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.

Contents

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.

Reimbursements

- To submit a reimbursement, please click here or visit our website Student Organization Resource Center | Division of Student Affairs (pitt.edu) – select the "FORMS" tile - select "Request a Reimbursement".
- Reimbursement receipts must be within 30 days of purchase unless a travel grant has been awarded.
- If a travel grant has been awarded, please upload your award letter/email as documentation.
- Receipts must show the payees name and the last 4 digits of the payment card.
- A bank statement with the payees name and redacted irrelevant information would also be helpful as additional documentation.
- Venmo receipts WILL NOT be accepted and your reimbursement will be denied.
- If you are requesting a reimbursement for a group business meal, group event or travel, please submit a list of attendees.
- Due to the volume of requests, reimbursements can take up to 6 weeks to process.

Approval Process

- You must type in the correct approvers email.
- If you are a **member of the group**, please have the business manager approve your reimbursement.
- If the **Organization Manage**r is the requestor of the form, please have the President approve your reimbursement.
- If the **President** is the requestor of the form, please have the President approve your reimbursement.

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)
- Once you have logged in, your Ex.P page should look something similar to below:
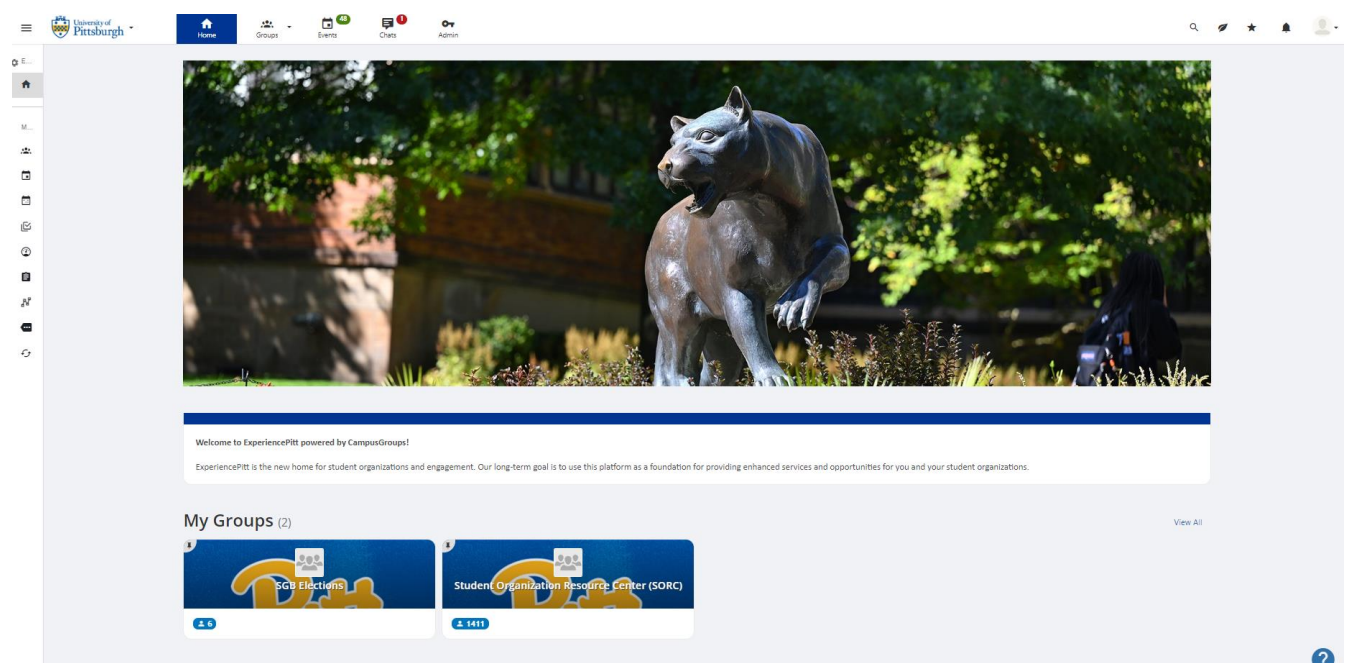
- At the bottom of the page, you will see "My Groups". Here, it should display all the groups/organizations you are a member of.

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:

STEP 3: Accounting Book

- Select the tile **"Accounting Book":**

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

- 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.

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

⑤ Budget & Payment Request Details

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📋 SORC Payments Form DRAFT

✏ Edit   🔗 Copy Link   ⚙ Manage

Appointment Confirmation & Vendor Info

Who is your appointment with? *

Start typing and wait for suggestions... ▼

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: *

- Select Group - ⌄

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 »

- Once you have submitted your request, it will be displayed in your accounting book:

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- 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

- 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.

Budget & Payment Request Details

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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   Save As Draft   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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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.