

# New Credit Card Merchant Request Form

## Purpose of the credit card merchant account

**Clientele, who will be the customers?**                      Students                      Alumni                      Public  
**Estimated annual activity volume**    # \_\_\_\_\_ \$ \_\_\_\_\_  
**The name of the new account** \_\_\_\_\_  
**Target date of setup** \_\_\_\_\_                      **Tub** \_\_\_\_\_                      **Org** \_\_\_\_\_

## What types of card will be accepted?

Visa / Mastercard                      Amex                      Discover

## How will cards be accepted?

Credit card present                      ecommerce                      Virtual Terminal                      Phone/mail order

## If ecommerce, what software will be used to accept cards?

Locally developed application                      Third Party software                      Off the shelf software

## If ecommerce, where will website be hosted?

@Harvard                      @Third Party                      @Hosting site (vendor name) \_\_\_\_\_

## If terminals will be used, where will the equipment be shipped?

Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

## If Point of Sale (POS) is to be used:

Name of POS \_\_\_\_\_  
 Name and Version of POS software \_\_\_\_\_  
 Authorizations will be done by                      Dial-up                      Internet  
 Where will POS be hosted? \_\_\_\_\_

## Business owner (department or unit head)

Name \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_  
 Address \_\_\_\_\_

## Reconciliation contact

Name \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_  
 Address \_\_\_\_\_

## IT contact (responsible for technical support)

Name \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_  
 Address \_\_\_\_\_

## Primary business contact (operational contact)

Name \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_  
 Address \_\_\_\_\_

**Merchant**

**My signature below indicates that I have reviewed the Harvard Credit Card Merchant Handbook and the PCI Data Security Standard. I understand the responsibilities of a credit card merchant**

**Requested (Business Owner)** \_\_\_\_\_ **Date** \_\_\_\_\_

**Financial Dean**

**My Signature below indicates that I approve this request and understand the obligations of adding an additional credit card merchant.**

**(Financial Dean)** \_\_\_\_\_ **Date** \_\_\_\_\_

**Chief Information Officer**

[The School CIO for school units or the University Chief Information Officer for Central Administration and Affiliates must sign all request except for merchants only using dial-up terminals.]

**My signature below indicates that I have reviewed the Harvard Credit Card Merchant Handbook and the PCI Data Security Standard. I understand the technical responsibilities for maintaining a secure credit card environment.**

**My signature below indicates I am aware of the application but it is being hosted by an external service provider.**

**(CIO)** \_\_\_\_\_ **Date** \_\_\_\_\_