



EFTS

Quarterly

Spring 2005



University of Connecticut
Health Center

Electronic Fund Transfer System
Lyman Maynard Stowe Library
University of Connecticut Health Center
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EFTS Announces Version 3.0

By Jackie Lewis and Ed Donnal

Thanks to your suggestions EFTS staff and software developers present to you what we hope will be a more dynamic, real time, friendly system for members to use. The enhancements include: One-time file upload, automatic reprocessing of errored transactions, automatic change of status, real-time balances, a grace period before a low balance fee is assessed and more detailed member reports.

A drum roll, please...

ONE-TIME FILE UPLOAD. This was the most often heard suggestion/complaint from our members—that their entire uploaded file was rejected because there were errors in it. With version 3.0 the system processes the uploaded file, accepts the "good" requests and places the errored transactions (with the appropriate error code) into a table (in your online transaction file) for further dispensation by the member. You can then edit the request, delete it or just leave it, especially if the error code was "Member Inactive" because the next feature will check nightly and try to reprocess the requests in your online transaction file.

AUTOMATIC REPROCESSING. The EFTS system will try to process/reprocess all requests in your online transaction file nightly and will report successes to you in a table "Summary of transactions processed overnight" when you logon. For "Member Inactive" errors, the system will check nightly to see if those members have made a deposit and are currently "Active".

STATUS CHANGE. The system will automatically change the status of a member from "Inactive" to "Active", anytime during the month, when a deposit is made when the resulting balance exceeds the minimum deposit of \$100. No need to wait until month close for updated member status.

REAL-TIME BALANCE. The balance you see on your logon Member Message screen and in your member Reports will be a "to the penny" computation of every transaction, deposit or redistribution.

LOW BALANCE FEE. A two month grace period will be granted before the low balance fee is charged. At the end of the third consecutive month with a negative balance your status will be changed to Inactive (not a change) and the \$25.00 low balance fee will be charged. Currently the fee is charged for each month you have a negative balance, at month close.

REPORTS. More detail has been added to member Reports. Click on Reports>History: Detailed Statement for: enter a month. The information in the table summary is detailed below.

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EFTS-L Listserv

The EFTS-L listserv is the primary mechanism for communication between Participants and the Office. New participants and software improvements are announced on the list. Participants can also ask questions and share information with others. Information on subscribing can be found under the Tools link on the homepage. Join today.



EFTS Advisory Committee Update

by Jola Sliwinski

The term of office for the first EFTS Advisory Committee as established by the Bylaws of the EFTS program will end with May 31, 2005. The vacancies that were created as a result of a member electing not to continue on the Committee are in the process of being filled.

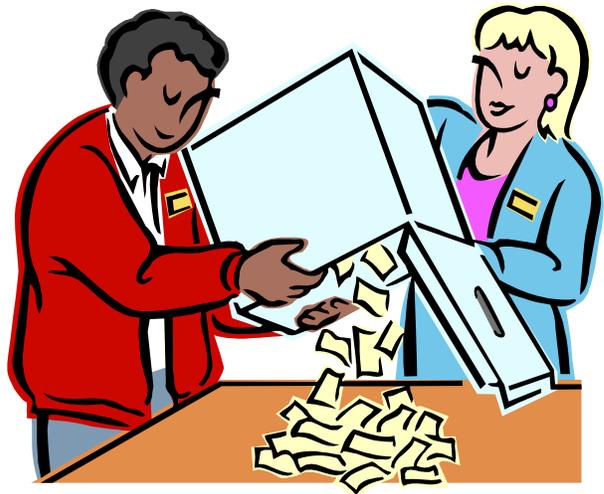
The EFTS Advisory Committee membership commitment is for a term of two (2) years. Each member has the right to remain on the Committee for up to three (3) consecutive terms (for a total of 6 years) if they so choose.

The Committee will be composed of the EFTS staff, representatives from the NLM, and representatives from a hospital and a medical library from each of the 8 NN/LM regions, as well as each region's Network Coordinator / designated representative from each Regional Medical Library.

The Advisory Committee comes together at least semi-annually to discuss the future of EFTS. Meetings are held via telephone conference. Regular meetings will be announced with one month's advance notice via e-mail to Committee members.

New nominees have been contacted with an "Invitation to Serve" on the Advisory Committee. Upon receipt of all acceptances an announcement regarding the EFTS Advisory Committee roster will be sent to the EFTS ListServ. Additionally, the Advisory Committee link on the website will be updated to reflect all changes.

Congratulations to all nominees!



Confessions of an EFTS User

I was working in Interlibrary Loan then, my desk and my time filled with coupon exchanges, invoices and checks. I'd had it, quite frankly, up to here with it all. The daily grind, the staple wounds, the paper cuts, the dust – sometimes I wondered if I could go on. I needed rejuvenation, a fresh outlook.

Then EFTS came in. It had a kind of charming new kid swagger, coupled with an eagerness to help. It was a most attractive package and appeared to be just what I needed in my time of angst. I fell for it, and fell hard.

Sure it wasn't perfect, sure there was work to be done to implement it and maintain it, but this was a relationship that was worth the effort. So I tweaked my routines and added software and hoped that all would be well. EFTS rewarded me by removing the coupons that overwhelmed my workspace. I found my fingers healing and my spirits rising. I began to trust that this was the real thing.

Still, as in all relationships, there were breath-holding moments, such as the changeover from DOS-based to Web-based operation. We made it through each of those moments and our bond strengthened. After all, an affair must change and grow if it is to last.

We are entering another such time of change. After these many years together, I believe the new EFTS will only be better and more essential to my life.

Dorothy Kalahan
University of Connecticut Health Center
Interlibrary Loan
And one time confession story writer



Enthusiastic Testimonial !

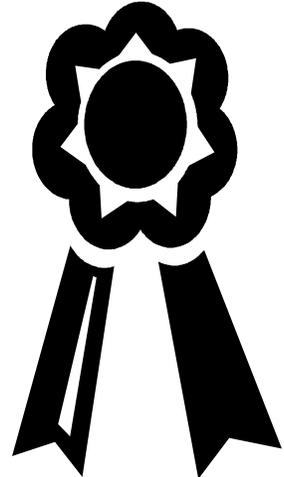
I would like to express our library's appreciation for the Electronic Fund Transfer System (EFTS) service. The Health Sciences Library (HSL) is one of the first libraries in Florida to join EFTS to pay for our Interlibrary Loan (ILL) requests. We have been extremely satisfied with this service; it is quick, efficient and painless. The most difficult and time consuming aspect of joining EFTS was convincing our institution that this service was needed, and cost effective.

As a Performance Improvement (PI) activity, the HSL charted the cost of using EFTS vs. the cost of continuing to submit Check Requests Forms (CFR) for the payment of ILL invoices. The library's PI demonstrated how low-

ering the number of ILL checks written from 28 per month to 6, at an average cost of \$30+ per check, netted an institutional cost-saving of nearly \$8,000 per year - it was a winner!

The library staff continually encourages other libraries, including our local library consortium members, to join this ILL electronic payment service. We would also like to see state libraries in Florida join EFTS; this would further streamline hospital libraries' payment procedures. EFTS is a great product and we are satisfied customers – thanks!

Naomi F. Elia, M.L.S., AHIP
Manager, Corporate Library Services
Orlando Regional Healthcare



REDISTRIBUTION: POLICY & PROCEDURE

Redistributions of payments received are triggered by the end of a calendar quarter (December, March, June, September) and are offered in **JANUARY, APRIL, JULY, and OCTOBER**. At that time, **ALL** participants are instructed via e-mail to review their 'Member Messages'. If you do *NOT* have a message, you do *not* have a redistribution.

The EFTS software automatically runs an algorithm to determine whether or not your institution is eligible for a redistribution. These are the criteria used:

1. Average Monthly Debt (AMD) for the past 12 months **OR** if in EFTS for less than one year, the total debts divided by months in EFTS
2. AMD x 1.5; this amount is to remain on account as a minimum
3. Elimination of participants who have opted out of 'redistribution' by selecting NO in the institutional profile
4. Elimination of participants whose debts are greater than their credits (NET BORROWERS)
5. \$100 is the minimum that must be on account before a redistribution can be considered

Those libraries who meet the criteria are sent a "redistribution message" to their system generated 'Member Messages'. At that time, a generic e-mail message is sent to the EFTS ListServ informing participants of the process as well as instructions regarding a "**REPLY BY DATE**". Participants are asked to respond no later than **ten (10) business days** regarding their selection. Participants may choose to take all, part or none of the offered amount. Once a selection is made, it cannot be changed. At the close of the selection period, EFTS software processes all the requests received. This officially closes the redistribution offer period. Any monies not requested remain on account until the next redistribution cycle.



EFTS staff will be exhibiting at the upcoming
MLA '05 meeting in San Antonio, TX—May 14-19, 2005.

Be sure to stop by and meet Jola and Cristina. They will be happy to answer questions, address concerns, take suggestions and to meet you!



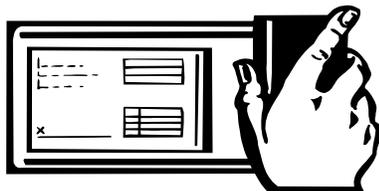
Tips from Cristina

By Cristina Alegria

Credit Card Deposits. For our participants' security, EFTS will no longer accept credit card information over the phone or e-mail. Credit Card Information Forms are available under the "Forms" link on the EFTS website, and can be faxed to the EFTS office at (860) 679-1305.

When your library goes through a "changing of the guard," occasionally the new library staff member will receive an institutional credit card. Even if the account number and expiration date remain the same, the Card Verification Value (CVV – the last 3 digits on the signature strip of the card) changes! This CVV changes with an updated expiration date also. Please keep your information with EFTS current by faxing us a new Credit Card Information Form, even if not making a deposit at that time.

And, of course, there is no need to fax us a Credit Card Information Form unless there is a change of information, or this is the first time your library is making a deposit to its EFTS account with a credit card. When replenishing with the same card, just click the "Make a Deposit" link once logged in online and fill in the four fields. All credit card deposit requests are processed at 3pm Eastern Time Monday through Friday.



REMEMBER! The National Library of Medicine (MDUNLM) uploads on a QUARTERLY BASIS, not monthly! NLM uploads transactions in the middle of January, April, July and October. Please be aware that any transactions from January through March will post this month, and try to budget accordingly! Mark your calendars to replenish your EFTS account before any NLM transactions post so that you do not risk a negative balance!

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