Business Services
Credit Card Terminal Loan Process

Introduction

Business Services loans out credit card terminals to support university departments with collecting revenues from credit and debit card payments. Departments that accept credit and debit cards as a form of payment are required to comply with Payment Card Industry Data Security Standards (PCI DSS). The purpose of PCI DSS is to promote the safe and efficient processing of credit and debit card transactions and to protect sensitive cardholder data (CHD).

Policy

University units that sell goods and services are encouraged to accept credit and debit card payments from customers. This process has been created to provide guidance for units that do not have a permanent credit card payment solution or need additional credit card payment terminals temporarily.

Procedures

The following steps should be followed to request the use of a credit card terminal from Business Services:

1. The department requesting a credit card terminal should fill out an electronic Credit Card Terminal Loan Form using DocuSign at least three business days prior to the event.

2. The returned form is reviewed by the Cashier's Office. The individual listed on the form who is taking possession of the credit card terminal must have completed PCI training within the last year. The Cashier's Office will approve or reject the request after reviewing the PCI training database and reviewing the availability the department's credit card terminals during the time requested. If PCI training is needed, the Cashier's Office will email the individual on how to complete the training.

3. The Cashier's Office will contact the requester via email confirming that the credit card terminal is available during the time frame listed on the Credit Card Terminal Loan Form. The Cashier's Office will update an internal calendar with terminal number and the date/time equipment is to be loaned. The Cashier's Office will ensure that the equipment is in good working order and fully charged prior to providing it to the requesting department.

4. The department will pick up the credit card equipment from the Cashier's Office—typically on the day of or the day before the event to ensure safekeeping. Cashier's Office staff will assist with training individuals on how to use the credit card terminals. Certain features may be restricted on the card readers.

5. Students and staff that are listed on the Credit Card Terminal Loan Form are expected to use the terminal on the day of the event, then close out the batch of transactions once finished using the device. The department should note the amount of revenue earned for the event for verification when the revenue is posted to WISER.

6. The department is expected to return the terminal the following business day and use the Credit Card Terminal Loan Return Form to submit batch information.

7. The Cashier's Office will send an email verifying that the device has been returned.

8. The revenue from the funding string listed on the form will be posted upon receipt of funds in the university bank account. The department should verify that the revenue information in WISER agrees to the batch totals following the event.

Forms

Credit Card Terminal Loan Form
Credit Card Terminal Return Form

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