

THE UCSD CHARGER APPLICATION

FOCUS ON EFFICIENCY

At UC San Diego, a departmental collaboration created a new automated system – the UCSD Charger Application – for processing campus ID card financial charges. The new system is faster, more accurate and reduces costs.

The result of a collaborative effort within the UC San Diego’s Student Financial Solutions office, the new UCSD Charger Application provides a reliable, cost-effective and efficient process for Campus Cards office employees to enter campus ID card charges onto accounts.

Previously, employees manually entered charging data into the university’s accounts receivable system for each customer who came into to the Campus Cards office. This process was both prone to error and cumbersome during peak times, especially during the fall term when thousands of new students and employees arrive on campus.

To resolve this issue, the university’s Campus Cards office and the Student Financial Solutions development team together developed the UCSD Charger Application, which streamlines the charging process. The application is designed to read an account-holder’s data from a campus entry-point terminal, and the charging data is automatically loaded into the account-holder’s record within the university’s Accounts Receivable system.

The new application is a lot easier for employees, as Accounts Receivable personnel now simply log in to the application at the beginning of their shifts. The application also eliminates errors that occur with manually entered the data.

MILESTONES

Sep
2018

- The UCSD Campus Cards office formally requests the development of an application/tool that would integrate with their electronic sign-in system and automatically assess an ID card replacement charge onto a student’s account in the Accounts Receivable system.

Mar
2019

- The Student Financial Solutions development office allocates resources to fund the project and assigns the developers.

Apr
2019

- Developers conduct discovery with the customer and build programming specifications.

May
2019

- Developers start writing the programming code for the application.
- Developers test the application, refine and finalize the coding, and install beta versions for user quality assurance testing.

June
2019

- Developers finalize all of the coding and roll the completed applications to the UCSD Campus Cards office

QUANTIFICATION AND RESULTS

The Chargers Application has thus far accurately loaded in excess of 2,000 charge transactions into the UCSD Accounts Receivables system.

Because these charges are no longer being manually loaded, the application has saved the university more than 200 hours of processing time, which translates into approximately \$3,000 in savings.

IMPACT AND BENEFITS

The primary benefits from the successful development and implementation of this tool are accurate loading of charges, savings in processing time and reduction in expenses.

As a result of the framework that the team developed, the Charger Application will be adapted to create a faster and more reliable resource for other campus departments that process repetitive small-volume charges into the Accounts Receivable system.

LESSONS LEARNED

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At the start, it is important to deepen process discovery to flesh out the involvement of other parties in the existing system. In the development of this tool, discovery was not conducted, and a third-party vendor had a security-flow setting on the Campus Cards office's system; the setting caught the influx of electronic transactions flowing through their site, and it initiated a shutdown shortly after the tool was implemented. The problem was addressed and resolved quickly, but with better initial discovery, the vendor's setting would have been detected beforehand.

PROJECT TEAM

UCSD CAMPUS CARDS OFFICE:

Andrew Weidler
Supervisor/Client

Francheska Morataya
Team Leader/Client

SFS DEVELOPMENT GROUP:

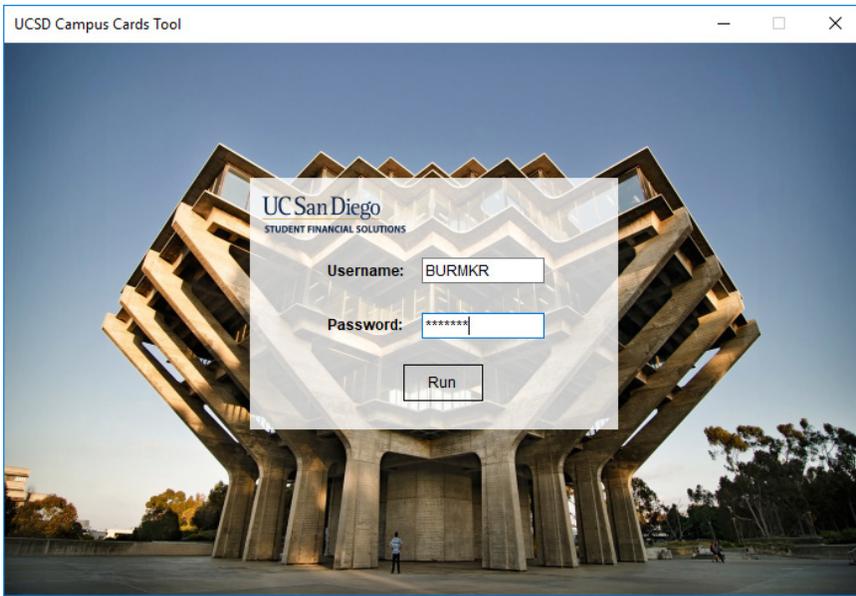
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Megan Kwok
Lead Developer

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Once an employee has logged into the application, it will run in the background during the user's shift. When customers come into the office, they enter their student ID number into Envoy, the service portal, where they may replace a lost or old card, and when they exit the Envoy interface, the application prepares and loads a charge transaction in the student's record on the Accounts Receivables system.

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SARMU13 1562 *ISIS* U.C. SAN DIEGO (PROD DB2) 04/06/20 03:14 P
BURMKR CHARGE : CHARGE DETAIL ENTRY

ACCOUNT ID: A11075941 NAME : STOP BILL :
TRAN NMBR : RTN CHK : COMMENTS : N

ACTION (AC): A

DETAIL CODE : BURIDR CAMPUS ID CARD REPRINT CHARGE
CHARGE AMOUNT : 21.00

ENTER PAYMENT : DOCUMENT NUMBER :
EFFECTIVE DATE : 04/06/20 EFFECTIVE TERM :
CHARGE DISPUTE :
TRANSACTION DATE: DUE DATE :
UNPAID BALANCE :
  
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This is a screen shot of the "replace campus ID card" application, in which a \$21 charge is made to the student's account. At the end of a shift, the employee simply terminates the application, and no further action is needed.