

New York State Library Loan Program: Guidelines and Ordering Information for Non-Public Schools

New York State education law requires that school districts purchase and loan school library materials to all students attending a school within the five boroughs of New York City who are enrolled in kindergarten through grade twelve in any public or non-public school. All loaned school library materials, both printed and audio-visual materials received by way of participation in this program – known as the New York State Library Loan Program (NYSLIB) – must be used for instructional/educational purposes only. School library materials cannot be used by non-public schools for administrative or religious purposes. Principals are accountable for all library 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 school library materials from a list of contracted library vendors provided by the DOE. In this way, non-public schools can select both printed and audio-visual 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, NYSLIB 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 NYSLIB orders. Purchasing guidelines and ordering instructions can be found below. Additional information may be found on the [Non-Public Schools Unit](#) Web site.

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GUIDELINES

1. Participation Requirements:

In order to participate in the NYSLIB 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 form for the new school year is available in September. However, schools must have the form for the previous school year on file in order to participate in early ordering.
- Possess a valid State Education Department (SED) assigned [Basic Educational Data System](#) (BEDS) number.
- Report student enrollment data on an annual basis to SED via its BEDS form.

2. Eligibility Requirements:

Non-public school students, who attend a non-public school within the five boroughs of New York City and who are enrolled in grades kindergarten through twelfth grade are eligible to receive school library materials via the NYSLIB loan program.

3. Library Allocation Levels:

The current allocation level for this fiscal year is \$ 6.25 per eligible student.

The per student allocation level is based upon the number of eligible students (K-12) attending the school as of October 31st of the previous 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).

4. BEDS Information:

Submitting a BEDS form to SED on an annual basis is necessary in order to participate in the NYSLIB 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](#). 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

5. Eligible Purchases:

Printed and reference materials intended for short term use exclusively in the school's central library or instructional media center (i.e., not already found in a classroom) may include the following:

- Publishers' bound books
- Pre-bound books

- Audio-visual media to include DVDs, CDs and other multi-media formats typically used in a library for reference purposes
- Printed subscription services to include books, newspapers and magazines

6. Disallowed Purchases:

The purchase of library books and reference materials intended for administrative use or religious purposes is strictly prohibited through this loan program. In addition, the following materials must not be purchased with NYSLIB funds:

- Textbooks intended for classroom study
- Books or reference materials advocating a specific religion, religious belief or religious practice that does not include a broad range of different religions
- Administrative computer software programs

7. Accountability:

All eligible school library materials requisitioned for loan through the NYSLIB 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](#).

8. Legislative Action Concerning Flexibility with Instructional Materials Aid:

While recent changes in the State education law allow non-public schools to use funds received for certain loan programs interchangeably, this flexibility does not extend to library funds. However, you can deposit funds received from the other New York State loan program (i.e., the New York State Textbook Loan (NYSTL), the New York State Software Loan (NYSSL), and/or the New York State Computer Hardware (NYSCH) loan programs) into your library account. 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.

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ORDERING INFORMATION

○ Ordering Period:

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

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

- You have your library materials 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.
- Any subscriptions ordered with current fiscal year funds must have a start date and end date 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.

○ Placing Orders:

Schools must place all library orders via [FAMIS](#), the DOE’s Web-based purchasing system. Within FAMIS, schools will access contracted library vendors via “Listing Applications” which will create purchase orders for those vendors who currently have approved DOE contracts for library books and reference materials. A listing of [library and reference materials vendors](#) is available to help you identify potential vendors.

To create a purchase order, please do the following:

- Log in to the [FAMIS Portal](#) 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](#) Web 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: 338”. The column to the left is labeled “Activt” (Activity Code). Make note of the code in the “Activt” column that corresponds to “OBJ: 338”. 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
 - Listing Application
- The “Purchasing: Listing Applications” screen will appear. Using information contained in the [library and reference materials data sheet](#), do the following:

- Enter the vendor code into the “Vendor Number” field and click “Retrieve Vendor Information”. The vendor contact information will appear.
 - Using the drop down menu on the right-hand side of the screen, select the corresponding class of library materials you wish to order (again, refer to the [library and reference materials data sheet](#)):

Class	Materials
A	Non-pre-bound library books (trade, library binding, paperback, etc.)
B	Pre-bound books
C	Subscription book services
D	Audio/visual equipment and media (DVDs, books on CD, playaways, etc.)
E	Foreign language books

Important: A separate purchase order must be created for each class of materials. For example, if you are ordering Class A and Class E materials, you will need to create two separate purchase orders; items from different classes may not be included on the same purchase order. Vendors have been instructed not to fulfill requests for materials from a particular class if they have not been awarded that contract.

- Click “Next”. The “Invoice Information” tab will appear. Enter the following information into the appropriate fields:
 - NYC Department of Education
 - Attn: NPS Payables (Group 55)
 - 65 Court Street, Room 1001
 - Brooklyn, NY 11201
 - (718) 935-3250
- Click “Next”. The “Delivery Information” tab will appear. Provide/update information as necessary including any special delivery instructions (e.g., requested delivery dates, etc.).
- Click “Next”. The “Add Spending Account Line” box will appear. Enter the following:
 - Quick Code: 012129
 - Object Code: 0338
 - Activity Code: (your school’s unique four-character code)
 - Start Date
 - End Date
 - Click “Retrieve Balance”. Your available balance to spend on library materials will appear in the “Balance” field. Enter the maximum dollar amount you would like to apply to library expenses.

Note: It is recommended that librarians create a list that exceeds the amount of money they wish to spend by 10% to 20%. This will take into account for items that become unavailable or on back order. For example, your purchase

order may reflect \$2,000 worth of books; however, you may wish to only spend \$1,500. The purchase order should be created for a “do not exceed” limit of \$1,500. The vendor will fill your order with available titles. If a title is unavailable, the vendor will choose another title on your list until the entire \$1,500 is used. Vendors do allow librarians to prioritize items to be filled first.

- Click “Add Accounting Line” and then click “Close”. The “Account Detail Information” tab will appear for you to review.
- Click “Next”. The “Items Details” tab will appear. Library orders are usually accompanied by a separate printed list of library books and reference materials created by the school librarian. The quantity reflected should be reasonable to accommodate your student population’s library needs and not reflect classroom quantities.
 - To order with a list prepared in advance (preferred for more than 5 titles), please enter the following:
 - Item #: N/A
 - Description: See attached list
 - Quantity: 1
 - Net Price: The maximum you would like to spend with this vendor
 - Check the box: I have a printed list of Items
 - Enter any additional information, if applicable (e.g. your Quote ID, Customer Number and List Number from your printed list created online).
 - To order individual titles:
 - Enter item number, title/set name, quantity, and price for each item.
- Click “Next”. Review all information contained in your “Order Summary” to ensure accuracy.
- Proceed to check-out by clicking “Complete Purchase Order” and then click “Yes” to generate a purchase order number (i.e., an “WR#”). Write down the WR#.
- Proceed to the “Document Inquiry” screen to access the purchase order just created by inserting the WR# into the “Document #” field. Click “Inquire”.
- Print two copies of the purchase order (one for the vendor and one for your school file). The principal/director must sign the vendor’s copy.
- **Important:** Mail a copy of the signed purchase order with the attached list of items directly to the vendor; if you do not forward your purchase order to the vendor, your vendor will not receive your order.
- **Note:** You may wish to follow up with the vendor to confirm receipt of your order.
- 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 5 business days of placing the order as vendors usually will not accept change notices

after an order has been shipped. Note: Subscriptions cannot be cancelled once the vendor begins delivery.

Please exercise extreme care when placing orders as we may not be able to honor your change request. Do not make arrangements for exchanges, substitutions or cancellations with the vendor until you receive authorization via a copy of a change notice from the NPS Unit.

○ 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 30th).
- Labeling the items delivered as "Property of the NYC Department of Education" and maintaining a record of all items per the [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](#) 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", 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".
 - Next click "Certify Document"
 - 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.

○ 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](#) Web site.

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