San Diego State University Research Foundation

Merchant Account Setup Form

Project Section	
Project Name:	
Project Address:	
Website URL:	Project Email Address:
Description of Product or Service:	

FOAP Section		
Fund:	Org:	Account:

Contact Person Section		
PI Name:	Phone #:	E-Mail Address:
Contact Name:	Phone #:	E-Mail Address:
Grant Specialist Name:	Phone #:	E-Mail Address:

Card Acceptance Information Section	
Average Sale Amount:	Card Present (Swiped) %:
High Sale Amount:	Card Not Present %:
Total Monthly Sales:	Internet %:
# of Transactions per Month:	Mail Order %:
Equipment Needed: Credit Card Terminal PIN Pad None	Telephone Order %:

Special Instruction/Notes

FOR FOUNDATION USE ONLY	
Elavon Assigned Merchant ID:	
Foundation Approving Officer Name:	Foundation Approving Officer Signature:

Signatures	
Principal Investigator Name:	Principal Investigator Signature:
Grant Specialist Name:	Grant Specialist Signature:

By signing this form, you are agreeing to have a merchant account set up under your project name. The project must comply with the SDSURF Credit Card Processing Security Policy found on the SDSURF website. These procedures include, but are not limited to, the following requirements: Annually, the PI or Project Director must demonstrate Payment Card Industry Data Security Standards (PCI DSS) compliance by completing the appropriate PCI DSS SAQ. All employees who are involved in the credit card process will need to complete annual PCI compliance training. Cash Receipts should be emailed to the SDSURF Cashier (sdsurfcashier@sdsu.edu) no later than the second business day of the folllowing month. The project is resposible for all fees associated with use of a merchant account including but not limited to equipment fees, supply costs, processing fees, dedicated phone lines, and all costs related to maintaining PCI-DSS compliance.
Please send an email to (sdsurfbanking@sdsu.edu) with any questions.