

Payment Form Training

For the academic year of 2024-2025, the SORC office has transitioned most of its payment forms to Experience Pitt (Ex.P) – Excludes Reimbursements. Here, all purchase appointments, disbursements and interdepartmental transfer requests must be made.

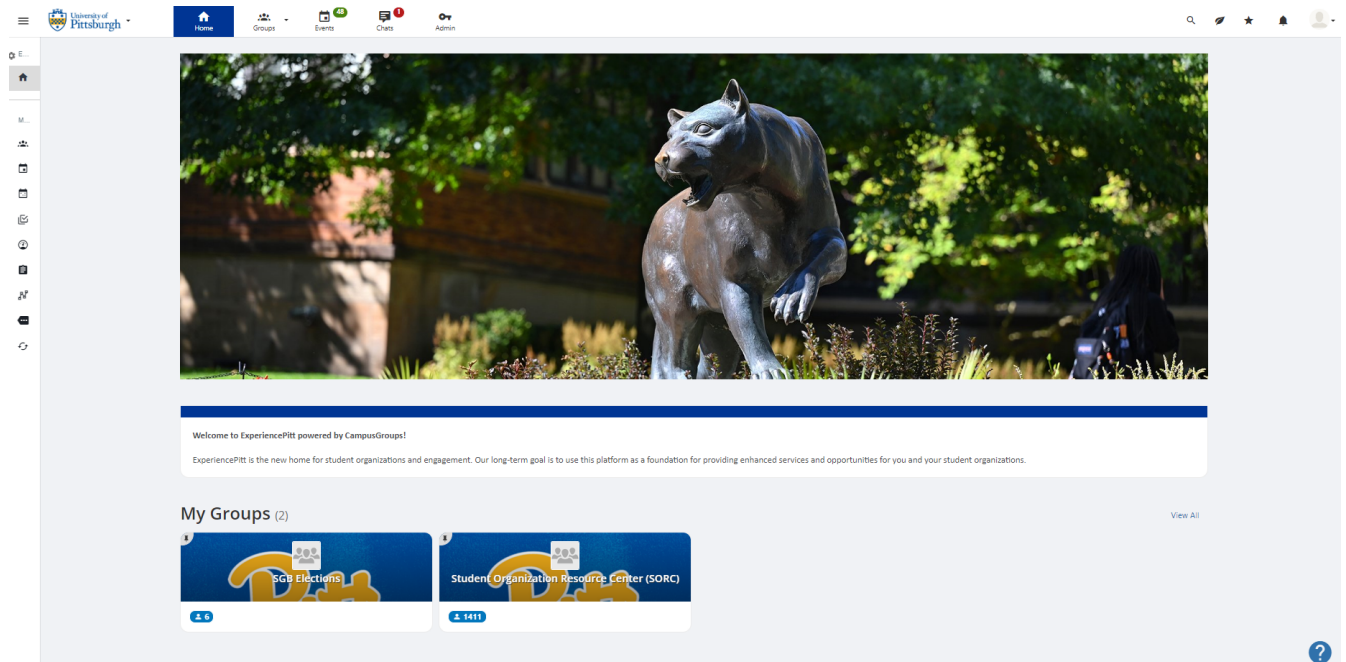
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All financial transactions must be accounted for in your Ex.P Accounting Book. If you have any questions, please reach out to SORC2@PITT.EDU.

STEP 1: Login to Experience Pitt

- You can enter Ex.P by either searching on Google or within your MyPitt. You will have to login using your Pitt credentials and Pitt passport - [Login \(pitt.edu\)](https://pitt.edu)
- Once you have logged in, your Ex.P page should look something similar to below:



- At the bottom of the page, you will see “My Groups”. Here, it should display all the groups/organizations you are a member of.

STEP 2: Making a Payment Request

- Select the group page you want to make a payment request for. It should direct you to your organizations page:

The screenshot shows a web dashboard for 'Test SORC Business Processes'. The top navigation bar includes the University of Pittsburgh logo, a home icon, a dropdown menu for 'Test SORC Bu...', and icons for Events, Chats, and Admin. The main content area is divided into 'Recently' and 'More' sections. The 'Recently' section contains two cards: 'Accounting Book' (Track your budget allocations and expenses) and 'Money' (Manage your membership and event revenues). The 'More' section contains nine cards: 'Members' (List of members, membership status, stats and settings) with 10 Current; 'Emails' (Send emails, open/click rates and templates) with 0 Sent; 'Events' (All your events, registrations, sales and attendance) with 0 Created; 'Group Page' (Communicate and make resources available to your members) with a View button; 'Forum' (Post resources for your members to find) with a View button; 'Hubs' (Manage your hubs) with a View button; 'Surveys & Forms' (Collect any data and survey users) with 11 Created; 'Website' (Create and maintain a Website with dynamic data) with 10 Pages; and 'Files' (Upload photos and documents, share publicly or privately) with 4 Uploaded.

STEP 3: Accounting Book

- Select the tile **“Accounting Book”**:

The screenshot shows the 'Accounting Book' interface. At the top, there are navigation icons and a search bar. Below that, the 'Accounting Book' title is displayed. A table shows the following data:

Budgets	Allocations/Reverses	Expenses	Balance
Oakland Private Funds FY25	\$0.00	\$0.00 (+ \$125.00 pending)	\$0.00
Total	\$0.00	\$0.00 (+ \$125.00 pending)	\$0.00

Below the table, there are filters for 'Source', 'Transaction Type', 'Item Category', 'Payment Method', 'Status', and 'Date'. A 'Payment/Budget Request' button is circled in red. Below the filters is a table of transactions:

#	Item Name	Entered By	Source	Payee / Vendor	Category	Payment Method	Receipts	Status	Credit	Debit
1	Test purchase - #14355 Aug 11, 2024	David Chao Test SORC Business Processes	Oakland Private Funds FY25	-	-	Payment into Online Payment Gateway	-	Pending Approval	-	\$125.00
2	Allocation - #198 Sep 18, 2023	David Chao Test SORC Business Processes	Oakland Test Advanced	-	Allocation	Payment into Online Payment Gateway	-	Approved	\$1,200.00	-

- Select Payment/Budget Request (circled above)
- The following pop-up will present:

The 'Payment/Budget Request' pop-up form is shown. It has a title bar with a dollar sign icon and a close button. The form contains the following fields:

- * Budget**: A dropdown menu with 'Oakland Private Funds FY25' selected. This field is circled in red.
- DETAILS**: A section header.
- * Transaction Type**: A dropdown menu with '- Select -' selected.
- * Description**: A text input field. Below it, there is a note: 'Ex: food, marketing materials, travel expenses, etc'.
- AMOUNT**: A section header.
- Revenue/Expense**: A dropdown menu with 'Expense' selected.
- * From Allocated**: A text input field with '\$ 0'. Below it, there is a note: 'Numbers only'.

At the bottom right, there are 'Close' and 'Next' buttons.

💰 Payment/Budget Request
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*** Budget**

DETAILS

*** Transaction Type**

*** Description**

AMOUNT

Revenue/Expense

*** From Allocated**

Numbers only

- **Budget:** Here various budgets may display. Your private funds, SGB Allocation Budget or any other source of income budget will be displayed. Please select the budget you wish the expense to be charged to.
- **Details:** Select transaction type
- **Description:** Please make the description as descriptive as possible. You should include the reasoning for the transaction, date, event name etc.
- **Revenue/Expense:** All transactions should have expense selected. If an organization were to receive a refund/change in payment total, a SORC staff member will go into your account and make the necessary updates.
- **From allocated:** Please indicate the cost of the expense (please include the cost of shipping etc. Any additional expenses)
- **Click Next**

STEP 4: Budget & Payment Request Details

- Once you click next, the following page will display:
- You must answer all the questions with that have (*) next to it.

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🇺🇸 Budget & Payment Request Details ⌵

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📄 **SORC Payments Form** DRAFT Edit Copy Link Manage

Payments Form

If an Organization Manager is the requestor of the form: We need to have the approval of the President.

If the President is the requestor of the form: We need to have the Advisor approve the form.

A comment saying they approve of the request, can be made in the comment section after the request has been submitted.

What type of transaction would you like to make? *

Disbursement

Interdepartmental Transfer

Purchase

Save As Draft Next »

Purchase Request

- Please select purchase request when you would like something to be paid via university a Credit Card for your organization.
- For purchase request, the form below will be displayed.
- You must answer all the questions with that have (*) next to it.
- When completing a purchase form, you will also have to make a purchase appointment. You can either click the link in the form (circled below) or at <https://cglink.me/2kn/m2>

🇺🇸 Budget & Payment Request Details

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SORC Payments Form DRAFT

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Appointment Confirmation & Vendor Info

Who is your appointment with? *

Please select the SORC account specialist you scheduled with.

Are you booking a Flight or Hotel? * Yes No

Note: For expensive or complex purchases (airfare, hotels, custom orders etc), in-person appointments are required.
A member of the SORC team will reach out to schedule an in-person appointment.

Student Organization Name: *

Vendor Name: *

Vendor Website URL/Phone Number *

This form is used for recording purchases made by student organizations.

You must schedule a meeting with the SORC team once the form is completed. Walk-ins will not be accepted!

Mandatory Meeting Scheduler (<https://cglink.me/2kn/m2>)
Click "Book" in upper right hand corner of Meeting Scheduler page to book a meeting with a SORC account specialist.

Did you schedule your purchasing appointment? * Yes No

If you answered no, see instructions above to schedule appointment, then return to form.

« Back Save As Draft Next »

- Complete the form.
- Click Submit.
- Once you have submitted your request, it will be displayed in your accounting book:

Accounting Book Show Archived Upload Transactions (Admin Only)

Budgets	Allocations/Revenues	Expenses	Balance
Oakland Private Funds FY25	\$0.00	\$0.00 (+ \$127.00 pending)	\$0.00
Total	\$0.00	\$0.00 (+ \$127.00 pending)	\$0.00

Transactions (3) Create Transaction (Admin Only) Payment/Budget Request

Search Transactions - Source - - Transaction Type - - Item Category - - Payment Method - - Status - Date ▼ Generate Report

#	Item Name	Entered By	Source	Payee / Vendor	Category	Payment Method	Receipts	Status	Credit	Debit
1	TEST - Elie - #14603 Aug 12, 2024	Elie Hardman Test SORC Business Processes	Oakland Private Funds FY25	-	-	Payment into Online Payment Gateway	-	Pending Approval See Workflow	-	\$2.00
2	Test purchase - #14555 Aug 11, 2024	David Chao Test SORC Business Processes	Oakland Private Funds FY25	-	-	Payment into Online Payment Gateway	-	Pending Approval See Workflow	-	\$125.00
3	Allocation - #198 Sep 18, 2023	David Chao Test SORC Business Processes	Oakland Test Advanced	-	Allocation	Payment into Online Payment Gateway	-	Approved	\$1,200.00	-

- Your request will then be reviewed by a SORC staff member, and either approved, declined or additional information will be requested.
- Within your submission, it allows SORC staff members to communicate with the individual who submitted a request via “chat”. You will be notified via email.
- If approved, please attend your purchase appointment on time.

Interdepartmental Transfer Request

- An interdepartmental request is when an organization would like money to be transferred to or from a department or organization within the University,
- Typically this is utilized when a department is sponsoring an organization, an organization needs to pay a department, or an organization is donating money to another organization.
- If you selected an interdepartmental transfer transaction, the below form will be displayed.
- You must answer all the questions with that have (*) next to it.

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💰 Budget & Payment Request Details⌵

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📄 **SORC Payments Form** DRAFT

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Transaction Details

Dollar Amount of Transfer *

Description of Transfer *

Provide context and justify why this transfer is taking place.

Please upload invoice or a confirmation letter for the Transfer * 📎 Upload file

« BackSave As DraftNext »

- Complete the form.
- Click Submit.
- Once you have submitted your request, it will be displayed in your accounting book.

Disbursement Request

- A disbursement request is when an organization needs to pay a vendor via Check. This option is typically when the vendor only accepts checks as a form of payment.
- Please be aware that disbursement requests can **take up to 60 days to be processed**. It must go through an approval process before payment processing cuts the check. A check is not issued within the SORC department.
- If you selected a disbursement request, the below form will be displayed.
- You must answer all the questions with that have (*) next to it.

🇺🇸 Budget & Payment Request Details

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Disbursement Details

This section is in regards to the person/business receiving the disbursement check.

Payee Name *

Payee Contact Info *

Email and/or phone number

Payee Address *

Include city, state, and zip code

Invoice Date *

Disbursement Due Date *

Has this Payee been paid by the University before? *

- Yes
- Yes, but Vendor information has changed
- No

If no, you must submit a W9 form with the Payee's information & Tax ID Number online by going to <https://www.studentaffairs.pitt.edu/student-unions/forms> and filling out the W-9 form under "Financial."

- Complete the form.
- Click Submit.
- Once you have submitted your request, it will be displayed in your accounting book.