

Experience Pitt Payment Form Training

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

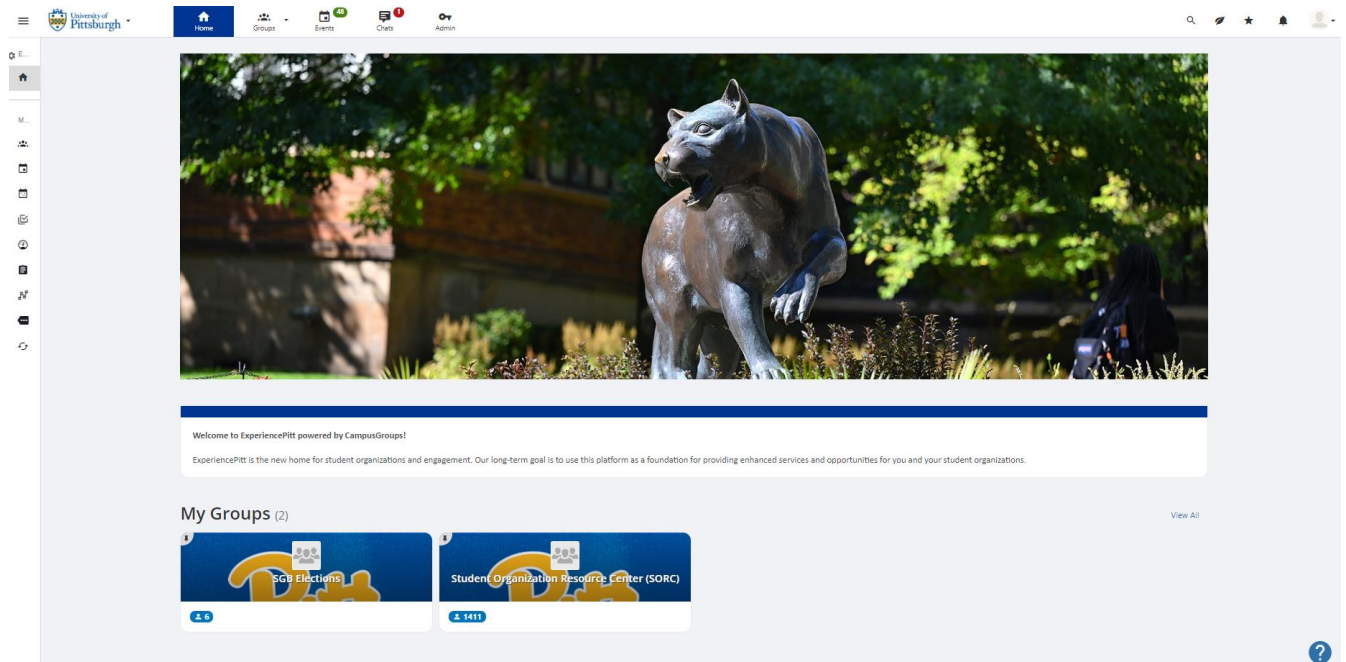
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All financial transactions must be accounted for in your Ex.P Accounting Book. If you have any questions, please reach out to SORC2@PITT.EDU.

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 the University of Pittsburgh. At the top, there is a navigation bar with the university logo, a home icon, a dropdown menu for 'Test SORC Bu...', and icons for Events, Chats, and Admin. Below this is a header for 'Test SORC Business Processes'. A left sidebar contains various navigation icons. The main content area is divided into two sections: 'Recently' and 'More'. 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/Reversals	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 is a 'Transactions (2)' section with a search bar and filters. A 'Payment/Budget Request' button is circled in red. Below this, a table lists transactions:

#	Item Name	Entered By	Source	Payee / Vendor	Category	Payment Method	Receipts	Status	Credit	Debit
1	Test purchase - #14555 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 screenshot shows the 'Payment/Budget Request' pop-up form. The 'Budget' field is circled in red and contains 'Oakland Private Funds FY25'. Below this, there are sections for 'DETAILS' and 'AMOUNT'.

DETAILS

- * Transaction Type: - Select -
- * Description: (Empty field)

AMOUNT

- Revenue/Expense: Expense
- * From Allocated: \$ 0

Numbers only

Close Next

Payment/Budget Request

* Budget: Oakland Private Funds FY25

DETAILS

* Transaction Type: - Select -

* Description: - Select -
Purchasing/Spending
Reimbursement
Interdepartmental Transfer
Disbursement

AMOUNT

Revenue/Expense: Expense

* From Allocated: \$ 0
Numbers only

Close Next

- Budget: As of 08/12/24, all private funds will be utilized. Once the FY24_25 SGB allocation process begins, here is where you will be able to select your allocation budget.
- 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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Payments Form

What type of transaction would you like to make? *

- Reimbursement
- Disbursement
- Interdepartmental Transfer
- Purchase

Student Organization Name *

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Organization Business Manager *

⌵

The business manager will be prompted to approve the form in Experience Pitt (If you are the business manager you still must select your name and approve the form).

Save As Draft Next »

Purchase Request

- 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>

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🇺🇸 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.

« BackSave As DraftNext »

- 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 - Ellie - #14603 Aug 12, 2024	Ellie 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 - #186 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.

Reimbursement Request

- If you selected a reimbursement transaction, 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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📄 SORC Payments Form DRAFT

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Reimbursement 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

Is this your first reimbursement? *

Yes
 No
 No, but my address has changed

If it's your first reimbursement or your address has changed, 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".

Attach W-9 *

Please select your status at the University *

« Back Save As Draft Next »

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

Interdepartmental Transfer Request

- 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

« Back

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Next »

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

Disbursement Request


- 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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SORC Payments Form **DRAFT**

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 Manage

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.