Department of Education

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

New York State education law requires that school districts purchase and loan educational software 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 computer software received by way of participation in this program – known as the New York State Software Loan Program (NYSSL) – must be used for instructional/educational purposes only. Computer software materials cannot be used by non-public schools for administrative or religious purposes. Principals are accountable for all software 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 computer software from an electronic catalog provided by the DOE. In this way, non-public schools can select computer software 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, NYSSL 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 NYSSL orders. Purchasing guidelines and ordering instructions can be found below. Additional information may be found on the Non-Public Schools Unit Web site.

Guidelines

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GUIDELINES

1. Participation Requirements:

   In order to participate in the NYSSL 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 computer software via the NYSSL loan program.

3. Computer Software Allocation Levels:

   The current allocation level for this fiscal year is $14.98 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 NYSSL 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:

   Computer software must meet the following criteria:

- Software is an educational program that is subject-oriented, and was designed for use by pupils in conjunction with computers or computer tablets.
- Software is a required learning aid in a particular class or program.
- Software content which is accessed or delivered through the internet based on a subscription model is aligned with State standards.

6. Disallowed Purchases:

   The purchase of computer software intended for administrative use or religious purposes is strictly prohibited through this loan program. In addition, the following materials must not be purchased with NYSSL funds:

   - Computer supplies
   - Blank discs
   - Computer correction devices
   - Disk drives and other similar items of hardware

7. Accountability:

   All eligible computer software requisitioned for loan through the NYSSL 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:

   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.

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ORDERING INFORMATION

1. Ordering Period:

   The NYSSL 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 software 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 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.

2. Placing Orders:

   Schools must place all computer software orders via FAMIS, the DOE's Web-based purchasing system. Within FAMIS, schools will access an electronic catalog of computer software which will reflect contracted titles that are NYSSL-approved and eligible for purchase under the NYSSL program. Not all items within a catalog are available for purchase with New York State Loan Program funds. Only those items designated as "NYSTL approved" qualify for purchase using state aid (including NYSSL funds).

   To access the catalog and to create a purchase order, please complete 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: 199". The column to the left is labeled "Activt" (Activity Code). Make note of the code in the "Activt" column that corresponds to "OBJ: 199". 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

    - Computer Software
- 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 “0199”
    - 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”.
    - In the “Shopping Cart Box” (right side), enter QTY and click “Update”
    - Continue to shop or proceed to “Check-Out”
    - After “Check-Out”, be sure to click “Yes” to generate a purchase order number or “WR#”

3. 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: Data based subscriptions cannot be cancelled once the vendor e-mails you the item.

   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.

4. 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.

5. 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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