**PDQ Management Policy Document – PDQ1**

**Request for a new PDQ (card) terminal for a Department**

|  |
| --- |
| ***Please not that approval of this form by the relevant Department/Service Manager, confirms acceptance that all staff within your department/service required to process card payment transactions, will be fully trained in the use of the PDQ terminal, in accordance with PDQ Management Policy, and the PCI DSS Policy.*** |

|  |  |
| --- | --- |
| **Request for permanent PDQ** | **Request for temporary PDQ** |
| Please complete Section 1 | Please complete Section 2 ***(a portable card terminal loan log will also need to be completed when the device is collected for hire)*** |

|  |  |  |
| --- | --- | --- |
| **Section 1 – request for permanent PDQ** | | |
| **Information required** | **Response** | **Accepted/comment**  ***(Income Office use)*** |
| Is a card terminal necessary – can payment be accepted by other means (such as online store)? |  |  |
| If a card terminal is necessary, what type of terminal is required (see PDQ Management Policy & Procedure Section 1)? |  |  |
| Where will the terminal be located? |  |  |
| How will the terminal connect to the UOS IT network? | ***Options:***  ***Preferred option: Phone line***  ***(unique or shared)***  ***Broadband (via LAN port)***  ***Wi-fi***  ***GPRS*** |  |
| How many transactions are estimated to be processed by the terminal each month/week? |  |  |
| How much income is estimated to be collected by the terminal each month/week? |  |  |
| Who will have access to use the terminal? |  |  |
| Who will have Supervisor access for the terminal? |  |  |
| Where will the terminal be stored when not in use? |  |  |
| Which cost centre is to be charged? |  |  |
| ***Income Team feasibility/financial viability check:*** | | |
| ***Hire/transaction cost*** |  | |
| ***Finance considered/balances against customer satisfaction and/or lack of availability of alternative payment methods – Y/N?*** |  | |
| **IT/Telecoms contacted re connection requirements – Y/N?** |  | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Authorised by (Department/Service Manager)** | **Authorisation Date** | **Approved/rejected(please give reason for rejection)**  ***Income Team use*** | **Date application approved/rejected and decision notified**  ***Income Team Use*** |
|  |  |  |  |
| **MID number**  **Income Team use** | **Terminal ID (if new PDQ hired – please specify if current loan PDQ)**  **Income Team use** | **Make & model (if new PDQ hired – please specify if current loan PDQ)**  **Income Team use** | **Inventory updated**  **Income Team use** |
|  |  |  |  |

**PDQ Management Policy Document – PDQ1**

**Request for a new PDQ (card) terminal for a Department or Service**

|  |  |  |  |
| --- | --- | --- | --- |
| **Section 2 – request for temporary PDQ**  **Please note that when the terminal is returned to the Income Manager, it must be accompanied by an internal paying-in slip and a daily reconciliation (z) report for every day hired.** | | | |
| **Information required** | **Response** | | **Accepted/comment**  **(Income Team use)** |
| Why is a card terminal necessary – can payment be accepted by other means (such as online)? |  | |  |
| If a card terminal is necessary, what type of terminal is required? |  | |  |
| Where will the terminal be located ( please give details of event)? |  | |  |
| How will the terminal connect to the UOS IT network? | ***Options:***  ***Preferred option: Phone line***  ***(unique or shared)***  ***Broadband (via LAN port)***  ***Wi-fi***  ***GPRS*** | |  |
| How long is the terminal required for (please give from and to dates)? |  | |  |
| Who will have access to use the terminal? |  | |  |
| Who will have Supervisor access for the terminal? |  | |  |
| Where will the terminal be stores when not in use? |  | |  |
| ***Income Team feasibility/financial viability check:*** | | | |
| ***Hire/transaction cost*** | |  | |
| ***Finance considered/balances against customer satisfaction and/or lack of availability of alternative payment methods – Y/N?*** | |  | |
| **IT/Telecoms contacted re connection requirements – Y/N?** | |  | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Authorised by (Department/Service Manager)** | **Authorisation Date** | **Approved/rejected(please give reason for rejection)**  ***Income Team use*** | **Date application approved/rejected and decision notified**  ***Income Team Use*** |
|  |  |  |  |
| **MID number**  **Income Team use** | **Terminal ID (if new PDQ hired – please specify if current loan PDQ)**  **Income Team use** | **Make & model (if new PDQ hired – please specify if current loan PDQ)**  **Income Team use** | **Inventory updated**  **Income Team use** |
|  |  |  |  |