

TITLE: Credit Card Processing Procedures

NUMBER: FIN100

EFFECTIVE: 30 AUG 2014

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PURPOSE:

To limit institute risk and liability when it comes to handling credit cards payments.

PROCEDURES:

For Credit Card Charges:

1. If the person/organization does not have a login to the Solution Point System, create one for them.
2. Create the invoice in Solution Point;
3. Gather the username and password for the person/organization.
4. Provide the login information to the person/organization.
5. Have the person or organizational representative login to Solution Point and pay the invoice.

For Credit Card Refunds:

Credit Card refunds in Solution Point should be the exception rather than the rule, opting instead for a credit in the Solution Point system. In the event this will not satisfy the customer's requirements, the following procedures should be followed for a credit card refund:

1. Identify the payment in Solution Point for which you need to make a refund;
2. Collect the Payment Reference Number, the number in the "No:" field on the payment.
3. Provide the Payment Reference Number to person with TouchNet access at CIS;
4. The person at CIS will email or call you with the Refund status;
5. Update the Payment as a refund in Solution Point.

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