2026 Agenda

Innovation, Transformation, and Risk: The Future is Now

Sessions and speakers are subject to change

Wednesday, April 15

3:00-4:00 PM (Eastern Time) TPA Webinar - Preparing for TPA 2026 & PCI DSS Refresh
So we can jump right into these great conference sessions, we are offering our annual PCI DSS Refresh session and TPA "know before you go" orientation as a pre-conference webinar. TPA attendees can access this webinar recording in the Guidebook event app along with the other conference materials.

Sunday, May 3

5:00 – 6:30 PM Registration
5:00 – 6:30 PM Welcome Reception and Supporter Exhibits

Monday, May 4

7:00 AM – 5:00 PM Registration
7:00 – 8:00 AM Networking Breakfast

General Sessions
8:00 – 8:30 AM Opening Remarks
8:30 – 9:30 AM Session under development

9:30 – 10:00 AM Morning Refreshment Break, Exhibits, and Networking

Concurrent Sessions
10:00 – 11:00 AM Introduction to Merchant Services: Understanding the Essentials
Matt Leman, Head of Partnership Initiatives, JPMorgan Payments

Are you new to the payments industry or looking to refresh your knowledge of merchant services? This session is your gateway to understanding the core concepts that drive every credit card transaction.

- Who's Who in Payments: Get clarity on the key players—merchants, acquirers, issuers, card networks, and processors—and how they interact.
- Interchange Demystified: Learn what interchange is, why it matters, and which elements you can influence to optimize costs.
- Chargebacks Uncovered: Understand the chargeback process, common triggers, and practical steps to minimize risk and loss.
- PCI Compliance & Data Security: Gain actionable insights into protecting payment data, maintaining compliance, and safeguarding your organization and students.

10:00 – 11:00 AM From Panic to Process: Building Resilient Responses to PCI Non-Compliance
Anne Gaskill, Director of Development, The University of Texas at Austin; Todd Graves, Senior Technology Architect & IT Manager, The University of Texas at Austin; and Stephanie Vanicek, Software Engineer, The University of Texas at Austin

You've written the policies, you've created strong partnerships with your contracts office and information security office, you've done the outreach, but sometimes – despite everyone's best intentions – you discover a non-compliant solution is in use on campus. This workshop-style session will walk through some potential scenarios before breaking out into groups for a mini tabletop exercise. After discussing the various approaches different institutions would take – or have taken – in these scenarios, the session will close with some best practices that can help prevent such situations in the first place.

11:00 – 11:15 AM Meeting Room Transition

Concurrent Sessions
11:15 AM – 12:15 PM Session under development

11:15 AM – 12:15 PM The UniRev Journey
Lori Snow, Assistant Treasurer, Stanford University and Rich Bolitzar, Founder & CEO, Unirev

Stanford University's Office of the Treasurer Merchant Services Program Transformation has been groundbreaking in its innovative use of emerging Fintech and embedded security. What began as an effort to replace a costly, fragmented payment collection system with a unified, efficient solution resulted in the creation of UniRev. Designed to streamline incoming payments, automate journal postings, relieve security burdens, and integrate seamlessly with accounting and reporting systems, UniRev has since been granted a license for use by other institutions nationwide. This achievement also earned Stanford the 2025 AFP Pinnacle Awards Grand Prize.

12:15 – 1:15 PM Networking Lunch

Concurrent Sessions
1:15 – 2:15 PM Campus Chronicles: Two Universities, One Cash-LESS Mission
Kevin Sisler, CTP, Director of Treasury Services, University of Kentucky and Christie McCloskey, PNC Bank

Explore the various solutions and payment modalities used by University of Kentucky to move toward a cash-LESS campus and hear about the roadmap that worked best for them. Reducing cash and check handling is a marathon, not a sprint. Determining the right payment strategy to solve for your specific use case can be daunting since there are many options, while keeping in mind the goal of avoiding unnecessary operational or back-office headaches. Please join us for an interactive session to hear about the challenges they faced over the years and how the Finance and Treasury Office elevated these challenges which soon became institutional priorities to solve.

1:15 – 2:15 PM Frontier Nursing University Modernizing Payments on Campus
Kylie Waters, Chief Financial Officer, Frontier Nursing University and Peter Drew, East Region Education Solutions Director, Paymentus

Managing tuition and payments shouldn't be a headache. Frontier Nursing University is revolutionizing their institution's payment operations with smarter processes, automation, leveraging modern payment solutions like PayPal, Venmo, Google Pay, Apple Pay, Text2Pay, and mobile payments with streamlined operations, improved cash flow and future-proofed payments.

2:15 – 2:45 PM Afternoon Refreshment Break, Exhibits, and Networking

<u>Concurrent Sessions</u>
2:45 – 3:45 PM Rethinking the PCI Attestation Cycle for Merchant Success
Matt Schafer, Director, Treasury Operations, Indiana University and Laura Allison, Project Management Product Lead, CampusGuard

PCI attestation is a critical component of maintaining compliance and protecting payment data, but how often should you do it? This session explores two approaches: Indiana University's monthly attestation cycle designed to reduce level of effort, accommodate merchant busy seasons, and improve focus, and the traditional annual cycle favored for simplicity. Learn the pros and cons of each, hear real-world lessons, and walk away with practical strategies to optimize your attestation process for your organization's unique needs.

2:45 – 3:45 PM Optimizing Merchant Tracking: Tools, Techniques, and Best Practices
Anthony Dornacher, PCIP, Risk and Compliance Analyst, University of Washington

Whether you have five, 50, or 500 merchant accounts, managing your inventory of locations, contacts, and devices is a key part of compliance. Join us to explore a variety of options available to help you find the right fit to administer your merchant account portfolio and related PCI-DSS information. This session will help you evaluate solutions and compare cost, resources, security and scalability.

3:45 – 4:00 PM Meeting Room Transition

<u>General Session</u>
4:00 – 5:00 PM Listserv Live: Let Your Voice Be Heard *(a school practitioner-only session)*
Facilitated by Preston DuBose, ISA, Director of Merchant Security & Services, Texas A&M University

Bring your questions, suggestions, ideas, and solutions to this practitioner-only, open forum discussion and share them with your college and university peers. Who knows what nuggets of information you'll take home. To get the conversation started, participants are encouraged to submit topics in advance via the link located in the Guidebook Main Menu. This will help the committee organize the allotted time, but as always you may pick up a microphone during the session and contribute on the spot.

5:00 – 6:30 PM Networking Reception and Supporter Exhibits

Tuesday, May 5

7:00 AM – 5:00 PM Registration
7:00 – 8:00 AM Networking Breakfast

<u>General Sessions</u>
8:00 – 8:15 AM Opening Remarks
8:15 – 9:15 AM From Checkout to Compromise: Guarding Higher Ed Against E-Skimming Threats
Kevin Doar, Director, Office of Merchant Services, University of Washington and David Gundrum, JD, CISA, CISSP, QSA, Senior Security Advisor, CampusGuard

As colleges and universities expand their digital payment experiences, the risks associated with e-skimming attacks continue to rise. Cybercriminals are increasingly targeting higher ed websites with malicious scripts designed to silently capture payment card data, putting students, families, and institutions at significant financial and reputational risk.
This session explores the vulnerabilities and tactics attackers use to bypass common security controls, how UW evaluated, implemented, and optimized one solution to secure its payment ecosystem, and recommended incident-response actions when a compromise occurs.

9:15 – 9:45 AM Morning Refreshment Break, Exhibits, and Networking

Concurrent Sessions
9:45 – 10:45 AM Why ACH Is Your Best Bet for Student and Vendor Transactions
Terri Mimms, CTP & FPAC, Director, The Office of Treasury Operations, Purdue University; Michael Herd, Executive Vice President, ACH Network Administration, Nacha; and Brad Smith, AAP, Senior Director, Nacha

Accounts payable, vendor and student payments are core to campus operations, yet many institutions still rely on checks, wires, or cards that drive up cost and complexity. This panel will examine why ACH remains the most affordable, reliable and scalable payment method for higher education—across vendor AP, philanthropy, tuition payments, student refunds, payroll, and other recurring payment use cases. With insights from a university payments leader and payments professionals, attendees will learn how ACH lowers processing costs, reduces fraud risk, and supports a positive experience for both vendors and students, with insights provided on compliance with upcoming Nacha operating rules for fraud risk management.

9:45 – 10:45 AM Session under development

10:45 – 11:00 AM Meeting Room Transition

Concurrent Sessions
11:00 AM – 12:00 PM Wait, We Sold What? Controlling Risk in Revenue Producing Activities
Matt Schafer, Director, Treasury Operations, Indiana University

Departments are finding increasingly creative ways to generate revenue, but that enthusiasm can cause serious compliance headaches. Discovering a rogue credit card process or a hidden expansion of your PCI scope during an audit is a nightmare we all want to avoid. In this session, you will learn how Indiana University proactively prevents these issues. We will share the good, the bad, and the funny stories from 15+ years of managing our revenue producing activity process and show how you can stop risks before they start.

11:00 AM – 12:00 PM Session under development

12:00 – 1:15 PM Networking Lunch

Concurrent Sessions
1:15 – 2:15 PM Best in Class: Proactive Fraud Protection in a Digital Age
Carol Samayoa, Executive Director of Treasury, University of Miami; Denise Arbesu, Senior Relationship Manager, Citi; and Greg LiCalzi, Senior Relationship Manager, Citi

As payment professionals, protecting institutional assets and sensitive data from ever-evolving threats is paramount. This session will delve into practical strategies and technological solutions for establishing robust fraud protection frameworks specifically tailored for higher education institutions. We will explore how to identify common and emerging fraud trends, implement multi-layered prevention measures, and develop effective risk management protocols that minimize financial losses and safeguard institutional reputation in today's digital age.

1:15 – 2:15 PM From RFP to ROI: Your Payments Governance Playbook
Christine Jones, Assistant Managing Director, Texas Tech University and Linda Wilson, Senior Growth Account Executive, Transact Campus

In an era of fragmented payment ecosystems and evolving regulatory scrutiny, successful companies don't just use vendors—they collaborate with them as strategic partners. This talk explores a structured, repeatable framework for evaluating, selecting, and managing relationships with payment processors, gateways, and technology partners to achieve both regulatory compliance and operational efficiency. Drawing from real-world implementations, we'll cover due diligence, integration best practices, and ongoing governance—transforming vendor relationships from cost centers into competitive advantages.

2:15 – 2:45 PM Afternoon Refreshment Break, Exhibits, and Networking

Concurrent Sessions
2:45 – 3:45 PM Session under development

2:45 – 3:45 PM PCI DSS & Service Providers – Oversight, Management, Risk, Vetting, Scoping
John Layman, PCIP, Senior Payment Card Management Specialist, University of Missouri

Third-party service providers are an essential part of our operations and our PCI compliance environments. The third parties you partner with can reflect upon your institution – for better or for worse. When choosing a service provider, your evaluation process must be thorough. This session will cover examples of how to create and leverage your compliance team, your processes, and your university policies to help ensure a successful partnership and ongoing compliance.

3:45 – 4:00 PM Meeting Room Transition

General Session
4:00 – 5:00 PM Beyond Compliance: PCI, Data Security, and Financial Stewardship Across the Two Sides of Academic Medical Centers
Matthew Moore, PCI ISA, Manager, Merchant Services, The Ohio State University and Noah Dermer, Head of Healthcare Payments Security, Instamed, a J.P. Morgan company

Hopefully we're all familiar with the relief of knowing our university's payment data is secure, the pride in leading a successful compliance initiative, and the confidence to collaborate across departments. But then, with data breaches making headlines, you realize that your organization spans both academic and healthcare operations – each with distinct participants, priorities, and requirements. We will explore the unique challenges and opportunities presented by the two sides of the house, highlighting how differences in focus, stakeholders, and compliance (including the impact of PHI on the healthcare side) require tailored approaches. Attendees will gain practical guidance on effective coordination, learn how leading academic medical centers are tackling payment security, and discover what others can learn from their journey.

Wednesday, May 6

7:00 – 11:30 AM Registration
7:00 – 8:00 AM Networking Breakfast

General Sessions
8:00 – 8:15 AM Opening Remarks
8:15 – 9:30 AM Powering the Future of Payment Security
Kandyce Young, CISM, CISSP, PMP, Principal Technical Product Manager, Data and Environment Security, PCI Security Standards Council

Payments are evolving at record speed, and PCI SSC is evolving with them. Join us to explore how PCI DSS is advancing to meet the needs of today and tomorrow and learn how our strategic vision- putting our stakeholders at the heart of everything we do while elevating global payment security through thoughtfully crafted release plans. Plus, get insight towards new and informative content for 2026 and beyond.

9:30 – 9:45 AM Morning Refreshment Break

9:45 – 10:45 AM The Payments & PCI Audit Gap: Moving from "Assessment" to "Active Management"
Cherene Davis, CTP, Senior Treasury Analyst, Purdue University and Bryan Jurewicz, Chief Revenue Officer, Arrow Payments

Most universities believe that completing a Payments & PCI Assessment ensures they are compliant. This presentation shatters that myth. An auditor's role is strictly limited to assessment and guidance; they review controls and identify gaps on a limited point-in-time basis. A PCI assessment does not review every merchant location, and an auditor does not manage your merchant services, fix your gaps, troubleshoot payment systems, or hold decentralized departments accountable for the rest of the year. This "Audit Gap" leaves a massive, high-risk void of unmanaged responsibilities. In this presentation, we will examine the full spectrum of daily, monthly, and annual tasks necessary to operate a secure and efficient university merchant services ecosystem. We will discuss utilizing a team of experts, including Treasury and IT departments, and how augmenting those teams with external experts could be beneficial. This approach provides an efficient, cost-effective, and reliable method to close the "PCI Audit Gap," enabling continuous compliance and operational excellence.

10:45 – 11:45 AM Making the Shift to a Payor-Funded Convenience Fee Model
Becky Kellow, Director Student Business Office and Treasurer, Western Washington University and Toinette Miller, Director, Treasury Consulting Practice, PFM Group Consulting, LLC

As merchant processing costs increase and institutions of higher education face thin margins, learn the basics about Service and Convenience Fees and how a payor-funded strategy of shifting your processing costs to your cardholders could improve your bottom line. Learn about the different types of allowable fees as you hear from a university that has navigated a change from a biller-funded service fee model to a payor-funded service fee model. We'll discuss the challenges, pitfalls and rewards of their experience and explore the pros and cons of bank-managed vs. client-managed convenience fee programs.

11:45 AM – 12:00 PM TPA Wrap up