One-Time Events Procedure for Accepting Credit Card Payments

Financial Services, in collaboration with IT Services (ITS) have selected a software solution to help meet the needs for one-time events or annual events, such as conferences, where Queen’s business units would like to accept credit card payments. The solution we have selected for these situations is the company “Eventbrite”

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Eventbrite Offers:

• Free for free events
• Reasonable pricing for events that charge a fee
• Ability to pass on the service fees to the end user (business unit would still pay the payment processing fee)
• Fast, easy setup of event
• Offers multiple ticket options (i.e. early bird pricing option, VIP tickets)
• Accept credit and debit card payments through Eventbrite’s secure payment processor
• Send invitations and emails from Eventbrite account to potential and existing attendees
• Send automated reminder emails to attendees a few days prior to event
• 24/7 customer service (1-855-286-9808 or www.eventbrite.ca)
• Eventbrite is PCI compliant – there is no additional work or costs needed for business unit to setup a PCI Compliant solution
• Create custom badges for the event
• Multiple reporting options:
  o Event dashboard – including a snapshot of your events’ total revenue, tickets sold, page visits and payouts
  o sales by ticket type
  o attendee summary
• Timely settlement of money to your account

**Do not use this process if the event is a regular occurrence, recurring, or too large. For those instances, contact the PCI Coordinator to discuss the possible need to create a merchant account**
Steps to Request and Receive Approval to use Eventbrite:

1. Submit Documents to Financial Services:
   - Contact the PCI Coordinator (pcicoordinator@queensu.ca) and request to use Eventbrite
   - PCI Coordinator will send you the following to be completed and returned:
     o One-Time Event Request form, and
     o One-Time Event Costing Template

2. Get Simplified Authorization to Operate (ATO) approved:
   To address potential privacy and security concerns, ITS and the privacy office need to approve an ATO for any software solution collecting information. A simplified ATO procedure has been adopted for using Eventbrite for conference registrations.
   
   You will need to do the following to get an ATO:
   - Request a copy of the spreadsheet from/gr-its-ato@queensuca.onmicrosoft.com
   - Complete the spreadsheet
   - Use these answers in the risk classification section:
     - Where will the information be stored?
     - Will the service require Internet connectivity?
     - Is this a Cloud service?
     - In the past 12 months, has the service provider been issued:
       - SSAE 16 SOC2 report or
       - ISAE 3402
     - Email completed spreadsheet to/gr-its-ato@queensuca.onmicrosoft.com for review and copy PCI Coordinator on the email pcicoordinator@queensu.ca
     - Please allow at least one month for ITS to review and process the ATO
     - When ATO approval received, send approval to PCI Coordinator at pcicoordinator@queensu.ca

3. Approval of Request to be done by Financial Services
   - PCI Coordinator will review the form, costing template and approved ATO
   - PCI Coordinator will be in contact with you to set up your account with Eventbrite. This involves creating a USER ID
     - This will be done within 5 business days of receiving all of the above documents
   - PCI Coordinator will email an Eventbrite Instructions document to be used when setting up your account with Eventbrite

4. Set up your account with Eventbrite
   - Visit Eventbrite’s website at www.eventbrite.ca/how-it-works/
   - Review the Eventbrite Instructions Document provided by PCI Coordinator
   - Conference organizer to contact Eventbrite to set up website and set up event
   - Eventbrite will guide you through customizing your own website to be able to collect payment
• It is recommended that you outline the event logistics before setting up the registration with Eventbrite – things to consider are:
  o Date(s) of event
  o How many tickets will be sold for each different rate ($) category
  o Different rates ($) and timing of when rates are available (i.e. early bird rates)
  o Event Summary
  o Logo
  o Does GST/HST apply? (contact hst.help@queensu.ca)

• Wording recommendations if you ask registrants for accessibility and/or dietary needs:
  o Queen’s is committed to an inclusive campus community with accessible goods, services, and facilities that respect the dignity and independence of persons with disabilities. Are there any steps we can take to make this a more inclusive and barrier-free event?
  o Do you have any dietary requirements?

• When setting up your event, make sure you check the option box to charge HST

• NOTE: You must use the Eventbrite payment processing option to process payments for your events, and NOT PayPal. PayPal is prohibited.

Other Service Providers:
If you need to use a product other than Eventbrite, the process is very similar to the one noted above. The process would include:

• Valid Attestation of Compliance (AOC) from service provider, this is a requirement for PCI Compliance
• Valid Merchant account or bank account, or approval to use Financial Services bank account
• Procurement process
• Ongoing maintenance of software and PCI Compliance requirements is the responsibility of business unit engaging with service provider and NOT Financial Services or ITS
• Final Approval by Financial Services to use other service provider
• Approved full ATO (about three (3) months to get approved)

Comparison of Requirements for Different Service Provider Options:

<table>
<thead>
<tr>
<th></th>
<th>Eventbrite</th>
<th>Other Supplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>ATO</td>
<td>• partial ATO required (1 month)</td>
<td>• full ATO required (3 months)</td>
</tr>
<tr>
<td>AOC</td>
<td>• NONE - in place already</td>
<td>• need to obtain from supplier and have reviewed by FS to ensure adequate</td>
</tr>
<tr>
<td>Procurement</td>
<td>• NONE – procurement done already unless event revenue is very high</td>
<td>• full procurement process, get 3 quotes if over 10K or do sole source form</td>
</tr>
<tr>
<td>Financial Services</td>
<td>• simplified approval process</td>
<td>• full approval process including costing review</td>
</tr>
<tr>
<td>Set up</td>
<td>• needed, have dedicated customer service representative</td>
<td>• needed</td>
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</tbody>
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