours	3 a.m. Tuesday

### 2.4.3 Help Menu Options

The following are links available in the portal’s **Help** menu. They provide access to this User’s Guide, all its appendices, and abbreviated Edit Messages and Conditions. These links will open in separate browser windows.

#### Web Instructions

The Web Instructions, found at the beginning of Section 2.3, list the necessary to complete the submission process for the survey. The Web Instructions are also displayed the first time you log in to the PLS Web Portal.

#### Data Element Definitions

Data Element Definitions (Appendix A2) are the official definitions and item numbers of all the items collected in the survey.

#### Name, Address, and Structure Changes

Name, Address, and Structure Changes (Appendix B) provide descriptions and diagrams of the correct format of records for administrative entities and outlets.

#### Resolving the Match Report

Resolving the Match Report (Appendix C) is a more detailed list of suggestions than is available in Section 5.

## Import Specifications

The import files must conform exactly to the specifications provided (Appendix D).

## PLS Contacts

The PLS Contacts list AIR (Appendix E) and IMLS contact information, including the Help Desk telephone number and e-mail address. The Help Desk contact information is also located at the bottom of every page of the PLS Web Portal.

## Francis Keppel Award Criteria

The Francis Keppel Award for timely and accurate submission of data is based on a point system (Appendix F) covering important aspects of the original-submission and post-submission processing.

## Standard Abbreviations

Standard Abbreviations (Appendix G) are used in this survey when the data exceed the field length.

## Edit Messages and Conditions (available online but not in print)

Edit Messages and Conditions is a list of all checks performed by the Edit Report routine as well as a list of internal checks executed by AIR during the post-lock edit follow-up.

## Summed Data Elements

Summed Data Elements (Appendix H) show the relationships between elements that should equal the sum of two or more other data elements: TOTSTAFF (253), TOTINCM (304), STAFFEXP (352), TOTEXPCO (356), TOTOPEXP (358), CAP\_REV (404), TOTPHYS (461), ELECCOLL (458), TOTCIR (550), ELCONT (555), TOTCOLL (556), TOTPRO (600) and TOTATTEN (610).

## SDC Discussion Forum

A place to post about questions or issues, an event calendar, and a document repository to better organize and archive resources and references. Conversations from the old SDC listserv have been imported into the forum; SDCs can search for topics, tags, or authors and make updates to older conversations. Currently accessible through the PLS Web Portal, you can adjust the level of notifications you receive to real time, daily summary, weekly digest, or none.

## SDC Training Videos

[SDC training videos](#) cover the five following topics:

1. How to Get Started for New or Interim SDCs
2. How to Import Data Files

3. An Overview of Status Structure Changes
4. An Overview of the Match Report
5. An Overview of the Edit Report and Annotation Process

## 2.5 External Links

The following external links may be helpful in preparing for the FY 2023 data submission. These links will open in separate browser windows.

- IMLS Data Catalog (<https://www.imls.gov/research-tools/data-collection>)

This external link will take you to the IMLS Data Catalog page. The items found on this page include the following:

- Historical PLS data files
  - Recent publications utilizing PLS data
  - Library Search and Compare Tool, which allows users to search for public libraries by number of branches, population size served, legal basis, circulation, revenue, number of staff, visits, and programs. Library detail pages include a toggle to view data as reported totals or calculated per person numbers. Users can also review 10 years' worth of data for each library and produce PDFs with library-level infographics.
  - PLS Benchmarking Tables, which highlight key indicators of public library use; financial health; staffing; and resources at the national, state, and library service area levels. Users can sort the tables and view trends across multiple years.
- [SDC Discussion Forum](#): The forum includes a place to post about questions or issues, an event calendar, and a document repository to better organize and archive resources and references. Conversations from the old listserv have been imported into the forum; SDCs can search for topics, tags, or authors and make updates to older conversations.

There are now two ways to log into the SDC Discussion Forum. The first is through the PLS Web Portal. The link can be found under **Helpful Links** on the Home page, or by clicking on the **Help** menu > click **SDC Discussion Forum**. Both will take you to IMLS.gov where you should **click on "PLS SDC Discussion Forum."** The second is by creating an IMLS account and logging into the SDC Discussion Forum directly. For complete instruction on how to set up an IMLS account, please see the instructions provided here, <https://www.imls.gov/node/592790>.

## 3 Import

### 3.1 Overview

After entering State Characteristics data, you can import data for AEs, outlets, and any Annotation Files into the PLS Web Portal. The Administrative Entity Import File Specifications, Outlet Import File Specifications, and Annotation Import File Specifications are in Appendix D.

- You can import AE data, outlet data, an Annotation File, and an Annotated Edit Report in Excel (.xls or .xlsx), comma delimited text (.csv), or fixed-length text formats (.txt).
- Each import file can only contain records of the same type. For example, the AE file can only contain AE records; outlet records cannot be included in the same import file.
- To export and re-import a file, choose the **Excel file formatted for import** file format found on the **Export Data** page. This file format keeps the FSCS ID assignments for re-import. It also allows you to export your file with the changes you made in the PLS Web Portal, make further revisions, and re-import the file. Please keep in mind that this file type will not include summed data elements, such as item #500 (HRS\_OPEN).

### 3.2 Upload and Import Data Files

Once you have prepared your files (see Section 3.4), you need to import the files into the PLS Web Portal.

After you log in at the website, go to **Tools** then **Import Data**. Click the **Browse** button to find the file you wish to import from your computer. After you have located your file, click **Upload and Import File** (Exhibit 3.1).

### Exhibit 3.1 PLS Web Portal Import Data Page

Import Data page		Home	Survey Status	Tools ▾	Reports ▾	Help ▾	External Links ▾
<b>SUB MENU</b>   USER OPTIONS   IMPORT SPECIFICATIONS   NAME, ADDRESS, AND STRUCTURE CHANGES							
Files Currently Loaded - 4							
FILE NAME	DATE FILE LOADED	FILE CONTENTS					
		Admin Entities	Outlets	Annotations	Share with Help Desk (not imported)		
<a href="#">AdminEntity data.xlsx</a>	2020-10-29 12:25 PM EST	X					
<a href="#">Outlet data.xlsx</a>	2020-10-29 12:25 PM EST		X				
<a href="#">Annotation.xlsx</a>	2020-10-30 10:13 AM EST			X			
<a href="#">Share With Help Desk.xlsx</a>	2020-10-30 10:14 AM EST				X		
DELETE ALL AE DATA		DELETE ALL OUTLET DATA		DELETE ALL ANNOTATIONS		DELETE ALL HELP DESK FILES	
<div> <div>File Upload and Import</div> <div> <div>BROWSE...</div> <input type="text"/> </div> </div> <p>When you press the "Upload and Import File" button, your browser will transmit the file to our web server. Data from the file will then be imported into our database. If the type of data from the loaded file above matches a data type previously loaded, the new data file will completely replace all records previously loaded for that data type.</p> <div> <div></div> <div>UPLOAD AND IMPORT FILE</div> </div>							

Once you click **Upload and Import File**, the system will prompt you to choose what type of file you are importing (Administrative Entity, Outlet, Annotation, or Edit Report).

**NOTE:** When you import a file with the same file name as a previous file, the previous file is deleted. When you click **Delete All**, all current-year imports are deleted from the PLS Web Portal. If you click **Delete All AE Data**, all the associated outlet data are deleted.

Several checks are performed while your file is being imported:

- If your AE or outlet file is successfully imported, a message box will display the number of records in the successfully imported file and the number of existing records from the prior year. If the number of imported records is less than the number of prior-year records, the following message will be displayed:

**WARNING:** Imported file may be missing records that existed in the prior year. Please verify by comparing imported file with data export of prior-year data. Removal of records (e.g., library closure) must be accomplished using structure status codes; otherwise, prior-year data will persist into current year for those records.

- Even if the number of imported and prior-year records matches, we recommend checking the export of your current-year data to confirm that all expected records are present before proceeding with the Match Report.
- If you have any problems that prevent a successful import, a message box will alert you to the record(s) affected. This message box will provide a downloadable report that shows all errors preventing the file from importing. Once these errors are resolved, the file should import correctly. Refer to the following sections for instructions about preparing files for import. Imported data must be valid for the import to be successful (see the following table):

<b>Numeric Data Elements</b>	
Any positive number for numeric data elements	Enter the appropriate numeric data.
0	Zero for numeric data means the library has none of that item (e.g., the library does not maintain a video collection). Do not use zero when the value is not known (e.g., the city pays benefits but does not provide the figure). Use -1, described next.
-1	-1 means the appropriate figure is unavailable.
-3	-3 means Not Applicable and is used for these items: <ul style="list-style-type: none"> <li>• Square Footage of Outlet (use only for Bookmobiles and Books-by-Mail Only outlets)</li> <li>• Website Visits (library does not have a website)</li> </ul>
<b>Alphanumeric Data Elements</b>	
Alphabetic or numeric data for alphanumeric data elements	Enter the appropriate alphabetic or numeric data. Some items require the selection of codes for data (e.g., Interlibrary Relationship Code = HQ, ME, or NO). See Appendix A2.
M	M means the appropriate figure is unavailable. <ul style="list-style-type: none"> <li>• Overdue Fine Policy (use in place of -1 due to character limit)</li> </ul>
-3	-3 means Not Applicable and is used for this item: <ul style="list-style-type: none"> <li>• Phone (use only if library has no phone)</li> </ul>
<b>Structure, Name, and Address Changes</b>	
-3	-3 means Not Applicable and is used for these items: <ul style="list-style-type: none"> <li>• FSCSKEY, FSCS_SEQ, LINKID, OLDID, and PARENTID</li> </ul>

### 3.3 Uploading Annotation Files

You can import a file that contains annotations at any point in the data submission process. Annotations are required to lock submitted data. You must include the FSCSKEY and Edit ID# for the explanation to be applied to the correct edit record. After successfully importing the Annotation File, you can run the Edit Report after you have successfully run the Match Report and reviewed the results. See Appendix D for the Import File Specifications.

### 3.4 Preparing Administrative Entity and Outlet Import Files

Each year, your current-year records are compared to your prior-year information. Any variances in name, address, or organizational structure between years must be explained by a status code defining the change.

The FSCS ID links each year's data. You must account for each record as it exists in the final FSCS ID data file for the prior year. You can obtain the prior-year information through the **Export Data** option in the **Tools** menu.

If you are unsure what changes may have occurred since the last submission, import your file, run the match, and use the report to see what you need to resolve. You can then decide whether to process the changes within the PLS Web Portal (please see details in Section 4) or include the information in your data file and import it again.

To process structure, name, and location changes from your import file, the following information must be included. Please see Appendix D for technical information about formatting your import records.

- **STATSTRU:** This code indicates the structure status of the record.

00 – No Change
01 – Existing Administrative Entity/Outlet Absorbs Another (Adoption)
02 – Newly Created Administrative Entity/Outlet
03 – Closed Administrative Entity/Outlet (Death)
04 – Move Outlet to Newly Created Administrative Entity (Divorce)
05 – Merge Two or More Administrative Entities/Outlets to Form a New Administrative Entity/Outlet (Marriage)
08 – Restore (Reopen) a Previously Closed Administrative Entity/Outlet
09 – Restore (Undo) a Previously Deleted Administrative Entity/Outlet
10 – Delete an Incorrect Record (includes Out of Scope/Errors or for Planned but Never Opened) <sup>2</sup>
11 – Outlet Moves to Different Previously Existing Administrative Entity
13 – Add an Existing Administrative Entity/Outlet Not Previously Reported
22 – Future Administrative Entity/Outlet FSCS ID Request
23 – Temporary Closure

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<sup>2</sup> STATSTRU 10 is only for removing data entry errors and AEs that never opened. If a library exists but did not submit data for the current year, report it as a Survey Nonrespondent (STATSTRU 25) and insert -1 into data fields from item #250 (MASTER) through item #653 (WEBVISIT) for AEs and item #711 (SQ\_FEET) through item #714 (WKS\_OPEN) for outlets. See Appendix B for more instructions about structure changes. Contact the PLS Help Desk ([PLS@air.org](mailto:PLS@air.org)) if you have questions.

24 – Reopen a Temporarily Closed Administrative Entity/Outlet
25 – Nonrespondent Administrative Entity/Outlet

- **STATNAME:** This code indicates the status of the library name.

00 – No Change
06 – Official Name Change
14 – Preferred Spelling for Library Name

- **STATADDR:** This code indicates the status of the physical location.

00 – No Change
07 – Move to a New Location
15 – Preferred Street Address

- **LINKID:** This is an identifier defined by the SDC and is used to associate two or more records that are involved in an adoption or marriage structure change. The LINKID must be unique for each set of records. For example, a merger requires at least three import records with the same LINKID. (See Appendix B, Administrative Entity Structure Change 05 – Merge Two or More Administrative Entities to Form a New Library [Marriage]).
- **PARENTID:** This identifier is in the outlet import file and is used to associate an outlet to its parent AE. The value for this field should be the same as the LIBID of the parent AE.
- **OLDID:** This identifier is reserved for structure changes where it is necessary to track the prior-year FSCSKEY information for records that will not be in the current-year file.



## 4 User Options, Input Data, and Structure Changes

The **Tools** menu contains selections that allow you to enter data directly into the PLS Web Portal:

- **User Options** allows you to choose the sort order for retrieving AE and outlet records and viewing the Edit Report. You can also choose to save changes automatically (default option). These options are available on every **Input Data** page. For further details, see Section 4.1.
- **Input Data** is the only means of entering State Characteristics data. It also provides access to current AE and outlet records. For further details, see Section 4.2.
- **Structure Changes** allows you to add, close, modify, or restore AEs or outlets. You also reset a record previously coded or marked for a structure change. Choose AE or Outlet, as appropriate, for the change you want to make. For further details, see Section 4.3.

### 4.1 User Options

The User Options selected in Exhibit 4.1 are the default settings.

**Exhibit 4.1 PLS Web Portal User Options Page**

**User Options**

Sort order for Administrative Entities in Input Data

☐ FSCSID ☒ LIBID ☐ NAME ☐ CITY

Sort order for Outlets in Input Data

☐ FSCSID ☒ LIBID ☐ NAME ☐ CITY

Sort order for Edit Report by Edit Number

☒ EDIT by FSCSID ☐ EDIT by Annotation Status by FSCSID

Auto Save data in Input Data

☒ Yes ☐ No

**APPLY CHANGES**

#### 4.1.1 Sort Order for Administrative Entities or Outlets in Input Data

You determine how your AE records display. Sorting can be by:

- FSCS ID (default setting)
- LIBID
- NAME
- CITY

#### 4.1.2 Sort Order for Edit Report by Edit Number

You can sort your Edit Report by Edit Number with these options:

- Edit number by FSCS ID (default setting)
- Edit number by Annotation Status by FSCS ID

#### 4.1.3 Auto Save Data in Input Data

You can set this option to:

- Yes (default setting; the system automatically saves your data whenever values are updated)
- No

**NOTE: The Auto Generate Totals option has been removed. The PLS Web Portal automatically generates totals for data input through the Input Data pages. It is not possible to turn off automatic totaling.**

### 4.2 Input Data Through PLS Web Portal

Select **Tools** then **State Char**, **AE**, or **Outlet** to navigate to the page you wish to update. Buttons that allow you to **Save** and **Print Page** appear at the bottom of every page. Use the tab key to move from field to field or use your mouse by clicking on the section you wish to go to under **Section Navigation**.

By default, the User Options are set to save your corrections automatically. If you choose not to save your corrections automatically, be sure to click **Save** before leaving the page. To exit any of these pages, select **Home** from the navigation bar to return to the main PLS Web Portal page.

#### 4.2.1 State Characteristics

This page consists of four data items for you to fill out (see the State Characteristics Page screenshot in Appendix A1). Once you have completed your updates and saved your data, you can return to the **Home** page or **Survey Status** page to check for further actions.

#### 4.2.2 Administrative Entity

Data for AE records are collected in nine sections, or pages. There is an additional section where you can access outlet data for that AE. The name of each section is provided as a link on the left side of the page. You can use your mouse to click on any of the links to go to the section you wish to correct or review.

You can go to another AE record by selecting the record from the drop-down menu at the top of the page. By default, records are listed by FSCS ID. You can choose another sort order under **User Options**. The arrow buttons available at the top of the page next to the AE name navigate you to the next or previous AE. The arrows with the line will navigate you to the first or last AE in the list.

If you make a change to name and/or address information for an AE, you also must select the appropriate status code (the name/address status codes and their values are included in Appendix B) to identify whether the change is an official name change or whether the address change indicates an actual location change.

**NOTE: Any changes to the name or address fields will require you to run the Match Report before you can proceed with any further processing of your submission.**

#### 4.2.3 Outlets

Outlet records require only one section and can be accessed through the parent AE record.

You can access all outlet records from the **Tools** menu. From there, you can navigate through all the outlet records by using the drop-down menu or the arrow buttons.

If you make a change to the name and address information for an outlet, you also must select the appropriate status code (the name/address status codes and their values are included in Appendix B) to identify whether the change is an official name change or whether the address change indicates an actual location change.

**NOTE: Any changes to the name or address fields will require you to run the Match Report before you can proceed with any further processing of your submission.**

### 4.3 Structure Changes

You can add, close, modify, restore, or reset records through the **Structure Changes** menu. Under **Tools**, select **Structure Changes** and then **AE** or **Outlet** depending on the record you need to change. Currently, you are restricted to one structure change per AE or outlet record (Exhibits 4.2 and 4.3). See Appendix B for detailed instructions on reporting structure changes via the AE and outlet import files.

**NOTE: If an AE or outlet was closed for any part of a fiscal year but there is data to report for the it, do not report it as closed this reporting cycle. Wait until the next reporting cycle, when you have no data to report for the AE or outlet, and then report it as closed. If the**

entity was temporarily closed and reopened during the next fiscal year, such that you have some data to report in consecutive fiscal years, do not report any structure change. Records with structure changes indicating closure will be ignored, and any data reported with those records will be excluded from analysis in the annual PLS report, the supplementary tables, and the state profiles.

**NOTE:** When you complete all structure changes, you must complete a successful Match Report before you can continue processing your submission.

#### Exhibit 4.2 PLS Web Portal Structure Change: AE Page

Structure Changes: AE Page		Home	Survey Status	Tools ▾	Reports ▾	Help ▾	External Links ▾
SUB MENU   USER OPTIONS   STRUCTURE CHANGES: OUTLET							
<p><i>Addition</i></p> <p><input type="radio"/> (02) Add an AE Opened Since Last Survey (Birth)</p> <p><input type="radio"/> (13) Add an existing AE Not Previously Reported</p> <p><input type="radio"/> (22) Add an AE that has Not Yet Opened to obtain FSCS ID (Future)</p>				<p><i>Restoration</i></p> <p><input type="radio"/> (08) Reopen a Closed AE (Restore an 03)</p> <p><input type="radio"/> (24) Reopen a Temporarily Closed AE (Restore a 23)</p> <p><input type="radio"/> (09) Restore a Deleted AE (Restore a 10)</p>			
<p><i>Closure</i></p> <p><input type="radio"/> (03) Close an AE (Death)</p> <p><input type="radio"/> (23) Temporarily Close an AE (Expected to Reopen)</p> <p><input type="radio"/> (10) Delete an Incorrect AE (Out of Scope)</p>				<p><i>Other</i></p> <p><input type="radio"/> (25) Survey Nonrespondent</p> <p><input type="radio"/> Reset/Undo an AE Structure Change Code for the Current Year</p>			
<p><i>Modification</i></p> <p><input type="radio"/> (01) Existing AE Absorbs another AE (Adoption)</p> <p><input type="radio"/> (05) Merge two or more AEs to create a New AE (Marriage)</p>				<p>Proceed with AE Structural Changes &gt;</p>			

## Exhibit 4.3 PLS Web Portal Structure Change: Outlet Page

Structure Changes: Outlet Page	Home	Survey Status	Tools ▾	Reports ▾	Help ▾	External Links ▾
SUB MENU   USER OPTIONS   STRUCTURE CHANGES: AE						
<div><div><p><i>Addition</i></p><p><input type="radio"/> (02) Add an Outlet Opened Since Last Survey (Birth)</p><p><input type="radio"/> (13) Add an existing Outlet Not Previously Reported</p><p><input type="radio"/> (22) Add an Outlet that has Not Yet Opened to obtain FSCS ID (Future)</p><p><i>Closure</i></p><p><input type="radio"/> (03) Close an Outlet (Death)</p><p><input type="radio"/> (23) Temporarily Close an Outlet (Expected to Reopen)</p><p><input type="radio"/> (10) Delete an Incorrect Outlet (Out of Scope)</p><p><i>Modification</i></p><p><input type="radio"/> (01) Existing Outlet Absorbs another Outlet (Adoption)</p><p><input type="radio"/> (05) Merge two or more Outlets to create a New Outlet (Marriage)</p><p><input type="radio"/> (04) Move Outlets to a Newly Created Administrative Entity (Divorce)</p><p><input type="radio"/> (11) Move Outlet to a Different Previously Existing Administrative Entity</p></div><div><p><i>Restoration</i></p><p><input type="radio"/> (08) Reopen a Closed Outlet (Restore an 03)</p><p><input type="radio"/> (24) Reopen a Temporarily Closed Outlet (Restore a 23)</p><p><input type="radio"/> (09) Restore a Deleted Outlet (Restore a 10)</p><p><i>Other</i></p><p><input type="radio"/> (25) Survey Nonrespondent</p><p><input type="radio"/> Reset/Undo an Outlet Structure Change Code for the Current Year</p><p>Proceed with Structural Changes &gt;</p></div></div>						

## 5 Match Report

After you import or enter data, you must run a successful Match Report. This step ensures file integrity by recording structure changes (e.g., new or closed libraries) as well as official name and location changes. The Match Report compares your current-year and prior-year records in the publicly released data file using FSCS ID information. After a successful Match Report has run, new IDs are assigned to new libraries.

To run the Match Report, select **Run Match Report** from the **Reports** menu. This generates an Excel workbook that will detail the results of the match. If the program does not encounter a problem, any new AEs and outlets are assigned FSCS IDs, and you will see a message to proceed with the Edit Report. If the program cannot resolve the information you provide, you will see messages in the report that identify any problems.

You **must resolve** all discrepancies in the Match Report. You can fix your original file and re-import it, or you may be able to resolve problems through the **Structure Change** options under the **Tools** menu. If you need your prior-year FSCS ID information, you can use the **Export Data** function under the **Tools** menu. Appendix C provides additional guidance for understanding the Match Report messages.

**NOTE: Any time you import a data file or make any structure, name, or address changes to either an outlet or AE record from the data input pages, you must rerun the Match Report.**

### 5.1 Match Report Results

The results of the Match Report are displayed in an Excel workbook across multiple worksheets.

**The report is not linked to the database (PLS Web Portal). You must make any corrections by either importing a new file or manually inputting data into the PLS Web Portal pages (i.e., Structure Change menu and the name and address status code fields).**

**NOTE: Sometimes one type of error will produce more than one error message for the Match Report.**

The Excel workbook has 10 worksheets, as follows:

- **Summary:** This worksheet provides an overview and count of errors found in the Match Report. Specific errors can be found on the subsequent worksheets.

If you do not have any Match Report problems, you will see the following message:

“Match has completed successfully. Check ‘New ID’ Sheet.”

New FSCS IDs are assigned to new AEs and outlets and are listed on the New ID worksheet.

Otherwise, you will see which of the following conditions failed, with a count of match errors per AE or outlet.

Invalid Status Code (STATSTRU)
Record found current year but not prior year
Record found prior year but not current year
All FSCSKEYs and OLDIDs must be unique (unless -3)
All LIBIDs must be unique for AE records
FSCS ID information must equal -3
FSCS ID information cannot equal -3
LINKID must equal -3
LINKID cannot equal -3
PARENTID must equal -3
PARENTID cannot equal -3
OLDID must equal -3
OLDID cannot equal -3
These records do not comply with the rules for Adoption
These records do not comply with the rules of Marriage
Cannot restore Record, there is no old AE
Administrative Entity does not have any Outlets
Outlet record is not in the AE file
PARENTID is not in the AE file
STATNAME and LIBNAME are inconsistent with the prior-year file
STATADDR and ADDRESS are inconsistent with the prior-year file

- **New ID:** This worksheet provides the list of new FSCS IDs generated. No resolution is required for these records because the software does not assign new identification numbers until the match is successful.
- **Admin Single:** This worksheet displays problems with structure changes involving only one AE record.

INVALID Status Code
This AE was not in the prior-year file
This AE was reported last year but is missing in the current-year file
FSCSKEY cannot be -3 for STATUS (00, 08, 09, 22 [second year+], 23, 24, or 25) Records
FSCSKEY must be -3 for STATUS (02, 03, 04, 05, 10, 13, and 22 [first year]) Records
LINKID cannot be -3 for STATUS (01 or 05) Records
LINKID must be -3 for STATUS (00, 02, 03, 04, 08, 09, 10, 13, 22, 23, 24, or 25) Records

INVALID Status Code
OLDID cannot be -3 for STATUS (03 or 10) Records
OLDID must be -3 for STATUS (00, 02, 04, 08, 09, 13, 22, 23, 24, or 25) Records
Cannot restore AE, there is no old AE with STATUS (03, 10, or 23)
Admin record does not have any outlets

- **Admin Multi:** This worksheet displays problems with structure changes involving multiple AE records.

All FSCSKEYs and OLDIDs must be Unique (unless -3)
All LIBIDs must be unique for AE records
These records do not comply with the rules of Adoption
These records do not comply with the rules of Marriage

- **Outlet Single:** This worksheet displays problems with structure changes involving only one outlet record.

INVALID Status Code
This Outlet was not in the prior-year file
This Outlet was reported last year, but is missing in the current-year file
FSCSKEY cannot be -3 for STATUS (00, 08, 09, 22 [second year+], 23, 24, or 25) Records
FSCSKEY must be -3 for STATUS (02, 03, 04, 05, 10, 11, 13, and 22 [first year]) Records
FSCS_SEQ cannot be -3 for STATUS (00, 08, 09, 22 [second year+], 23, 24, or 25) Records
FSCS_SEQ must be -3 for STATUS (02, 03, 04, 05, 10, 11, 13, and 22 [first year]) Records
LINKID cannot be -3 for STATUS (01 or 05) Records
LINKID must be -3 for STATUS (00, 02, 03, 04, 08, 09, 10, 13, 22, 23, 24, or 25) Records
OLDID cannot be -3 for STATUS (03, 04, 10, or 11) Records
OLDID must be -3 for STATUS (00, 02, 08, 09, 13, 22, 23, 24, or 25) Records
PARENTID cannot be -3 for STATUS (02, 04, 11, 13, or 22 [first year]) Records
PARENTID must be -3 for STATUS (00, 01, 03, 08, 09, 10, 22 [second year +] 23, 24, or 25)
Cannot restore Outlet, there is no old AE with STATUS (03, 10, or 23)
Outlet Record is not in the AE File
PARENTID is not in the AE File

- **Outlet Multi:** This worksheet displays problems with structure changes involving multiple outlet records.

All FSCSKEYs and OLDIDs must be unique (unless -3)
These records do not comply with the rules of Adoption
These records do not comply with the rules of Marriage



- **Name Changes:** This worksheet displays records with name change problems.

STATNAME Invalid
STATNAME 00 and Name Change
STATNAME 06 and no Name Change
STATNAME 14 and no Name Change

- **Address Changes:** This worksheet displays records with address change problems.

STATADDR Invalid
STATADDR 00 and Address Change
STATADDR 07 and no Name Change
STATADDR 15 and no Name Change

- **Restorable AE:** This worksheet provides a list of all closed, deleted, and temporarily closed entities for the state to be used as a reference.
- **Restorable Outlet:** This worksheet provides a list of all closed, deleted, and temporarily closed entities for the state to be used as a reference.

## 5.2 Resolving Unsuccessful Records

*Please see Appendix C: Resolving the Match Report for specific instructions and examples on how to resolve each individual match error.*

The Match Report runs assuming the status structure code is the intended value and checks that the format of the record is consistent with the code. For example, if you close a library and used the correct STATSTRU = 03 but did not make the appropriate entries for the FSCSKEY and OLDID fields, you will receive an error message.

The report displays information about the record, status code, and error messages. The error messages refer to problems with the format of a record based on the reported status code for the structure change. If the status code is incorrect, simply change it to the correct code. Otherwise, you must adjust the AE or outlet information to match the status code.

You can correct information in your data file and import the revised file, or, for most problems, you can use the **Structure Changes** menu options under the **Tools** menu. However, you must fix problems with duplicate FSCS ID or OLDID information directly in the data file and import it again.

The **Restorable AE** tab and the **Restorable Outlet** tab are for your reference. The **Restorable AE** tab provides a list of all closed, deleted, and temporarily closed entities for your state. Before you open a newly created AE (birth), structure code 02, you should check this tab to make sure that the AE you are trying to create is truly new, meaning that the AE was not previously reported, then either closed, deleted, or temporarily closed. This preserves the historical and longitudinal record for your state. This also applies to the **Restorable Outlet** tab.

**HINT:** Name and address changes can generate the largest number of error messages. You can run the Match Report and then decide how best to make corrections. For example, if you find you are getting messages because all the current-year address fields are incorrect, you might want to copy the prior-year addresses to the current-year file and import the revised file. However, if you need to change the status code for only a few records, you can simply use the **Input Data** pages.

## 6 Edit Report

Once you have completed a successful match, you must run the Edit Report by selecting **Reports** then **Run Edit Report**.

The report is displayed in an Excel workbook with multiple worksheets and is **not** linked to the PLS Web Portal. You must make changes to your data through the **Input Data** options or through an updated import file. (Please note that if you import a corrected file, you will have to run the Match Report again.)

**NOTE: You must save the Edit Report, record and save your annotation(s) in the workbook, and import the revised version into the PLS Web Portal as an Edit Report file type.**

You can select one of two sort orders for the Edit Report from the **Tools/User Options** menu: Sort by **Edit Number by FSCS ID** or **Edit Number by Annotation Status by FSCS ID**.

It is necessary to provide an explanation for noncritical and internal edits. The annotations that accompany your Edit Report are an essential part of your submission because they provide verification of and explanations for data that are correct but have been flagged with a noncritical edit. At least one noncritical and one internal edit must be annotated before you can complete your submission. If you make data changes or add annotations, you must rerun the Match Report and Edit Report before you can lock your submission.

### 6.1 Edit Messages and Conditions

**The full list of edit conditions is published on the IMLS website, but they are also listed in the Help menu of the Web Portal.** The following lists summarize the types of edits within the three broad categories of edits: critical, noncritical, and internal.

#### 6.1.1 Critical Edits

Critical edits **must be resolved** before you can lock your submission. Examples of critical edits include:

- Any -2 value
- Zero or -1 in any population data element
- Invalid categorical or date values
- The state population is less than the unduplicated population
- Name or address of library or outlet is not reported
- Number of service outlets is not reported
- Discrepancies between the number of outlets reported in the AE record and its outlet records
- A subset item is greater than the total (e.g., Circulation of Children's Materials is greater than Total Circulation)

- Any occurrence where fully reported detail data do not equal the reported total

### 6.1.2 Noncritical and Internal Edits

- Noncritical and internal edits **must be annotated** before you can lock your submission. Both noncritical and internal edits are further categorized into current and historical edits.
- Current edits identify possible errors in current-year data:
  - Reporting patterns for data elements with detail items where not all items are reported (e.g., Total Librarians and Total Staff are reported as equal but Other Paid Employees is -1)
  - Inter-item comparison ratios (e.g., Total Circulation to Annual Visits)
  - Logical (e.g., Total Programs is zero, but Program Attendance is not zero)
  - Magnitude (e.g., Databases is greater than 1,000)
  - Definitional (e.g., Print Materials is zero)

Historical edits identify possible errors in the current-year (CY) data by comparing them to the prior-year (PY) data:

- PY was -1, and CY is zero
- PY was -1, and CY is 1
- PY was greater than a calculated value, and CY is zero
- CY is greater than a calculated value, and PY was zero
- CY and PY have the same value
  - CY to PY ratio is outside a specified range

## 6.2 Annotations

Annotations are stored in the PLS Web Portal database and are applied to the edits when you run the Edit Report.

You can upload your Annotation File into the PLS Web Portal through the **Import Data** option under the **Tools** menu in the following formats (see Annotation Import File Specifications in Appendix D):

- A comma-delimited text file (.csv)
- Fixed-length text file (.txt)
- Excel file (.xls and .xlsx)

If you need to make more annotations after the files have been uploaded, you can upload again through the Edit Report. Save the Excel file generated by running the Edit Report, record your annotations, and re-upload the revised version.

Only annotations associated with individual edits will display in the Edit Report. If you have a general explanation that applies to several libraries, you must copy that explanation into the annotation column for each record to which it applies.

## 7 Lock Data

The **Lock Data** page is located under the **Tools** menu. You must verify that you want to lock your data.

Remember to review the **Tables** under the **Reports** option to check for any large statewide discrepancies before locking your data.

The following conditions must be met to lock your data:

1. No critical edits are found when the Edit Report runs.
2. For noncritical edits flagged, at least one annotation is present per edit check.
3. You can perform the following actions after locking your PLS data:
  - View Survey Status
  - Export data
  - View the completed survey form
  - Run tables
  - View help documents
  - Access external links
  - Log out

Once locked, the application does not allow the respondent to change any data, import files, run the Match Report, or run the Edit Report. If you lock your data and need to revise the locked data, please contact AIR at [PLS@air.org](mailto:PLS@air.org) or 1-866-744-5746.

### 7.1 Estimate of Burden

After locking your data, you must provide the estimated number of hours it took for you to complete the survey (Exhibit 7.1). The estimated number of hours should include the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collected. Your burden estimate may also include the following:

- Preparing for the data submission (e.g., reviewing User's Guide, import specification, edit check specifications, and other general PLS related documentation)
- Vetting data submissions of individual libraries (e.g., reviewing and revising PLS import files (self-made or vendor provided) for upload into the PLS Web Portal)
- Ready data for submission to AIR and contacting libraries, as needed, with questions (e.g., reaching out to libraries with questions that came up while vetting files)

- Submitting data through the PLS Web Portal (e.g., files uploads, reviewing Match and Edit Reports, reaching out to libraries to resolve Edit Report issues, annotating Edit Reports)
- Responding to post-lock questions (e.g., library outreach to resolve post-lock questions, updating data in the PLS Web Portal, replying to and/or asking AIR questions)

### Exhibit 7.1 PLS Web Portal Lock Data Confirmation Page

**Lock Data Confirmation**

**Are you sure you want to lock your Data?**

*If at a later time, you need to make any revisions, please email at [PLS@air.org](mailto:PLS@air.org) or contact by telephone at 1-866-744-5746 and we will unlock your data submission.*

Indicate the estimated number of hours taken to complete the survey

**YES, LOCK DATA**

No, Return to Survey

Cancel

## 8 Chief Officer Certification

The role of the Chief Officer (CO) is to review and certify the data after the survey is locked and has gone through a post-lock review. The CO will receive login credentials for the PLS Web Portal via e-mail shortly after the start of data collection (usually in early to mid-January).

After the survey is locked and the post-lock review completed, an e-mail will be sent to inform your CO that the data are ready for review and certification (SDCs will be copied on this e-mail). When your CO completes the certification process, another automated e-mail will be sent to the SDC and the CO confirming the PLS data have been certified.

### 8.1 Chief Officer Web Instructions

#### *View Data*

As the Chief Officer, you can view your state's Public Libraries Survey (PLS) before and after the SDC locks the data. Below are brief instructions on how to navigate the PLS Web Portal. For more details about the PLS Web Portal, please see the User's Guide under the Helpful Links on the Home screen.

To view the status of the survey:

- Select **Survey Status** in the dark green navigation panel
  - Here you will be able to see the SDC's progress in completing the survey

To view State Characteristics, AE, and Outlet Data:

- Select **Tools** in the dark green navigation panel
- Select the data you would like to view (State Char, AE, or Outlet) from the drop-down menu

To export data:

- Select **Tools** in the dark green navigation panel
- Select **Export Data** from the drop-down menu
  - Select the file format and dataset you would like to export, then:
    - Select **Generate File Export** or
    - Select **Export All Datasets – 1 Excel File** to have all the current-year and prior-year data in one file

To download the Match Report:

- Select **Reports** in the dark green navigation panel
- Select **View Match Report** from the drop-down menu
- Select **Download Match Report**
- View and save the Match Report for your records



To download the Edit Report:

- Select **Reports** in the dark green navigation panel
- Select **View Edit Report** from the drop-down menu
- Select **Download Edit Report**
  - Note: If you receive the error, “A successful Match Report is required for the current-year data,” the SDC has not run a successful Match Report and has not yet run the Edit Report.
- View and save the Edit Report for your records

To download the Tables Report:

- Select **Reports** in the dark green navigation bar
- Select **View Tables** from the drop-down menu
- Select **Download Tables Report**
- View and save the Tables Report for your records

### ***Certify Data***

Once you have received an e-mail from the PLS team alerting you that your state’s data have been locked and the post-lock review is complete, you can certify your data.

To certify your state’s data, follow these steps:

1. Log in into the PLS Web Portal at <https://submitpls.imls.gov>
2. Navigate to the top right of the screen and click “Certify Data”
3. Review the PLS Certification Form
4. Click the “Certify” button
5. Sign the PLS Certification Form by entering your PLS Web Portal password
6. Click the “Confirm Certification” button
7. Once you have signed the form, you and your state’s SDC will receive an e-mail indicating that the data have been certified. The e-mail will include the text from the completed PLS Certification Form.


## Appendix A1 Survey Instrument: Data Entry Screens

### State Characteristics Page

*Input Data: State Char page* Home Survey Status Tools ▾ Reports ▾ Help ▾ External Links ▾

SUB MENU | USER OPTIONS | DATA ELEMENT DEFINITIONS: STATE CHAR

State Characteristics			
ITEM #	ITEM	CURRENT YEAR	PRIOR YEAR
100	Reporting Period Start Date (MM/YYYY)	<input type="text" value="07/2015"/>	07/2014
101	Reporting Period End Date (MM/YYYY)	<input type="text" value="12/2016"/>	12/2015
102	State Total Population Estimate	<input type="text" value="2,942,902"/>	2,942,902
103	Total Unduplicated Population of Legal Service Areas	<input type="text" value="2,922,598"/>	2,922,598

 PRINT PAGE

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## Administrative Entity — Name/Addresses

Input Data: AE Page

Home

Survey Status

Tools ▾

Reports ▾

Help ▾

External Links ▾

SUB MENU

USER OPTIONS

STRUCTURE CHANGES: AE

DATA ELEMENT DEFINITIONS: AE

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BEAVER PUBLIC LIBRARY ▾

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Section Navigation

Name/Address >

Other Identification >

Population/Outlets/Staff >

Operating Revenue >

Operating Expenditures >

Capital >

Library Collections >

Service Measures >

Programs/Other Electronic >

Associated Outlet(s) >

Name/Address

ITEM #	ITEM	CURRENT YEAR	PRIOR YEAR
150	FSCS ID	UT0002	UT0002
150a	Structure Status	00	00
151	LIB ID	BEAVER1200	BEAVER1200
152	Name	BEAVER PUBLIC LIBRARY	BEAVER PUBLIC LIBRARY
152a	Name Status	00 No Change ▾	00
Street Address			
153	Address	55 WEST CENTER STREET	55 WEST CENTER STREET
153a	Address Status	00 No Change ▾	00
154	City	BEAVER	BEAVER
155	ZIP Code	84713	84713
Mailing Address			
157	Address	P.O. BOX 192	P.O. BOX 192
158	City	BEAVER	BEAVER
159	ZIP Code	84713	84713

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Administrative Entity — Other Identification	
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Input Data: AE Page		<a href="#">Home</a>	<a href="#">Survey Status</a>	<a href="#">Tools ▾</a>	<a href="#">Reports ▾</a>	<a href="#">Help ▾</a>	<a href="#">External Links ▾</a>																																												
<b>SUB MENU</b>   <a href="#">USER OPTIONS</a>   <a href="#">STRUCTURE CHANGES: AE</a>   <a href="#">DATA ELEMENT DEFINITIONS: AE</a>																																																			
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<div style="background-color: #0072bc; color: white; padding: 5px; margin-bottom: 5px;">Section Navigation</div> <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px; cursor: pointer;">Name/Address &gt;</div> <div style="background-color: #0072bc; color: white; padding: 5px; margin-bottom: 5px; cursor: pointer;">Other Identification &gt;</div> <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px; cursor: pointer;">Population/Outlets/Staff &gt;</div> <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px; cursor: pointer;">Operating Revenue &gt;</div> <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px; cursor: pointer;">Operating Expenditures &gt;</div> <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px; cursor: pointer;">Capital &gt;</div> <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px; cursor: pointer;">Library Collections &gt;</div> <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px; cursor: pointer;">Service Measures &gt;</div> <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px; cursor: pointer;">Programs/Other Electronic &gt;</div> <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px; cursor: pointer;">Associated Outlet(s) &gt;</div>		<div style="background-color: #0072bc; color: white; padding: 5px; margin-bottom: 5px; text-align: center;">Other Identification</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #0072bc; color: white;"> <th style="width: 10%;">ITEM #</th> <th style="width: 20%;">ITEM</th> <th style="width: 40%;">CURRENT YEAR</th> <th style="width: 30%;">PRIOR YEAR</th> </tr> </thead> <tbody> <tr> <td>161</td> <td>County</td> <td>Anchorage</td> <td>Anchorage</td> </tr> <tr> <td>162</td> <td>Phone</td> <td>9073432892</td> <td>9073432892</td> </tr> <tr> <td>200</td> <td>Interlibrary Relationship Code</td> <td>NO Not a Member of a Federation or Cr ▾</td> <td>NO</td> </tr> <tr> <td>201</td> <td>Legal Basis Code</td> <td>CO County/Parish ▾</td> <td>CO</td> </tr> <tr> <td>202</td> <td>Administrative Structure Code</td> <td>MO Administrative Entity with Multiple ▾</td> <td>MO</td> </tr> <tr> <td>203</td> <td>FSCS Public Library Definition</td> <td>Yes ▾</td> <td>Y</td> </tr> <tr> <td>204</td> <td>Geographic Code</td> <td>CO1 County or Equivalent, entirety ▾</td> <td>MA1</td> </tr> <tr> <td>205</td> <td>Legal Service Area Boundary Change</td> <td>No ▾</td> <td>N</td> </tr> <tr style="background-color: #e6f2ff;"> <td>206</td> <td>Reporting Period Start Date (MM / DD / YYYY)</td> <td>01/01/2021</td> <td>01/01/2018</td> </tr> <tr> <td>207</td> <td>Reporting Period End Date (MM / DD / YYYY)</td> <td>12/31/2021</td> <td>12/31/2018</td> </tr> </tbody> </table>						ITEM #	ITEM	CURRENT YEAR	PRIOR YEAR	161	County	Anchorage	Anchorage	162	Phone	9073432892	9073432892	200	Interlibrary Relationship Code	NO Not a Member of a Federation or Cr ▾	NO	201	Legal Basis Code	CO County/Parish ▾	CO	202	Administrative Structure Code	MO Administrative Entity with Multiple ▾	MO	203	FSCS Public Library Definition	Yes ▾	Y	204	Geographic Code	CO1 County or Equivalent, entirety ▾	MA1	205	Legal Service Area Boundary Change	No ▾	N	206	Reporting Period Start Date (MM / DD / YYYY)	01/01/2021	01/01/2018	207	Reporting Period End Date (MM / DD / YYYY)	12/31/2021	12/31/2018
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## Administrative Entity — Population/Outlets/Staff

Input Data: AE Page

Home

Survey Status

Tools ▾

Reports ▾

Help ▾

External Links ▾

SUB MENU | USER OPTIONS | STRUCTURE CHANGES: AE | DATA ELEMENT DEFINITIONS: AE

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Administrative Entity

Name

Kuskokwim Consortium Library ▾

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Section Navigation

Name/Address >

Other Identification >

**Population/Outlets/Staff >**

Operating Revenue >

Operating Expenditures >

Capital >

Library Collections >

Service Measures >

Programs/Other Electronic >

Associated Outlet(s) >

Population / Outlets / Staff

ITEM #	ITEM	CURRENT YEAR	PRIOR YEAR
208	Population of the Legal Service Area	<input type="text" value="6,325"/>	6,135
Service Outlets			
209	Number of Centrals	<input type="text" value="1"/>	1
210	Number of Branches	<input type="text" value="0"/>	0
211	Number of Bookmobiles	<input type="text" value="0"/>	0
Paid Staff (Full-Time Equivalent)			
250	ALA - MLS Librarians	<input type="text" value="1.00"/>	0.00
251	Total Librarians	<input type="text" value="1.00"/>	1.00
252	All Other Paid Staff	<input type="text" value="1.50"/>	2.00
253	Total Paid Employees	<input type="text" value="2.50"/>	3.00

PRINT PAGE

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Administrative Entity — Operating Revenue

Input Data: AE Page

Home

Survey Status

Tools ▾

Reports ▾

Help ▾

External Links ▾

SUB MENU | USER OPTIONS | STRUCTURE CHANGES: AE | DATA ELEMENT DEFINITIONS: AE

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OXFORD PUBLIC LIBRARY ▾

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Section Navigation

Name/Address >

Other Identification >

Population/Outlets/Staff >

Operating Revenue >

Operating Expenditures >

Capital >

Library Collections >

Service Measures >

Programs/Other Electronic >

Associated Outlet(s) >

Operating Revenue

ITEM #	ITEM	CURRENT YEAR	PRIOR YEAR
300	Local Government Revenue	495,502	495,502
301	State Government Revenue	22,063	22,063
302	Federal Government Revenue	0	0
303	Other Revenue	0	0
304	Total Revenue	517,565	517,565

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## Administrative Entity — Operating Expenditures

Input Data: AE Page

Home

Survey Status

Tools ▾

Reports ▾

Help ▾

External Links ▾

SUB MENU | USER OPTIONS | STRUCTURE CHANGES: AE | DATA ELEMENT DEFINITIONS: AE

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Administrative Entity

Name

KARL MILES LECOMPTE MEMORIAL LIBRARY✓

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Section Navigation

Name/Address >

Other Identification >

Population/Outlets/Staff >

Operating Revenue >

Operating Expenditures >

Capital >

Library Collections >

Service Measures >

Programs/Other Electronic >

Associated Outlet(s) >

Operating Expenditures			
ITEM #	ITEM	CURRENT YEAR	PRIOR YEAR
Staff Expenditures			
350	Salaries & Wages Expenditures	13,937	14,760
351	Employees Benefits Expenditures	1,985	2,477
352	Total Staff Expenditures	15,922	17,237
Collection Expenditures			
353	Print Materials Expenditures	6,171	4,402
354	Electronic Materials Expenditures	0	0
355	Other Materials Expenditures	168	0
356	Total Collection Expenditures	6,339	4,402
357	Other Operating Expenditures	7,716	7,518
358	Total Operating Expenditures	29,977	29,157

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## Administrative Entity — Capital

*Input Data: AE Page*HomeSurvey StatusTools ▾Reports ▾Help ▾External Links ▾

SUB MENU | USER OPTIONS | STRUCTURE CHANGES: AE | DATA ELEMENT DEFINITIONS: AE

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Administrative Entity

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Section Navigation

Name/Address >

Other Identification >

Population/Outlets/Staff >

Operating Revenue >

Operating Expenditures >

Capital >

Library Collections >

Service Measures >

Programs/Other Electronic >

Associated Outlet(s) >

Capital

ITEM #	ITEM	CURRENT YEAR	PRIOR YEAR
Capital Revenue			
400	Local Government Capital Revenue	<input type="text" value="0"/>	0
401	State Government Capital Revenue	<input type="text" value="0"/>	0
402	Federal Government Capital Revenue	<input type="text" value="0"/>	0
403	Other Capital Revenue	<input type="text" value="0"/>	0
404	Total Capital Revenue	<input type="text" value="0"/>	0
Capital Expenditures			
405	Total Capital Expenditures	<input type="text" value="0"/>	0

PRINT PAGE

SAVE



**Administrative Entity — Library Collections**

Input Data: AE Page
Home   Survey Status   Tools ▾   Reports ▾   Help ▾   External Links ▾

**SUB MENU** | USER OPTIONS | STRUCTURE CHANGES: AE | DATA ELEMENT DEFINITIONS: AE

Administrative Entity

Name Chiniak Public Library ▾

**Section Navigation**

- Name/Address >
- Other Identification >
- Population/Outlets/Staff >
- Operating Revenue >
- Operating Expenditures >
- Capital >
- Library Collections >
- Service Measures >
- Programs / Other Electronic >
- Associated Outlet(s) >

Library Collections			
ITEM #	ITEM	CURRENT YEAR	PRIOR YEAR
450	Print Materials	<input type="text" value="2,300"/>	2,300
451	Electronic Books	<input type="text" value="21,587"/>	21,587
452	Audio - Physical Units	<input type="text" value="-1"/>	-1
453	Audio - Downloadable Units	<input type="text" value="12,992"/>	12,992
454	Video - Physical Units	<input type="text" value="257"/>	257
455	Video - Downloadable Units	<input type="text" value="0"/>	0
461	Total Physical Items in Collection	<input type="text" value="293"/>	
462	Other Circulating Physical Items	<input type="text" value="334"/>	
Electronic Collections			
456	Local / Other Cooperative Agreements	<input type="text" value="0"/>	0
457	State (State Government or State Library)	<input type="text" value="49"/>	49
458	Total Electronic Collections	<input type="text" value="49"/>	49

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## Administrative Entity — Service Measures

Input Data: AE Page		Home	Survey Status	Tools ▾	Reports ▾	Help ▾	External Links ▾																																																																																
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<b>Section Navigation</b> <ul style="list-style-type: none"> <li>Name/Address &gt;</li> <li>Other Identification &gt;</li> <li>Population/Outlets/Staff &gt;</li> <li>Operating Revenue &gt;</li> <li>Operating Expenditures &gt;</li> <li>Capital &gt;</li> <li>Library Collections &gt;</li> <li><b>Service Measures &gt;</b></li> <li>Programs/Other Electronic &gt;</li> <li>Associated Outlet(s) &gt;</li> </ul>		<b>Service Measures</b> <table border="1"> <thead> <tr> <th>ITEM #</th> <th>ITEM</th> <th>CURRENT YEAR</th> <th>PRIOR YEAR</th> </tr> </thead> <tbody> <tr> <td>500</td> <td>Public Service Hours Per Year</td> <td>0</td> <td>1,245</td> </tr> <tr> <td>501</td> <td>Library Visits</td> <td><input type="text" value="5,127"/></td> <td>6,032</td> </tr> <tr> <td>501a</td> <td>Library Visits Reporting Method</td> <td><input type="text" value="CT"/></td> <td></td> </tr> <tr> <td>502</td> <td>Reference Transactions</td> <td><input type="text" value="204"/></td> <td>4</td> </tr> <tr> <td>502a</td> <td>Reference Transactions Reporting Method</td> <td><input type="text" value="ES"/></td> <td></td> </tr> <tr> <td>503</td> <td>Registered Users</td> <td><input type="text" value="1,950"/></td> <td>1,726</td> </tr> <tr> <td>504</td> <td>Overdue Fine Policy</td> <td><input type="text"/></td> <td></td> </tr> <tr> <td colspan="4"></td> </tr> <tr> <td>550</td> <td>Total Circulation of Materials</td> <td><input type="text" value="-1"/></td> <td>11,316</td> </tr> <tr> <td>551</td> <td>Circulation of Children's Materials</td> <td><input type="text" value="-1"/></td> <td>2,294</td> </tr> <tr> <td>552</td> <td>Use of Electronic Material</td> <td><input type="text" value="-1"/></td> <td>0</td> </tr> <tr> <td>553</td> <td>Physical Item Circulation</td> <td><input type="text" value="-1"/></td> <td>11,316</td> </tr> <tr> <td>554</td> <td>Successful Retrieval of Electronic Information</td> <td><input type="text" value="-1"/></td> <td>1,744</td> </tr> <tr> <td>555</td> <td>Electronic Content Use</td> <td><input type="text" value="-1"/></td> <td>1,744</td> </tr> <tr> <td>556</td> <td>Total Collection Use</td> <td><input type="text" value="-1"/></td> <td>13,060</td> </tr> <tr> <td>561</td> <td>Circulation of Other Physical Items</td> <td><input type="text" value="-1"/></td> <td></td> </tr> <tr> <td colspan="4"></td> </tr> <tr> <td>575</td> <td>Interlibrary Loans Provided To</td> <td><input type="text" value="8,684"/></td> <td>0</td> </tr> <tr> <td>576</td> <td>Interlibrary Loans Received From</td> <td><input type="text" value="2,660"/></td> <td>30</td> </tr> </tbody> </table>						ITEM #	ITEM	CURRENT YEAR	PRIOR YEAR	500	Public Service Hours Per Year	0	1,245	501	Library Visits	<input type="text" value="5,127"/>	6,032	501a	Library Visits Reporting Method	<input type="text" value="CT"/>		502	Reference Transactions	<input type="text" value="204"/>	4	502a	Reference Transactions Reporting Method	<input type="text" value="ES"/>		503	Registered Users	<input type="text" value="1,950"/>	1,726	504	Overdue Fine Policy	<input type="text"/>						550	Total Circulation of Materials	<input type="text" value="-1"/>	11,316	551	Circulation of Children's Materials	<input type="text" value="-1"/>	2,294	552	Use of Electronic Material	<input type="text" value="-1"/>	0	553	Physical Item Circulation	<input type="text" value="-1"/>	11,316	554	Successful Retrieval of Electronic Information	<input type="text" value="-1"/>	1,744	555	Electronic Content Use	<input type="text" value="-1"/>	1,744	556	Total Collection Use	<input type="text" value="-1"/>	13,060	561	Circulation of Other Physical Items	<input type="text" value="-1"/>						575	Interlibrary Loans Provided To	<input type="text" value="8,684"/>	0	576	Interlibrary Loans Received From	<input type="text" value="2,660"/>	30
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## Administrative Entity — Programs/Other Electronic

Input Data: AE Page
Home   Survey Status   Tools ▾   Reports ▾   Help ▾   External Links ▾

**SUB MENU** | USER OPTIONS | STRUCTURE CHANGES: AE | DATA ELEMENT DEFINITIONS: AE

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Administrative Entity

Name  
 Anchor Point Public Library ▾

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**Section Navigation**

- Name/Address >
- Other Identification >
- Population/Outlets/Staff >
- Operating Revenue >
- Operating Expenditures >
- Capital >
- Library Collections >
- Service Measures >
- Programs/Other Electronic >
- Associated Outlet(s) >

Programs / Other Electronic			
ITEM #	ITEM	CURRENT YEAR	PRIOR YEAR
<i>Library Programs</i>			
600	Total Number of Synchronous Program Sessions	<input type="text" value="0"/>	60
601	Number of Synchronous Program Sessions Targeted at Children Ages 0-5	<input type="text" value="8,684"/>	
602	Number of Synchronous Program Sessions Targeted at Children Ages 6-11	<input type="text" value="1,722"/>	
603	Number of Synchronous Program Sessions Targeted at Young Adults Ages 12-18	<input type="text" value="1,722"/>	1
604	Number of Synchronous Program Sessions Targeted at Adults Age 19 or Older	<input type="text" value="10,406"/>	
605	Number of Synchronous General Interest Program Sessions	<input type="text" value="0"/>	
606	Number of Synchronous In-Person Onsite Program Sessions	<input type="text" value="0"/>	
607	Number of Synchronous In-Person Offsite Program Sessions	<input type="text" value="30"/>	
608	Number of Synchronous Virtual Program Sessions	<input type="text" value="150"/>	
610	Total Attendance at Synchronous Programs	<input type="text" value="53"/>	642
611	Attendance at Synchronous Programs Targeted at Children Ages 0-5	<input type="text" value="53"/>	
612	Attendance at Synchronous Programs Targeted at Children Ages 6-11	<input type="text" value="38"/>	
613	Attendance at Synchronous Programs Targeted at Young Adults Ages 12-18	<input type="text" value="4"/>	2

### Administrative Entity — Programs/Other Electronic, Continued

614	Attendance at Synchronous Programs Targeted at Adults Age 19 or Older	<input type="text" value="2"/>	
615	Attendance at Synchronous General Interest Programs	<input type="text" value="142"/>	
616	Synchronous In-Person Onsite Program Attendance	<input type="text" value="8"/>	
617	Synchronous In-Person Offsite Program Attendance	<input type="text" value="0"/>	
618	Synchronous Virtual Program Attendance	<input type="text" value="898"/>	
620	Total Number of Asynchronous Program Presentations	<input type="text" value="265"/>	
630	Total Views of Asynchronous Program Presentations within 30 Days	<input type="text" value="267"/>	
<i>Other Electronic Information</i>			
650	Internet Computers Used by the General Public	<input type="text" value="193"/>	8
651	Uses (Sessions) of Public Internet Computers Per Year	<input type="text" value="26"/>	1,495
651a	Reporting Method for Number of Uses of Public Internet Computers Per Year	<input type="text" value="14"/>	
652	Wireless Sessions	<input type="text" value="766"/>	1,182
652a	Reporting Method for Wireless Sessions	<input type="text" value="13"/>	
653	Website Visits	<input type="text" value="0"/>	-1

 PRINT PAGE
  SAVE

## Administrative Entity—Associated Outlet(s) Page

Input Data: AE Page
Home   Survey Status   Tools ▾   Reports ▾   Help ▾   External Links ▾

**SUB MENU** | USER OPTIONS | STRUCTURE CHANGES: OUTLET | DATA ELEMENT DEFINITIONS: OUTLET

Administrative Entity

Name Fairbanks North Star Borough Public Libraries ▾

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Associated Outlets

Name Cowles Street Bookmobile ▾

**Section Navigation**

- Name/Address >
- Other Identification >
- Population/Outlets/Staff >
- Operating Revenue >
- Operating Expenditures >
- Capital >
- Library Collections >
- Service Measures >
- Programs/Other Electronic >
- Associated Outlet(s) >

Associated Outlet(s)			
ITEM #	ITEM	CURRENT YEAR	PRIOR YEAR
700	FSCS ID	AK0023-002	AK0023-002
700a	Structure Status	00	00
701	LIB ID	<input type="text" value="AK0023-002"/>	AK0023-002
702	Name	<input type="text" value="Cowles Street Bookmobile"/>	Cowles Street Bookmobile
702a	Name Status	<input style="background-color: #f0f0f0; border: 1px solid #ccc;" type="text" value="00 No Change"/>	00
703	Street Address	<input type="text" value="1215 Cowles Street"/>	1215 Cowles Street
703a	Address Status	<input style="background-color: #f0f0f0; border: 1px solid #ccc;" type="text" value="00 No Change"/>	00
704	City	<input type="text" value="Fairbanks"/>	Fairbanks
705	ZIP Code	<input type="text" value="99701"/>	99701
707	County	<input type="text" value="Fairbanks North Star"/>	Fairbanks North Star
708	Phone	<input type="text" value="9074591031"/>	9074591031
709	Outlet Type Code	<input style="background-color: #f0f0f0; border: 1px solid #ccc;" type="text" value="Bookmobile(s)"/>	BS
711	Area in Square Footage	<input type="text" value="-3"/>	-3
712	Number of Bookmobiles	<input type="text" value="1"/>	1
713	Public Service Hours Per Year	<input type="text" value="0"/>	1,743
714	Number of Weeks Open	<input type="text" value="0"/>	52

PRINT PAGE

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## Appendix A2 Survey Instrument: Data Element Definitions

### State Characteristics Data Element Definitions

Note: The following items are answered by the state library agency.

#	Data Element Name (Variable Name)	Data Element Definition
100	Reporting Period Starting Date (STARTDAT)	<p>This is the earliest date (month and year) for a 12-month period that applies to the state's data being submitted to IMLS.</p> <p>Note: Reporting period means data for the fiscal year that ended in the previous calendar year. If data are collected for different local reporting periods, provide the earliest starting date.</p>
101	Reporting Period Ending Date (ENDDATE)	<p>This is the latest date (month and year) for a 12-month period that applies to the state's data being submitted to IMLS.</p> <p>Note: Reporting period means data for the fiscal year that ended in the previous calendar year. If data are collected for different local reporting periods, provide the latest ending date.</p>
102	State Total Population Estimate (POPU_ST)	<p>This is the most recent total population figure for your state that matches the local population figures that you are submitting to IMLS. The State Data Coordinator should obtain this figure annually from the State Data Center or other state sources.</p>
103	Total Unduplicated Population of Legal Service Areas (POPU_UND)	<p>This is the total unduplicated population of those areas in your state that receive library services. The population of unserved areas is not included in this figure.</p> <p>Note: A state's actual total population of legal service areas may be different from the total population of legal service areas as calculated by PLS Web Portal. This happens in states where there are overlaps in population of legal service areas served by individual libraries, resulting in the same population being counted twice in the PLS Web Portal calculation. For states that have no overlapping jurisdictions, this number will be identical to your state's total population of legal service areas as calculated by PLS Web Portal. For states that do have overlaps in population of legal service areas served by individual libraries, this number must be calculated separately.</p> <p>Use your state's most recent state population figures for jurisdictions in your state as the basis for calculating the total unduplicated population of legal service areas.</p>

## Administrative Entity Data Element Definitions

**Administrative Entity.** (This is not a PLS Web Portal Data Element.) This is the agency that is legally established under local or state law to provide public library service to the population of a local jurisdiction. The administrative entity may have a single outlet, or it may have more than one outlet.

#	Data Element Name (Variable Name)	Data Element Definition
150	FSCS ID (Automatic Display) (FSCSKEY)	This is the identification code assigned by PLS Web Portal to the administrative entity.
150a	Structure Status (STATSTRU)	This is the Structure Change Code to record actions such as adding, deleting, or merging.
151	LIB ID (LIBID)	This is the state-assigned identification code for the administrative entity.
152	Name (LIBNAME)	This is the legal name of the administrative entity. Note: Provide the name of the public library. Do not use acronyms. Do not abbreviate the name unless it exceeds the PLS Web Portal field length of 60 characters. Avoid abbreviations at the beginning of the name and do not punctuate abbreviations. (See Standard Abbreviations for PLS Web Portal in Appendix G.)
152a	Name Status (STATNAME)	This is the Name Change Code to identify whether the change is an official name change.
<b>Street Address</b>		
153	Street Address (ADDRESS)	This is the complete street address of the administrative entity. Note: Do not report a post office box or general delivery.
153a	Address Status (STATADDR)	This is the Address Change Code to identify whether the address change is an actual location change.
154	City (of street address) (CITY)	This is the city or town in which the administrative entity is located.
155	ZIP Code (of street address) (ZIP)	This is the standard five-digit postal zip code for the street address of the administrative entity.
<b>Mailing Address</b>		
157	Mailing Address (ADDRES_M)	This is the mailing address of the administrative entity.
158	City (of mailing address) (CITY_M)	This is the city or town of the mailing address for the administrative entity.

#	Data Element Name (Variable Name)	Data Element Definition
159	ZIP Code (of mailing address) (ZIP_M)	This is the standard five-digit postal ZIP code for the mailing address of the administrative entity.
161	County of the Entity (CNTY)	This is the county in which the headquarters of the administrative entity is physically located.
162	Phone (PHONE)	This is the telephone number of the administrative entity, including area code.  Note: Report telephone number without spacing or punctuation. If the Administrative Entity has no phone, enter -3 (for Not Applicable).
200	Interlibrary Relationship Code (C_RELATN)	Select one of the following:  HQ—Headquarters of a Federation or Cooperative. The library or entity that provides the physical space and staff who manage, coordinate, or administer the programs of the federation or cooperative.  Note: Agencies that serve other libraries rather than the public should not be reported to FSCS.  ME—Member of a Federation or Cooperative. An autonomous library joined by formal or informal agreement(s) with (a) other autonomous libraries in the same state to perform various services cooperatively, such as resource sharing, communications, etc., and (b) libraries that are part of national, multi-state or statewide library federations or cooperatives. (Do not include OCLC.) Do not include multiple outlet administrative entities (e.g., libraries with branches and that have the word “system” in their legal name) if the entity does not have an agreement with another autonomous library.  NO—Not a Member of a Federation or Cooperative.
201	Legal Basis Code (C_LEGBAS)	The legal basis is the type of local government structure within which the entity functions. It reflects the state or local law, which authorizes the library.  Select one of the following:  CC—City/County. A multi-jurisdictional entity that is operated jointly by a county and a city.  CI—Municipal Government (city, town, or village). A municipal government is an organized local government authorized in a state’s constitution and statutes and



#	Data Element Name (Variable Name)	Data Element Definition
		<p>established to provide general government for a specific concentration of population in a defined area.</p> <p>CO—County/Parish. An organized local government authorized in a state’s constitution and statutes and established to provide general government.</p> <p>LD—Library District. A library district is a local entity other than a county, municipality, township, or school district that is authorized by state law to establish and operate a public library as defined by FSCS. It has sufficient administrative and fiscal autonomy to qualify as a separate government. Fiscal autonomy requires support from local taxation dedicated to library purposes (e.g., a library tax).</p> <p>MJ—Multi-jurisdictional. An entity operated jointly by two or more units of local government under an intergovernmental agreement which creates a jointly appointed board or similar means of joint governance; to be distinguished from a library which contracts to serve other jurisdictions and from special library districts.</p> <p>Note: Please put city/county combinations under ‘CC’, rather than under Multi-jurisdictional.</p> <p>NL—Native American Tribal Government. An organized local government authorized and established to provide general government to residents of a Native American reservation.</p> <p>Note: Include native Alaskan villages in this category.</p> <p>NP—Nonprofit Association or Agency. An entity privately controlled but meeting the statutory definition of a public library in a given state; includes association libraries and libraries with 501(c) designation.</p> <p>SD—School District. An organized local entity providing public elementary, secondary, and/or higher education, which under state law, has sufficient administrative and fiscal autonomy to qualify as a separate government. Excludes “dependent public school systems” of county, municipal, township, or state governments.</p> <p>OT—Other.</p>
202	Administrative Structure Code (C_ADMIN)	This code identifies an autonomous library entity (administrative entity) that has its own governance and funding.

#	Data Element Name (Variable Name)	Data Element Definition
		<p>An administrative entity is the agency that is legally established under local or state law to provide public library service to the population of a local jurisdiction. The administrative entity may have a single outlet, or it may have more than one outlet.</p> <p>Select one of the following:</p> <p>MA—Administrative Entity with Multiple Direct Service Outlets where Administrative Offices are separate. An administrative entity that serves the public directly with two or more service outlets, including some combination of one central library, branch(es), bookmobile(s), and/or books-by-mail only. The administrative offices are separate from the direct service outlets and do not provide direct library services.</p> <p>MO—Administrative Entity with Multiple Direct Service Outlets where Administrative Offices are Not Separate. An administrative entity that serves the public directly with two or more service outlets, including some combination of one central library, branch(es), bookmobile(s), and/or books-by-mail only.</p> <p>SO—Administrative Entity with a Single Direct Service Outlet. An administrative entity that serves the public directly with one central library, books-by-mail only, or one bookmobile.</p>
203	FSCS Public Library Definition (C_FSCS)	<p>Answer &lt;Y&gt;es or &lt;N&gt;o to the following question: “<i>Does this public library meet all the criteria of the FSCS public library definition?</i>”</p> <p>A public library is an entity that is established under state enabling laws or regulations to serve a community, district, or region, and that provides at least the following:</p> <ol style="list-style-type: none"> <li>1. An organized collection of printed or other library materials, or a combination thereof;</li> <li>2. Paid staff;</li> <li>3. An established schedule in which services of the staff are available to the public;</li> <li>4. The facilities necessary to support such a collection, staff, and schedule; and</li> <li>5. Is supported in whole or in part with public funds.</li> </ol>

#	Data Element Name (Variable Name)	Data Element Definition
		Note: If the library meets all the requirements of this definition, respond with a <Y>es. If the library does not meet one or more of the requirements, respond with a <N>o.
204	Geographic Code (GEOCODE)	<p>Choose one of the following types of geography (defined by the U.S. Census Bureau) that best describes the legal service area (LSA) for which the public library has been established to offer services and from which (or on behalf of which) the library derives revenue, plus any areas served under contract for which the library is the primary service provider. The Geographic Code should represent the basis for the Population of Legal Service Area (data element #208), including areas served under contract, and as such should be determined by the state library agency.</p> <p>Each geography type has at least two subtypes: “entirety” and “overlap.” If the LSA is not coterminous with one of the geography types, select the “overlap” option for the geography type that most overlaps the LSA. For “County or Equivalent” and “Multi-County” geographies, a third subtype, “remainder excluding AEs of contained geographies,” exists specifically for AEs that serve the areas of counties outside of municipalities with separate AEs.</p> <p>Note: For further clarification, see the definition of terms published by the U.S. Census Bureau:  <a href="https://www.census.gov/programs-surveys/geography/about/glossary.html">https://www.census.gov/programs-surveys/geography/about/glossary.html</a></p> <p>PL1—Place (e.g., incorporated city or village, census-designated), entirety</p> <p>PL2—Place (e.g., incorporated city or village, census-designated), overlap</p> <p>MP1—Multi-Place, entirety</p> <p>MP2—Multi-Place, overlap</p> <p>CD1—Minor Civil Division [MCD] (e.g., town, township), entirety</p> <p>CD2—Minor Civil Division [MCD] (e.g., town, township), overlap</p> <p>MD1—Multi-MCD, entirety</p> <p>MD2—Multi-MCD, overlap</p>

#	Data Element Name (Variable Name)	Data Element Definition
		CO1—County or Equivalent, entirety
		CO2—County or Equivalent, overlap
		CO3—County or Equivalent, remainder excluding AEs of contained geographies
		MC1—Multi-County, entirety
		MC2—Multi-County, overlap
		MC3—Multi-County, remainder excluding AEs of contained geographies
		SU1—School District - Unified, entirety
		SU2—School District - Unified, overlap
		SE1—School District - Elementary, entirety
		SE2—School District - Elementary, overlap
		SS1—School District - Secondary, entirety
		SS2—School District - Secondary, overlap
		OTH—Other
205	Legal Service Area Boundary Change (LSABOUND)	<p>Answer &lt;Y&gt;es or &lt;N&gt;o to the following question: “<i>Did the administrative entity’s legal service area boundaries change since last year?</i>”</p> <p>Note: Changes are likely to result, for example, when a municipality annexes land, when one municipality in a county becomes either an independent city or its own county necessitating its exclusion from the first county’s geography, or when an administrative entity contracts to provide public library service for some additional geographic area other than the geographic area for which it was established (e.g., a municipal library contracts to serve county residents).</p>
206	Reporting Period Starting Date (STARTDAT)	<p>This is the starting date (month, day, and year) for a 12-month period that applies to the administrative entity’s data being submitted to IMLS.</p> <p>Note: Reporting period means data for the fiscal year that ended in the previous calendar year.</p>

#	Data Element Name (Variable Name)	Data Element Definition
207	Reporting Period Ending Date (ENDDATE)	<p>This is the ending date (month, day, and year) for a 12-month period that applies to the administrative entity's data being submitted to IMLS.</p> <p>Note: Reporting period means data for the fiscal year that ended in the previous calendar year.</p>
208	Population of the Legal Service Area (POPU_LSA)	<p>The number of people in the geographic area for which a public library has been established to offer services and from which (or on behalf of which) the library derives revenue, plus any areas served under contract for which the library is the primary service provider.</p> <p>Note: The determination of this population figure shall be the responsibility of the state library agency. This population figure should be based on the most recent state population figures for jurisdictions in your state available from the State Data Center. The State Data Coordinator should obtain these figures annually from the State Data Center or other state sources.</p>
209	Number of Central Libraries (CENTLIB)	<p>This is one type of single outlet library (SO) or the library, which is the operational center of a multiple-outlet library (MO or MA). Usually all processing is centralized here and the principal collections are housed here. Synonymous with main library.</p> <p>Note: Each administrative entity may report either no central library or one central library. No administrative entity may report more than one central library. In the administrative entity file, this simply means reporting "0" or "1" for central library. Where two or more libraries are considered "centrals" for state or local purposes, one central library and one or more branch libraries should be reported to FSCS. If you wish to identify a central library in the outlet file, identify the library with the largest collection as the central library for FSCS purposes, and report all others as branches. Where there are several co-equal outlets and no principal collection, report all such outlets as branches, not central libraries.</p>

#	Data Element Name (Variable Name)	Data Element Definition
210	Number of Branch Libraries (BRANLIB)	A branch library is an auxiliary unit of an administrative entity which has at least all the following:  Separate quarters;  An organized collection of library materials;  Paid staff; and  Regularly scheduled hours for being open to the public.
211	Number of Bookmobiles (BKMOB)	A bookmobile is a traveling branch library. It consists of at least all the following:  A truck or van that carries an organized collection of library materials;  Paid staff; and  Regularly scheduled hours (bookmobile stops) for being open to the public.  Note: Count the number of vehicles in use, not the number of stops the vehicle makes.

### PAID STAFF (FULL-TIME EQUIVALENT)

Report figures as of the last day of the fiscal year. Include all positions funded in the library's budget whether those positions are filled or not. To ensure comparable data, 40 hours per week has been set as the measure of full-time employment (FTE). For example, 60 hours per week of part-time work by employees in a staff category divided by the 40-hour measure equals 1.50 FTEs.

#	Data Element Name (Variable Name)	Data Element Definition
250	ALA-MLS Librarians (MASTER)	Librarians with master's degrees from programs of library and information studies accredited by the American Library Association.
251	Total Librarians (LIBRARIA)	Persons with the title of librarian who do paid work that usually requires professional training and skill in the theoretical or scientific aspects of library work, or both, as distinct from its mechanical or clerical aspect. This data element also includes ALA-MLS (data element #250).
252	All Other Paid Staff (OTHPAID)	This includes all other FTE employees paid from the reporting unit budget, including plant operations, security, and maintenance staff.

#	Data Element Name (Variable Name)	Data Element Definition
253	Total Paid Employees (TOTSTAFF)	This is the sum of Total Librarians and All Other Paid Staff (data elements #251 and #252).

## OPERATING REVENUE

Report revenue used for operating expenditures as defined below. Include federal, state, local, or other grants. DO NOT include revenue for major capital expenditures, contributions to endowments, revenue passed through to another agency (e.g., fines), or funds unspent in the previous fiscal year (e.g., carryover). (Funds transferred from one public library to another public library should be reported by only one of the public libraries. The State Data Coordinator shall determine which library will report these funds.)

#	Data Element Name (Variable Name)	Data Element Definition
300	Local Government Revenue (LOGVT)	<p>This includes all local government funds designated by the community, district, or region and available for expenditure by the public library. Do not include the value of any contributed or in-kind services or the value of any gifts and donations, library fines, fees, or grants.</p> <p>Do not include state, federal, and other funds passed through local government for library use. Report these funds with state government revenue or federal government revenue, as appropriate.</p> <p>Note: Significant funding provided by other local government agencies with the authority to levy taxes “on behalf of” the library should be included if the information is available to the reporting agency and if such funds are supported by documentation (such as certified budgets, payroll records, etc.)</p>
301	State Government Revenue (STGVT)	<p>These are all funds distributed to public libraries by state government for expenditure by the public libraries, except for federal money distributed by the state. This includes funds from such sources as penal fines, license fees, and mineral rights.</p> <p>Note: If operating revenue from consolidated taxes is the result of state legislation, the revenue should be reported under state revenue (even though the revenue may be from multiple sources).</p>
302	Federal Government Revenue (FEDGVT)	This includes all federal government funds distributed to public libraries for expenditure by the public libraries, including federal money distributed by the state.

#	Data Element Name (Variable Name)	Data Element Definition
303	Other Operating Revenue (OTHINCM)	This is all operating revenue other than that reported under local, state, and federal (data elements #300, #301, and #302). Include, for example, monetary gifts and donations received in the current year, interest, library fines, fees for library services, or grants. Do not include the value of any contributed or in-kind services or the value of any nonmonetary gifts and donations.
304	Total Operating Revenue (TOTINCM)	This is the sum of Local Government Revenue, State Government Revenue, Federal Government Revenue, and Other Operating Revenue (data elements #300 through #303).

## OPERATING EXPENDITURES

Operating expenditures are the current and recurrent costs necessary to support the provision of library services. Significant costs, especially benefits and salaries, that are paid by other taxing agencies (government agencies with the authority to levy taxes) “on behalf of” the library may be included if the information is available to the reporting agency. Only such funds that are supported by expenditure documents (such as invoices, contracts, payroll records, etc.) at the point of disbursement should be included. Do not report the value of free items as expenditures. Do not report estimated costs as expenditures. Do not report capital expenditures under this category.

### Staff Expenditures

#	Data Element Name (Variable Name)	Data Element Definition
350	Salaries & Wages Expenditures (SALARIES)	This includes salaries and wages for all library staff (including plant operations, security, and maintenance staff) for the fiscal year. Include salaries and wages before deductions but exclude employee benefits.
351	Employee Benefits Expenditures (BENEFIT)	These are the benefits outside of salaries and wages paid and accruing to employees (including plant operations, security, and maintenance staff), regardless of whether the benefits or equivalent cash options are available to all employees.  Include amounts for direct paid employee benefits including Social Security, retirement, medical insurance, life insurance, guaranteed disability income protection, unemployment compensation, workmen’s compensation, tuition, and housing benefits



#	Data Element Name (Variable Name)	Data Element Definition
352	Total Staff Expenditures (STAFFEXP)	This is the sum of Salaries & Wages Expenditures and Employee Benefits Expenditures (data elements #350 and #351).

### Collection Expenditures

This includes all operating expenditures from the library budget for all materials in print, microform, electronic, and other formats considered part of the collection, whether purchased, leased, or licensed. Exclude charges or fees for interlibrary loans and expenditures for document delivery.

#	Data Element Name (Variable Name)	Data Element Definition
353	Print Materials Expenditures (PRMATEXP)	Report all operating expenditures for the following print materials: books, current serial subscriptions, government documents, and any other print acquisitions.
354	Electronic Materials Expenditures (ELMATEXP)	Report all operating expenditures for electronic (digital) materials. Types of electronic materials include e-books, audio and video downloadables, e-serials (including journals), government documents, databases (including locally mounted, full text or not), electronic files, reference tools, scores, maps, or pictures in electronic or digital format, including materials digitized by the library. Electronic materials can be distributed on magnetic tape, diskettes, computer software, CD-ROM, or other portable digital carrier, and can be accessed via a computer, via access to the Internet, or by using an e-book reader. Include expenditures for materials held locally and for remote materials for which permanent or temporary access rights have been acquired. Include expenditures for database licenses. [Note: Based on ISO 2789 definition.]  Note: Expenditures for computer software used to support library operations or to link to external networks, including the Internet, are reported under Other Operating Expenditures (data element #357).
355	Other Materials Expenditures (OTHMATEX)	Report all operating expenditures for other materials, such as microform, audio and video physical units, DVD, and materials in new formats.
356	Total Collection Expenditures (TOTEXPCO)	This is the sum of Print Materials Expenditures, Electronic Materials Expenditures, and Other Materials Expenditures (data elements #353, #354, and #355).

#	Data Element Name (Variable Name)	Data Element Definition
357	Other Operating Expenditures (OTHOPEXP)	This includes all expenditures other than those reported for Total Staff Expenditures (data element #352) and Total Collection Expenditures (data element #356).  Note: Include expenses such as binding, supplies, repair or replacement of existing furnishings and equipment; and costs of computer hardware and software used to support library operations or to link to external networks, including the Internet. Report contracts for services, such as costs of operating and maintaining physical facilities, and fees paid to a consultant, auditor, architect, attorney, etc.
358	Total Operating Expenditures (TOTOPEXP)	This is the sum of Total Staff Expenditures, Total Collection Expenditures, and Other Operating Expenditures (data elements #352, #356, and #357).

## CAPITAL REVENUE

Report all revenue to be used for major capital expenditures, by source of revenue. Include funds received for (a) site acquisition; (b) new buildings; (c) additions to or renovation of library buildings; (d) furnishings, equipment, and initial collections (print, nonprint, and electronic) for new buildings, building additions, or building renovations; (e) computer hardware and software used to support library operations, to link to networks, or to run information products; (f) new vehicles; and (g) other one-time major projects. Exclude revenue to be used for replacement and repair of existing furnishings and equipment, regular purchase of library materials, and investments for capital appreciation. Exclude income passed through to another agency (e.g., fines), or funds unspent in the previous fiscal year (e.g., carryover). Funds transferred from one public library to another public library should be reported by only one of the public libraries. Report federal, state, local, and other revenue to be used for major capital expenditures in the following categories:

#	Data Element Name (Variable Name)	Data Element Definition
400	Local Government Capital Revenue (LCAP_REV)	Report all governmental funds designated by the community, district, or region and available to the public library for the purpose of major capital expenditures, except for state and/or federal money distributed by the local government.
401	State Government Capital Revenue (SCAP_REV)	Report all funds distributed to public libraries by state government for expenditure by the public libraries for the purpose of major capital expenditures, except for federal money distributed by the state.
402	Federal Government Capital Revenue (FCAP_REV)	Report federal governmental funds, including federal funds distributed by the state or locality, and grants and

#	Data Element Name (Variable Name)	Data Element Definition
		aid received by the library for the purpose of major capital expenditures.
403	Other Capital Revenue (OCAP_REV)	Report private (nongovernmental funds), including grants received by the library for the purpose of major capital expenditures.
404	Total Capital Revenue (CAP_REV)	This is the sum of Local Government Capital Revenue, State Government Capital Revenue, Federal Government Capital Revenue, and Other Capital Revenue (data elements #400 through #403).  Note: The amounts reported for Total Capital Revenue and Total Capital Expenditures are not expected to be equal.

**CAPITAL EXPENDITURES**

#	Data Element Name (Variable Name)	Data Element Definition
405	Total Capital Expenditures (CAPITAL)	Report major capital expenditures (the acquisition of or additions to fixed assets). Examples include expenditures for (a) site acquisitions; (b) new buildings; (c) additions to or renovation of library buildings; (d) furnishings, equipment, and initial book stock for new buildings, building additions, or building renovations; (e) library automation systems; (f) new vehicles; and (g) other one-time major projects. Include federal, state, local, or other revenue used for major capital expenditures. Only funds that are supported by expenditure documents (e.g., invoices, contracts, payroll records, etc.) at the point of disbursement should be included. Estimated costs are not included. Exclude expenditures for replacement and repair of existing furnishings and equipment, regular purchase of library materials, and investments for capital appreciation.  Exclude contributions to endowments, or revenue passed through to another agency (e.g., fines). Funds transferred from one public library to another public library should be reported by only one of the public libraries.

## LIBRARY COLLECTION

This section of the survey (450–460) collects data on selected types of materials.

It does not cover all materials (i.e., microforms, loose sheet music, maps, and pictures) for which expenditures are reported under Print Materials Expenditures, Electronic Materials Expenditures, and Other Materials Expenditures (data elements #353, #354, and #355). Under this category report only items that have been purchased, leased, or licensed by the library, a consortium, the state library, a donor or other person or entity. Included items must only be accessible with a valid library card or at a physical library location; inclusion in the catalog is not required. Do not include items freely available without monetary exchange. Do not include items that are permanently retained by the patron; count only items that have a set circulation period where it is available for their use. Count electronic materials at the administrative entity level; do not duplicate numbers at each branch.

#	Data Element Name (Variable Name)	Data Element Definition
450	Print Materials (BKVOL)	Report a single figure that includes the following:  Books in print. Books are non-serial printed publications (including music scores or other bound forms of printed music, and maps) that are bound in hard or soft covers, or in loose-leaf format. Do not include unbound sheet music. Include non-serial government documents. Report the number of physical units, including duplicates. For smaller libraries, if volume data are not available, count the number of titles. Books packaged together as a unit (e.g., a 2-volume set) and checked out as a unit are counted as one physical unit.
451	Electronic Books – EBooks (EBOOK)	E-books are digital documents (including those digitized by the library), licensed or not, where searchable text is prevalent, and which can be seen in analogy to a printed book (monograph). E-books are loaned to users on portable devices (e-book readers) or by transmitting the contents to the user's personal computer for a limited time. Include e-books held locally and remote e-books for which permanent or temporary access rights have been acquired. Report the number of electronic units, including duplicates, at the administrative entity level; do not duplicate unit count for each branch. E-books packaged together as a unit (e.g., multiple titles on a single e-book reader) and checked out as a unit are counted as one unit.  Report the number of units. Report only items that have been purchased, leased, or licensed by the library, a consortium, the state library, a donor or other person or entity. Included items must only be accessible with a valid

#	Data Element Name (Variable Name)	Data Element Definition
		<p>library card or at a physical library location; inclusion in the catalog is not required. Do not include items freely available without monetary exchange. Do not include items that are permanently retained by the patron; count only items that have a set circulation period where it is available for their use. Count electronic materials at the administrative entity level; do not duplicate numbers at each branch.</p> <p>NOTE: For purposes of this survey, units are defined as “units of acquisition or purchase.” The “unit” is determined by considering whether the item is restricted to a finite number of simultaneous users or an unlimited number of simultaneous users.</p> <p>Finite simultaneous use: units of acquisition or purchase is based on the number of simultaneous usages acquired (equivalent to purchasing multiple copies of a single title). For example, if a library acquires a title with rights to a single user at a time, then that item is counted as 1 “unit”; if the library acquires rights to a single title for 10 simultaneous users, then that item is counted as 10 “units.” For smaller libraries, if volume data are not available, the number of titles may be counted.</p> <p>Unlimited simultaneous use: units of acquisition or purchase is based on the number of titles acquired. For example, if a library acquires a collection of 100 books with unlimited simultaneous users, then that collection would be counted as 100 “units.”</p>
452	Audio – physical units (AUDIO_PH)	<p>These are materials circulated in a fixed, physical format on which sounds (only) are stored (recorded) and that can be reproduced (played back) mechanically, electronically, or both. Include records, audiocassettes, audio cartridges, audio discs (including audio-CD-ROMs), audio-reels, talking books, and other sound recordings stored in a fixed, physical format. Do not include downloadable electronic audio files.</p> <p>Report the number of units, including duplicates. Items packaged together as a unit (e.g., two audiocassettes for one recorded book) and checked out as a unit are counted as one physical unit.</p>
453	Audio – downloadable units	<p>These are downloadable electronic files on which sounds (only) are stored (recorded) and that can be reproduced</p>

#	Data Element Name (Variable Name)	Data Element Definition
	(AUDIO_DL)	<p>(played back) electronically. Audio – Downloadable Units may be loaned to users on portable devices or by transmitting the contents to the user’s personal computer for a limited time. Include Audio – Downloadable Units held locally and remote Audio – Downloadable Units for which permanent or temporary access rights have been acquired.</p> <p>Report the number of units. Report only items that have been purchased, leased, or licensed by the library, a consortium, the state library, a donor or other person or entity. Included items must only be accessible with a valid library card or at a physical library location; inclusion in the catalog is not required. Do not include items freely available without monetary exchange. Do not include items that are permanently retained by the patron; count only items that have a set circulation period where it is available for their use. Count electronic materials at the administrative entity level; do not duplicate numbers at each branch.</p> <p>NOTE: For purposes of this survey, units are defined as “units of acquisition or purchase.” The “unit” is determined by considering whether the item is restricted to a finite number of simultaneous users or an unlimited number of simultaneous users.</p> <p>Finite simultaneous use: units of acquisition or purchase is based on the number of simultaneous usages acquired (equivalent to purchasing multiple copies of a single title). For example, if a library acquires a title with rights to a single user at a time, then that item is counted as 1 “unit”; if the library acquires rights to a single title for 10 simultaneous users, then that item is counted as 10 “units. For smaller libraries, if volume data are not available, the number of titles may be counted.</p> <p>Unlimited simultaneous use: units of acquisition or purchase is based on the number of titles acquired. For example, if a library acquires a collection of 100 books with unlimited simultaneous users, then that collection would be counted as 100 “units.”</p>
454	Video – physical units (VIDEO_PH)	These are materials circulated in a fixed, physical format on which moving pictures are recorded, with or without sound.

#	Data Element Name (Variable Name)	Data Element Definition
		<p>Electronic playback reproduces pictures, with or without sound, using a television receiver or computer monitor. Video formats may include tape, DVD and CD-ROM. Do not include downloadable electronic video files.</p> <p>Report the number of units, including duplicates. Items packaged together as a unit (e.g., two DVDs for one movie) and checked out as a unit are counted as one physical unit.</p>
455	Video – downloadable units (VIDEO_DL)	<p>These are downloadable electronic files on which moving pictures are recorded, with or without sound. Electronic playback reproduces pictures, with or without sound, using a television receiver, computer monitor or video-enabled mobile device. Video – Downloadable Units may be loaned to users on portable devices or by transmitting the contents to the user’s personal computer for a limited time. Include Video – Downloadable Units held locally and remote Video – Downloadable Units for which permanent or temporary access rights have been acquired.</p> <p>Report the number of units. Report only items that have been purchased, leased, or licensed by the library, a consortium, the state library, a donor or other person or entity. Included items must only be accessible with a valid library card or at a physical library location; inclusion in the catalog is not required. Do not include items freely available without monetary exchange. Do not include items that are permanently retained by the patron; count only items that have a set circulation period where it is available for their use. Count electronic materials at the administrative entity level; do not duplicate numbers at each branch.</p> <p>NOTE: For purposes of this survey, units are defined as “units of acquisition or purchase.” The “unit” is determined by considering whether the item is restricted to a finite number of simultaneous users or an unlimited number of simultaneous users.</p> <p>Finite simultaneous use: units of acquisition or purchase is based on the number of simultaneous usages acquired (equivalent to purchasing multiple copies of a single title). For example, if a library acquires a title with rights to a single user at a time, then that item is counted as 1 “unit”; if the library acquires rights to a single title for 10 simultaneous users, then that item is counted as 10</p>

#	Data Element Name (Variable Name)	Data Element Definition
		<p>“units.” For smaller libraries, if volume data are not available, the number of titles may be counted.</p> <p>Unlimited simultaneous use: units of acquisition or purchase is based on the number of titles acquired. For example, if a library acquires a collection of 100 books with unlimited simultaneous users, then that collection would be counted as 100 “units.”</p>
461	Total Physical Items in Collection (TOTPHYS)	<p>All circulating physical items in the collection. These are materials in a fixed, physical format available for use outside the library. This includes Print Materials (data element 450), Audio – physical units (data element 452), Video – physical units (data element 454), and Other Circulating Physical Items (data element 462).</p> <p>Report the number of units, including duplicates. Items packaged together as a unit (such as a set of cookie cutters) and checked out as a unit are counted as one physical unit.</p>
462	Other Circulating Physical Items (OTHPHYS)	<p>Report a single figure that includes the following: all circulating physical items other than print books (data element 450), physical audio units (data element 452), physical video units (data element 454), and serials. These are materials in a fixed, physical format available for use outside the library. These can include a variety of item types, such as wi-fi hotspots, sewing machines, cake pans, tools, etc.</p> <p>Report the number of units, including duplicates. Items packaged together as a unit (such as a set of cookie cutters) and checked out as a unit are counted as one physical unit.</p>

## Electronic Collections

Report the number of electronic collections.

An electronic collection is a collection of electronically stored data or unit records (facts, bibliographic data, abstracts, texts, photographs, music, video, etc.) with a common user interface and software for the retrieval and use of the data. An electronic collection may be organized, curated, and electronically shared by the library, or rights may be provided by a third-party vendor. An electronic collection may be funded by the library, or provided through cooperative agreement with other libraries, or through the State Library. Do not include electronic collections that are provided by third parties and freely linked to on the Web.



**Electronic Collections do not have a circulation period** and may be retained by the patron. Remote access to the collection may or may not require authentication. Unit records may or may not be included in the library's catalog; the library may or may not select individual titles. Include electronic collections that are available online or are locally hosted in the library.

**Note: The data or records are usually collected with a particular intent and relate to a defined topic.**

Report the number of electronic collections acquired through curation, payment, or formal agreement, by source of access:

#	Data Element Name (Variable Name)	Data Element Definition
456	Local/Other cooperative Agreements (EC_LO_OT)	
457	State (state government or state library) (EC_ST)	
458	Total Electronic Collections (ELECCOLL)	This is the sum of Local/Other cooperative agreements and State electronic collections (data elements #456 and #457).

## SERVICES

#	Data Element Name (Variable Name)	Data Element Definition
501	Library Visits (VISITS)	This is the total number of persons entering the library for whatever purpose during the year.  Note: If an actual count of visits is unavailable, determine an annual estimate by counting visits during a typical week in October and multiplying the count by 52. A "typical week" is a time that is neither unusually busy nor unusually slow. Avoid holiday times, vacation periods for key staff, or days when unusual events are taking place in the community or the library. Choose a week in which the library is open its regular hours. Include seven consecutive calendar days, from Sunday through Saturday (or whenever the library is usually open).
501a	Library Visits Reporting Method (VISITRPT)	Regarding the number of Library Visits (data element #501) entered, is this an annual count or an annual estimate based on a typical week or weeks?

#	Data Element Name (Variable Name)	Data Element Definition
		<p>Select one of the following:</p> <p>CT—Annual Count</p> <p>ES—Annual Estimate Based on Typical Week(s)</p>
502	Reference Transactions (REFERENC)	<p>Reference Transactions are information consultations in which library staff recommend, interpret, evaluate, and/or use information resources to help others to meet particular information needs.</p> <p>Reference transactions do not include formal instruction or exchanges that provide assistance with locations, schedules, equipment, supplies, or policy statements.</p> <p><u>NOTES:</u></p> <ol style="list-style-type: none"> <li>(1) A reference transaction includes information and referral service, unscheduled individual instruction and assistance in using information sources (including websites and computer-assisted instruction).</li> <li>(2) Count Readers Advisory questions as reference transactions.</li> <li>(3) Information sources include (a) printed and nonprinted material; (b) machine-readable databases (including computer-assisted instruction); (c) the library's own catalogs and other holdings records; (d) other libraries and institutions through communication or referral; and (e) persons both inside and outside the library.</li> <li>(4) When a staff member uses information gained from previous use of information sources to answer a question, the transaction is reported as a reference transaction even if the source is not consulted again.</li> <li>(5) If a contact includes both reference and directional services, it should be reported as one reference transaction.</li> <li>(6) Duration should not be an element in determining whether a transaction is a reference transaction.</li> <li>(7) Do not include transactions that include only a directional service, such as instruction for locating staff, library users, or physical features within the library. Examples of directional transactions include, "Where is the reference librarian? Where is Susan</li> </ol>

#	Data Element Name (Variable Name)	Data Element Definition
		<p>Smith? Where is the rest room? Where are the 600s? Can you help me make a photocopy?"</p> <p><u>Annual Count vs. Annual Estimate</u></p> <p>If an annual count of reference transactions is unavailable, count reference transactions during a typical week or weeks, and multiply the count to represent an annual estimate.</p> <p>A "typical week" is a time that is neither unusually busy nor unusually slow. Avoid holiday times, vacation periods for key staff, or days when unusual events are taking place in the community or in the library. Choose a week in which the library is open its regular hours.</p> <p>Example: If there are four weeks sampled, multiply the totals for those four weeks by 13 to get an estimate for the full year. If the sample is done twice a year (one week at each time, two weeks total) multiply the count by 26 to get the estimated annual count.</p>
502a	Reference Transactions Reporting Method (REFERRPT)	<p>Regarding the number of Reference Transactions (data element #502) entered, is this an annual count or an annual estimate based on a typical week or weeks?</p> <p>Select one of the following: CT—Annual Count ES—Annual Estimate Based on Typical Week(s)</p>
503	Number of Registered Users (REGBOR)	<p>A registered user is a library user who has applied for and received an identification number or card from the public library that has established conditions under which the user may borrow library materials or gain access to other library resources.</p> <p>Note: Files should have been purged within the past three (3) years.</p>
504	Overdue Fine Policy (ODFINE)	<p>Answer &lt;Y&gt;es or &lt;N&gt;o to the following question:</p> <p>As of the end of the reporting period, does the library charge overdue fines to any users when they fail to return physical print materials by the date due?</p> <p>NOTE: Overdue fines are monetary penalties that typically increase according to the number of days the materials are overdue. Overdue fines are not replacement costs for lost or damaged materials.</p>

#	Data Element Name (Variable Name)	Data Element Definition
550	Total Circulation of Materials (TOTCIR)	This is the sum of Use of Electronic Material and Physical Item Circulation (data elements #552 and #553).
551	Circulation of Children's Materials (KIDCIRCL)	The total annual circulation of all children's materials in all formats to all users, including renewals.
552	Use of Electronic Material (ELMATCIR)	Electronic Materials are materials that are distributed digitally online and can be accessed via a computer, the Internet, or a portable device such as an e-book reader. Types of electronic materials include e-books and downloadable electronic video and audio files. Electronic materials packaged together as a unit and checked out as a unit are counted as one use. Include circulation only for items that require a user authentication and have a limited period of use.
553	Physical Item Circulation (PHYSCIR)	The total annual circulation of all physical library materials of all types, including renewals.  Note: Count all physical materials in all formats that are charged out for use outside the library. Interlibrary loan transactions included are only items borrowed for users. Do not include items checked out to another library.
554	Successful Retrieval of Electronic Information (ELINFO)	The number of full-content units or descriptive records examined, downloaded, or otherwise supplied to user, from online library resources that require user authentication but do not have a circulation period. Examining documents is defined as having the full text of a digital document or electronic resource downloaded or fully displayed. Some electronic services do not require downloading as simply viewing documents is normally sufficient for user needs.  Include use both inside and outside the library. Do not include use of the OPAC or website. [based on NISO Standard Z39.7 (2013) #7.7, p. 43]
555	Electronic Content Use (ELCONT)	The total annual count of the circulation of electronic materials and the successful retrieval of electronic information (Data elements #552 and #554).
556	Total Collection Use (TOTCOLL)	The total annual count of physical item circulation, circulation of electronic material and successful retrieval of electronic information (Data elements #552, #553, and #554).

#	Data Element Name (Variable Name)	Data Element Definition
561	Circulation of Other Physical Items (OTHPHCIR)	Circulation of all physical items other than print books (data element 450), physical audio units (data element 452), physical video units (data element 454), and serials, including renewals. These are materials in a fixed, physical format available for use outside the library. These can include a variety of item types, such as wi-fi hotspots, sewing machines, cake pans, tools, telescopes, board games, video games, etc.

## INTER-LIBRARY LOANS

#	Data Element Name (Variable Name)	Data Element Definition
575	Provided To (LOANTO)	These are library materials, or copies of the materials, provided by one autonomous library to another upon request. The libraries involved in interlibrary loans are not under the same library administration. “Library administration” means Administrative Entity (not anything broader). Do not include items loaned between outlets within the same library administrative entity. These data are reported as annual figures.
576	Received From (LOANFM)	These are library materials, or copies of the materials, received by one autonomous library from another upon request. The libraries involved in interlibrary loans are not under the same library administration. “Library administration” means Administrative Entity (not anything broader). Do not include items loaned between outlets within the same library administrative entity. These data are reported as annual figures.

## LIBRARY PROGRAMS

### Synchronous Program Sessions

A synchronous (live) program session is any planned event which introduces the group attending to library services or which provides information to participants.

Program sessions may cover use of the library, library services, or library tours. Program sessions may also provide cultural, recreational, or educational information. Examples of these types of program sessions include, but are not limited to, film showings, lectures, story hours, literacy programs, citizenship classes, and book discussions.

Include	Exclude
All program sessions that are sponsored or co-sponsored by the library. For a program session to be sponsored or co-sponsored by the library, the library must contribute financial resources or staff time toward the program session. For a program session that is part of a larger community event (such as a farmer's market or festival), it is not necessary for the library to also sponsor or organize the larger event.	Program sessions sponsored by other groups that use library facilities. For example, do not include a homeschooling group hosting a speaker in a meeting room without facilitation from library staff.
Both on-site and off-site program sessions. For example, include a storytime at a farmer's market or a presentation to a school group about library resources conducted at a school.	Offsite outreach efforts that do not otherwise meet the definition of a program session. For example, do not include having a library card signup booth at a farmer's market.
Live-streamed virtual (synchronous) program sessions that are sponsored or co-sponsored by the library.	Recorded (asynchronous) presentations of program content; these should be counted in Total Number of Asynchronous Program Presentations (data element 620).  Programming that is shared on the library's website or social media that is not sponsored or co-sponsored by the library. For example, do not include sharing a video from an author's website of him or her reading a book.
Program sessions with attendance of zero or one if they were intended for a group.	Activities delivered on a one-to-one basis, rather than to a group, such as one-to-one literacy tutoring, services to homebound, homework assistance, and mentoring activities.

Include	Exclude
	Passive or self-directed activities that do not occur at a scheduled time. For example, do not include leaving an art project or puzzle on a table for participants to complete.

#	Data Element Name (Variable Name)	Data Element Definition
600	Total Number of Synchronous Program Sessions (TOTPRO)	<p>This is a total count of the number of synchronous (live) program sessions during the reporting period. See the Synchronous Program Sessions definition for more detail about what counts as a program session.</p> <ul style="list-style-type: none"> <li>• If programs are offered as a series, count each program session in the series. For example, a film series offered once a week for eight weeks should be counted as eight program sessions.</li> <li>• Include in-person onsite, in-person offsite, and virtual synchronous program sessions.</li> <li>• Each program session should only be counted once, regardless of the number of formats in which it is presented. For example, a program session that has both in-person and virtual attendance options should be counted as a single program session.</li> </ul> <p>This is the sum of:</p> <ul style="list-style-type: none"> <li>• Number of Synchronous Program Sessions Targeted at Children Ages 0–5 (data element 601),</li> <li>• Number of Synchronous Program Sessions Targeted at Children Ages 6–11 (data element 602),</li> <li>• Number of Synchronous Program Sessions Targeted at Young Adults Ages 12–18 (data element 603),</li> <li>• Number of Synchronous Program Sessions Targeted at Adults Ages 19 or Older (data element 604), and</li> <li>• Number of Synchronous General Interest Program Sessions (data element 605).</li> </ul> <p>Separately, it is also the sum of:</p> <ul style="list-style-type: none"> <li>• Number of Synchronous In-Person Onsite Program Sessions (data element 606),</li> <li>• Number of Synchronous In-Person Offsite Program Sessions (data element 607), and</li> </ul>

#	Data Element Name (Variable Name)	Data Element Definition
		<ul style="list-style-type: none"> <li>Number of Synchronous Live-Virtual Program Sessions (data element 608).</li> </ul>
601	Number of Synchronous Program Sessions Targeted at Children Ages 0–5 (K0_5PRO)	<p>A program session targeted at children ages 0–5 is any planned event for which the primary audience is infants, toddlers, or preschool-age children. Examples of these types of program sessions include, but are not limited to, story hours, every child ready to read programs, musical or sing-along events, and puppet shows. Include program sessions aimed at children ages 0–5 even if adult caregivers also attend. Each program session should only be counted in one age category based on its primary target audience.</p> <p>This figure is a subset of the Total Number of Synchronous Program Sessions (data element 600). See Synchronous Program Session definition for more information about counting program sessions.</p>
602	Number of Synchronous Program Sessions Targeted at Children Ages 6–11 (K6_11PRO)	<p>A program session targeted at children ages 6–11 is any planned event for which the primary audience is elementary-school-age children. Examples of these types of program sessions include, but are not limited to, story hours, science events, crafting classes, and summer reading events. Include program sessions aimed at children ages 6–11 even if adult caregivers also attend with the children. Each program session should only be counted in one age category based on its primary target audience.</p> <p>This figure is a subset of the Total Number of Synchronous Program Sessions (data element 600). See Synchronous Program Session definition for more information about counting program sessions.</p>
603	Number of Synchronous Program Sessions Targeted at Young Adults Ages 12–18 (YAPRO)	<p>A young adult program session is any planned event for which the primary audience is young adults ages 12 to 18 years. Examples of these types of program sessions include, but are not limited to, book clubs, college prep programs, teen tech or gaming clubs, and summer reading events. Each program session should only be counted in one age category based on its primary target audience.</p> <p>This figure is a subset of the Total Number of Synchronous Program Sessions (data element 600). See Synchronous Program Session definition for more information about counting program sessions. Note: The</p>



#	Data Element Name (Variable Name)	Data Element Definition
		<a href="#">Young Adult Library Services Association</a> (YALSA) defines young adults as age 12 through 18.
604	Number of Synchronous Program Sessions Targeted at Adults Ages 19 or Older (ADULTPRO)	<p>An adult program session is any planned event for which the primary audience is adults ages 19 or older. Examples of these types of program sessions include, but are not limited to, book discussions, citizenship classes, and lectures. Each program session should only be counted in one age category based on its primary target audience.</p> <p>This figure is a subset of the Total Number of Synchronous Program Sessions (data element 600). See Synchronous Program Session definition for more information about counting program sessions.</p>
605	Number of Synchronous General Interest Program Sessions (GENPRO)	<p>A general interest program session is any planned event that is appropriate for any age group or multiple age groups. Include all-age, all-library, family, and intergenerational program sessions. Examples of these types of program sessions include, but are not limited to, family game nights, holiday events, storytelling programs, or chess clubs. Include all programs here that do not fit into the other age category elements. Each program session should only be counted in one age category based on its primary target audience; do not include program sessions here that have already been counted in earlier age category elements. Avoid including program sessions that are targeted at more than one non-adult age category (and are not targeted at adults); these should be counted in the child or young adult age category that best represents the target audience.</p> <p>This figure is a subset of the Total Number of Synchronous Program Sessions (data element 600). See Synchronous Program Session definition for more information about counting program sessions.</p>
606	Number of Synchronous In-Person Onsite Program Sessions (ONPRO)	<p>An in-person onsite program session is any planned event that includes an in-person attendance option and takes place at library facilities. Examples include, but are not limited to, a job skills class in the library or a nature program on the library grounds. Regardless of the number of formats in which a program session is offered, each program session should only be counted once and in one format category. Include in-person program sessions that</p>

#	Data Element Name (Variable Name)	Data Element Definition
		also have a virtual attendance option and count them as a single program session.
		This figure is a subset of the Total Number of Synchronous Program Sessions (data element 600). See Synchronous Program Session definition for more information about counting program sessions.
607	Number of Synchronous In-Person Offsite Program Sessions (OFFPRO)	<p>An in-person offsite program session is any planned event that includes an in-person attendance option and takes place somewhere other than the library or the library grounds. Examples include, but are not limited to, facilitating a book club at a local nursing home, hosting a storytime at a local farmer's market, or visiting a school to present about library services. Regardless of the number of formats in which a program session is offered, each program session should only be counted once and in one format category. Include in-person program sessions that also have a virtual attendance option and count them as a single program session.</p> <p>This figure is a subset of the Total Number of Program Sessions (data element 600). See Synchronous Program Session definition for more information about counting program sessions.</p>
608	Number of Synchronous Virtual Program Sessions (VIRPRO)	<p>A synchronous (live) virtual program session is any planned event that is streamed virtually and can be viewed live as it progresses (i.e., live-streaming). Regardless of the number of formats in which a program session is offered, each program session should only be counted once and in one format category. Include virtual program sessions that are also recorded. Include program sessions hosted on Facebook Premiere that are facilitated by a staff member. Count virtual program sessions at the administrative entity level; do not duplicate numbers at each branch. Exclude program sessions that also have an in-person component; these should be counted under Number Synchronous In-Person Onsite Program Sessions or Number of Synchronous In-Person Offsite Program Sessions (data elements 606 or 607).</p> <p>This figure is a subset of the Total Number of Synchronous Program Sessions (data element 600). See Synchronous Program Session definition for more information about counting program sessions.</p>

## Synchronous Program Attendance

#	Data Element Name (Variable Name)	Data Element Definition
610	Total Attendance at Synchronous Programs (TOTATTEN)	<p>This is a total count of the audience at all program sessions during the reporting period. See the Synchronous Program Sessions definition for more detail about what counts as a program session.</p> <ul style="list-style-type: none"> <li>• Include all attendees regardless of age (e.g., count all adult attendees of children's programs in children's program attendance).</li> <li>• For program sessions with both in-person and virtual attendance, combine attendee counts across formats or platforms.</li> </ul> <p>This is the sum of:</p> <ul style="list-style-type: none"> <li>• Attendance at Synchronous Programs Targeted at Children Ages 0–5 (data element 611),</li> <li>• Attendance at Synchronous Programs Targeted at Children Ages 6–11 (data element 612),</li> <li>• Attendance at Synchronous Programs Targeted at Young Adults Ages 12–18 (data element 613),</li> <li>• Attendance at Synchronous Programs Targeted at Adults Aged 19 or Older (data element 614), and</li> <li>• Attendance at Synchronous General Interest Programs (data element 615).</li> </ul> <p>Separately, it is also the sum of:</p> <ul style="list-style-type: none"> <li>• Synchronous In-Person Onsite Program Attendance (data element 616),</li> <li>• Synchronous In-Person Offsite Program Attendance (data element 617), and</li> <li>• Synchronous Virtual Program Attendance (data element 618).</li> </ul>
611	Attendance at Synchronous Programs Targeted at Children Ages 0–5 (K0_5ATTEN)	<p>The count of the audience at all program sessions for which the primary audience is children ages 0 to 5 years. Please count all attendees of these program sessions regardless of age.</p> <p>This figure is a subset of the Total Attendance at Synchronous Programs (data element 610). See Total Attendance at Synchronous Programs for more information about counting program session attendance.</p>

#	Data Element Name (Variable Name)	Data Element Definition
612	Attendance at Synchronous Programs Targeted at Children Ages 6–11 (K6_11ATTEN)	<p>The count of the audience at all program sessions for which the primary audience is children ages 6 to 11 years. Please count all attendees of these program sessions regardless of age.</p> <p>This figure is a subset of the Total Attendance at Synchronous Programs (data element 610). See Total Attendance at Synchronous Programs for more information about counting program session attendance.</p>
613	Attendance at Synchronous Programs Targeted at Young Adults Ages 12–18 (YAATTEN)	<p>The count of the audience at all program sessions for which the primary audience is young adults ages 12 to 18 years. Please count all attendees of these program sessions regardless of age.</p> <p>This figure is a subset of the Total Attendance at Synchronous Programs (data element 610). See Total Attendance at Synchronous Programs for more information about counting program session attendance.</p>
614	Attendance at Synchronous Programs Targeted at Adults Ages 19 or Older (ADULTATTEN)	<p>The count of the audience at all program sessions for which the primary audience is adults ages 19 or older. Please count all attendees of these program sessions regardless of age.</p> <p>This figure is a subset of the Total Attendance at Synchronous Programs (data element 610). See Total Attendance at Synchronous Programs for more information about counting program session attendance.</p>
615	Attendance at Synchronous General Interest Programs (GENATTEN)	<p>The count of the audience at program sessions that are appropriate for any age group or multiple age groups. Please count all attendees of these program sessions regardless of age.</p> <p>This figure is a subset of the Total Attendance at Synchronous Programs (data element 610). See Total Attendance at Synchronous Programs for more information about counting program session attendance.</p>
616	Synchronous In-Person Onsite Program Attendance (ONATTEN)	<p>The count of in-person attendance at program sessions that take place at library facilities. Regardless of the number of formats in which a program session is offered, each attendee should only be counted once. Each attendee should be counted in the format category in which they attended the program session.</p> <p>For in-person onsite programs that also have a virtual component, exclude virtual attendance; this should be</p>

#	Data Element Name (Variable Name)	Data Element Definition
		counted under Synchronous Virtual Program Attendance (data element 618).  This figure is a subset of the Total Attendance at Synchronous Programs (data element 610). See Total Attendance at Synchronous Programs for more information about counting program session attendance.
617	Synchronous In-Person Offsite Program Attendance (OFFATTEN)	The count of in-person attendance at program sessions that take place somewhere other than the library. Regardless of the number of formats in which a program session is offered, each attendee should only be counted once. Each attendee should be counted in the format category in which they attended the program session.  For in-person offsite programs that also have a virtual component, exclude virtual attendance; this should be counted under Synchronous Virtual Program Attendance (data element 618).  This figure is a subset of the Total Attendance at Synchronous Programs (data element 610). See Total Attendance at Synchronous Programs for more information about counting program session attendance.
618	Synchronous Virtual Program Attendance (VIRATTEN)	The count of live attendance at virtual program sessions. Regardless of the number of formats in which a program session is offered, each attendee or view should only be counted once. Each attendee should be counted in the format category in which they attended or viewed the program session. Count each participant device connected to a virtual program as a single attendee. For program sessions hosted on Facebook Live, YouTube Live, or similar platforms, count peak concurrent viewers. For those hosted on videoconferencing platforms, count the maximum number of non-staff participants during the session.  For virtual program sessions that are also recorded for later, on-demand, asynchronous viewing, exclude views that occur after the session has ended; these should be counted under Total Views of Asynchronous Program Presentations (data element 630). For program sessions that also have an in-person component, exclude in-person attendance; this should be counted under Synchronous In-Person Onsite Program Attendance or Synchronous In-

#	Data Element Name (Variable Name)	Data Element Definition
		<p>Person Offsite Program Attendance (data elements 616 or 617).</p> <p>This figure is a subset of the Total Attendance at Synchronous Programs (data element 610). See Total Attendance at Synchronous Programs for more information about counting program session attendance.</p>

### Asynchronous Program Sessions and Views

#	Data Element Name (Variable Name)	Data Element Definition
620	Total Number of Asynchronous Program Presentations (TOTPRES)	<p>An asynchronous program presentation is any recording of program content that cannot be viewed live as it unfolds (i.e., on-demand streaming). Only include program presentations posted during the reporting period. Regardless of the number of platforms on which a presentation is posted, count each unique presentation only once. Include program sessions hosted on Facebook Premiere that are not facilitated by a staff member. Count asynchronous program presentations at the administrative entity level; do not duplicate numbers at each branch. Include recordings of synchronous program sessions that were available for asynchronous viewing after the session ended.</p>
630	Total Views of Asynchronous Program Presentations within 30 Days (TOTVIEWS)	<p>The count of views of asynchronous program presentations for a period of thirty (30) days after the presentation was posted, even if that period extends beyond the survey reporting period (or fiscal year). For program presentations made available via Facebook, count unique 1-minute views of each video. For those made available via other platforms, count unique views of each video.</p> <p>For program presentations that are recordings of synchronous virtual program sessions, exclude synchronous attendance; these should be counted under Synchronous In-Person Onsite Program Attendance, Synchronous In-Person Offsite Program Attendance, or Synchronous Virtual Program Attendance (data elements 616, 617, or 618).</p>

## OTHER ELECTRONIC INFORMATION

#	Data Element Name (Variable Name)	Data Element Definition
650	Number of Internet Computers Used by General Public (GPTERMS)	Report the number of the library's Internet computers [personal computers (PCs), laptops, and tablets], whether purchased, leased, or donated, used by the general public in the library. Do not include computers that connect to the Internet for a dedicated purpose (e.g., to access an OPAC or specific database, or to train the public) or purposes.
651	Number of Uses (Sessions) of Public Internet Computers Per Year (PITUSR)	<p>Report the total number of uses (sessions) of the library's Internet computers in the library during the last year. If the computer is used for multiple purposes (Internet access, word-processing, OPAC, etc.) and Internet uses (sessions) cannot be isolated, report all usage. A typical week or other reliable estimate may be used to determine the annual number. Sign-up forms or Web-log tracking software also may provide a reliable count of uses (sessions).</p> <p>Note: This count includes only the library's Internet computers. Do not include WiFi access using nonlibrary computers. The number of uses (sessions) may be counted manually, using registration logs. Count each use (session) for public internet computers, regardless of the amount of time spent on the computer. A use (session) on the library's public internet computer(s) three times a year would count as three uses (sessions). Software such as "Historian" can also be used to track the number of uses (sessions) at each public internet computer. If the data element is collected as a weekly figure, multiply that figure by 52 to annualize it.</p>
651a	Reporting Method for Number of Uses of Public Internet Computers Per Year (PITUSRRPT)	<p>Regarding the Number of Uses (Sessions) of Public Internet Computers per Year (data element 651) entered, is this an annual count or an annual estimate based on a typical week or weeks?</p> <p>Select one of the following:</p> <p>CT—Annual Count</p> <p>ES—Annual Estimate Based on Typical Week(s)</p>
652	Wireless Sessions (WIFISESS)	Report the number of wireless sessions provided by the library wireless service annually. Count one session for each time a device connects to the library's wireless network, regardless of the duration of connection. If possible, only count sessions for patron devices and

#	Data Element Name (Variable Name)	Data Element Definition
		<p>exclude library devices such as routers, access points, printers, and public access computers; otherwise, if patron devices cannot be isolated, report sessions for all devices.</p> <p>NOTE: If an annual count of wireless sessions is unavailable, count wireless sessions during a typical week or weeks using methods like hardware logging or network scanning, and multiply the count to represent an annual estimate. (Do not conduct visual surveys of devices in use as a method to establish a count of a typical week.) A “typical week” is a time that is neither unusually busy nor unusually slow. Avoid holiday times, vacation periods for key staff, or days when unusual events are taking place in the community or in the library. Choose a week in which the library is open its regular hours.</p>
652a	Reporting Method for Wireless Sessions (WIFISRPT)	<p>Regarding the number of Wireless Sessions (data element 652) entered, is this an annual count or an annual estimate based on a typical week or weeks of hardware logging or network scanning?</p> <p>Select one of the following:</p> <p>CT—Annual Count</p> <p>ES—Annual Estimate Based on Typical Week(s)</p>
653	Website Visits (WEBVISIT)	<p>Visits represent the annual number of sessions initiated by all users from inside or outside the library to the library website. The library website consists of all webpages under the library’s domain. A website “visit” or “session” occurs when a user connects to the library's website for any length of time or purpose, regardless of the number of pages or elements viewed. Usage of library social media accounts (e.g., Facebook, Twitter, etc.) should not be reported here. Libraries unable to collect a count of their website visits should report “-1” (missing). Libraries without websites should report “-3” (not applicable). (Missing values will be imputed in the final dataset, whereas values of not applicable will not be imputed.)</p>



## Outlet Data Element Definitions

#	Data Element Name (Variable Name)	Data Element Definition
700	FSCS ID and SEQ (Automatic Display) (FSCSKEY and FSCS_SEQ)	This is the identification code assigned by PLS Web Portal. Outlets are assigned the same FSCS ID as the administrative entity to which they belong, with a unique three-digit suffix added to distinguish each outlet.
700a	Structure Status (STATSTRU)	This is the Structure Change Code to record actions such as adding, deleting, or merging.
701	LIB ID (Optional) (LIBID)	This is the state-assigned identification code for the outlet.
702	Name (LIBNAME)	<p>This is the legal name of the outlet.</p> <p>Note: Provide the legal name of the outlet. Do not use acronyms. Do not abbreviate the name unless it exceeds the PLS Web Portal field length of 60 characters. Avoid abbreviations at the beginning of the name and do not punctuate abbreviations.</p> <p>(See Standard Abbreviations for PLS Web Portal in Appendix G.)</p>
702a	Name Status (STATNAME)	This is the Name Change Code to identify whether the change is an official name change.
703	Street Address (ADDRESS)	<p>This is the complete street address of the outlet.</p> <p>Note: Do not report a post office box or general delivery. For a bookmobile that operates from an administrative entity, branch, or central library, report the address of the administrative entity, branch, or central library from which it operates. For a bookmobile that is itself the administrative entity, report the address where the bookmobile is parked at night.</p>
703a	Address Status (STATADDR)	This is the Address Change Code to identify whether the address change is an actual location change.
704	City (CITY)	This is the city or town in which the outlet is located.
705	ZIP Code (ZIP)	This is the standard five-digit postal ZIP code for the street address of the outlet.
707	County of the Outlet (CNTY)	This is the county in which the outlet is physically located.

#	Data Element Name (Variable Name)	Data Element Definition
708	Phone (PHONE)	<p>This is the telephone number of the outlet, including area code.</p> <p>Note: Report telephone number without spacing or punctuation. If the outlet has no phone, enter “-3” (for Not Applicable).</p>
709	Outlet Type Code (C_OUT_TY)	<p>An outlet is a unit of an administrative entity that provides direct public library service.</p> <p>Select one of the following:</p> <p>BM—Books-by-Mail Only. A direct mail order service which provides books and other library materials. Books-by-mail typically serves rural residents, the disabled, the homebound, and others without access to another type of public library outlet. Requests for materials are usually received by mail and by telephone only. Only books-by-mail services that are housed separately from any other type of direct public service outlet (that is, central library, branches, or bookmobiles) should be coded here.</p> <p>BR—Branch Library. A branch library is an auxiliary unit of an administrative entity which has at least all the following:</p> <ul style="list-style-type: none"> <li>• Separate quarters;</li> <li>• An organized collection of library materials;</li> <li>• Paid staff; and</li> <li>• Regularly scheduled hours for being open to the public.</li> </ul> <p>BS—Bookmobile(s). A bookmobile is a traveling branch library. It consists of at least all the following:</p> <ul style="list-style-type: none"> <li>• A truck or van that carries an organized collection of library materials;</li> <li>• A paid staff; and</li> <li>• Regularly scheduled hours (bookmobile stops) for being open to the public.</li> </ul> <p>Note: A separate outlet record may be created for each bookmobile. You may wish to create separate outlet records for individual bookmobiles if they have different addresses. Alternatively, a bookmobile outlet record may include more than one bookmobile.</p>

#	Data Element Name (Variable Name)	Data Element Definition
		<p>CE—Central Library. This is one type of single outlet library (SO) or the library which is the operational center of a multiple outlet library (MO or MA). Usually all processing is centralized here and the principal collections are housed here. Synonymous with main library.</p> <p>Note: Each administrative entity may report either no central library or one central library. No administrative entity may report more than one central library. If you wish to identify a central library in the outlet file, identify the library with the largest collection as the central library for FSCS purposes, and report all others as branches. Where there are several coequal outlets and no principal collection, report all such outlets as branches, not central libraries.</p>
711	Square Footage of Outlet (SQ_FEET)	<p>Provide the area, in square feet, of the public library outlet (central library or branch). Report the total area in square feet for each library outlet (central library or branch) separately. This is the area on all floors enclosed by the outer walls of the library outlet. Include all areas occupied by the library outlet, including those areas off-limits to the public. Include any areas shared with another agency or agencies if the outlet has use of that area.</p>
712	Number of Bookmobiles in the Bookmobile Outlet Record (L_NUM_BM)	<p>The number of bookmobiles in the bookmobile outlet record.</p> <p>Note: A bookmobile outlet record may include one or more bookmobiles. Complete this data element only if the outlet record is of the type BS—Bookmobile(s) (see outlet data element #709). A bookmobile is a traveling branch library. It consists of at least all the following:</p> <ul style="list-style-type: none"> <li>• A truck or van that carries an organized collection of library materials;</li> <li>• A paid staff; and</li> <li>• Regularly scheduled hours (bookmobile stops) for being open to the public. Count vehicles in use, not the number of stops the vehicle makes.</li> </ul>
713	Public Service Hours Per Year (actual hours) (HOURS)	<p>This is the number of annual public service hours for outlets (reported individually by central, branch, bookmobile and Books-by-Mail Only)</p> <p>Note: Include the <b>actual</b> hours open for public service for centrals (data element #209), branches (data element</p>

#	Data Element Name (Variable Name)	Data Element Definition
		#210), and bookmobiles (data element #211), and Books-by-Mail Only. For each bookmobile, count only the hours during which the bookmobile is open to the public. For administrative entities that offer ONLY books-by-mail service, count the hours that the outlet is staffed for service. Minor variations in public service hours need not be included. Extensive hours closed to the public due to natural disasters or other events should be excluded from the count.
714	Number of Weeks an Outlet is Open (actual weeks) (WKS_OPEN)	<p>This is the number of weeks during the year that an outlet was open to the public.</p> <p><b>Note:</b> Include the number of weeks open for public service for Centrals (data element #209), Branches (data element #210), Bookmobiles (data element #211), and Books-by-Mail Only.</p> <p>For each bookmobile, count only the weeks during which the bookmobile is open to the public. For administrative entities that offer ONLY books-by-mail service, count the weeks that the outlet is staffed for service. The count should be based on the number of weeks that a library outlet was open for half or more of its scheduled service hours. Extensive weeks closed to the public due to natural disasters or other events should be excluded from the count. <b>Do not</b> calculate based on total number of service hours per year at the outlet level. For example, by dividing total hours by the average hours open per week. Round to the nearest whole number of weeks. If the library was open half or more of its scheduled hours in a given week, round up to the next week. If the library was open less than half of its scheduled hours, round down.</p>

## Appendix B Name, Address, and Structure Changes

### Name and Address Changes

In direct data entry, changes to the name and address information for an AE or outlet can be made through the appropriate **Input Data** pages. If you make a change to either field, you also must select the appropriate status code (the codes and their values are listed below) to identify whether the change is an official name change or whether the address change indicates an actual location change. For AEs, status code changes are made in Survey Item 152a, Name Status, and Item 153a, Address Status. For outlets, status code changes are entered in Survey Item 702a, Name Status, and Item 703a, Address Status.

If you are importing your data, the name and address status codes for all AEs and outlets should be recorded in the STATNAME and STATADDR fields on the import files.

### Name Changes for Administrative Entities and Outlets

Name changes do not require any additional information other than the FSCS ID information and the code indicating the status (STATNAME) of the field.

#### No Change from Last Year

- STATNAME is 00

#### Official Name Change

- STATNAME is 06

#### Preferred Spelling for Library Name

- STATNAME is 14

### Address Changes for Administrative Entities and Outlets

Address changes do not require any additional information other than the FSCS ID information and the code indicating the status (STATADDR) of the field.

#### No Change from Last Year

- STATADDR is 00

#### Move to New Location

- STATADDR is 07

#### Preferred Street Address

- STATADDR is 15

## Administrative Entity Structure Changes

Diagrams are included for each type of structure change to indicate clearly what the fields on the file should contain. The diagrams are only partial representations of the file. An *X* is a placeholder and means that information must be supplied for that field. If the information in that column is not needed for the change, use -3 to indicate *not applicable*.

### oo – No Change from Last Year

This simply means that nothing about the library's structure has changed from the previous year. The only information required is the FSCSKEY and STATSTRU.

- FSCSKEY = the prior year FSCSKEY
- STATSTRU = 00
- LINKID = -3
- OLDID = -3

FSCSKEY	STATSTRU	LINKID	OLDID
<i>X</i>	00	-3	-3

### Example:

The New York Public Library is still the New York Public Library. The FSCSKEY is provided because the library will be included on the current year file. No other records are involved, so the LINKID is not needed. The OLDID field is not needed because no information is required for the historical tracking.

The record appears as follows:

FSCSKEY	STATSTRU	LINKID	OLDID
NY0778	00	-3	-3

**NOTE:** If you are preparing an import file, it is important to remember that you cannot have any empty or blank fields on your file. Fill all non-applicable fields with -3.

**01 – Existing Administrative Entity Absorbs Another Administrative Entity (Adoption)**

When one or more AE is no longer functioning independently and now operates as part of another existing AE, the LINKID is required so that we can identify which records are involved. At least two records must exist for a valid adoption to occur.

**NOTE: All outlet records for an adopted AE must be associated with either the adopting AE or a different AE or closed. Please see the section on preparing outlet import files for details. Options for the existing outlets are:**

- Adopted by another outlet of the adopting or a different parent AE
- Closed
- Moved to another AE

For the record that is adopting other AEs:

- FSCSKEY = the prior year FSCSKEY
- STATSTRU = 01
- LINKID is user defined but must be the same as the adopted entity. If the adopting AE does not have a LINKID, one must be created to link adopting to adopted (e.g., PA1)
- OLDID = -3

For the record(s) being adopted:

- FSCSKEY = -3
- STATSTRU = 01
- LINKID is user defined but must be the same as the adopting entity
- OLDID = the prior year FSCSKEY

	FSCSKEY	STATSTRU	LINKID	OLDID
Adopting	X	01	PA1	-3
Adopted	-3	01	PA1	X

**Example:**

The Hershey Public Library and the Middletown Public Library operated under the AE of the Dauphin County Library System to form one county library in the current year.

Three records are required to resolve the Match Report. The record for Dauphin should contain the current year data because this is the currently active AE. The other two AEs will not be included on the final release files but will be maintained on the PLS Web Portal file, so the structure change must be properly tracked.

The resulting records appear as follows:

	FSCSKEY	STATSTRU	LINKID	OLDID
Dauphin (Adopting)	PA0222	01	PA1	-3
Hershey (Adopted)	-3	01	PA1	PA0221
Middletown (Adopted)	-3	01	PA1	PA0223

## 02 – Newly Created Administrative Entity (Birth)

When a completely new library has opened in the current year, we track that as a birth. We need the following information in the following fields:

- FSCSKEY = -3
- STATSTRU = 02
- LINKID = -3
- OLDID = -3
- LIBID = State assigned

	FSCSKEY	STATSTRU	LINKID	OLDID	LIBID
<i>New AE</i>	-3	02	-3	-3	<i>X</i>

Because the FSCSKEY has not been assigned, there is no information for the respondent to provide. Adding a new record for a new library does not involve another library, so the LINKID is unnecessary. Because this is a new record, no OLDID exists from the prior year file.

Please reference the Restorable AE tab in the Match Report before you open a newly created AE (birth) to make sure that the AE you are trying to create is truly new, meaning, the AE was not previously reported then closed, deleted, or temporarily closed.

For future AEs that requested an FSCS ID in a prior year, the reporting year that the library does open, the STATSTRU will be a 02 and the FSCSKEY will be the previously assigned FSCS ID when the record was submitted initially as a future library. ID as follows:

	FSCSKEY	STATSTRU	LINKID	OLDID	LIBID
<i>New AE</i>	<i>X</i>	02	-3	-3	<i>X</i>



### 03 – Closed (Death)

If an AE was closed for the entire current year, we track the change with the STATSTRU = 03.

**NOTE:** If an AE was closed for part of the current year but you are reporting data for it, do not report it as closed this reporting cycle.

The record should include the following information:

- FSCSKEY = -3
- STATSTRU = 03
- LINKID = -3
- OLDID = the prior year FSCSKEY

	FSCSKEY	STATSTRU	LINKID	OLDID
<i>Closed AE</i>	-3	03	-3	<i>X</i>

#### Example:

The River Bluffs Regional Library did not operate in the current year. The FSCSKEY is not included on the record because it will not be included in the current year. There is no other record involved, so the LINKID is not needed. However, the historical file needs to be updated, so the FSCSKEY from the prior year must be supplied in the OLDID field.

The record appears as follows:

	FSCSKEY	STATSTRU	LINKID	OLDID
River Bluffs	-3	03	-3	MO0148

**To correct inaccurate information, which could include the deletion of a record that was created for a future AE or outlet that never opened, use STATSTRU = 10, Delete an Incorrect Record.**

### 04 – Move Outlet to a Newly Created Administrative Entity (Divorce)

If an outlet has broken away from a parent AE to form its own independent library, we must create a parent AE record to establish the new FSCSKEY. **Due to the complexity of this Structure Change, it must be completed through the user interface of the PLS Web Portal and NOT an Import file, ideally after all other data have been input and edited.** For assistance executing this Structure Change, please contact the PLS Help Desk.

### 05 – Merge Two or More Administrative Entities to Form a New Library (Marriage)

When two or more AEs merge into a newly formed library, at least three records should exist on the file. One record includes information for the new library and current year data. In addition, at least two records must exist for the libraries that will be forming the new library.

**NOTE: Outlet records for merged AEs must be associated with either the new AE, a different AE, or closed. Please see the section on preparing outlet import files for details. Options for the existing outlets are:**

- Adopted by another outlet of a different parent AE
- Closed
- Merged to another AE
- Moved to another AE

New AE:

- FSCSKEY = -3
- STATSTRU = 05
- LINKID must be the same for all AEs that are merging. If new AE does not have a LINKID, one must be created to link new AE to old AE (e.g., NM1)
- OLDID = -3

Two (or more) AEs are merging together (old AEs):

- FSCSKEY = -3
- STATSTRU = 05
- LINKID is the same as the LINKID of the new AE.
- OLDID = the prior year FSCSKEY

	FSCSKEY	STATSTRU	LINKID	OLDID
<i>New AE</i>	-3	05	NM1	-3
<i>Old AE</i>	-3	05	NM1	X
<i>Old AE</i>	-3	05	NM1	X

#### Example:

The Bloomfield Public Library, Aztec Public Library, and Farmington Public Library dissolved as individual AEs and formed a new AE under the name of the San Juan Public Library in the current year. This change requires four records to process. One record will contain all the information for the new San Juan Public Library along with the current year data. Each of the AEs that are no longer in operation must be included with the same LINKID as the new record. A new FSCSKEY must

be assigned to the new library, so that field is not applicable. The OLDID field is valid only for the previously existing records.

	FSCSKEY	STATSTRU	LINKID	OLDID
San Juan (New AE)	-3	05	NM1	-3
Bloomfield (Old AE)	-3	05	NM1	NM0074
Aztec (Old AE)	-3	05	NM1	NM0004
Farmington (Old AE)	-3	05	NM1	NM0014

#### o8 – Restore/Undo Was a o3 (Reopen a Closed Administrative Entity)

If a library closed for a time and is reopening, you need to keep the previously assigned FSCSKEY ID. You can obtain a list of AEs that are eligible to restore by selecting **Tools** then **Export Data** then **Export All Datasets in 1 Excel File**. Check for restorable tabs for FSCSKEYs with a STATSTRU code of 03 to find the correct identification number for your record.

- FSCSKEY = FSCSKEY from the list of previously closed entities
- STATSTRU = 08
- LINKID = -3
- OLDID = -3

	FSCSKEY	STATSTRU	LINKID	OLDID
<i>Restored AE</i>	<i>X</i>	08	-3	-3

#### Example:

The Old Harbor Library reopened in the current year and needs to be included on the data file. Because the AE existed previously, we want to maintain the original FSCSKEY, so it should be entered on the record. The LINKID field is not necessary because no other records are involved. The OLDID is not needed because the record will be on the current year file.

The record appears as follows:

	FSCSKEY	STATSTRU	LINKID	OLDID
Old Harbor	AK0108	08	-3	-3

Please reference the Restorable AE tab on the Match Report to find closed, but restorable, AEs with STATSTRU 03.

**09 – Restore/Undo Was a 10 (Undo a Deleted Administrative Entity)**

Libraries removed from the survey for other reasons than a closure also can be restored. You can obtain a list of AEs that are eligible to restore by selecting **Tools** then **Export Data** then **Export All Datasets in 1 Excel File**. Check for FSCSKEYs with a STATSTRU code of 10 to find the correct identification number for your record.

- FSCSKEY = the FSCSKEY from the list of previously deleted entities
- STATSTRU = 09
- LINKID = -3
- OLDID = -3

	FSCSKEY	STATSTRU	LINKID	OLDID
<i>Restored AE</i>	<i>X</i>	09	-3	-3

**Example:**

The Winding Rivers Library System should be included in the current year submission but was deleted previously. Because the AE existed previously, the original FSCSKEY should be used for the current year file. The LINKID field is not necessary because no other records are involved. The OLDID is not needed because the record will be on the current year file.

The record appears as follows:

	FSCSKEY	STATSTRU	LINKID	OLDID
Winding Rivers	WI9013	09	-3	-3

Please reference the Restorable AE tab on the Match Report to find closed, but restorable, AEs with STATSTRU 10.

**10 – Delete an Incorrect Record**

If a library record should not be on the survey, include a record on the file with the following information to indicate the record is no longer on the file:

- FSCSKEY = -3
- STATSTRU = 10
- LINKID = -3
- OLDID = the prior year FSCSKEY

	FSCSKEY	STATSTRU	LINKID	OLDID
<i>Deleted AE</i>	-3	10	-3	<i>X</i>

**Example:**

The Scotia Public Library was removed from the survey. The FSCSKEY field is not applicable because the record will not be on the current year file. There is no other record involved, so the LINKID is not necessary. The OLDID field must contain the FSCSKEY from the prior year file to update the historical file.

The resulting record appears as follows:

	FSCSKEY	STATSTRU	LINKID	OLDID
Scotia	-3	10	-3	NE9038

**To correct inaccurate information, which could include the deletion of a record that was created for a future AE or outlet that never opened, use STATSTRU = 10, Delete an Incorrect Record.**

**13 – Add an Existing Administrative Entity Not Previously Reported**

To add a library that is not brand new but now meets the FSCS requirements for a public library, we require the following information:

- FSCSKEY = -3
- STATSTRU = 13
- LINKID = -3
- OLDID = -3

	FSCSKEY	STATSTRU	LINKID	OLDID
<i>New AE</i>	-3	13	-3	-3

Because the FSCSKEY has not been assigned, the respondent has no information to provide. Adding a new record for a library does not involve another library, so the LINKID is unnecessary. And again, because this is a new record, the OLDID field is not needed.

## 22 – Future Administrative Entity FSCS ID Request

If a library **has not yet opened** in the current year but requires an FSCS ID, you can request a future ID. The library will not be carried on final files that are released to the public for the current year, but the ID will be kept on the prior year file in PLS Web Portal file for the next reporting year. The initial record should include the following information:

- FSCSKEY = -3
- STATSTRU = 22
- LINKID = -3
- OLDID = -3

	FSCSKEY	STATSTRU	LINKID	OLDID
<i>Future AE</i>	-3	22	-3	-3

### Example:

The River Bluffs Regional Library was built during FY 2023 but will not open its doors until FY 2024. The library would like to have an FSCS ID for budgetary purposes. The library will first need to clear the request with the SDC. The FSCS ID will not be carried on the final current year files that are released to the public, but the ID will be kept, and the library will appear on the following year's prior year file.

Because the FSCSKEY has not been assigned, there is no information for the respondent to provide. Adding a new record for a future library does not involve another library, so the LINKID is unnecessary. Because this is a new record, no OLDID exists from the previous year.

The record appears as follows:

	FSCSKEY	STATSTRU	LINKID	OLDID
River Bluffs	-3	22	-3	-3

If a future administrative entity is reported for a second (or more) year, the FSCSKEY field contains the value previously assigned, as follows:

	FSCSKEY	STATSTRU	LINKID	OLDID
<i>New Outlet</i>	<i>X</i>	22	-3	-3

For the reporting year that the library does open, the STATSTRU will be a 00 and the FSCSKEY will be the previously assigned FSCS ID when the record was submitted initially as a Future entity.

**To correct inaccurate information, which could include the deletion of a record that was created for a future AE or outlet that never opened, use STATSTRU = 10, Delete an Incorrect Record.**

## 23 – Temporary Closure

If an AE was closed for the entire current year, *but plans to reopen in the future*, we track the change with the STATSTRU = 23.

**NOTE:** If an AE was closed for part of a fiscal year but you are reporting data for it, do not report it as closed this reporting cycle.

The record should include the following information:

- FSCSKEY = the prior year FSCSKEY
- STATSTRU = 23
- LINKID = -3
- OLDID = -3

	FSCSKEY	STATSTRU	LINKID	OLDID
<i>Closed AE</i>	<i>X</i>	23	-3	-3

### Example:

The River Bluffs Regional Library was closed for the current year due to reconstruction. Because the library will be inactive, but included on the current year file, the FSCSKEY is needed. There is no other record involved, so the LINKID field is not needed. The OLDID field is not needed because the record will be maintained on the data file and not moved to the historical tables like with STATSTRU 03 and 10.

The record appears as follows:

	FSCSKEY	STATSTRU	LINKID	OLDID
River Bluffs	MO0148	23	-3	-3

**24 – Restore/Undo Was a 23 (Reopen a Temporarily Closed Administrative Entity)**

If a library temporarily closed (STATSTRU 23) and will reopen this FY, you must keep the original FSCSKEY. You can obtain a list of AEs that are eligible to restore by selecting **Tools** then, **Export Data** then, **Export All Datasets in 1 Excel File**. Check for FSCSKEYs with a STATSTRU code of 23 to find the correct FSCSKEY for your record.

- FSCSKEY = FSCSKEY from the list of previously closed entities
- STATSTRU = 24
- LINKID = -3
- OLDID = -3

	FSCSKEY	STATSTRU	LINKID	OLDID
<i>Restored AE</i>	<i>X</i>	24	-3	-3

**Example:**

The Old Harbor Library closed temporarily for renovations and reopened in the current year. The library needs to be included on the data file. Because the AE previously existed, we want to maintain the FSCSKEY, so that needs to be entered on the record. The LINKID field is not necessary because no other records are involved. The OLDID is not needed because the record will be on the current year file.

The record appears as follows:

	FSCSKEY	STATSTRU	LINKID	OLDID
Old Harbor	AK0108	24	-3	-3

Please reference the Restorable AE tab on the Match Report to find closed, but restorable, AEs with STATSTRU 23.



## 25 – Survey Nonrespondent

If a library did not report on the state library survey for the fiscal year, include the record on the file with the following information to indicate that it did not respond to the PLS, but the structure of the library was otherwise unchanged (i.e., the library is not new and was open for at least part of the reporting period and did not combine with any other entity).

- FSCSKEY = FSCSKEY from the list of previously closed entities
- STATSTRU = 25
- LINKID = -3
- OLDID = -3

	FSCSKEY	STATSTRU	LINKID	OLDID
Old Harbor	X	25	-3	-3

### Example:

The Old Harbor Library did not respond to their state library survey. The library needs to be included on the data file since they have not officially closed. Because the AE still exists, we will continue to use its FSCSKEY. The LINKID field is not necessary because no other records are involved. The OLDID is not needed because the record will be on the current year file.

The record appears as follows:

	FSCSKEY	STATSTRU	LINKID	OLDID
Old Harbor	AK0108	25	-3	-3

**NOTE:** The AE record should continue to include all name, address, other identification, LSA population, and number of outlets data (data elements 150–211). The remaining AE data elements (250–653) should be reported as “-1” (missing) or blank depending upon the appropriate response; however, the State Library Administrative Agency may report any data element on behalf of the library that it prefills in the state survey for all libraries.

**The record will remain on the file in its current structure for the next fiscal year, and if the nonrespondent status persists, this structure change code must be applied again.**

## Outlet Structure Changes

Diagrams are included for each type of structure change to clearly indicate what the fields on the file should contain. The diagrams are only partial representations of the file. An *X* means that information must be supplied for that field. If the information in that column is not needed for the change, use -3 to indicate *not applicable*.

### oo – No Change from Last Year

This simply means that nothing about the outlet's structure has changed from the prior year. The only information required is the FSCSKEY, FSCS\_SEQ, and STATSTRU.

- FSCSKEY = the PY FSCSKEY
- FSCS\_SEQ = the PY FSCS\_SEQ
- STATSTRU = 00
- LINKID = -3
- PARENTID = -3
- OLDID is = -3

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
<i>Outlet</i>	<i>X</i>	<i>X</i>	00	-3	-3	-3

### Example:

The Greenbrier County Library operated in the current year just as it did the prior year. The FSCSKEY is provided because the outlet will be included on the current year file. No other records are involved, so the LINKID is not needed. The PARENTID is not necessary because the FSCSKEY will associate the outlet with the correct AE record. The OLDID field is not needed because no information is required for the historical tracking.

The resulting record appears as follows:

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
Greenbrier	WV0082	002	00	-3	-3	-3

**01 – Existing Outlet Absorbs Another Outlet (Adoption)**

If one or more outlets no longer function independently and now operate as part of another existing outlet, we require the following information for the records involved (i.e., you should have at least two records).

Outlet adopting one or more outlets:

- FSCSKEY = the prior year FSCSKEY
- FSCS\_SEQ = the prior year FSCS\_SEQ
- STATSTRU = 01
- LINKID is the same as the LINKID of the outlet that is being absorbed. If adopting outlet does not have a LINKID, one must be created to link adopting to adopted (e.g., MI01)
- PARENTID = -3
- OLDID = -3

Outlet(s) being adopted:

- FSCSKEY = -3
- FSCS\_SEQ = -3
- STATSTRU = 01
- LINKID is the same as the LINKID of the existing outlet
- PARENTID = -3
- OLDID = the prior year FSCSKEY and FSCS\_SEQ (e.g., AL0002-002)\*

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
<i>Adopting Outlet</i>	<i>X</i>	<i>X</i>	01	MI01	-3	-3
<i>Adopted Outlet</i>	-3	-3	01	MI01	-3	<i>X</i>

**Example:**

The Ira Township Library moved its collection to the Yale Public Library and did not operate in the current year. Because the Yale Public Library was open, a current year record should be included on the outlet file with the same FSCSKEY/FSCS\_SEQ as the prior year. The LINKID is required for both outlet records to make the appropriate connection. The PARENTID is not necessary for either record. Yale has an FSCSKEY value that associates it with the parent record. Ira Township will not be on the current year file. The OLDID is required for Ira Township to make the necessary updates to the historical table.

The resulting records appear as follows:

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
Yale (Adopting)	MI0321	011	01	MI01	-3	-3
Ira (Adopted)	-3	-3	01	MI01	-3	MI0321-006

**\* The sequence number that follows the FSCSKEY must be three digits. For example, use AL0002-002, not AL0002-2.**

## 02 – Newly Created Outlet (Birth)

When a completely new library has opened in the current year, we track that as a birth. We need the following information in the following fields:

- FSCSKEY = -3
- FSCS\_SEQ = -3
- STATSTRU = 02
- LINKID = -3
- PARENTID = LIBID of the parent AE
- OLDID = -3

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
<i>New Outlet</i>	-3	-3	02	-3	<i>X</i>	-3

### Example:

The Oneida County District added a bookmobile. Although the FSCSKEY exists for the parent AE, the sequence number (FSCS\_SEQ) needs to be assigned. The LINKID is not necessary because no other record is involved. The PARENTID must be the LIBID of the parent AE to determine the FSCSKEY and next available sequence number. An OLDID does not exist.

The resulting record appears as follows:

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
Oneida	-3	-3	02	-3	IDMA	-3

Please reference the Restorable Outlet tab on the Match Report before you open a newly created outlet (birth) to ensure the outlet you are trying to create is truly new, meaning, the outlet was not previously reported, then either closed, deleted, or temporarily closed.

For future outlets that requested an FSCS ID in a prior year, the reporting year that the library does open, the STATSTRU will be a 02 and the FSCSKEY and FSCS\_SEQ will be the previously assigned FSCS ID when the record was submitted initially as a future ID and the PARENTID will be -3 as follows:

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
<i>New Outlet</i>	ID	ID	02	-3	-3	-3

### 03 – Closed (Death)

If an outlet was closed for the entire current year, we track the change simply with the STATSTRU = 03.

**NOTE:** If an outlet was closed for part of a fiscal year but you are reporting data for it, do not report it as closed this reporting cycle.

Include a record on the file with the following information:

- FSCSKEY = -3
- FSCS\_SEQ = -3
- STATSTRU = 03
- LINKID = -3
- PARENTID = -3
- OLDID = the prior year FSCSKEY and FSCS\_SEQ (e.g., AL0002-002)\*

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
<i>Closed Outlet</i>	-3	-3	03	-3	-3	X

### Example:

The Kitsap Regional Library stopped its bookmobile service last year. Because the bookmobile outlet will not be on the current year file, the FSCSKEY and FSCS\_SEQ fields are not needed. No other record is involved, so the LINKID is not needed. The PARENTID field also is not needed. The OLDID is required for historical tracking.

The record appears as follows:

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
Kitsap	-3	-3	03	-3	-3	WA0060-012

**To correct inaccurate information, which could include the deletion of a record that was created for a future AE or outlet that never opened, use STATSTRU = 10, Delete an Incorrect Record.**

\* The sequence number that follows the FSCSKEY must be three digits. For example, use AL0002-002, not AL0002-2.

#### 04 – Move Outlet to Newly Created Administrative Entity (Divorce)

If an outlet has broken away from a parent AE to form its own independent library, we must associate the existing outlet record with the newly created AE record. **Due to the complexity of this Structure Change it must be completed through the user interface of the PLS Web Portal and NOT an Import file, ideally after all other data have been input and edited.** For assistance executing this Structure Change, please contact the PLS Help Desk.

#### 05 – Merge Two or More Outlets to Form a New Outlet (Marriage)

When two or more outlets merge into a newly formed library, you should include a record for the new library that contains the current year data as well as records for the outlets that are merging (i.e., you should have at least three records). We require the following information:

New outlet:

- FSCSKEY = -3
- FSCS\_SEQ = -3
- STATSTRU = 05
- LINKID = the LINKID of the outlets that are merging must all be the same. If the new outlet does not have a LINKID, one must be created to link the new outlet to the old outlet (e.g., KS1)
- PARENTID = the LIBID of parent AE
- OLDID = -3

Two (or more) outlets that are merging out of existence:

- FSCSKEY = -3
- FSCS\_SEQ = -3
- STATSTRU = 05
- LINKID = the LINKID of the new outlet
- PARENTID = -3
- OLDID = the prior year FSCSKEY and FSCS\_SEQ (e.g., AL0002-002)\*

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
<i>New Outlet</i>	-3	-3	05	KS1	<i>X</i>	-3
<i>Old Outlet</i>	-3	-3	05	KS1	-3	<i>X</i>
<i>Old Outlet</i>	-3	-3	05	KS1	-3	<i>X</i>

**Example:**

The Cimarron City Library consolidated all its collection into a new central facility in the county. A record for the new outlet with the current year information must be on the file as well as a record for each of the outlets that will be closing because of the merger. The FSCSKEY and FSCS\_SEQ fields will be assigned. The LINKID ensures that the correct records are included in the structure change. The PARENTID is required for the new record only. The LIBID of the AE provides the association to the correct parent record. The OLDID is required for the old outlet records for historical tracking.

The records appear as follows:

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENT ID	OLDID
Gray County (New Outlet)	-3	-3	05	KS1	KS0048	-3
Cimarron City 1 (Old Outlet)	-3	-3	05	KS1	-3	KS0299-002
Cimarron City 2 (Old Outlet)	-3	-3	05	KS1	-3	KS0299-004
Cimarron City 3 (Old Outlet)	-3	-3	05	KS1	-3	KS0299-005

**\* The sequence number that follows the FSCSKEY must be three digits. For example, use AL0002-002, not AL0002-2.**

**o8 – Restore/Undo Was a o3 (Reopen a Closed Outlet)**

If a library was closed for a time and is reopening, you want to keep the previously assigned FSCSKEY/FSCS\_SEQ. You can obtain a list of outlets that are eligible to restore by selecting **Tools** then **Export Data** then **Export All Datasets in 1 Excel File**. Check for FSCSKEY/FSCS\_SEQ with a STATSTRU code of 03 to find the correct FSCS ID for your record.

- FSCSKEY = FSCSKEY from the list of previously closed entities
- FSCS\_SEQ = FSCS\_SEQ from the list of previously closed entities for the FSCSKEY
- STATSTRU = 08
- LINKID = -3
- PARENTID = -3
- OLDID = -3

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
<i>Restored Outlet</i>	<i>X</i>	<i>X</i>	08	-3	-3	-3

**Example:**

The Old Harbor Library is restored on the AE file, so the outlet record also is restored. The FSCSKEY and FSCS\_SEQ fields are required because the record will be on the current year file. The LINKID is not needed because no other records are involved. The PARENTID is not needed because the outlet can be associated to the parent record from the FSCSKEY field. The OLDID also is not needed.

The record appears as follows:

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
Old Harbor	AK0108	002	08	-3	-3	-3

Please reference the Restorable Outlet tab on the Match to find the closed outlets. You can restore outlets with STATSTRU code 03 or STATSTRU code 08, which will prevent you from opening a newly created outlet (birth) that was previously reported and then closed.



**09 – Restore/Undo Was a 10 (Undo a Deleted Outlet)**

Libraries removed from the survey for other reasons than a closure also can be restored. You can obtain a list of outlets that are eligible to restore by selecting **Tools** then, **Export Data** then **Export All Datasets in 1 Excel File**. Check for FSCSKEY/FSCS\_SEQ with a STATSTRU code of 10 to find the correct FSCS ID for your record.

- FSCSKEY = the FSCSKEY from the list of previously deleted outlet records
- FSCS\_SEQ = the FSCS\_SEQ from the list of previously deleted outlets for the FSCSKEY
- STATSTRU = 09
- LINKID = -3
- PARENTID = -3
- OLDID = -3

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
<i>Restored Outlet</i>	<i>X</i>	<i>X</i>	09	-3	-3	-3

**Example:**

The Winding River Library System was restored to the AE file and the outlet also should be restored. The FSCSKEY and FSCS\_SEQ fields are required because the library will be on the current year file. The LINKID field is not necessary because no other records are involved. The PARENTID is not necessary because the FSCSKEY provides the association to the parent record. The OLDID also is not needed.

The record appears as follows:

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
Winding River	WI9013	003	09	-3	-3	-3

Please reference the Restorable Outlet tab on the Match to find the outlet with the STATSTRU code 10. To restore the outlet, use STATSTRU code 09, which will prevent you from opening a new outlet (birth) previously reported and then deleted.

**10 – Delete an Incorrect Record**

If a library record should not be on the survey, include a record on the file with the following information to indicate the record is no longer on the file:

- FSCSKEY = -3
- FSCS\_SEQ = -3
- STATSTRU = 10
- LINKID = -3
- PARENTID = -3
- OLDID = the prior year FSCSKEY/FSCS\_SEQ (e.g., AL0002-002)\*

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
<i>Deleted Outlet</i>	-3	-3	10	-3	-3	X

**Example:**

The Scotia Public Library was removed from the survey. The FSCSKEY and FSCS\_SEQ fields are not applicable because the record will not be on the current year file. There is no other record involved, so the LINKID is not necessary. The OLDID field must contain the FSCSKEY/FSCS\_SEQ from the prior year file to update the historical file.

The resulting record appears as follows:

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
Scotia	-3	-3	10	-3	-3	NE9038-001

**To correct inaccurate information, which could include the deletion of a record that was created for a future AE or outlet that never opened, use STATSTRU = 10, Delete an Incorrect Record.**

**\* The sequence number that follows the FSCSKEY must be three digits. For example, use AL0002-002, not AL0002-2.**

## 11 – Outlet Moves to Different Previously Existing Administrative Entity

If an outlet comes under the jurisdiction of another AE that currently exists, we require the following information:

- FSCSKEY = -3
- FSCS\_SEQ = -3
- STATSTRU = 11
- LINKID = -3
- PARENTID = the LIBID of the parent AE the outlet is moving to
- OLDID = the prior year FSCSKEY-FSCS\_SEQ (e.g., AL0002-002)\*

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
<i>Moved Outlet</i>	-3	-3	11	-3	X	X

### Example:

Going back to the merge example for AEs, in which the Bloomfield, Aztec, and Farmington Public Libraries merged to form a county library, we need to resolve the outlets. For simplicity, we will say that all the outlets will be operating under the newly created AE called San Juan Public Library. The FSCSKEY and FSCS\_SEQ fields will be assigned by the PLS Web Portal application after you run a successful Match Report. The LINKID is not necessary because, even though there are several records, they are processed independently in this structure change. The PARENTID is the LIBID of the new San Juan Public Library, so the outlets can be associated with the correct parent record. The OLDID field is necessary for historical tracking.

The records appear as follows:

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
Bloomfield	-3	-3	11	-3	SANJUAN	NM0074-002
Aztec	-3	-3	11	-3	SANJUAN	NM0004-002
Farmington	-3	-3	11	-3	SANJUAN	NM0014-002

\* The sequence number that follows the FSCSKEY must be three digits. For example, use AL0002-002, not AL0002-2.

### 13 – Add an Existing Outlet Not Previously Reported

To add an outlet that is not brand new but now meets the FSCS definition for a public library, we require the following information:

- FSCSKEY = -3
- FSCS\_SEQ = -3
- STATSTRU = 13
- LINKID = -3
- PARENTID = the LIBID of the parent AE
- OLDID = -3

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
<i>New Outlet</i>	-3	-3	13	-3	103-445	-3

### 22 – Future Outlet FSCS ID Request

If a library **has not yet opened** in the current year but requires an FSCS ID, you can request a future ID. The library will not be carried on final files that are released to the public for the current year, but the ID will be kept on the prior year file in PLS Web Portal file for the next reporting year. The record should include the following information:

- FSCSKEY = -3
- FSCS\_SEQ = -3
- STATSTRU = 22
- LINKID = -3
- PARENTID = LIBID of the parent AE
- OLDID = -3

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
<i>New Outlet</i>	-3	-3	22	-3	X	-3

#### Example:

The Oneida Regional Library was built during FY 2023 but will not open its doors until FY 2024. The library would like to have an FSCS ID for budgetary purposes. The library will first need to clear the request with the SDC. The FSCS ID will not be carried on the final current year files that are released to the public, but the ID will be kept and the library will appear on the following year's prior year file.

Any new AE requires an associated outlet as well. Because the FSCSKEY has not been assigned, there is no information for the respondent to provide. Adding a new record for a future library does not involve another library, so the LINKID is unnecessary. Because this is a new record, no OLDID exists from the prior year. The resulting record appears as follows:

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
Oneida	-3	-3	22	-3	IDMA	-3

If a future outlet is reported for a second (or more) year, the FSCSKEY and FSCS\_SEQ fields contain the values previously assigned, and the PARENTID will be -3, as follows:

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
<i>New Outlet</i>	<i>X</i>	<i>X</i>	22	-3	-3	-3

For the reporting year that the library does open, the STATSTRU will be a 00 and the FSCSKEY and FSCS\_SEQ will be the previously assigned FSCS ID when the record was submitted initially as a Future entity and the PARENTID will be -3.

**To correct inaccurate information, which could include the deletion of a record that was created for a future AE or outlet that never opened, use STATSTRU = 10, Delete an Incorrect Record.**

## 23 – Temporary Closure

If an outlet was closed for the entire current year, *but plans to reopen in the future*, we track the change with the STATSTRU = 23.

**NOTE:** If an outlet was closed for part of a fiscal year but you are reporting data for it, do not report it as closed this reporting cycle.

The record should include the following information:

- FSCSKEY = the prior year FSCSKEY
- FSCS\_SEQ = the prior year FSCS\_SEQ
- STATSTRU = 23
- LINKID = -3
- PARENTID = -3
- OLDID = -3

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
<i>Closed Outlet</i>	<i>X</i>	<i>X</i>	23	-3	-3	-3

### Example:

The Scotia Public Library closed for the current year due to reconstruction. Because the library will be inactive, but included on the current year file, the FSCSKEY and FSCS\_SEQ fields are needed. There is no other record involved, so the LINKID field is not needed. The PARENTID field also is not needed. The OLDID field is not needed either because the record will be maintained on the data file and not moved to the historical tables like with STATSTRUs 03 and 10.

The record appears as follows:

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
Scotia Public Library	NE9038	001	23	-3	-3	-3

## 24 – Restore/Undo Was a 23 (Reopen a Temporarily Closed Outlet)

If a library was temporarily closed with a structure code of 23 and is now ready to reopen, you want to keep the previously assigned FSCS ID. You can obtain a list of AEs that are eligible to restore by selecting **Tools** then, **Export Data** then **Export All Datasets in 1 Excel File**. Check for FSCSKEYs with a STATSTRU code of 23 to find the correct FSCS ID for your record.

- FSCSKEY = FSCSKEY from the list of previously closed entities
- FSCS\_SEQ = FSCS\_SEQ from the list of previously closed entities for the FSCSKEY
- STATSTRU = 24
- LINKID = -3
- PARENTID = -3
- OLDID = -3

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
<i>Restored Outlet</i>	<i>X</i>	<i>X</i>	24	-3	-3	-3

### Example:

The Old Harbor Library was temporarily closed for renovations and reopened in the current year. The AE and outlet files need to be included on the data file. The FSCSKEY and FSCS\_SEQ fields are required because the record will be on the current year file. The LINKID is not needed because no other records are involved. The PARENTID is not needed because the outlet can be associated to the parent record from the FSCSKEY field. The OLDID also is not needed.

The record appears as follows:

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
Old Harbor	AK0108	002	24	-3	-3	-3

Please reference the Restorable Outlet tab on the Match to find STATSTRU code 23. To restore the outlet, use STATSTRU code 24, which will prevent you from opening a new outlet (birth) previously reported and then temporarily closed.

## 25 – Survey Nonrespondent

If a library did not report on the state library survey for the fiscal year, include the Outlet record(s) on the file with the following information to indicate that it did not respond to the PLS, but the structure of the library was otherwise unchanged (i.e., the library is not new and was open for at least part of the reporting period and did not combine with any other entity).

- FSCSKEY = FSCSKEY from the prior year
- FSCS\_SEQ = FSCS\_SEQ from the prior year
- STATSTRU = 25
- PARENTID = -3
- LINKID = -3
- OLDID = -3

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
Old Harbor	X	X	25	-3	-3	-3

### Example:

The Old Harbor Library did not respond to their state library survey. The library needs to be included on the data file since they have not officially closed. Because the AE still exists, we will continue to use its FSCSKEY and FSCS\_SEQ. The LINKID field is not necessary because no other records are involved. The PARENTID is not needed because the outlet can be associated to the parent record from the FSCSKEY field. The OLDID is not needed because the record will be on the current year file.

The record appears as follows:

	FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
Old Harbor	AK0108	002	25	-3	-3	-3

**NOTE:** For any AE record with STATSTRU = 25, all associated Outlets should also have STATSTRU = 25. The Outlet record(s) should continue to include valid responses for data elements 700–712. Data elements 713–716 should be reported as “-1” (missing).



## Appendix C Resolving the Match Report

### Resolving the Match Report by Worksheet by Message

Except for invalid codes and duplicate IDs, the messages on the Match Report are general because they refer to format problems on the record. The information on each record must be consistent with the status code for the Match Report to complete properly.

The following information is organized by worksheet in the report by edit message. Except for an outright invalid value and the restore options, the following instructions assume the status code is the intended value. If you find you need to change the status code, you should check the record's identifying information (e.g., FSCSKEY, OLDDID, LINKID) to be sure it is consistent with the new code. You can refer to Appendix D for the correct structure codes and formats.

Examples and diagrams are provided. Please note that the diagrams are partial representations of the import record that pertain only to the Match Report.

Reminder: Depending on the record format, you may see more than one error message, on multiple worksheets, that relate to a single record.

## I. Admin Single

Each record has a message to indicate the type of problem that must be resolved.

### A. INVALID Status Code

You can use PLS Web Portal to reset the record to the prior year's status code through the Structure Change menu, or you can correct the data file to import again. The only valid entries for the STATSTRU field on the administrative entity file are:

00 – no change

01 – one administrative entity or outlet absorbs one or more administrative entities or outlets (adoption)

02 – new

03 – closed

04 – outlet forms independent administrative entity

05 – two administrative entities or outlets merged into a new library (marriage)

08 – previously closed administrative entity or outlet is restored

09 – previously omitted administrative entity or outlet is restored

10 – an administrative entity or outlet is removed from the survey (includes Out of Scope/Errors or for Planned but Never Opened)

13 – a previously existing library is added to the survey for the first time

22 – future administrative entity FSCS ID request

23 – temporary closure of an administrative entity or outlet

24 – previously temporarily closed administrative entity or outlet is restored

25 – nonrespondents

### B. This AE was not on the prior year file

Any entry other than -3 in the FSCSKEY or OLDID fields must have a corresponding record on the prior year public release data file. You can obtain a prior year file from the Export Data utility under the Tools menu.

Possible solutions:

- i. A record was included on the current year file in error and should be removed.

You can delete the record either from your import file or through the Structure Change menu option to Delete an Incorrect Record.

- ii. The OLDID entry is incorrect. Check for a possible data entry error. If that is not the problem, check the prior year record from the File Export to ensure you are using the correct FSCS ID information.

### Example:

The Beaver County Public Library System closed in the current year. The prior year FSCS ID for the AE is OK0010. That information was entered incorrectly in the OLDID field.

Note: This record will generate **two** error messages. In addition to the OLDID not being on the prior year file, you will see a message that OK0010 was on the prior year but not the current year.

FSCSKEY	STATSTRU	LINKID	OLDID
-3	03	-3	OK1011

Corrected:

FSCSKEY	STATSTRU	LINKID	OLDID
-3	03	-3	OK0010

### C. This AE was reported last year but is missing on the current year file

An AE was on the survey in the last collection but is not included on the current file.

- i. The record is not on the import file. You can either:
  - a. Add a record to the current file with an appropriate status code.
    - i. If the AE is still active, the status code is 00 or possibly 01 with the correct FSCS information in the FSCSKEY field.
    - ii. If it is inactive, possible status codes are 01, 03, 05, 10, or 23 with the FSCSKEY provided in the OLDID field.
  - b. The entry in either the FSCSKEY or OLDID field is incorrect. Check the prior year file to ensure you have the same FSCS ID for the AE name listed.

### Example:

The Beaver County Public Library System prior year FSCS ID appears to be missing because it was entered incorrectly in the OLDID field.

FSCSKEY	STATSTRU	LINKID	OLDID
-3	03	-3	OK1011

Corrected:

FSCSKEY	STATSTRU	LINKID	OLDID
-3	03	-3	OK0010

**D.** FSCSKEY cannot be -3 for STATUS (00, 08, 09, 24, or 25) Records

You must supply FSCS IDs for all records that will be included on the current year file.

**Example:**

The Stillwater Public Library is being restored to the survey but the FSCSKEY is in the wrong field. (You can obtain a list of restorable records from the Export Data feature under Tools.)

FSCSKEY	STATSTRU	LINKID	OLDID
-3	08	-3	OK0089

Corrected:

FSCSKEY	STATSTRU	LINKID	OLDID
OK0089	08	-3	-3

**Example:**

The FSCSKEY for the Inola Public Library was entered in the OLDID field.

Hint: This error will produce two messages on the report. The other message is “OLDID must be -3 for STATUS (00, 02, 04, 08, 09, 13, 22, 24, or 25) Records.”

FSCSKEY	STATSTRU	LINKID	OLDID
-3	00	-3	OK0050

Corrected:

FSCSKEY	STATSTRU	LINKID	OLDID
OK0050	00	-3	-3

**E.** FSCSKEY must be -3 for STATUS (02, 03, 04, 05, 10, or 13) Records

- i. New records are identified by status codes 02, 04, 05, and 13. Because PLS Web Portal assigns new FSCS IDs only after a successful Match, this information does not exist for records with these structure change codes. If the status code is correct on the record, the only appropriate entry is -3 for the FSCSKEY field.
- ii. Inactive records that are excluded from the current year are 01 for an adopted AE, 03 and 10. All FSCS ID information is required in the OLDID field so that the information will be recorded appropriately to the historic file and omitted from the current year table.

**Example:**

The Medford Public Library is closed for the current processing year, so the FSCSKEY entry should be in the OLDID field.

FSCSKEY	STATSTRU	LINKID	OLDID
OK0063	03	-3	-3

Corrected:

FSCSKEY	STATSTRU	LINKID	OLDID
-3	03	-3	OK0063

- a. Status code 05 signals a newly formed library as well as at least two inactive records. All three records must have -3 in FSCSKEY field.

**Example:**

The Sentinel Public Library and the Chickasha Public Library are forming a new library. When the record for the new Sam Houston Memorial Library was created, the Sentinel Public Library FSCS ID was left on the record.

FSCSKEY	STATSTRU	LINKID	OLDID
OK0024	05	New1	-3

FSCSKEY	STATSTRU	LINKID	OLDID
-3	05	New1	OK0024

FSCSKEY	STATSTRU	LINKID	OLDID
-3	05	New1	OK0021

Corrected: In this instance, only the new record needs to be changed.

FSCSKEY	STATSTRU	LINKID	OLDID
-3	05	New1	-3

**F. LINKID cannot be -3 for STATUS (01 or 05) Records**

Adoptions and marriages are structure changes that involve more than one AE record. To process the records correctly, the LINKID field must be the same for all associated records.

You must identify the associated records and enter the proper LINKID value.

**Adoption Example:** The Cherokee City-County Library is adopting the Carmen Public Library. Unfortunately, the LINKID fields for the two records were not completed.

FSCSKEY	STATSTRU	LINKID	OLDID
OK0020	01	-3	-3
-3	01	-3	OK0016

Corrected:

FSCSKEY	STATSTRU	LINKID	OLDID
OK0020	01	OK1	-3
-3	01	OK1	OK0040

**Merge (marriage) Example:** The Frederick Public Library and the Grandfield Public Library merged to form a new Tillman County Public Library. When the record for the new AE was added to the file, the LINKID was omitted.

FSCSKEY	STATSTRU	LINKID	OLDID
-3	05	OK4	OK0038
-3	05	OK4	OK0040
-3	05	-3	-3

Corrected:

FSCSKEY	STATSTRU	LINKID	OLDID
-3	05	OK4	OK0038
-3	05	OK4	OK0040
-3	05	OK4	-3

**NOTE:** The LINKID field is the same for records in the same transaction but should be unique for each set of records.

- G.** LINKID must be -3 for STATUS (00, 02, 03, 04, 08, 09, 10, 13, 22, 23, 24, or 25) Records

The LINKID field is only required when two or more records are affected by the same structure change. Any records with the values listed above for STATSTRU must have the LINKID field as -3.

**Example:**

The Vinita Public Library is closed for the current year. This closing does not involve another AE, so the LINKID is unnecessary.

FSCSKEY	STATSTRU	LINKID	OLDID
-3	03	OK0094	OK0094

Corrected:

FSCSKEY	STATSTRU	LINKID	OLDID
-3	03	-3	OK0094

- H.** OLDID cannot be -3 for STATUS (03 or 10) Record

Records that will not be on the current year AE file must provide the OLDID field value for historical tracking purposes.

**Example:**

Wynnewood Public Library was closed for the current year. The software is looking for the FSCS ID information in the OLDID field so that the record can be posted successfully to the historic table.

FSCSKEY	STATSTRU	LINKID	OLDID
OK0103	03	-3	-3

Corrected:

FSCSKEY	STATSTRU	LINKID	OLDID
-3	03	-3	OK0103

- I.** OLDID must be -3 for STATUS (00, 02, 04, 08, 09, 13, 22, 24, or 25) Records

The OLDID is not appropriate for records included on the current year file. Any record with the listed values for STATSTRU must have the OLDID field set to -3.

**Example:**

The Oilton Public Library is reopening and must be restored to the survey. The OLDID field was mistakenly filled with the FSCS ID that should be in the FSCSKEY field.

FSCSKEY	STATSTRU	LINKID	OLDID
-3	08	-3	OK0072

Corrected:

FSCSKEY	STATSTRU	LINKID	OLDID
OK0072	05	-3	-3

**J.** Cannot restore AE, there is no old AE with STATUS (03, 10, or 23) Records

Each restore code specifically relates to the type of delete action that originally removed the record from the survey. If the current record is truly a restore, refer to the file of eligible restore records to determine the correct status code to restore the record to the survey.

**Example:**

The Elgin Community Library was temporarily closed and is now ready to reopen. The record is on the historical table with a code of 03, so the correct restore code is 08.

FSCSKEY	STATSTRU	LINKID	OLDID
OK0115	09	-3	-3

Corrected:

FSCSKEY	STATSTRU	LINKID	OLDID
OK0115	08	-3	-3

**K.** Administrative Entity does not have any Outlets

Every AE must be associated with at least one outlet record.

Possible solutions:

- i. Check the outlet file to determine if record(s) are missing from the file:
  - a. If the AE record was added or restored to the current year file but the outlets were omitted, either add or restore the records as appropriate.
  - b. If the records were removed from the file through a structure change (e.g., adopted by another AE or merged with another outlet):



- i. If the action is correct, remove the AE record with the appropriate structure change.
  - ii. If the action is not correct:
    - a) Fix the outlet record, import, and rerun the match.
    - b) Reset the outlet record through the Structure Change option from the Tools menu.
  - c. If the records were omitted from the file:
    - i. Add the record to the import file, input again, and re-run the match.
    - ii. Add the record to the database through the Structure Change option from the Tools menu.
  - ii. If the appropriate record or records are on the outlet file:
    - a. For a new outlet, check the PARENTID field to be sure it is the same as the LIBID of the parent AE.
    - b. For restored or prior year outlets, check the FSCSKEY field to be sure it is correct.

## II. Admin Multi

This worksheet lists all records associated by the LINKID in structure changes that involve more than one AE. Only one message will be provided for each set of associated records because more than one record may require attention.

### A. All FSCSKEYs and OLDIDs must be unique (unless -3)

The FSCSKEY is unique for every AE record whether it is active or inactive. The OLDID is the FSCSKEY from prior years and must be uniquely referenced on the current year file.

#### Example:

This record has the same value for the FSCSKEY and OLDID fields. Because the status code is 00 for this example, the OLDID field should be -3.

FSCSKEY	STATSTRU	LINKID	OLDID
OK0003	00	-3	OK0003

Corrected:

FSCSKEY	STATSTRU	LINKID	OLDID
OK0003	00	-3	-3

**Example:**

The Fairview City Library closed but the OLDID information was entered incorrectly and matches another record with the same FSCSKEY value.

FSCSKEY	STATSTRU	LINKID	OLDID
-3	03	-3	OK0073

Corrected:

FSCSKEY	STATSTRU	LINKID	OLDID
OK0037	00	-3	-3

In this case, you also will get a message on the Admin Single page because OK0037 is on the prior year file but is not on the current year.

**B.** All LIBIDs must be unique for AE records

The LIBID field is used to associate outlet records with the parent AE and therefore must not be duplicated on the AE file.

**C.** These records do not comply with the rules for Adoption

An adoption occurs when two or more AEs merge but one of them remains on the current file. These records **must** share the same **LINKID** value so that the correct records are processed together. The information required is different for the record that will be on the current file than for the record(s) that will be excluded.

Refer to Appendix D for diagrams illustrating how the records should be constructed. Possible solutions:

- i. If your Match Report shows only one record with status 01:
  - a. If a record is missing, you must include the record(s) for the other AEs involved.
  - b. If the LINKID is missing on another record in your file, you must correct it.
- ii. If two or more records have the same LINKID but the status codes are not all 01, determine if the records listed are supposed to be associated:

- a. If the records are not supposed to be associated and the status code is correct, change the value of the LINKID field to -3.
  - b. If the records are supposed to be associated, change the status code to 01.
- iii. If two or more records exist on the current file with the same LINKID and status 01, you must examine the individual records to determine the problem.
- iv. The record that will remain on the file:
  - a. The FSCSKEY must exist on the prior year file.
  - b. The OLDID must be -3.
- v. The record(s) not left on the file:
  - a. The FSCSKEY must be -3.
  - b. The OLDID must exist on the prior year file.

**D.** These records do not comply with the rules for Marriage

A marriage occurs when two or more AEs merge to create a wholly new AE. The marriage is different from the adoption structure change because a record must be on the file that contains the data for the newly formed AE. All the records **must** share the same **LINKID** value so that the correct records are processed together. Different information is required for each record to determine which is the new AE record and which records are being removed from the survey.

Refer to Appendix B for diagrams illustrating how the records should be constructed. Possible solutions:

- i. If your Match Report shows less than three records with status code 05:
  - a. If any records are missing, you must add them to the file.
  - b. If the LINKID is missing on one or more records, you must add it to the appropriate AEs.
- ii. If three or more records share the same LINKID but the status codes are not 05 for all, determine if the records listed are supposed to be associated:
  - a. Change the LINKID to -3 if the records are not associated and the status codes are correct.
  - b. Change the status code to 05 if the records are associated.

- iii. If three or more records exist on the current file with the same LINKID and status 05, you must examine the individual records to determine the problem.
  - a. The record that will be created for the current file:
    - i. The FSCSKEY must be -3.
    - ii. The OLDID must be -3.
  - b. The records not remaining on the file:
    - i. The FSCSKEY must be -3.
    - ii. The OLDID must exist on the prior year file.

### III. Outlet Single

Each record has a message to indicate the type of problem that must be resolved.

#### A. INVALID Status Code

The only valid entries for the STATSTRU field on the outlet file are:

00 – no change

01 – one AE or outlet absorbs one or more AEs or outlets (adoption)

02 – new

03 – closed

04 – outlet forms independent AE

05 – two AEs or outlets merged into a new library (marriage)

08 – previously closed AE or outlet is restored

09 – previously omitted AE or outlet is restored

10 – an AE or outlet is removed from the survey (includes Out of Scope/Errors or for Planned but Never Opened (formerly 26))

11 – an outlet moves to a different parent AE

13 – a previously existing library is added to the survey for the first time

22 – future outlet FSCS ID request

23 – temporarily closed outlet

24 – previously temporarily closed outlet is restored

25 – nonrespondents

**B.** This outlet was not on the prior year file

Any entry in the FSCSKEY-FSCS\_SEQ or OLDID fields must have a corresponding record on the prior year file. You can obtain a prior year file from the Export Data utility under the Tools menu.

Possible solutions:

- i. A record was included on the current year file in error and should be removed. You can use the Delete an Incorrect Record option on the Structure Change menu or simply delete the record from your data file and import again.
- ii. The FSCSKEY-FSCS\_SEQ or OLDID entry is incorrect. Check the prior year file to make corrections to your data file. You can correct only the import file for this problem.

**Example:**

The Wright Library closed but the OLDID value is entered incorrectly.

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
-3	-3	03	-3	-3	CR0074- 02X

Corrected:

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
-3	-3	03	-3	-3	CR0074- 022

- iii. You intended to restore a previously closed record.

**Example:**

The Tulsa City-County Library System outlet was previously closed. The record is a legitimate restore candidate, so if it is to remain on the file, the value for STATSTRU should be 08.

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
OK0093	022	00	-3	-3	-3

Corrected:

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
OK0093	022	08	-3	-3	-3

**NOTE: The FSCS\_SEQ must be three digits. For example, use AL0002-002, not AL0002-2.**

**C.** This outlet was reported last year but is missing on the current year file

An outlet was on the survey in the last collection but is not included on the current file.

Possible solutions:

- i. The entry in either the FSCSKEY-FSCS\_SEQ or OLDID field is incorrect. Check the prior year file to ensure you have the same FSCS ID for the outlet name listed.

**Example:**

The Alva Public Library (OK0003-002) is being adopted by another outlet. The OLDID field is not correct, so the record appears to be unaccounted from the previous year.

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
-3	-3	01	OK1	-3	OK0003- 00X

Corrected:

FSCSKEY	FSCS_SEQ	STATSTR U	LINKID	PARENTI D	OLDID
-3	-3	01	OK1	-3	OK0003- 002

- ii. The record was omitted. Add a record to the current file with an appropriate status code.
  - a. If the outlet is still active, the status code is 00.
  - b. If the outlet is inactive, possible status codes are 01, 03, 05, 10, or 23.
- iii. A record was miscoded in the current year file in error.

See Appendix B Name, Address, and Structure Changes for detailed explanation of name, address, and structure codes.

**NOTE: The FSCS\_SEQ must be three digits. For example, use AL0002-002, not AL0002-2.**

**D.** FSCSKEY cannot be -3 for STATUS (00, 08, 09, 24, or 25) Records or FSCS\_SEQ cannot be -3 for STATUS (00, 08, 09, 24, or 25) Records

You must supply FSCS ID information for all records that will be included on the current year file.

**Example:**

The Newcastle Public Library is missing from the file because no FSCS ID information was provided. If the value for STATSTRU is correct, check the prior year file for the required information.

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
-3	-3	00	-3	-3	-3

Corrected:

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
OK0070	004	00	-3	-3	-3

- E.** FSCSKEY must be -3 for STATUS (02, 03, 05, 10, 11, or 13) Records or FSCS\_SEQ must be -3 for STATUS (02, 03, 05, 10, 11, or 13) Records
- i. New records are identified by status codes 02, 05 (for a newly created outlet from a merger), 11, and 13. Because the FSCS ID has not been assigned, no information for that field exists. The only appropriate entry is -3 for records with these codes.

**Example:**

The Ardmore Public Library central outlet is going to move to the Chickasaw Regional Library System. Even though the FSCS ID information is available for Chickasaw, the software must still assign the FSCS\_SEQ.

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
OK0006	-3	11	-3	1	OK0006-002

Corrected:

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
-3	-3	11	-3	1	OK0006-002

- ii. Inactive records that are excluded from the current year are 03, 05 where existing outlets are forming a new outlet 10. Any FSCS ID information is required in the OLDID field.

**Example:**

The Walters Public Library central outlet (OK0096-002) is merging with the Watonga Public Library central outlet (OK0097-002). The FSCS ID information for these records should be in the OLDID field so that it can be posted to the historical table.

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
OK0096	002	05	OK55	-3	-3
OK0097	002	05	OK55	-3	-3

Corrected:

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
-3	-3	05	OK55	-3	OK0096-002
-3	-3	05	OK55	-3	OK0097-002

**NOTE: The FSCS\_SEQ must be three digits. For example, use AL0002-002, not AL0002-2.**

**F. LINKID cannot be -3 for STATUS (01 or 05) Records**

Adoptions and marriages are structure changes that involve more than one outlet record. To process the records correctly, the LINKID field must be the same for all associated records.

You must identify the associated records and enter the proper LINKID value.

**Example:**

The Chelsea Public Library outlet record is merging with another outlet but no information is provided on the records involved in the structure change.

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
-3	-3	05	-3	-3	OK0019-002

Corrected:

With the LINKID provided, the PLS Web Portal can now identify the other two records involved in the merger.

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
-3	-3	05	OK50	BOONE	-3
-3	-3	05	OK50	-3	OK0019-002
-3	-3	05	OK50	-3	OK0020- 002

**NOTE: The FSCS\_SEQ must be three digits. For example, use AL0002-002, not AL0002-2.**

**G. LINKID must be -3 for STATUS (00, 02, 03, 08, 09, 10, 11, 13, 22, 23, 24, or 25) Records**



The LINKID field is required only when two or more records are affected by the same structure change. Any records with the values listed above for STATSTRU must have the LINKID field as -3.

**Example:**

The Florence Park Library central outlet is reopening after renovations are complete. No other outlets are required for this structure change, so there is no need for a LINKID.

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
OK0093	008	08	FLO	-3	-3

Corrected:

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
OK0093	008	08	-3	-3	-3

**H. OLDID cannot be -3 for STATUS (03, 10, or 11) Records**

Records that will not be on the current year outlet file must provide the OLDID field value for historical tracking purposes.

**Example:**

The Seiling Public Library is no longer a branch of the Western Plains Library System and is now a branch of the Watonga Public Library. The outlet record will require new FSCS ID information based on the PARENTID provided for Watonga, and the OLDID information is required for historical update.

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
OK0024	006	11	-3	98	-3

Corrected:

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
-3	-3	11	-3	98	OK0024-006

**NOTE: The FSCS\_SEQ must be three digits. For example, use AL0002-002, not AL0002-2.**

**I. OLDID must be -3 for STATUS (00, 02, 08, 09, 13, 22, 24, or 25) Records**

Records that will be on the current year outlet file do not require OLDID information.

**Example:**

The Hollis Public Library is not undergoing any structural change for the current year. The only identification information needed is the FSCS ID fields.

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
OK0002	002	00	-3	-3	OK0002-002

Corrected:

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
OK0002	002	00	-3	-3	-3

**J. PARENTID cannot be -3 for STATUS (02, 11, 13, or 22) Records**

The PARENTID is the field that links the outlet to the correct parent AE. It is defined as the LIBID of the parent record and must be provided when outlets are added to the file or moving to a new parent.

**Example:**

The Davis Public Library is a new branch of the Chickasaw Regional Library System. New FSCS ID information will have to be assigned to the outlet record. The PARENTID must be provided to associate the correct outlet and AE records.

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
-3	-3	02	-3	-3	-3

Corrected:

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
-3	-3	02	-3	OK0007	-3

**NOTE: The FSCS\_SEQ must be three digits. For example, use AL0002-002, not AL0002-2.**

**K.** PARENTID must be -3 for STATUS (00, 01, 03, 08, 09, 10, 23, 24, or 25) Records

The FSCS ID information is required for the status codes listed above, so the PARENTID is not needed to identify the parent AE.

**Example:**

The Pond Creek City Library is being restored to the current year file. Restored Outlet records must provide the FSCS ID information and can be associated to the corrected parent AE record. The PARENTID field is not required.

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
OK0108	002	08	-3	POND	-3

Corrected:

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
OK0108	002	08	-3	-3	-3

**L.** Cannot restore outlet, there is no old outlet with STATUS (03, 10, or 23)

Each restore code specifically relates to the type of delete action that originally removed the record from the survey. If the current record is truly a restore, refer to the file of eligible restore records to determine the correct status code to restore the record to the survey.

**Example:**

The Kansas Public Library was previously closed and is now reopening. The appropriate restore code for a closed outlet is 08.

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
OK8001	001	09	-3	-3	-3

Corrected:

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
OK8001	001	08	-3	-3	-3

**M.** Outlet Record is not on the AE file

Every outlet record must have an active parent AE record on the current year file.

Possible solutions:

- i. If the outlet record is active for the current year under the FSCS ID information provided:

- a. The parent AE may require correction to be processed as a current year record.
  - b. If the AE record is missing from the current year file, add it, ensuring that it is coded properly for current processing.
- ii. If the outlet record is *not* active for the current year under the FSCS ID information provided:
  - a. Correct the FSCS ID information if appropriate.
  - b. Remove the outlet record from the file.

**N. PARENTID is not on the AE File**

The PARENTID is the field that links the outlet to the correct parent AE. It is defined as the LIBID of the parent record and must be provided when outlets are added to the file or moving to a new parent.

Possible solutions:

- i. If the AE record is missing, add it to the file, making sure that the LIBID entry matches the PARENTID entry on the outlet record.
- ii. If the AE record is present, make sure the LIBID and PARENTID fields match.

**IV. Outlet Multi**

This worksheet lists all records associated by the LINKID in structure changes that involve more than one outlet. Only one message will be provided for each set of associated records because more than one record may require attention.

**A. All FSCSKEYs and OLDIDs must be unique (unless -3)**

The FSCS ID information is unique for every outlet record whether it is active or inactive. The OLDID is the FSCSKEY from prior years and must be uniquely referenced on the current year file.

**Example:**

The Suburban Acres Library is moving from its current parent AE to form its own AE. Two records ended up on the file with the same OLDID information because an incorrect “add” record was not removed.

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
-3	-3	02	-3	OK200	OK0093-023
-3	-3	04	-3	OK200	OK0093-023

Corrected:

Remove the incorrect add record.

FSCSKEY	FSCS_SEQ	STATSTRU	LINKID	PARENTID	OLDID
-3	-3	04	-3	OK200	OK0093-023

**NOTE: The FSCS\_SEQ must be three digits. For example, use AL0002-002, not AL0002-2.**

**B.** These records do not comply with the rules for Adoption

An adoption occurs when two or more outlets merge but one of them remains on the current file. These records **must** share the same **LINKID** value so that the correct records are processed together. The information required is different for the record that will be on the current file than for the record(s) that will be excluded.

Refer to Appendix D for diagrams illustrating how the records should be constructed.

Possible solutions:

- i. If your Match Report shows only one record with status 01:
  - a. If a record is missing, you must include the record(s) for the other outlet involved.
  - b. If the LINKID is missing on another record in your file, you must correct it.
- ii. If two or more records have the same LINKID but the status codes are not all 01, determine if the records listed are supposed to be associated:
  - a. If the records are not supposed to be associated and the status code is correct, change the value of the LINKID field to -3.
  - b. If the records are supposed to be associated, change the status code to 01.
- iii. If two or more records exist on the current file with the same LINKID and status 01, you must examine the individual records to determine the problem.
- iv. The record that will remain on the file:
  - a. The FSCSKEY-FSCS\_SEQ must exist on the prior year file.
  - b. The OLDID must be -3.
- v. The record(s) not left on the file:
  - a. The FSCSKEY-FSCS\_SEQ must be -3.

- b. The OLDID must exist on the prior year file.

C. These records do not comply with the rules for Marriage

A marriage occurs when two or more outlets merge to create a wholly new outlet. This is different from the adoption structure change because a record must be on the file that contains the data for the newly formed outlet. All the records **must** share the same **LINKID** value so that the correct records are processed together. Different information is required for each record to determine which is the new outlet record and which records are being removed from the survey.

Refer to Appendix D for diagrams illustrating how the records should be constructed.

Possible solutions:

- i. If your Match Report shows less than three records with status code 05:
  - a. If any records are missing, you must add them to the file.
  - b. If the LINKID is missing on one or more records, you must add it to the appropriate outlets.
- ii. If three or more records share the same LINKID but the status codes are not 05 for all, determine if the records listed are supposed to be associated:
  - a. Change the LINKID to -3 if the records are not associated and the status codes are correct.
  - b. Change the status code to 05 if the records are associated.
- iii. If three or more records exist on the current file with the same LINKID and status 05, you must examine the individual records to determine the problem.
  - a. The record that will be created for the current file:
    - i. The FSCSKEY-FSCS\_SEQ must be -3.
    - ii. The OLDID must be -3.
  - b. The records not remaining on the file:
    - i. The FSCSKEY-FSCS\_SEQ must be -3.
    - ii. The OLDID must exist on the prior year file.

**V. Name Changes**

This worksheet lists inconsistencies between the name status code (STATNAME) and the year-to-year change in the AE or outlet name.

**A. STATNAME Invalid**

The only valid values for STATNAME are:

00 – no change from the prior year

06 – the AE or outlet has made an official name change

14 – the AE or outlet name has changed, but it is not an official change

**B. STATNAME 00 and Name Change**

The name field value is different from the prior year, but the status code does not explain the change.

**C. STATNAME 06 and no Name Change**

The name field value is the same as the prior year, but the status code indicates an official name change.

**D. STATNAME 14 and no Name Change**

The name field value is the same as the prior year, but the status code indicates that a minor name change has occurred.

**VI. Address Changes**

This worksheet lists inconsistencies between the street address status code (STATADDR) and the year-to-year change in the physical location or street address of the administrative entity or outlet record.

**A. STATADDR Invalid**

The only valid values for STATADDR are:

00 – no change from the prior year

07 – the AE or outlet has changed its physical location

15 – the address has a minor change from the prior year but is still in the same physical location

**B. STATADDR 00 and Address Change**

The address field entry is different from the prior year, but the status code does not explain the change.

**C. STATADDR 07 and no Address Change**

The address field entry is the same as the prior year, but the status code indicates a location change.

**D. STATADDR 15 and no Address Change**

The address field entry is the same as the prior year, but the status code indicates a minor change.



## Appendix D Import File Specifications

### Administrative Entity Import File Specifications

Variable Name	Data Element Name	Width	ASCII Position	Excel/.csv Column	Type/Decimals	Item Number
FSCSKEY	IMLS Identification number	6	1	A	Character	150
STATSTRU	Status of AE record current to prior year	2	7	B	Character	150a
STATNAME	Status of LIBNAME current to prior year	2	9	C	Character	152a
STATADDR	Status of ADDRESS current to prior year	2	11	D	Character	153a
LINKID	User Defined, used to link two or more AE together.	20	13	E	Character	
OLDID	Old FSCSKEY	6	33	F	Character	
LIBID	State assigned identification number MUST BE UNIQUE	20	39	G	Character	151
LIBNAME	Legal Name	60	59	H	Character	152
ADDRESS	Physical Street Address	35	119	I	Character	153
CITY	City	20	154	J	Character	154
ZIP	ZIP Code	5	174	K	Character	155
ADDRES_M	Mailing Address	35	179	L	Character	157
CITY_M	Mailing City	20	214	M	Character	158
ZIP_M	Mailing Zip Code	5	234	N	Character	159
CNTY	County	20	239	O	Character	161
PHONE	Phone	10	259	P	Character	162
C_RELATN	Interlibrary Relationship Code	2	269	Q	Character	200
C_LEGBAS	Legal Basis Code	2	271	R	Character	201
C_ADMIN	Administrative Structure Code	2	273	S	Character	202
C_FSCS	FSCS Public Library Definition	1	275	T	Character	203

Variable Name	Data Element Name	Width	ASCII Position	Excel/.csv Column	Type/Decimals	Item Number
GEOCODE	Geographic Code	3	276	U	Character	204
LSABOUND	Legal Service Area Boundary Change	1	279	V	Character	205
STARTDAT	Reporting Period Start Date (mm/dd/yyyy)	10	280	W	Character	206
ENDDATE	Reporting Period End Date (mm/dd/yyyy)	10	290	X	Character	207
POPU_LSA	Population of the Legal Service Area	9	300	Y	Numeric/0	208
CENTLIB	Number of Central Libraries	3	309	Z	Numeric/0	209
BRANLIB	Number of Branch Libraries	3	312	AA	Numeric/0	210
BKMOB	Number of Bookmobiles	3	315	AB	Numeric/0	211
MASTER	ALA-MLS	9	318	AC	Numeric/2	250
LIBRARIA	Total Librarians	9	327	AD	Numeric/2	251
OTHPAID	All Other Paid Employees	9	336	AE	Numeric/2	252
TOTSTAFF	Total Paid Employees	10	345	AF	Numeric/2	253
LOCGVT	Local Government Revenue	9	355	AG	Numeric/0	300
STGVT	State Government Revenue	9	364	AH	Numeric/0	301
FEDGVT	Federal Government Revenue	9	373	AI	Numeric/0	302
OTHINCM	Other Operating Revenue	9	382	AJ	Numeric/0	303
TOTINCM	Total Operating Revenue	10	391	AK	Numeric/0	304
SALARIES	Salaries & Wages Expenditures	9	401	AL	Numeric/0	350
BENEFIT	Employee Benefits Expenditures	9	410	AM	Numeric/0	351

Variable Name	Data Element Name	Width	ASCII Position	Excel/.csv Column	Type/Decimals	Item Number
STAFFEXP	Total Staff Expenditures	9	419	AN	Numeric/0	352
PRMATEXP	Print Materials Expenditures	9	428	AO	Numeric/0	353
ELMATEXP	Electronic Materials Expenditures	9	437	AP	Numeric/0	354
OTHMATEX	Other Materials Expenditures	9	446	AQ	Numeric/0	355
TOTEXPCO	Total Collection Expenditures	9	455	AR	Numeric/0	356
OTHOPEXP	Other Operating Expenditures	9	464	AS	Numeric/0	357
TOTOPEXP	Total Operating Expenditures	10	473	AT	Numeric/0	358
LCAP_REV	Local Government Capital Revenue	9	483	AU	Numeric/0	400
SCAP_REV	State Government Capital Revenue	9	492	AV	Numeric/0	401
FCAP_REV	Federal Government Capital Revenue	9	501	AW	Numeric/0	402
OCAP_REV	Other Capital Revenue	9	510	AX	Numeric/0	403
CAP_REV	Total Capital Revenue	9	519	AY	Numeric/0	404
CAPITAL	Total Capital Expenditures	9	528	AZ	Numeric/0	405
BKVOL	Print Materials	9	537	BA	Numeric/0	450
EBOOK	Electronic Books	9	546	BB	Numeric/0	451
AUDIO_PH	Audio—Physical Units	9	555	BC	Numeric/0	452
AUDIO_DL	Audio—Downloadable Titles	9	564	BD	Numeric/0	453
VIDEO_PH	Video—Physical Units	9	573	BE	Numeric/0	454
VIDEO_DL	Video—Downloadable Units	9	582	BF	Numeric/0	455

Variable Name	Data Element Name	Width	ASCII Position	Excel/.csv Column	Type/Decimals	Item Number
EC_LO_OT	Local/Other Cooperative Agreements	9	591	BG	Numeric/0	456
EC_ST	State (state government or state library)	9	600	BH	Numeric/0	457
ELECCOLL	Total Electronic Collections	9	609	BI	Numeric/0	458
TOTPHYS	Total Physical Items in Collection	9	618	BJ	Numeric/0	461
OTHPHYS	Other Circulating Physical Items	9	627	BK	Numeric/0	462
VISITS	Library Visits	9	636	BL	Numeric/0	501
VISITRPT	Library Visits Reporting Method	2	645	BM	Character	501a
REFERENC	Reference Transactions	9	647	BN	Numeric/0	502
REFERRPT	Reference Transactions Reporting Method	2	656	BO	Character	502a
REGBOR	Number of Registered Users	9	658	BP	Numeric/0	503
ODFINE	Overdue Fine Policy	1	667	BQ	Character	504
TOTCIR	Total Circulation of Materials	9	668	BR	Numeric/0	550
KIDCIRCL	Circulation of Children's Materials	9	677	BS	Numeric/0	551
ELMATCIR	Use of Electronic Material	9	686	BT	Numeric/0	552
PHYSCIR	Physical Item Circulation	9	695	BU	Numeric/0	553
ELINFO	Successful Retrieval of Electronic Information	9	704	BV	Numeric/0	554
ELCONT	Electronic Content Use	10	713	BW	Numeric/0	555

Variable Name	Data Element Name	Width	ASCII Position	Excel/.csv Column	Type/Decimals	Item Number
TOTCOLL	Total Collection Use	10	723	BX	Numeric/0	556
OTHPHCIR	Circulation of Other Physical Items	9	733	BY	Numeric/0	561
LOANTO	Interlibrary Loans Provided To	9	742	BZ	Numeric/0	575
LOANFM	Interlibrary Loans Received From	9	751	CA	Numeric/0	576
TOTPRO	Total Number of Synchronous Program Sessions	9	760	CB	Numeric/0	600
K0_5PRO	Number of Synchronous Program Sessions Targeted at Children Ages 0–5	9	769	CC	Numeric/0	601
K6_11PRO	Number of Synchronous Program Sessions Targeted at Children Ages 6–11	9	778	CD	Numeric/0	602
YAPRO	Number of Synchronous Program Sessions Targeted at Young Adults Ages 12–18	9	787	CE	Numeric/0	603
ADULTPRO	Number of Synchronous Program Sessions Targeted at Adults Ages 19 or Older	9	796	CF	Numeric/0	604
GENPRO	Number of Synchronous General Interest Program Sessions	9	805	CG	Numeric/0	605
ONPRO	Number of Synchronous In-Person Onsite Program Sessions	9	814	CH	Numeric/0	606

Variable Name	Data Element Name	Width	ASCII Position	Excel/.csv Column	Type/Decimals	Item Number
OFFPRO	Number of Synchronous In-Person Offsite Program Sessions	9	823	CI	Numeric/0	607
VIRPRO	Number of Synchronous Virtual Program Sessions	9	832	CJ	Numeric/0	608
TOTATTEN	Total Attendance at Synchronous Programs	9	841	CK	Numeric/0	610
K0_5ATTEN	Attendance at Synchronous Programs Targeted at Children Ages 0–5	9	850	CL	Numeric/0	611
K6_11ATTEN	Attendance at Synchronous Programs Targeted at Children Ages 6–11	9	859	CM	Numeric/0	612
YAATTEN	Attendance at Synchronous Programs Targeted at Young Adults Ages 12–18	9	868	CN	Numeric/0	613
ADULTATTEN	Attendance at Synchronous Programs Targeted at Adults Ages 19 or Older	9	877	CO	Numeric/0	614
GENATTEN	Attendance at Synchronous General Interest Programs	9	886	CP	Numeric/0	615
ONATTEN	Synchronous In-Person Onsite Program Attendance	9	895	CQ	Numeric/0	616

Variable Name	Data Element Name	Width	ASCII Position	Excel/.csv Column	Type/Decimals	Item Number
OFFATTEN	Synchronous In-Person Offsite Program Attendance	9	904	CR	Numeric/0	617
VIRATTEN	Synchronous Virtual Program Attendance	9	913	CS	Numeric/0	618
TOTPRES	Total Number of Asynchronous Program Presentations	9	922	CT	Numeric/0	620
TOTVIEWS	Total Views of Asynchronous Program Presentations within 30 Days	9	931	CU	Numeric/0	630
GPTERMS	Number of Internet Computers Used by General Public	6	940	CV	Numeric/0	650
PITUSR	Number of Uses (Sessions) of Public Internet Computers Per Year	9	946	CW	Numeric/0	651
PITUSRRPT	Reporting Method for Number of Uses of Public Internet Computers Per Year	2	955	CX	Character	651a
WIFISESS	Wireless Sessions	10	957	CY	Numeric/0	652
WIFISRPT	Reporting Method for Wireless Sessions	2	967	CZ	Character	652a
WEBVISIT	Website Visits	10	969	DA	Numeric/0	653

## Outlet Import File Specifications

Variable Name	Data Element Name	Width	ASCII Position	Excel/.csv Column	Type/Decimals	Item Number
FSCSKEY	IMLS assigned identification number	6	1	A	Character	700
FSCS_SEQ	IMLS assigned identification number suffix	3	7	B	Character	700
STATSTRU	Status of Outlet record current to prior year	2	10	C	Character	700a
STATNAME	Status of LIBNAME current to prior year	2	12	D	Character	702a
STATADDR	Status of ADDRESS current to prior year	2	14	E	Character	703a
LINKID	User Defined, used to link two or more outlets together	20	16	F	Character	
PARENTID	LIBID of parent AE	20	36	G	Character	
OLDID	Old FSCSKEY – FSCS_SEQ	10	56	H	Character	
LIBID	State assigned identification number	20	66	I	Character	701
LIBNAME	Legal Name	60	86	J	Character	702
ADDRESS	Physical Street Address	35	146	K	Character	703
CITY	City	20	181	L	Character	704
ZIP	ZIP Code	5	201	M	Character	705
CNTY	County of the Outlet	20	206	N	Character	707
PHONE	Phone	10	226	O	Character	708
C_OUT_TY	Outlet Type Code	2	236	P	Character	709
SQ_FEET	Square Footage of Outlet	8	238	Q	Numeric/0	711
L_NUM_BM	Number of Bookmobiles in the Bookmobile Outlet Record	2	246	R	Numeric/0	712



Variable Name	Data Element Name	Width	ASCII Position	Excel/.csv Column	Type/Decimals	Item Number
HOURS	Public Service Hours Per Year (actual hours)	4	248	S	Numeric/0	713
WKS_OPEN	Number of Weeks Open (actual weeks)	2	252	T	Numeric/0	714

#### Annotation Import File Specifications

Column	Description	Width	ASCII Position	Excel/.csv Column	Type
RECORD TYPE	Must always be 'ANNO'	4	1	A	Text
FSCSKEY - FSCS_SEQ	IMLS assigned identification number with suffix for outlets	10	5	B	Text
EDITID	Edit number	5	15	C	Text
COMMENT	Respondent annotation	Max	20	D	Text

## Appendix E PLS Contacts

American Institutes for Research (AIR) Contacts	
<b>PLS Help Desk:</b>	
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## Appendix F Francis Keppel Award Criteria

<b>Keppel Award Point Criteria—Group 1</b> <b>(AK, AZ, CA, CT, DE, GA, HI, IA, KY, MA, MD, MO, MT, NC, NM, NV, OK, OR, RI, SC, TN, VA, WV, WY)</b>	
<b>(Minimum points required for award = 16, Maximum points = 20)</b>	
	<b>Points</b>
<b>Submission Points</b>	
Data Submission on or before March 15, 2024	10
Data Submission received March 16 through March 22, 2024	8
Data Submission received March 23 through March 29, 2024	6
Data Submission received after March 29, 2024	Disqualified
Final Deadline is April 12, 2024	
<b>Edit Follow-Up Points</b>	
Responded to Edit Follow-Up within two weeks	10
Responded to Edit Follow-Up within three weeks	8
Did not respond to Edit Follow-Up	Disqualified
<b>Item Nonresponse</b>	
A data item that has been collected more than three years is missing for an entire state	Disqualified

Note: IMLS makes the final decision regarding who receives the Keppel Award. A data submission includes a locked data file and an annotated Edit Report.

<b>Keppel Award Point Criteria—Group 2</b> <b>(AL, AR, CO, DC, FL, ID, IL, IN, KS, LA, ME, MI, MN, MS, ND, NE, NH, NJ, NY, OH, PA, SD, UT, VT, WA, WI, American Samoa, Guam, Northern Mariana Islands, Puerto Rico, U.S. Virgin Islands)</b>	
<b>(Minimum points required for award = 16, Maximum points = 20)</b>	
	<b>Points</b>
<b>Submission Points</b>	
Data Submission on or before June 21, 2024	10
Data Submission received June 22 through June 28, 2024	8
Data Submission received July 29 through July 5, 2024	6
Data Submission received after July 5, 2024	Disqualified
Final Deadline is July 19, 2024	
<b>Edit Follow-Up Points</b>	
Responded to Edit Follow-Up within two weeks	10
Responded to Edit Follow-Up within three weeks	8
Did not respond to Edit Follow-Up	Disqualified
<b>Item Nonresponse</b>	
A data item that has been collected more than three years is missing for an entire state	Disqualified

Note: IMLS makes the final decision regarding who receives the Keppel Award. A data submission includes a locked data file and an annotated Edit Report.

<b>Keppel Award Point Criteria—Group 3 (TX)</b>	
<b>(Minimum points required for award = 16, Maximum points = 20)</b>	
	<b>Points</b>
<b>Submission Points</b>	
Data Submission on or before July 26, 2024	10
Data Submission received July 27 through August 2, 2024	6
Data Submission received after August 2, 2024	Disqualified
Final Deadline is August 9, 2024	
<b>Edit Follow-Up Points</b>	
Responded to Edit Follow-Up within two weeks	10
Responded to Edit Follow-Up within three weeks	8
Did not respond to Edit Follow-Up	Disqualified
<b>Item Nonresponse</b>	
A data item that has been collected more than three years is missing for an entire state	Disqualified

Note: IMLS makes the final decision regarding who receives the Keppel Award. A data submission includes a locked data file and an annotated Edit Report.

## Appendix G Standard Abbreviations

(Use Only if Data Exceed Field Length)

Term	Abbreviation
Administrative, Administration	Adm
American	Amer
Association	Assn
Avenue	Ave
Board	Bd
Bookmobile	Bkmob
Branch	Br
Building	Bldg
Bureau	Bur
Center	Ctr
Central	Ctrl
Circle	Cir
Circulation, Circulating	Circ
Committee	Com
Community	Cmnty
Consolidated	Consol
Cooperative, Cooperating	Coop
County	Cnty
Court	Ct
Department, Departmental	Dept
District	Dist
Division, Divisional	Div
Extension	Ext
Federal	Fed
Fort	Ft
Foundation	Fdn
Free	Fr
General Delivery	Gen Del
Headquarters	Hq
Highway	Hwy
Information	Inf
Interlibrary	IL
Interlibrary Loan	ILL

Term	Abbreviation
Joint	Jt
Library District	LD
Library(ies)	L(s)
Memorial	Mem
Metropolitan	Metro
Mount	Mt
Mountain	Mtn
Municipal	Mun
Museum	Mus
National	Natl
Park	Pk
Parkway	Pkwy
People's	Peop
Public	P
Public Library(ies)	PL(s)
Reading	Rdng
Reference	Ref
Region	Rgn
Regional	Rgnl
Reorganized, Reorganization	Reorg
Research	Res
Room(s)	Rm(s)
Route	Rt
Saint, Street	St
School(s)	Sch(s)
Service(s)	Serv
Society	Soc
Supervisor, Supervisory	Supv
System(s)	Sys
Terrace	Terr
Township	Twp
Trail, Trustee	Tr
University	Univ

## Appendix H Summed Data Elements

Summed Data Elements list shows the relationships between elements that should equal the sum of two or more other data elements.

### Calculating Summed Data Elements

	Sum	Parts
<b>Data Element</b>	<b>TOTSTAFF (253)</b>	<i>LIBRARIA (251)+OTHPAID (252)</i>
<b>Notes</b>	<i>251+252 = 253</i>	<i>*MASTER (250) is included in LIBRARIA (251).</i>
<b>Data Element</b>	<b>TOTINCM (304)</b>	<i>LOCGVT (300)+STGVT (301)+FEDGVT (302)+OTHINCM (303)</i>
<b>Notes</b>	<i>300+301+302+303 = 304</i>	
<b>Data Element</b>	<b>STAFFEXP (352)</b>	<i>SALARIES (350)+BENEFIT (351)</i>
<b>Notes</b>	<i>350+351 = 352</i>	
<b>Data Element</b>	<b>TOTEXPCO (356)</b>	<i>PRMATEXP (353)+ELMATEXP (354)+OTHMATEX (355)</i>
<b>Notes</b>	<i>353+354+355 = 356</i>	
<b>Data Element</b>	<b>TOTOPEXP (358)</b>	<i>STAFFEXP (352)+TOTEXPCO (356)+OTHOPEXP (357)</i>
<b>Notes</b>	<i>352+356+357 = 358</i>	
<b>Data Element</b>	<b>CAP_REV (404)</b>	<i>LCAP_REV (400)+SCAP_REV (401)+FCAP_REV (402)+OCAP_REV (403)</i>
<b>Notes</b>	<i>400+401+402+403 = 404</i>	
<b>Data Element</b>	<b>TOTPHYS (461)</b>	<i>BKVOL (450) + AUDIO_PH (452) + VIDEO_PH (454) + OTHPHYS (462)</i>
<b>Notes</b>	<i>450+452+454+462 = 461</i>	
<b>Data Element</b>	<b>ELECCOLL (458)</b>	<i>EC_LO_OT (456)+EC_ST (457)</i>
<b>Notes</b>	<i>456+457 = 458</i>	
<b>Data Element</b>	<b>TOTCIR (550)</b>	<i>ELMATCIR (552)+PHYSCIR (553)</i>
<b>Notes</b>	<i>552+553 = 550</i>	
<b>Data Element</b>	<b>ELCONT (555)</b>	<i>ELMATCIR (552)+ELINFO (554)</i>
<b>Notes</b>	<i>552+554 = 555</i>	
<b>Data Element</b>	<b>TOTCOLL (556)</b>	<i>ELMATCIR (552)+PHYSCIR (553)+ELINFO (554)</i>
<b>Notes</b>	<i>552+553+554 = 556</i>	
<b>Data Element</b>	<b>TOTPRO (600)</b>	<i>K0_5PRO (601)+K6_11PRO (602)+YAPRO (603)+ADULTPRO (604)+GENPRO (605)</i>
<b>Notes</b>	<i>601+602+603+604+605 = 600</i>	
	<b>AND</b>	
	<i>606+607+608 = 600</i>	<i>ONPRO (606)+OFFPRO (607)+VIRPRO (608)</i>

	Sum	Parts
<b>Data Element</b>	<b>TOTATTEN (610)</b>	<i>K0_5ATTEN (611)+K6_11ATTEN</i>
<b>Notes</b>	<i>611+612+613+614+615</i> <b>= 610</b> <b>AND</b> <i>616+617+618 = 610</i>	<i>(612)+YAATTEN (613)+ADULTATTEN</i> <i>(614)+GENATTEN (615)</i>  <i>ONATTEN (616)+OFFATTEN (617)+VIRATTEN</i> <i>(618)</i>