

January 10, 2024

Subject: Required update for units taking payment cards by phone

Dear Campus Merchants:

This is an update on University of Michigan practices for accepting payment card information by telephone. Please carefully review and act on this information as applicable to your department prior to your next Self-Assessment Questionnaire (SAQ).

U-M has been in the process of upgrading to Zoom Phone at UM-Ann Arbor, UM-Dearborn and UM-Flint. Zoom Phone service can be used in a number of different modes. The most common option is a “softphone” implementation, which allows users to receive and place calls using the Zoom app on a computer, tablet, or mobile phone. To date, almost 10,000 U-M phone numbers have been transitioned to Zoom Phone.

The change in phone service on campus has affected U-M requirements under the Payment Card Industry Data Security Standard (PCI). PCI defines technical and procedural requirements for taking payments by phone, with the goal of maximizing the security of cardholder data.

By your next SAQ:

The following U-M telephone services **are acceptable options** for receiving credit cardholder information:

- Legacy analog voice telephones (being phased out during phone upgrade project)
- Legacy VoIP (Cisco) telephones (being phased out during phone upgrade project)
- A Zoom-based common-area [deskset](#) phone with recording, call-forwarding and voicemail features disabled. These can be deployed both on campus and at remote locations.

The following forms of telephone service **should not be used** to receive credit cardholder data:

- Zoom softphone tied to a user’s username, even if implemented on a deskset
- The Cisco Jabber softphone client
- Amazon Connect call center

Please make all necessary phone service changes prior to your next SAQ if you have any employees who take payment card information by phone with the service options listed above. The ITS Infrastructure Telephone Team can assist you in making any changes necessary to ensure compliance with the requirements detailed in this email. You should allow time to review your telephone service needs and arrange for any changes. If you have any questions or would like to initiate a change in phone service, please email: its-inf-csr@umich.edu.

We understand that these requirements may require adjustments to your department’s workflow or carry expenses for additional phone services and apologize for any inconvenience. These

efforts are part of U-M's continued obligation to comply with PCI standards and essential to our ongoing success as a responsible financial partner.

Thank you for your attention to this important matter and please feel free to contact us if you have any questions..

Sincerely,

Merchant Services