

# New Credit Card Merchant Request Form

**Purpose of the credit card merchant account:**

**Preferred merchant account name:**

**Who are your customers?**                      Students                      Alumni                      Public

**Estimated annual activity volume:**

Visa/Mastercard	#	\$
Amex	#	\$
Discover	#	\$

**Target date of setup:**

*(please allow 4-6 weeks for new account setup)*

**Tub:**                      **Org:**

**What types of cards will be accepted?**

Visa/Mastercard                      Amex                      Discover

**How will cards be accepted?**

Credit card present                      ecommerce                      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 the 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:                      W P2PE here                      Internet

Where will POS be hosted?

**Merchant Account Phone Number:**

*Note: this phone number will appear on customer bank statements*

**Merchant Account Address:**

Street Address:

City:

State:

ZIP:

**Business owner (department or unit head)**

Name:

Phone:

Email:

**Reconciliation Contact**

Name:

Phone:

Email:

**IT Contact (responsible for technical support)**

Name:

Phone:

Email:

**Primary business contact**

Name:

Phone:

Email:

**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/Chief Information Security and Data Privacy Officer**

The School CIO for school units or the University Chief Information Officer for Central Administration and Affiliates must sign all requests.

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/CISDPO):**

**Date:**