



cms

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SecurityMetrics Quick Steps

Get PCI DSS Certified



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As a merchant that accepts credit card payments either in person, over the phone, or online, it is essential to protect your business from hackers and crooks. Keep your data secure and avoid costly data breaches by becoming compliant with the mandatory PCI DSS program. PCI DSS is critical for the security of the payments you take from your customers

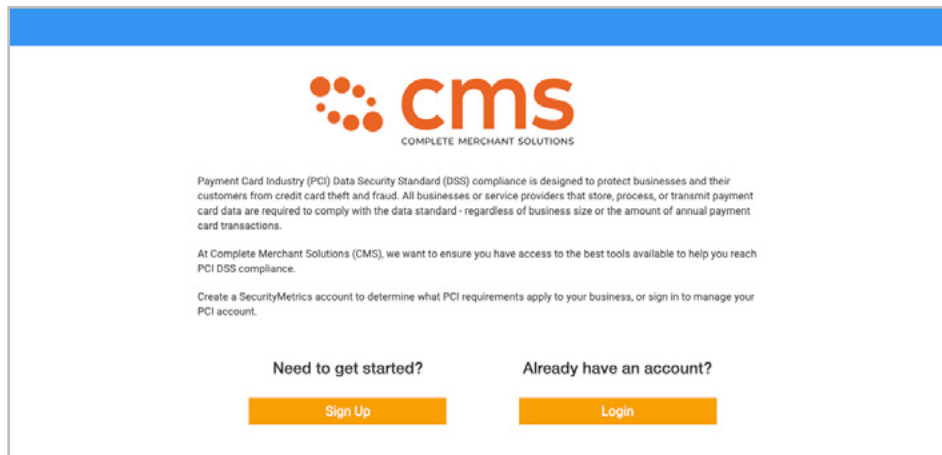
PCI FAQ: [CMS Freshdesk](#)

SecurityMetrics Quick Steps

Get PCI DSS Certified

1

To begin your process of becoming PCI DSS Certified, open your web browser to: <https://www.securitymetrics.com/pcidss/cms>



2

Click the **Sign-Up** button to create an account. Once you have created a SecurityMetrics account and set up your password, you will automatically be directed to the Merchant Console main dashboard.

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Select items in the “To Do List” to start or complete compliance tasks. You will then be directed to the Scoping Process page.

To Do List

Current PCI Status Failing

 Click here to get started with PCI 3.2. 

SAQ Status: Failing

Attested: N/A

Exp. Date: N/A

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Answer the questions on the Scoping Process page. Depending on how you accept payments, you will be assigned to the appropriate Self Assessment Questionnaire (SAQ).

Scoping Process

This scoping process will determine which PCI standards apply to you. When you have completed the scoping process you will be presented with a Self-Assessment Questionnaire (SAQ) that you must complete to fulfill your PCI validation. Please choose the answer that best describes how you handle credit card information. If you have more than one merchant ID and they do not all process the same way, please call 800-557-4797.

Do any of the following apply to you?

I store credit card information electronically, ie: accounting software...
I direct my customers to send credit card numbers through email and/or efax.
I record and store phone calls electronically where credit card information is provided.

☐ One or more of these apply to me

☐ None of these apply to me

Back

Next

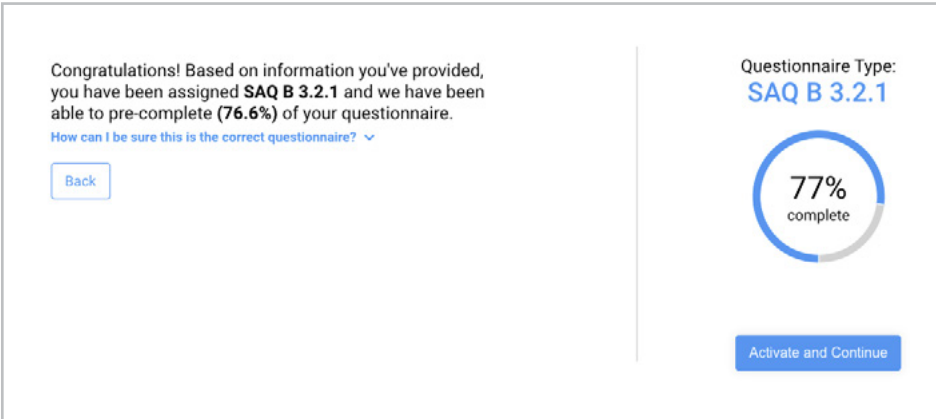
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SecurityMetrics has simplified the SAQ process for CMS merchants. The scoping process also automatically pre-fills a portion of the SAQ.

Click the **Activate and Continue** button.



The screenshot shows a confirmation screen for the SAQ B 3.2.1 questionnaire. On the left, a message states: "Congratulations! Based on information you've provided, you have been assigned **SAQ B 3.2.1** and we have been able to pre-complete (76.6%) of your questionnaire." Below this is a link: "How can I be sure this is the correct questionnaire?" with a downward arrow. A "Back" button is located below the link. On the right, the text "Questionnaire Type: **SAQ B 3.2.1**" is displayed above a circular progress indicator showing "77% complete". At the bottom right is a blue "Activate and Continue" button.

Congratulations! Based on information you've provided, you have been assigned **SAQ B 3.2.1** and we have been able to pre-complete (76.6%) of your questionnaire.

[How can I be sure this is the correct questionnaire?](#) ▼

Back

Questionnaire Type: **SAQ B 3.2.1**

77% complete

Activate and Continue

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Complete the PCI Self-Assessment Questionnaire.

The screenshot displays the 'Policy' section of the PCI Self-Assessment Questionnaire B 3.2.1. The interface has a blue header with the title 'PCI Self-Assessment Questionnaire B 3.2.1'. The main content area is titled 'Policy' and contains several questions. The first question is 'Do you have a written policy which is kept up to date and disseminated to all relevant employees?'. Below it is a 'YES' button and a 'NO' button. The second question is 'Your policy should be reviewed at least once a year or whenever changes in business environment require, such as hiring new employees, changes in your business or risk environment or using new technologies. Is your policy reviewed appropriately?'. Below it is a 'YES' button and a 'NO' button. There is a 'Get started on your policies.' section with a link to 'Access Policies'. A 'How to Complete this Section' sidebar on the right provides instructions. At the bottom right, there is a blue box with the word 'POLICY' and a play button icon.

PCI Self-Assessment Questionnaire B 3.2.1

Policy

Do you have a written policy which is kept up to date and disseminated to all relevant employees?

> Official PCI Text

12.7.1 YES NO

Get started on your policies.
Build and tailor using SecurityMetrics Policies templates. Click below to download and customize your templates.
[Access Policies](#)

Your policy should be reviewed at least once a year or whenever changes in business environment require, such as hiring new employees, changes in your business or risk environment or using new technologies. Is your policy reviewed appropriately?

> Official PCI Text

12.7.2 YES NO

The next three standards are regarding your policy's approach to devices that are Internet capable or able to store data electronically. Examples of these technologies could be laptops, smart phones, tablets, or anything else with web connectivity. It also includes wireless networks if deployed and the usage of email if allowed. Please keep in mind that if you do not have any of these devices or applications, you are in compliance with the requirement.

> Official PCI Text

Do employees have direct approval from management to use these devices/applications?

How to Complete this Section

This section contains requirements regarding your company's security policies and procedures. Policies and procedures are documents that provide guidance and instruction for your employees and should instruct them in securely conducting day-to-day business activities.

If you have a security policy, either through building one in-house, using SecurityMetrics Policies & Procedures templates, or through other means, then you must ensure it includes instructions for the requirements listed in this section. Once this is confirmed, you may be able to meet the requirements for the Policy section.

POLICY


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Once you've answered all the questions, you'll see a confirmation that you've completed the questionnaire.

PCI Self-Assessment Questionnaire B 3.2.1



Congratulations! You have completed your Self-Assessment Questionnaire.
Go to your account Dashboard to address any other outstanding items within your To Do List.

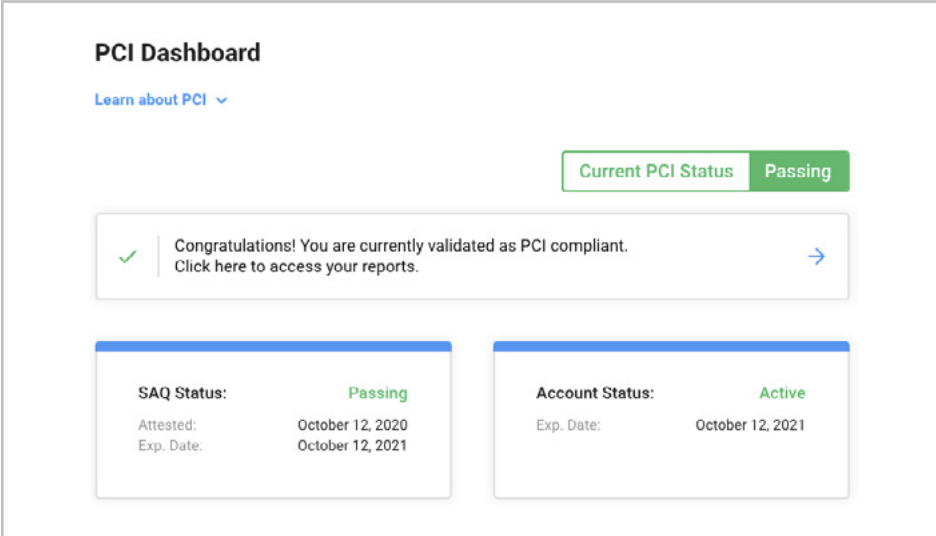
Dashboard

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When you return to the main dashboard, you will see that your “To-Do’s” are completed, and you are all set.



PCI Dashboard

[Learn about PCI](#) ▾

Current PCI Status **Passing**

✓ Congratulations! You are currently validated as PCI compliant.
Click [here](#) to access your reports. →

SAQ Status:	
Attested:	October 12, 2020
Exp. Date:	October 12, 2021

Account Status:	
Exp. Date:	October 12, 2021



What to expect for next year's PCI DSS certification

Certification for next year is even easier! Simply log in and confirm that nothing has changed in the past year, and you are ready to go. If there have been changes, you will need to be re-scoped and complete the questionnaire.

Need help or have questions?

CMS Customer Support:

Phone: (877) 267-4324

support@cmsonline.com

SecurityMetrics Technical Support:

Phone: (801) 705-5700

support@securitymetrics.com