

UGA Foundation

Payment Card Data Security: Card handling procedures for remote locations

UGA Foundation's preferred method for acceptance of payment card transactions is via a secure UGA giving form (Example: <https://gail.uga.edu/commit>). There will be times, however, when it is not practical for a donor to complete a payment online, resulting in the need to record cardholder data (CHD) for processing at a future time. The steps below provide instructions for how to safely collect, store, and destroy CHD.

As always, it is imperative that University policy is followed in the collection and processing of CHD. Please see the exhaustive list of related University policies at <https://policies.uga.edu/Finance/Cash-Management-Banking-and-Investments/Credit-Debit-Cards/>. For the purposes of this document, a summary of the most applicable UGA policies include:

- CHD refers to the account number, expiration date, and security code on a credit/debit card
- CHD should never be entered into a giving form except by the donor
- When accepting CHD for a future authorization, the information must be handwritten.
- CHD should not be keyed or typed into a fillable form or document, including Word doc, PDF, or Excel sheet or in any way stored/transmitted electronically.
- Email must never be used to accept CHD or to transmit internally once accepted.

COLLECTION, STORAGE, AND DESTRUCTION FROM REMOTE LOCATIONS

1. Handwrite payment information on an approved form collecting the following fields:
 - a. Name, address, amount of payment, designation, card number, expiration date
 - b. If multiple payments are to be charged, indicate whether the payments should be applied to a pledge or a recurring gift
 - c. The security code is not required for UGA Foundation to process a charge
2. Physically secure the written authorization in a locked cabinet or drawer until the authorization can be delivered to Gift Accounting.
 - a. Payment authorizations should only be delivered by an authorized employee of the University. Mail and courier services, including Campus Mail, should not be used.
3. Deliver to Gift Accounting, One Press Place, Suite 101, during regular office hours. Sign-in the delivery at the front desk and drop in the locked drop box. Note: Office hours may be modified during exceptional working conditions. During such times, please visit our website (<https://give.uga.edu/uga-foundation/>) for a current operating schedule.
4. Occasionally, it may be more practical to relay the payment information by telephone to a Gift Accounting employee. In such a situation, please call (706) 542-4438 to provide the payment details. Once Gift Accounting has received the authorization, please follow the destruction steps below.
 - a. Please note: Telephone services using internet connection should not be used, specifically VoIP services. When using a cellular phone, please disable any WiFi calling features to ensure the call uses a cellular network.
5. Cardholder data should not be retained any longer than that defined by a legitimate business need. CHD must be destroyed immediately following authorization. UGA Foundation's preferred method of destruction is cross-cut shredder.