

# THE HOME STRETCH TO EMV: It's Time to Get in Gear!



Phase I  
device Sourcing

Phase II  
integration + Upgrade

Phase III  
Implementation



Merchants and ISVs\*, refer to the appropriate section below to learn what to do to get EMV ready.

	MERCHANT	ISV*	BANK/PROCESSOR
Project Planning	<p>1 Merchant begins EMV project planning with Shift4.</p> <ul style="list-style-type: none"> <li>- Email <a href="mailto:myaccount@shift4.com">myaccount@shift4.com</a> and work with a representative to determine how many EMV devices may be needed and costs associated with this project</li> <li>- Complete account maintenance addendum</li> </ul>	<p>1 ISV certifies with Shift4 for EMV, including UTG® device control.</p> <ul style="list-style-type: none"> <li>- Certify ISV for Access Tokens if applicable</li> <li>- Complete certification testing</li> </ul>	<p>1 Shift4 continues joint efforts with banks and processors to expedite EMV certifications based on the various requirements. Check <a href="http://www.shift4.com/EMV">www.shift4.com/EMV</a> for current status of banks and processors as we race to the finish line.</p>
Phase I device Sourcing	<p>2 Merchant selects a Shift4-certified EMV device that also works with your POS.</p> <ul style="list-style-type: none"> <li>- Determine a device and communication method based on your ISV's EMV integration plan or their certification with Shift4 (e.g., USB, Ethernet, Serial, Bluetooth, WiFi)</li> </ul> <p>3 Merchant selects a <b>Shift4-approved distributor</b> that is able inject our <i>True P2PE™</i> keys, as well as the necessary debit keys for online PIN-based EMV support, and places order.</p> <ul style="list-style-type: none"> <li>- In some cases your ISV or bank/processor can help you make this choice.</li> </ul>	<p>2 ISV works with merchant to ensure EMV device compatibility.</p> <p>3 ISV may work with merchant to identify distributor that can inject bank/processor debit keys, or in some cases, card brand debit keys for online PIN-based EMV support.</p>	<p>2 Bank or processor may work with merchant to identify distributor that can inject their debit keys, or in some cases, card brand debit keys for online PIN-based EMV support.</p>
A Few Months Before EMV GO LIVE ↓			
Phase II integration + Upgrade	<p>4 Merchant physically installs devices.</p> <p>5 Merchant works with Shift4 to ensure their devices use the correct software applications/firmware to support EMV.</p> <ul style="list-style-type: none"> <li>- Work with ISV or device manufacturer to create new custom forms and get firmware updates, if applicable</li> </ul> <p>6 Merchant works with Shift4 and ISV to upgrade the POS software to the EMV-ready solution.</p> <ul style="list-style-type: none"> <li>- This may include installing UTG on workstations and completing the Access Token process, if applicable</li> </ul>	<p>4 ISV follows documentation on how to create custom form content on devices and then works with merchant to customize device forms, if applicable.</p> <p>5 ISV works with merchant to complete the Access Token process, if applicable, and POS upgrade. In some cases, ISV may assist merchant with installing UTG on applicable workstations.</p>	
Getting closer ↓			<p>3 Shift4 continues completing EMV certifications with various processors.</p>
Phase III Implementation	<p>7 Merchant completes processor change to add EMV with Shift4.</p> <ul style="list-style-type: none"> <li>- Verify updated configuration is accurate in DOLLARS ON THE NET® and UTG</li> </ul> <p>8 Merchant updates EMV settings in UTG and DOLLARS ON THE NET as each terminal goes live!</p>	<p>Almost There ↓</p>	<p>4 MSP works with merchant to complete updated EMV profit center form.</p> <ul style="list-style-type: none"> <li>- Include updated merchant ID and terminal IDs for all devices</li> <li>- MSP works with Shift4 to validate all info before merchant configuration can be updated</li> </ul>

