

Gift Donations by Credit Card

College/Division Administrators Meeting - May 11, 2017
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**Encourage donors to make gifts online.
This is the most secure, accurate, and efficient way to process gifts.**

To update listed designations on online giving pages:

- Request designation spreadsheet from Annual Giving (Bria Johnson at bcjohnso@central.uh.edu with copy to Rachel Brown at rbrown23@central.uh.edu)
- Review and update both spreadsheet and PeopleSoft
 - o use copy/paste from PeopleSoft to spreadsheet to ensure accuracy
- Send updated spreadsheet to giftproc@central.uh.edu.
- Updates are made in Advance donor database and notification sent to department once complete
- Department should review changes on online giving page

What if donor has problems with the online giving site?

- If their desired designation is not listed, the donor should select the closest match and then use the free form box to clarify their intentions. On the main giving page, the free form box is on the 2nd screen.
- If the donor calls in with credit card information, staff can process the donor's gift through their credit card portal or through the online giving page.

What if a donor mails in their credit card information for processing?

- Save departmental processing time by getting solicitation documents pre-approved by GPR so they can be used as a substitute for a Gift Transmittal Form (GTF).
- Departments may process credit card transaction through their credit card portal or through the online giving page.
- Approved solicitation documents may be sent via UH Police to GPR for processing.

If I process a gift through my department's credit card portal, what else do I need to do?

- Process journal to feed PeopleSoft.
- Send copy of journal and GTF, or approved substitute, to GPR via gifts1@central.uh.edu. (see compliance below)

How do I remain compliant when handling credit card information?

- Never send or receive credit card information via email. Phone, fax (located in secure location), and mail is OK.
- Process transactions promptly. Store credit card information in secure location and only for minimal time necessary.
- Properly redact credit card numbers, expiration dates, and security codes as soon as transaction is processed.
 - o Cross-shred information, or
 - o White out, copy original, destroy original, and retain copy.

Incomplete GTFs slow down processing which impacts everyone!