

## Guidance for the PLS FY 2017 Data Collection: Import File and Edit Check Specifications - UPDATED

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**Date:** August 29, 2017; UPDATED – December 1, 2017  
**To:** Institute of Museum and Library Services (IMLS) and State Data Coordinators (SDCs)  
**From:** American Institutes for Research (AIR)

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To help you and your libraries prepare for the PLS FY 2017 data collection in early 2018, this memo provides information on two documents: the **import file specifications** and the **edit check specifications** for FY 2017.

These two specification documents and this memo will also be posted to the IMLS website in the near future: <https://www.imls.gov/research-evaluation/surveys-data/public-libraries-survey/report-your-pls-data/>. Please provide these files to your vendor if you have one.

### 1. Import File Specifications (FY 2017 PLS Import Specs Final.xlsx)

**No data elements have been changed for FY 2017.** Therefore, the import file specifications for FY 2017 are the same as those used for FY 2016.

### 2. Edit Check Specifications (FY 2017 PLS Edit Check Changes to SDCs Final.xlsx)

The first tab in the **edit check specification** document, labeled “Edit Changes Web&Internal FY17,” lists 241 modified or deleted edit checks for FY 2017. As described in the “Description of Change” column, changes to the FY 2017 edits include the following:

- Updates to *edit message language* to provide instruction to SDCs regarding next steps (n=199). For example, the instruction “Please check the value for possible error.” was added to many edit messages to make them consistent with other edit messages that already contained that instruction.
- Updates to *flag condition logic* to fully define the conditions explained in the edit message (n=20). For example, certain edits will no longer trigger when STATSTRU equals 02, and other checks that verify totals will no longer trigger if the total equals -1 when any detail item equals -1.
- *Deletion* of obsolete, ineffective, or redundant internal edit checks per input from SDCs, AIR, and IMLS (n=22)

The “All Edits Web&Internal FY17” tab includes both the unaltered edit checks brought forward from FY 2016 and the revised edit checks for FY 2017. We provide definitions for each column header in the “Edit Changes Web&Internal FY17” and “All Edits Web&Internal FY17” tabs below:

- **Description of Change** (“*Edit Changes Web&Internal FY17*” tab only): Provides an explanation for the modified and deleted edit checks.
- **Pubord**: Indicates the type of edit either a current edit (C) or a historical edit (H). Current edits flag potential issues within the current year data, while historical edits compare current year and prior year data.
- **Critical**: Indicates if the edit is critical, non-critical, or internal. (An internal edit is run in the Post-Lock Edit Report and is not part of the Web Portal Edit Report.) The flags in the column indicate a critical edit check if there is a “Y,” non-critical if there is an “N,” and internal if there is an “I” in the column.
- **Code**: Indicates the five-digit edit check number. Note that edit check codes are assigned in the following manner:
  - First three digits refer to the data element number being checked. If there are multiple data elements for the check it is typically the number of the data element that is a sum of the detail variables.
  - Last two digits are randomly assigned.
- **Flag Condition**: Presents edit check logic code.
- **Edit Message**: Presents text that is displayed in the edit report associated with this edit.
- **Edit Condition**: Provides detailed explanation of the edit check that lists the data element numbers associated with this edit. This is not displayed in the edit report.

**UPDATE (12/1/17):** Since these specifications were originally distributed in August 2017, two other major changes have made to the edit check process.

1. All 59 remaining Internal checks have been integrated into the Web Portal. SDCs will see these edit checks in the Web Portal Edit Report and should annotate them before locking data, just like non-critical edit checks. This addition of the internal edit checks to the Web Portal will significantly change the Post-Lock process for FY 2017. AIR will continue to run all edit checks (critical, non-critical, and internal) on locked data to confirm there are no outstanding issues. This changes should reduce the overall burden of Post-Lock and allow for faster delivery of final state data.
2. Critical edit check 10329 flags instances where  $POPU\_UND > \text{sum}(POPU\_LSA)$ . In FY 2016, this edit check only appeared in the Post-Lock Edit Report. For FY 2017, this edit check has been restored to the Web Portal Edit Report, and SDCs encountering this edit check will need to resolve it before locking.

## Need Help?

Please contact us at [PLS@air.org](mailto:PLS@air.org) and/or 1-866-744-5746, option 1 (open from 9 am to 5 pm ET) if you have any questions.