

# ONLINE FY2026 ANNUAL REPORT INFORMATION SURVEY (ARIS) TIPS & TRICKS

The online ARIS will be available to fill out on July 1, 2025 and will close on Friday, August 15, 2025.

Please note: The **signature page only** must be printed out (see directions below), signed in **pen** by the Library Director and the Trustee Chair, scanned and sent as an attachment to [uechi.ng@mass.gov](mailto:uechi.ng@mass.gov). The final day to email the **FY2026 ARIS signature page** is **Friday, August 15, 2025**.

**NOTE:** There is no longer a separate form for the Branch and Bookmobile questions. If your library has branches and/or bookmobiles, the questions will appear at the end of the ARIS form.

## **TIPS FOR THE SURVEY:**

Enter a zero, only if the number is actually zero.

You do not need to write in "N/A" if the question does not apply, just leave it blank.

Make sure you respond if an edit check appears. The edit check box will indicate if a note is needed in the FEDERAL or STATE field. Please explain WHY something changed from the prior year. Do not just say the data is accurate.

Make sure to enter data for this year even if it is the same as last year, otherwise, your report will show no data.

**Save your work regularly as you go.** The system is designed to save automatically, but it's worth saving yourself.

Before you SUBMIT your data, be sure to select STATUS and fix any:

- remaining edit checks
- unanswered questions
- flagged questions

When resolving edit checks, add a note to either the State or Federal field. The edit check language will tell you which to use.

Be sure to print the ARIS signature page BEFORE you lock your ARIS form. For your own records, be sure to print or save the entire form. If you lock your form before printing, you will need to contact Jen Inglis or Uechi Ng to get it unlocked.

Documents must be submitted electronically.

Questions? Contact Jen Inglis [jennifer.inglis@mass.gov](mailto:jennifer.inglis@mass.gov) or Cate Merlin [cate.merlin@mass.gov](mailto:cate.merlin@mass.gov)

## **New Questions This Year:**

We have three sets of new questions this year.

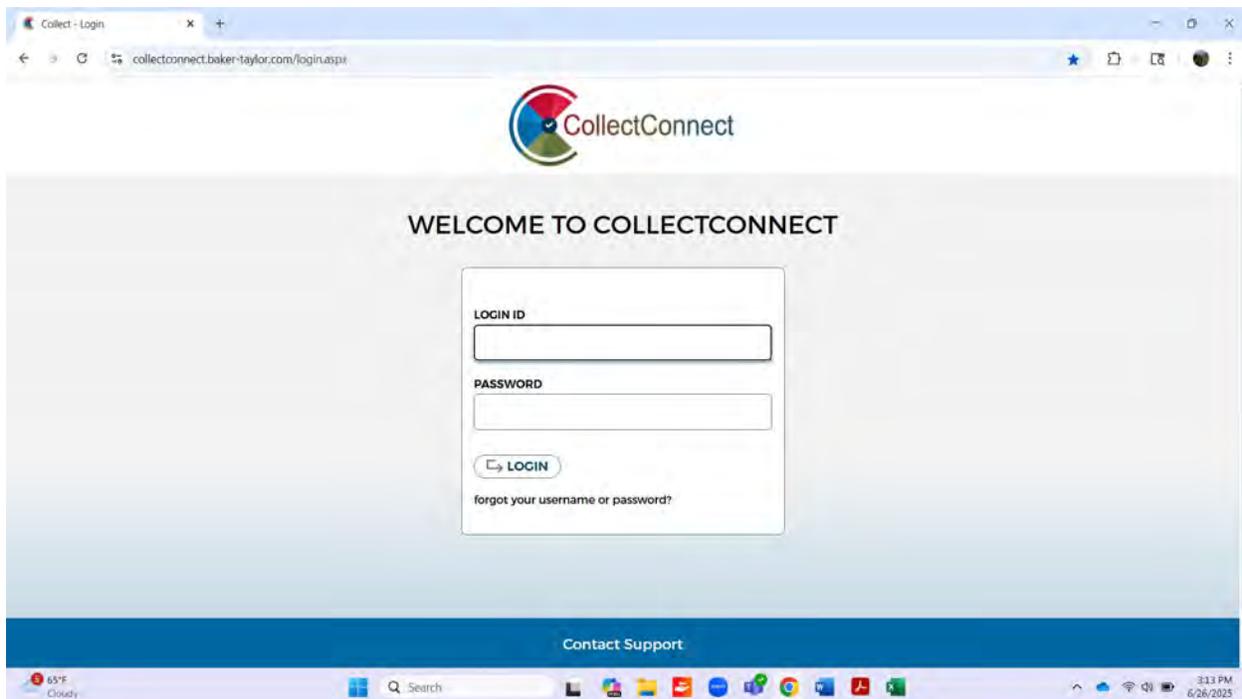
The first asks how many substitute and seasonal staff you have. These positions have not been counted before. These will become permanent questions.

The second set of questions goes into detail about social workers at your library, if you have them. These are temporary and will help provide a snapshot of where social workers are providing services across Massachusetts.

The third set of questions ask about whether or not you have a policy about lending to residents of non-certified municipalities. These may become permanent.

## **Instructions for filling out the ARIS online**

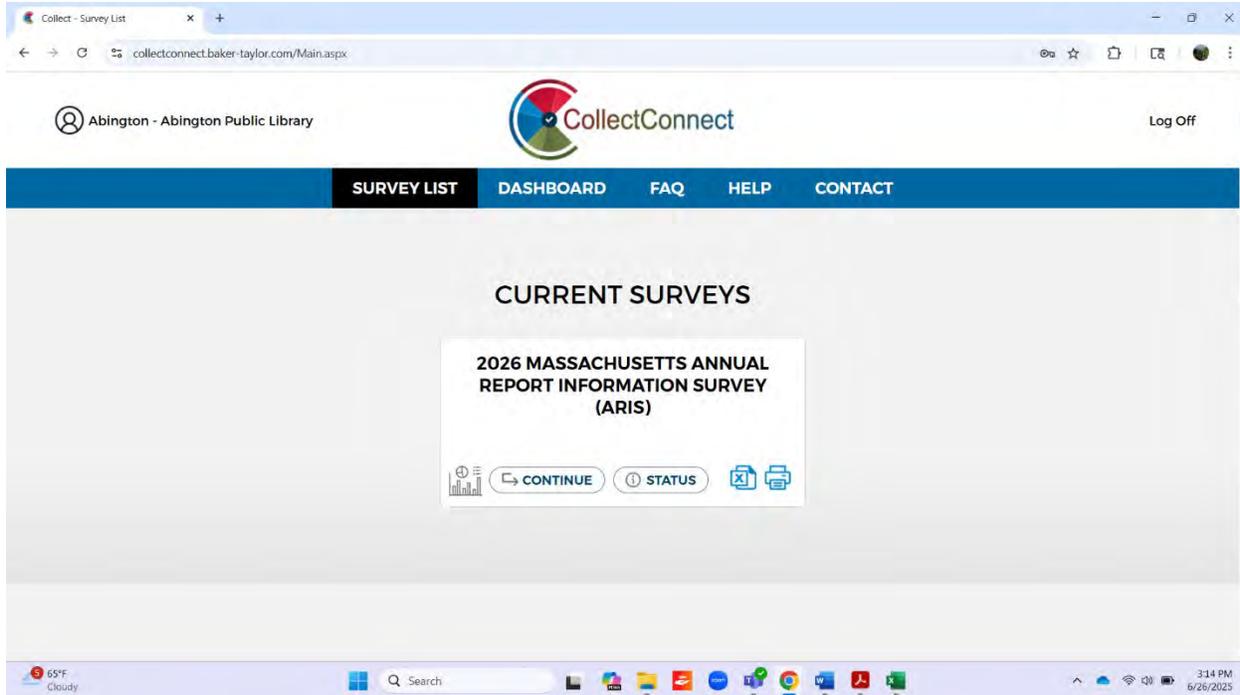
Login to the survey from our website or at:  
<https://collectconnect.baker-taylor.com/login.aspx>



When you reach the login screen enter your username and password—This will be sent to library directors before July 1. Contact Uechi Ng after July 1 if you haven't received it.

Click on "Login".

After entering the username and password you will see "Current Surveys." Choose the "2026 Massachusetts Annual Report (ARIS)" and click on "Continue". Two surveys, the ARIS and the Financial Report, will be open at the same time for two weeks in August. Make sure you're entering the correct one!



Once in the survey:

1. Enter data by using the Survey Navigation sidebar to access the questions section by section. Click on the “Save” button after each section.
2. If you have a branch or bookmobile, the questions have been incorporated into the ARIS form and appear at the end.
3. When you have finished entering all your data, click on “**STATUS**”. This will show status checks for any unanswered questions and required edit checks. Resolve any edit checks needed by providing an explanation in the appropriate note field. The edit check will indicate which field is to be used.
4. You only need to print out the signature page. Please be sure to do this before you submit the form. You should keep a copy of the survey for your own records.
5. When all of your data has been checked, and you have printed out the Signature Page, you are ready to submit the form. Click on the **Submit** button. This will lock the survey. If you need it reopened, contact Jen Inglis or Uechi Ng at the MBLC.
6. Please have the library director, and chairperson for the Trustees sign the form, scan and send the signature page only to [uechi.ng@mass.gov](mailto:uechi.ng@mass.gov) as an email attachment.
7. You are done!

**Your library will receive a confirmation from Uechi when the signed copy is accepted by the MBLC.**

## Tips & Hints to Fill Out the Online Forms:

### Navigating the Form:

- Select the section to be filled out from the “Survey Navigation” column on the left side of the screen.
- Use the **Next** and **Previous** buttons to move through the form, one section at a time.
- Move from field to field on the form by clicking on a field. Or, you can use the Tab or Enter key to proceed through fields one at a time.

### Data Entry

- Grayed out fields automatically total your data.
- A pop-up window will prompt you to explain why data may be out of usual range. Edit checks ensure that entered values are within a usual range (i.e., if 42,000 is entered instead of 4,200 for book holdings). Please tell us WHY something has changed, not just that the number is correct or that you have checked it. Make sure to put the information in the appropriate note.
- Some data entry options are in a drop-down menu format (e.g. for yes/no questions).
- Information that doesn't change often, such as addresses and phone numbers, will be pre-filled. If you need to update your information and the field is locked, contact the MBLC to make changes for you.
- Previous year's data can be turned on and off using the “Hide/Show Last Year's Data” button.

### Add Notes to Questions

- Click on the note pad icon under the question. There are three types of notes: Federal, State, Local.  
*Federal* notes are for the questions we send to IMLS to be included in the PLS survey.  
*State* notes are asked for a couple of questions – Changes in NRC reporting or meeting room usage.  
*Local* notes are where you can enter notes that may be helpful in answering that question in the future. For example, these notes might explain who gave you those circulation numbers, or attendance figures, etc. Local notes carry over from the previous year. Make sure you cut and paste if the information needs to be continued for the future.
- Make as many notes to yourself as needed.
- Notes should be used whenever the data changes significantly from year to year. Using notes to explain data prevents the MBLC from having to contact your library to verify if data is correct.
- Edit checks require notes and the edit check language will tell you which note field to use.
- Make sure you save your notes by clicking on the “save” button.
- Remember to click on “Status” before you “Submit” and lock the survey. Fix any problems that appear on the Status page.

## Checking Your Status

Before you submit your survey, make sure you show your “status” to make sure you have resolved any edit checks, have answered all the questions, and resolved any flagged issues. You are ready to submit when you have three green checkmarks on the “status” screen:

### Status



[Edit Checks](#)   [Unanswered Questions](#)   [Flagged Questions](#)

#### Submit Survey

Please review the items below and then click the "Submit" button to complete the survey process. Please remember to print and save a copy of your survey and annotations.

- ✓ All required questions have been answered.
- ✓ No questions are flagged for review.
- ✓ Edit checks have been satisfied.



#### Submit Survey



**Congratulations, your survey was submitted successfully!**

Your survey has been submitted and locked. Please contact your state data coordinator if you need access to this survey again.

## **Submit Data**

- After you have completed the form, and have checked its status, please print out the signature page BEFORE you click on “Submit” in the upper right-hand corner of the input screen.
- Once you click on “Submit”, you will not be able to change any values.
- If a change is required after the data set is Submitted, please contact Jen Inglis or Uechi Ng at the MBLC to unlock the form to make changes yourself, or to request changes be made for you.
- Note that we may not be able to unlock the form immediately.