

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.

Reimbursements

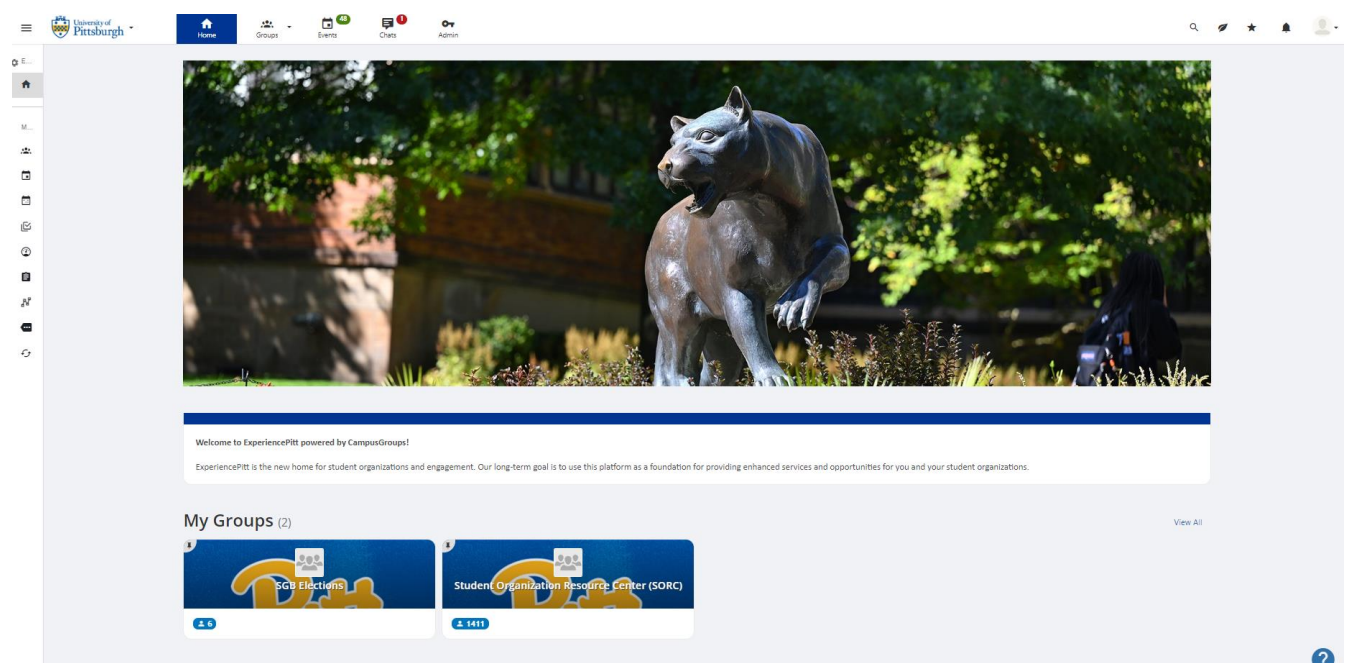
- To submit a reimbursement, please click here or visit our website [Student Organization Resource Center | Division of Student Affairs \(pitt.edu\)](#) – select the “FORMS” tile - select “Request a Reimbursement”.
- Reimbursement receipts must be within 30 days of purchase unless a travel grant has 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 Manager** 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:

The screenshot shows a web dashboard for the University of Pittsburgh. The top navigation bar includes the university logo, a home icon, a dropdown menu for 'Test SORC Bu...', and icons for Events, Chats, and Admin. The main header displays 'Test SORC Business Processes'. A left sidebar contains navigation icons for home, messages, calendar, documents, graduation, globe, camera, folder, and a vertical ellipsis. 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), 'Emails' (Send emails, open/click rates and templates), 'Events' (All your events, registrations, sales and attendance), 'Group Page' (Communicate and make resources available to your members), 'Forum' (Post resources for your members to find), 'Hubs' (Manage your hubs), 'Surveys & Forms' (Collect any data and survey users), 'Website' (Create and maintain a Website with dynamic data), and 'Files' (Upload photos and documents, share publicly or privately). Each card has a 'View' button and a status bar at the bottom.

Category	Item Name	Description	Status
Recently	Accounting Book	Track your budget allocations and expenses.	View
Recently	Money	Manage your membership and event revenues.	View
More	Members	List of members, membership status, stats and settings.	10 Current
	Emails	Send emails, open/click rates and templates.	0 Sent
	Events	All your events, registrations, sales and attendance.	0 Created
	Group Page	Communicate and make resources available to your members.	View
	Forum	Post resources for your members to find.	View
	Hubs	Manage your hubs.	View
	Surveys & Forms	Collect any data and survey users.	11 Created
	Website	Create and maintain a Website with dynamic data.	10 Pages
	Files	Upload photos and documents, share publicly or privately.	4 Uploaded

STEP 3: Accounting Book

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

The screenshot displays the 'Accounting Book' interface. At the top, there is a navigation bar with the University of Pittsburgh logo and various icons. Below this, the 'Accounting Book' section features a summary table with columns for Budgets, Allocations/Revenues, Expenses, and Balance. The 'Total' row shows \$0.00 for Allocations/Revenues, \$0.00 for Expenses (with a note '(+ \$125.00 pending)'), and \$0.00 for Balance.

Below the summary table is the 'Transactions (2)' section. It includes a search bar and several filter dropdowns. A red circle highlights the 'Payment/Budget Request' button in the top right corner of this section. Below the filters is a table with the following data:

#	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:

Payment/Budget Request

* Budget: Oakland Private Funds FY25

DETAILS

* Transaction Type: - Select -

* Description:
 Ex: food, marketing materials, travel expenses, etc

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.

✕

\$ Budget & Payment Request Details
⌵

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📄
SORC Payments Form
DRAFT

✎ Edit
🔗 Copy Link
⚙️ Manage

Payments Form

What type of transaction would you like to make? *

Reimbursement
 Disbursement
 Interdepartmental Transfer
 Purchase

Student Organization Name * - Select Group - ⌵

Organization Business Manager * Start typing and wait for suggestions... ⌵

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>

🇺🇸 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:

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

#	Item Name	Entered By	Source	Payee / Vendor	Category	Payment Method	Receipts	Status	Credit	Debit
1	TEST - Elle - #14603 Aug 12, 2024	Elle 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.

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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📄 SORC Payments Form **DRAFT**

✎ Edit

🔗 Copy Link

⚙️ Manage

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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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.