**New York State Textbook Loan Program:**

# Guidelines and Ordering Information for Non-Public Schools

New York State education law requires that school districts purchase and loan textbooks to all students legally residing in within the five boroughs of New York City, who are attending kindergarten through grade twelve in any public or nonpublic school. All loaned textbooks received by way of participation in this program – known as the New York State Textbook Loan Program (NYSTL) – must be used for instructional/educational purposes only. Textbooks and instructional materials cannot be used by non-public schools for administrative or religious purposes. Principals are accountable for all textbooks and instructional material orders placed by staff at their schools in accordance with New York State education law and the instructions provided herein.

To participate in this program, non-public schools request the loan directly from the school district, in this case, the New York City Department of Education (DOE). Non- public schools select the textbooks and instructional materials from an electronic catalog provided by the DOE. In this way, non-public schools can select textbooks and instructional materials that are right for their schools and student populations. There is one ordering period per school year in which to take advantage of this program.

Similar to other New York State loan programs, NYSTL is administered by the Non- public Schools Unit (NPS) within the Division of Financial Operations (DFO) at the DOE.

This document is intended for non-public school staff responsible for placing NYSTL orders. Purchasing guidelines and ordering instructions can be found below. Additional information may be found on the Non-Public Schools site.

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# GUIDELINES

1. Participation Requirements:

In order to participate in the NYSTL loan program, non-public schools are required to:

* + Have a DOE Location Code – a unique 4-digit or alpha identifier code assigned to your school (e.g. 3987 or RZXY). If you are a new school, please contact the NPS Unit for assignment of a code.
	+ Complete the Loan Request & Enrollment Certificate (LREC) for Non- Public K-12 Schools on an annual basis (the required Principal’s Statement of Assurances is page two of this form). The form for the new school year will be available in September. However, you must have the form for the previous school year on file in order to participate in early ordering.
	+ Have a valid State Education Department (SED) assigned [Basic Educational Data System](http://www.p12.nysed.gov/irs/beds/home.html) (BEDS) number and have reported your student enrollment data on your annual BEDS form to SED.
1. Eligibility Requirements:

Non-public school students, who legally reside within the five boroughs of New York City and who are enrolled in grades kindergarten through twelfth grade attending a non-public school are eligible to receive textbooks and instructional materials via the NYSTL loan program.

1. Textbook Allocation Levels:

The current allocation level for this fiscal year is $58.25 per eligible student.

The per student allocation level is based upon the number of eligible resident students (K-12) attending the school as of October 31 of the current school year. Enrollment data comes from the SED (as reported on the annual BEDS form), and the DOE (as reported on the annual LREC form).

Early ordering in the summer, prior to the start of the new school year, is based on the BEDS/ LREC data submitted for the previous school year. Adjustments will be made accordingly upon receipt of the new enrollment data submitted in the fall to both SED and the DOE.

1. BEDS Information:

Submitting a BEDS form to SED on an annual basis is necessary in order to participate in the NYSTL loan program. In order to do this, schools must possess a valid BEDS number (a 12-digit code assigned by SED). More information about BEDS can be found on [SED’s website](http://www.p12.nysed.gov/irs/beds/home.html). If your school needs to be assigned a BEDS number or if you have questions about the BEDS online system, contact SED:

* + dataquest@mail.nysed.gov
	+ (518) 474-7965

1. [Eligible Purchases](#_bookmark4):

Textbooks and related instructional materials used as primary study material in a structured instructional environment (classroom) are eligible expenses through the NYSTL loan program provided that they have been reviewed and approved for NYSTL use. The following is a list of sample materials:

* + Hard-covered and paperback books
	+ Workbooks designed to be written in and used up
	+ Manuals
	+ Reproductions of downloaded NYS Common Core ELA/Literacy and Mathematics Curriculum Modules, provided they are used as textbooks.
	+ Courseware or other content-based instructional materials in electronic format
	+ Newspapers or news magazines, as long as they:
		- have a general circulation
		- are printed and distributed at least biweekly
		- have a paid circulation within the school district
		- are designated by the US Postal Service as second-class matter
		- are available to schools on the date of publication at a discount of not less than 33 1/3 percent from the regular price
		- are accompanied by study guides on a regular basis from the publisher at no extra charge to the school district.
1. Disallowed Purchases:

The purchase of textbooks and instructional materials intended for administrative use or religious purposes is strictly prohibited through this loan program. In particular, the following materials must not be purchased with NYSTL funds:

* + Teacher’s editions of textbooks
	+ Review books
	+ Test and testing materials
	+ Materials in kit form
	+ Books or materials advocating or supporting a religious belief
	+ Internet on-line services
	+ Reference materials such as encyclopedias, almanacs, atlases and general or special dictionaries with the exception of dictionaries individually assigned to all pupils in a particular class or program as a textbook substitute
	+ Supplementary textbooks, novels, fiction, magazines, newspapers; except as provided under [eligible purchases](#_bookmark4)
	+ Audiovisual materials normally housed in the school library or instructional materials center for short-term use by pupils.
1. Accountability:

All eligible textbooks and instructional materials requisitioned for loan through the NYSTL loan program is the property of the DOE and will be identified as such by use of an affixed label/tag or other identifying marker. Schools will make every effort to comply with all applicable regulations and guidelines per the NYS Loan Program Accountability Guidelines. All schools are required to maintain inventory records per the NYS Loan Program Inventory Guidelines.

1. Legislative Action Concerning Flexibility with Instructional Materials Aid:

Recent changes in the State education law allow non-public schools to use funds received for certain loan programs interchangeably. This flexibility is extended to funds received from the New York State Textbook Loan (NYSTL) program, the New York State Software Loan (NYSSL) program, and the New York State Computer Hardware (NYSCH) loan program. Non-public schools wishing to take advantage of this flexibility should first read the transfer of funds guidelines prior to placing orders within the FAMIS ordering system.

# ORDERING INFORMATION

1. Ordering Period:

The NYSTL loan program ordering period for the new school year commences in June (early ordering) and remains open until early spring. Please check the NPS site for specific dates.

It is recommended that you participate in early ordering to ensure that:

* + You have your books for school opening. However, for summer delivery you must indicate on the purchase order under “special instructions” when school personnel will be available for receipt of summer delivery. Please be sure to follow up with the vendor.
	+ You take advantage of current pricing. Some book vendors contractually may increase their book prices after July 1.
	+ Any subscriptions ordered with current fiscal year funds end by the close of the same fiscal year.

Note: All items ordered within a given fiscal year (FY) must be delivered within the same fiscal year.

1. Placing Orders:

Schools must place all textbook orders via the [FAMIS Portal](https://www.finance360.org/famis/portal/login.aspx), the DOE’s Web-based purchasing system. Within FAMIS, schools will access an electronic catalog of textbooks which will reflect contracted titles that are NYSTL approved and eligible for purchase under the NYSTL program. To access the catalog and to create a purchase order, please complete the following:

* + Log in to the [FAMIS Portal](https://www.finance360.org/famis/portal/login.aspx) by typing your user ID and password into the appropriate fields. Click “Sign In”.
		- Note: If you have forgotten your user ID or need assistance, refer to the contact information available on the Non-Public Schools site.
	+ The “Welcome” page will appear. In the left-hand directory, click “Inquiry”, then click “Spending Plan Inquiry”.
	+ The “Spending Plan Inquiry” screen will appear. In the “Group By” field located within the “Required” box, select “Activity” from the drop-down menu. Click “Inquire”.
	+ A list of activity codes will appear. In the “Description” column, locate the line that reads “OBJ: 337”. The column to the left is labeled “Activt” (Activity Code). Make note of the code in the “Activt” column that corresponds to “OBJ: 337”. You will need to use this code later in the ordering process.
	+ On the left-hand side under “Purchasing / Payments”, click “Purchasing”. The “Purchasing Setup” screen will appear. In the “Options” box, click the following:
		- Contracted
		- E-catalog
		- Textbook/Trade Book
	+ The “Add Spending Account Line” box will appear. Do the following:
		- In the “Quick Code” field, type “012129”
		- In the “Object Code” field, use the drop-down menu to select “0337”
		- In the “Activity Code” field, type the unique 4-character (alpha/digit) activity code you noted from the previous screen (as indicated above)
		- Click “Retrieve Balance”
		- Click “Add Accounting Line”
		- Click “Close”
		- Click “Next”
		- The “Purchasing: E-catalog” screen will appear. You may search the catalog by any of the categories listed in the drop-down box (e.g., description, item number, vendor, etc.). Type a corresponding search term into the search box, and then click “Search”.
1. Modifying or Canceling an Order:

An order, once placed, cannot be cancelled or modified without proper authorization from NPS. This includes an even exchange of items ordered. To obtain authorization, complete an Authorization to Issue a Change Notice and submit it via fax to NPS.

Important: Authorization to change or cancel an order must be received by NPS within five business days of placing the order, as vendors usually will not accept change notices after an order has been shipped. Please exercise extreme care when placing orders, as we may not be able to honor your change request. Do not arrange for exchanges, substitutions or cancellations with the vendor until you receive authorization via a copy of a change notice from the NPS Unit.

1. Delivery and On-line Certification of Delivery:

Once a school receives its delivery, it is responsible for:

* + Comparing the purchase order with the items delivered to ensure that the order is complete.
	+ Following up with a vendor immediately when an ordered item is missing.

It is particularly important that orders are reconciled prior to the close of the DOE’s fiscal year (June 30).

* + Labeling the items delivered as “Property of the NYC Department of

Education” and noting all items received into school NYSTL inventory per NYS Loan Program Inventory Guidelines.

* + Completing the On-Line Certification of Delivery within FAMIS. To accomplish this, please do the following:
		- Log in to the [FAMIS Portal](https://www.finance360.org/famis/portal/login.aspx) by typing your user ID and password into the appropriate fields. Click “Sign In”.
		- The “Welcome” page will appear. In the left-hand directory, click “Inquiry”, and then click “Document Inquiry”.
		- The “Document Inquiry” page will appear. In the “Document #” field,

type your purchase order number (the number begins with “WR”), and then click “Inquire”.

* + - The “Web Certification” page will appear. Certify receipt of documents as required, and then click “Save”.
		- Note: In the “Received Date” field, enter date received.
1. Inquiries:

For additional information or assistance pertaining to this or any of the New York State loan programs, please refer to the contact information available on the Non-Public Schools site.

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