



# EFTS Quarterly

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University of Connecticut  
Health Center

Electronic Fund Transfer System  
Lyman Maynard Stowe Library  
University of Connecticut Health Center  
263 Farmington Avenue - PO Box 4003  
Farmington, CT 06034-4003  
(866) 561-5045  
Fax: (860) 679-1305  
<https://efts.uhc.edu>

## HALE AND FAREWELL!

“The best way to predict the future is to invent it” Alan Kay

As a librarian involved with ILL in 1995 I couldn't wait for the future that Ralph Arcari and Ed Donald were to invent. I was sick of counting coupons, sending them for reimbursement, as well as the necessity of hiring a part time person just to do all the tasks associated with ILL paper billing. The ILL department was always encouraging Ralph and Ed to “find a better way” for these time-consuming tasks, and they did! EFTS.

As with any program there are bound to be changes. This has been the case with EFTS over the years. Since I started my association with EFTS in 2004 not only has our software changed and evolved but so has our organization. At this time it is necessary to say a fond farewell and thank you to Ralph and Ed for their 10-year effort with EFTS. We wish Ralph a happy, healthy retirement and Ed success in pursuing his career dreams. We'll miss their vision, analytical skills, dedication and sense of humor.

On the other hand, we're delighted to welcome to the EFTS organization Evelyn Morgen, Associate Director, Lyman Maynard Stowe Library and Bill Leslie, Technical Support. Evelyn, who has been with the library for over 3 years, will provide administrative oversight, strategic planning and will continue Ralph's role of guiding EFTS into the future, toward the goal of self-sufficiency. Bill, who worked with Ed for 6 weeks, is already busy supporting our daily activities and developing EFTS version 4.0. Along with the present staff, Jola and Cristina, the future looks bright for our organization, our members and our future.

Jackie Lewis  
Head, Collection Access  
Lyman Maynard Stowe Library  
EFTS Program Manager

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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.



### To Err is Human, To Refund is Divine

We all do it. We make mistakes. Then we have to fix the mistakes. And we hope that it's as easy to fix the mistakes as it was to commit them.

With EFTS, a common mistake is charging something we shouldn't have charged. Perhaps we were going to do it for free, but a charge was somehow attached. Perhaps we were typing in items to charge and, interrupted by a telephone call, inadvertently typed that request in twice. We happily send the transactions off to EFTS and it's soon OOPS time.

Either we find the mistakes or our borrowers call and e-mail. It's time to fix. Fortunately, in EFTS, it's a simple procedure. Simply log into the member space and create a transaction file, then upload the file.

Here's the procedure:

- Login to EFTS
- Click on "Transaction File"
- Click on "Build an online transaction file"
- Fill out the form. Use the LIBID for the borrowing library (the folks we owe money to). I use the same request number as the mistake, but put an "r" behind it. Choose "refund" from the drop down box as the charge type
- Click "Add to file"
- Click "View Transactions"
- Is everything okay? There may be transactions waiting to be checked overnight. Don't worry about them. Click on "Upload transactions". Whatever can be processed will be processed, including the refund

Logout if there's no further work to do in EFTS.

Wasn't that easy?

Dorothy Kalahan

Interlibrary Loan

Univ. of Connecticut Health Center Library

### EFTS in SAN ANTONIO: TEXAS EXHIBIT REPORT

By Jola Sliwinski

Meeting: MLA National Meeting

Location: Henry B. Gonzales Convention Center, San Antonio

Dates: May 14-18, 2005

Exhibitors: Jola Sliwinski, Cristina Alegria

The EFTS booth was located between HC Pro and the Christopher & Dana Reeve Paralysis Foundation. The visitors to the booth included both EFTS users who expressed much satisfaction with the service and the latest Version 3.0 enhancements as well as parties (hospital libraries and other possible participants) interested in becoming EFTS participants. Contacts were made for follow-up. EFTS staff was approached by next year's National organizers, Region 2 and Region 5 to participate in upcoming meetings.

Of the recommendations that were made for EFTS, the most frequently repeated concern involves expanding participation with Canadian libraries. Attendees were told of our plans to work out the currency conversion issue which is the most significant hurdle we face in this endeavor. Now that EFTS has in-sourced its programming needs, by hiring a part-time programmer, we should be able to satisfy this concern. Bev Brown (CISTI) will be in touch with Evelyn Morgen and Jackie Lewis to discuss time line etc.

Other interested parties were not aware of the March 2005 changes to the MOA, which makes participation more accessible. In the past, smaller hospital libraries have had difficulty with the wording "deposit account" and in obtaining CFO signature. The new MOA has removed all references to "deposit" and replaced with only "account". This appears to be terminology that will allow for more hospital libraries to participate. The current MOA requires two levels of signature and notarization. These changes were perceived and received as positive. Perhaps, they will translate into growth.

Future attendance at this meeting is recommended. This meeting provides good public relations opportunities however, "vendor" status should be reviewed. I strongly suggest looking into making contact with MLA organizers to request MEETING / USERS group space for EFTS rather than participation as a vendor. The Group Meeting could allow for demonstrations, Q&A, and distribution of promotional materials.



## Tips from Cristina

By **Cristina Alegria**

Did you know that system-generated account alerts can be sent to more than one recipient? Simply log in with your LIBID and password, click "Member Profile" and separate multiple e-mail addresses with a semicolon and space!

Please remember that a subscription to our efts-l listserv is completely separate from the system-generated account alerts that are sent out monthly! If you receive one type of e-mail but not the other, it probably means you are not yet signed up for our efts-l listserv, or that the e-mail address listed in the Member Profile is missing or not valid!

It is absolutely imperative that all correspondence includes your LIBID – especially deposits made by check! To ensure that your LIBID is included with your check, you can use your LIBID plus the date (e.g. CTUCON070105 for July 1, 2005) as an invoice number.

EFTS proudly supports non-DOCLINE transactions! Any transaction under \$1,000.00 can be paid through EFTS – these include, but are not limited to, OCLC transactions, Loansome Doc, even payments for services – not just ILLs! As EFTS is a participant-to-participant system, payments can only be made to an EFTS user from an EFTS user, however, anybody can join EFTS. **Our service is not limited to libraries!** We are pleased to provide the same service we have been to libraries since 1996 to small businesses and even library patrons! Imagine being able to bill repeat patrons through EFTS – the process for an individual, business, or even corporation is identical to the process for a library to join.

Don't have a DOCLINE LIBID? No problem – we can create a unique account ID for you!



### EFTS Advisory Committee

The newly appointed EFTS Advisory Committee will hold its first telephone conference on July 26, 2005. EFTS participants are encouraged to contact representatives in your area and express any questions or concerns you would like the Advisory Committee to address. A complete listing of the membership has been updated on the EFTS website.

#### EFTS Staff

**Evelyn Breck Morgen**, MSLS, Associate Director  
emorgen@uchc.edu

**Jacqueline Lewis**, MLS, Head of Collection Access,  
EFTS Program Manager  
jlewis@nso.uchc.edu

**Jolanta Sliwinski**, EFTS Program Coordinator  
sliwinski@nso.uchc.edu

**Cristina Alegria**, EFTS Program Assistant  
calegria@uchc.edu

**William Leslie**, EFTS Technical Support  
wleslie@uchc.edu

#### Contact Us

EFTS  
University of Connecticut Health Center  
263 Farmington Avenue  
P.O. Box 4003  
Farmington, CT 06034-4003

Phone/Fax: 860-679-4500 (9:00 am to 4:30 pm EST)  
Toll Free: 866-561-5045 (9:00 am to 4:30 pm EST)  
Fax: 860-679-1305  
E-mail: efts@uchc.edu  
Web: <https://efts.uchc.edu/>