

PLANNING FOR EMV®

Preparing for a site assessment



Drawing the roadmap

The best way to start the EMV® conversion process is with a site assessment of a fueling site. This will provide a picture of the fueling station's current state and help determine upgrades, additions, and any wiring or connectivity changes that need to be made. Before speaking with a distributor, site owners can conduct their own initial site assessment by using the EMV Planning Worksheet on page 5 of this guide. The answers to the worksheet will give distributors and site owners a head start and help streamline the process.

Even if the funds for total EMV conversion have not yet been secured, starting the planning process well in advance of the April 2021 deadline will help ensure the new payment system will be enabled in time to avoid chargebacks from fraud.

STEP 1: INITIAL QUESTIONS

Use the EMV Planning Worksheet to collect preliminary information about the current site configuration and its future needs. Answer the questions to the best of your ability but don't worry if you can't answer them all. They will be confirmed during the technician's site visit.

STEP 2: CONTACT DISTRIBUTOR

With the planning worksheet answers in hand, contact your distributor to schedule an EMV Site Survey. The distributor will go over some initial questions, collect contact information, and schedule a date and time for the site survey.

STEP 3: PREPARE FOR THE SITE SURVEY

The technician will need access to the site's backroom as well as both sides of the dispensers, so you'll need to make any necessary arrangements in advance. Tell staff about the visit and let them know that the technician will be taking photos.

STEP 4: SITE SURVEY DAY

During the site survey, the technician will collect information to help determine the best route to enabling EMV. This includes:

PHYSICAL INFORMATION:

- Fuel flag
- Number of dispensers
- Number of fueling points
- Layout of the backroom
- Available outlets in the backroom
- Available space to mount backroom equipment
- Conduit space

HARDWARE & SOFTWARE INFORMATION:

- Forecourt manufacturer
- Forecourt controller type
- Dispenser manufacturer and model
- Dispenser serial numbers
- Dispenser communications wiring type
- Pump computer firmware version
- Point-of-sale (POS) manufacturer
- POS model
- Payment host
- Number of terminals
- POS software version

PHOTOS THAT WILL BE TAKEN:

- Forecourt including canopy
- Tank gauge
- Backroom layout
- Dispenser serial plate
- Sales/volume display
- Both sides of dispenser

DISPENSER CONFIGURATION REPORTS:

- Connectivity and system information
- Component versions
- Attached devices including media and scanner settings

STEP 5: FOLLOW-UP AND PLANNING

After the site information is collected and any additional capabilities have been determined, the distributor and site owner will choose the best course of action for the EMV upgrade. This could mean installing EMV upgrade kits or new dispensers, updating wiring or adding wireless connectivity for TCP/IP, software installation, and consulting about POS vendor Level 3 certification issues.

The full upgrade can be implemented in either one or two visits depending on the amount of work to be done, availability of technicians, and 3rd party software updates.

Getting a plan in place, even if purchases are not finalized, will help establish a site's priority status, helping them bypass the backlog due to the shortage of installation technicians.



EMV® Planning Worksheet

Please answer the following questions to the best of your ability.

HARDWARE:

How many fuel dispensers do you have at your site? _____

How many different fuel dispenser models do you have? _____

SOFTWARE:

What point-of-sale (POS) system are you running? _____

Who is your payment host/acquiring network
(e.g., FirstData, Heartland, etc.)? _____

Do you want to offer your customers both debit and credit on the forecourt? _____

Which Card Verification Methods (CVMs) will be supported
(PIN, Signature, No CVM Required)? _____

Do you accept fleet cards? _____

Do you have a loyalty program? _____

Are you a full-service station? _____

Are you showing media at the fuel dispenser today? _____

Are you interested in Point-to-Point Encryption (P2PE)? _____

CONNECTIVITY:

What connectivity do you have on your forecourt today
(2-Wire/Twisted Pair, Ethernet, Wireless)? _____

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