**PDQ Management Policy Document – PDQ1**

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

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| ***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.***  |

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| **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)*** |

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| **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?** |  |

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| **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*** |
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| **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** |
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**PDQ Management Policy Document – PDQ1**

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

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| **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?** |  |

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| **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** |
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