SORC EX.P PAYMENT FORM INSTRUCTIONS

To utilize your organization funds during the academic year of 2025-2026, you will have to make a budget request within Experience Pitt. Here, you can request a disbursement, inter-departmental transfer, and a purchase request. To request a reimbursement, you must do so through Qualtrics. You can request a reimbursement through the SORC website - Forms | Division of Student Affairs

This handbook will walk you through step-by-step on how to do so.

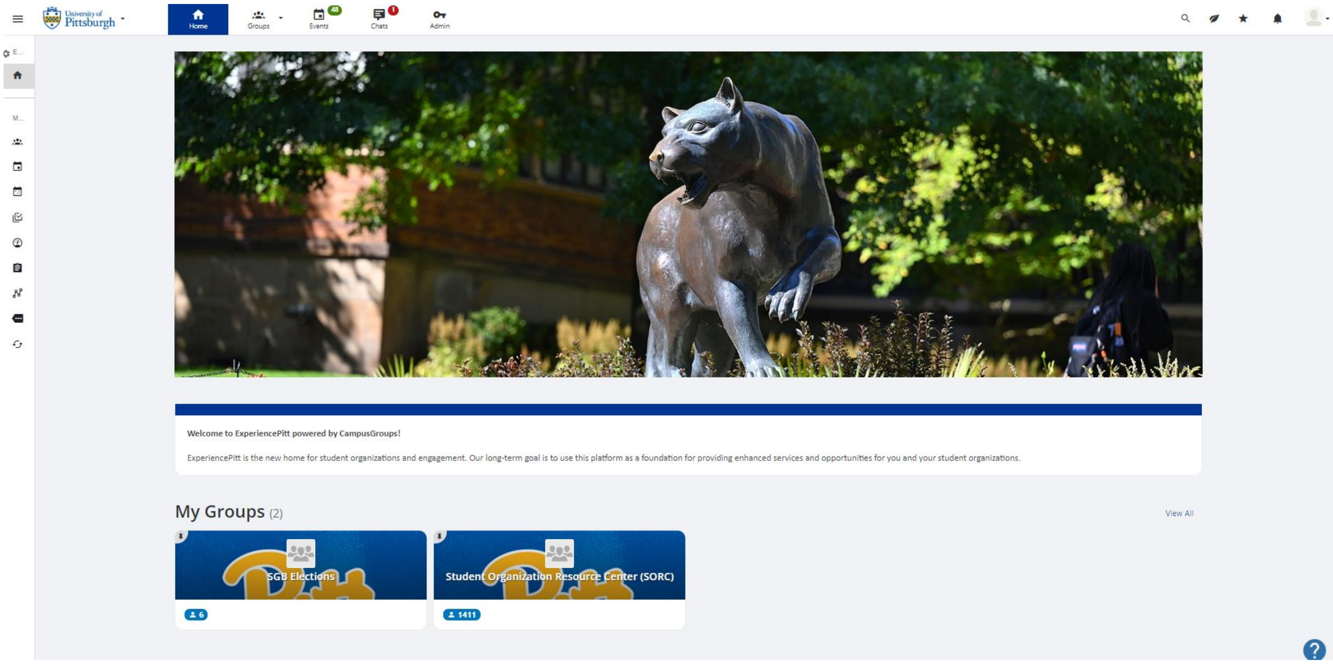
Contents

All financial transactions must be accounted for in your Ex.P Accounting Book. Two officers must approve all requests. If the president of the organization has made the budget request, then the organization business manager must be the second approver. If the organization business manager has made the budget request, then the organization president must be the second approver. SORC must approve all transactions before proceeding,

If you have any questions, please reach out to sorc2@pitt.edu

STEP 1: Login to Experience Pitt

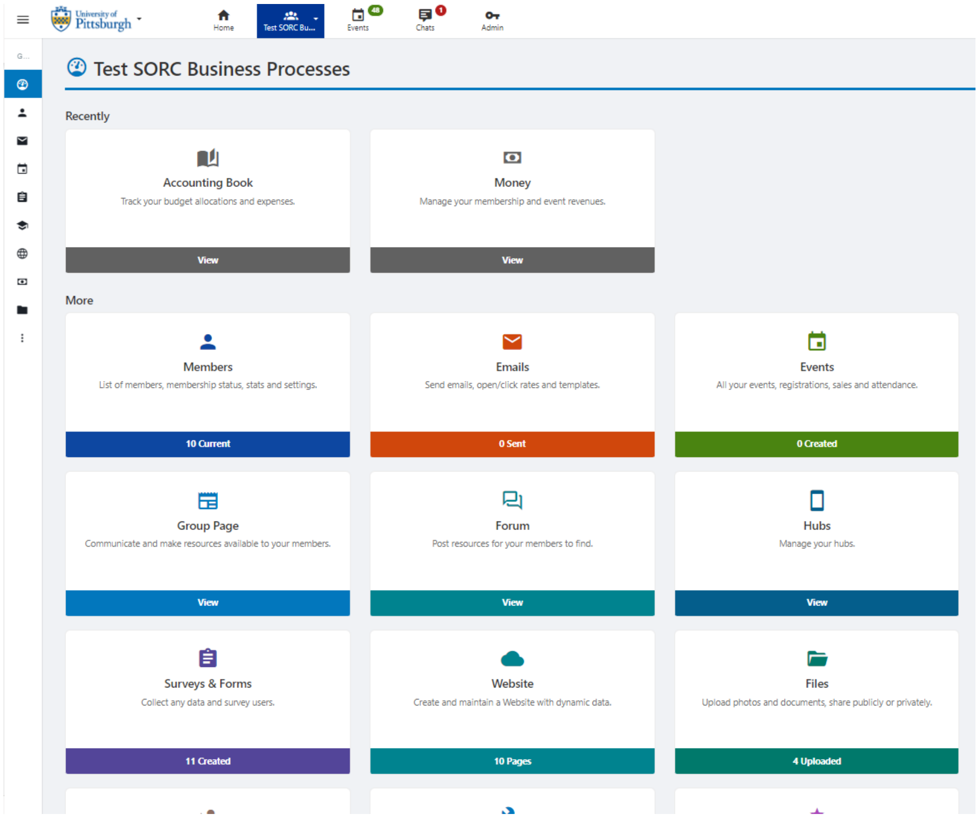
- You can enter Ex.P by either searching on Google or within your MyPitt. You will have to login using your Pitt credentials and Pitt passport - Login (pitt.edu)
- Once you have logged in, your Ex.P page should look something similar to below:



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

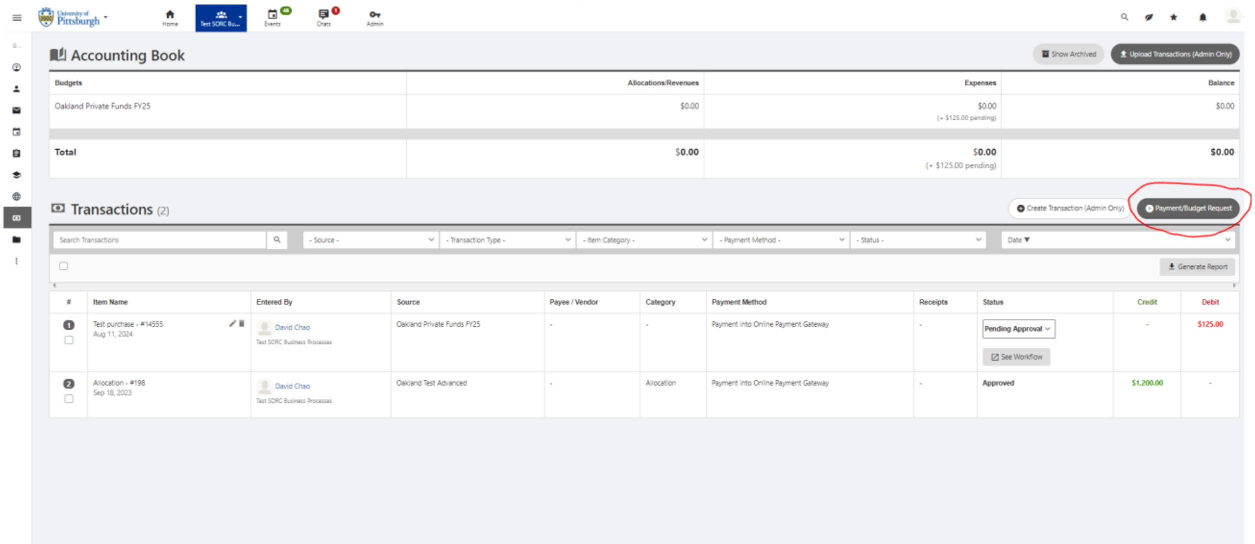
STEP 2: Making a Payment Request

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

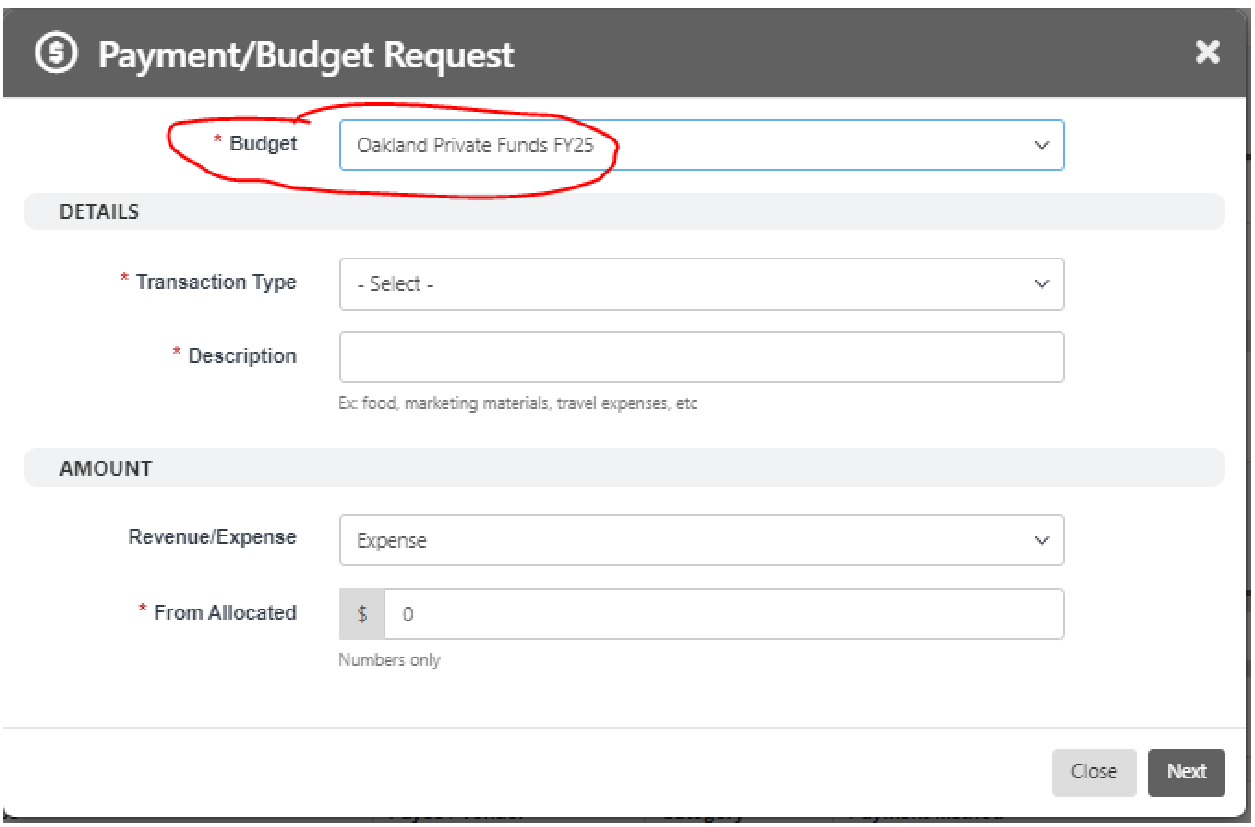


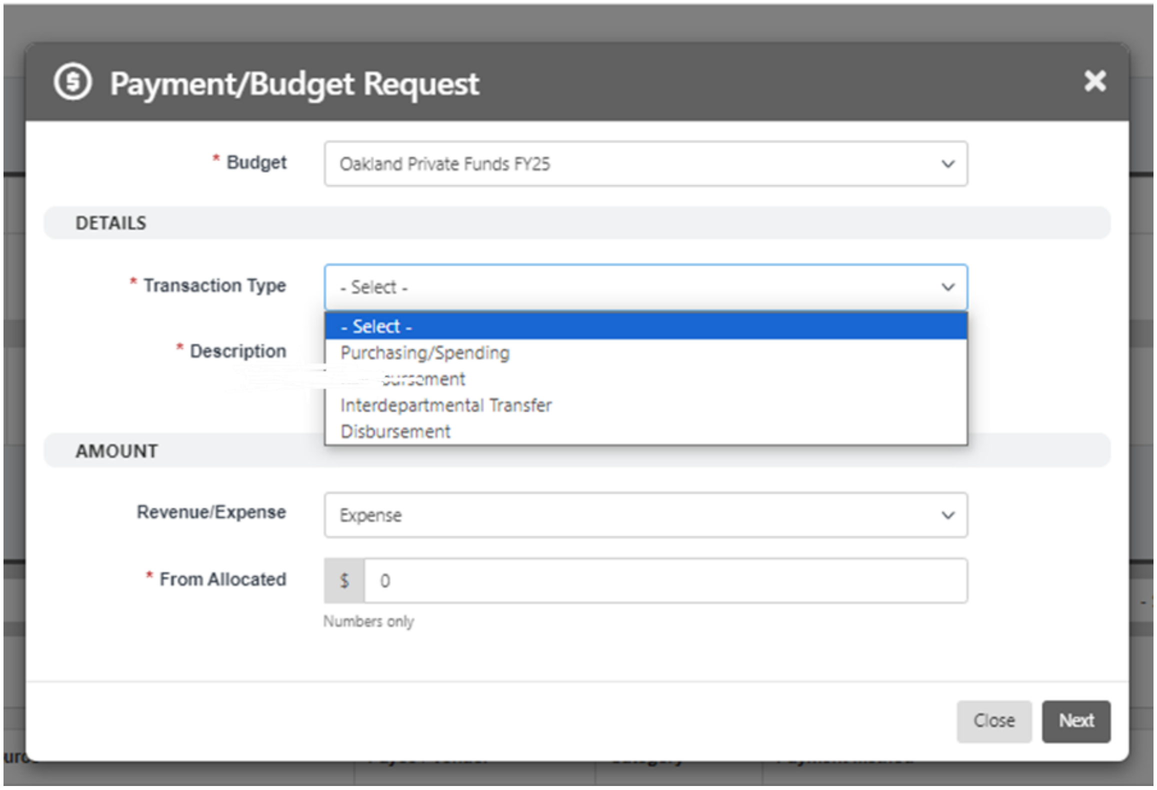
STEP 3: Accounting Book

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



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





- Budget: Here various budgets may be displayed. Your private funds, SGB Allocation Budget, or any other source of income will be displayed. Please select the budget you wish for the expense to be charged.
- 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 estimated cost of the expense (please include the cost of shipping etc. Any additional expenses). This does not mean you are utilizing funds from your SGB Allocation Budget. Unfortunately, this is a set title within the system that cannot be changed.
- Click Next

STEP 4: Approval & Explanation of Transaction

- You will see a page that explains what each transaction request means. Select what best describes the transaction you wish to make. If you are unsure, please reach out to sorc2@pitt.edu.
- You must have 2 officers within your organization approve the request. SORC will not review your request until both officers have approved.

Insert new screenshot once Bob has updated

STEP 5: Budget & Payment Request Details

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

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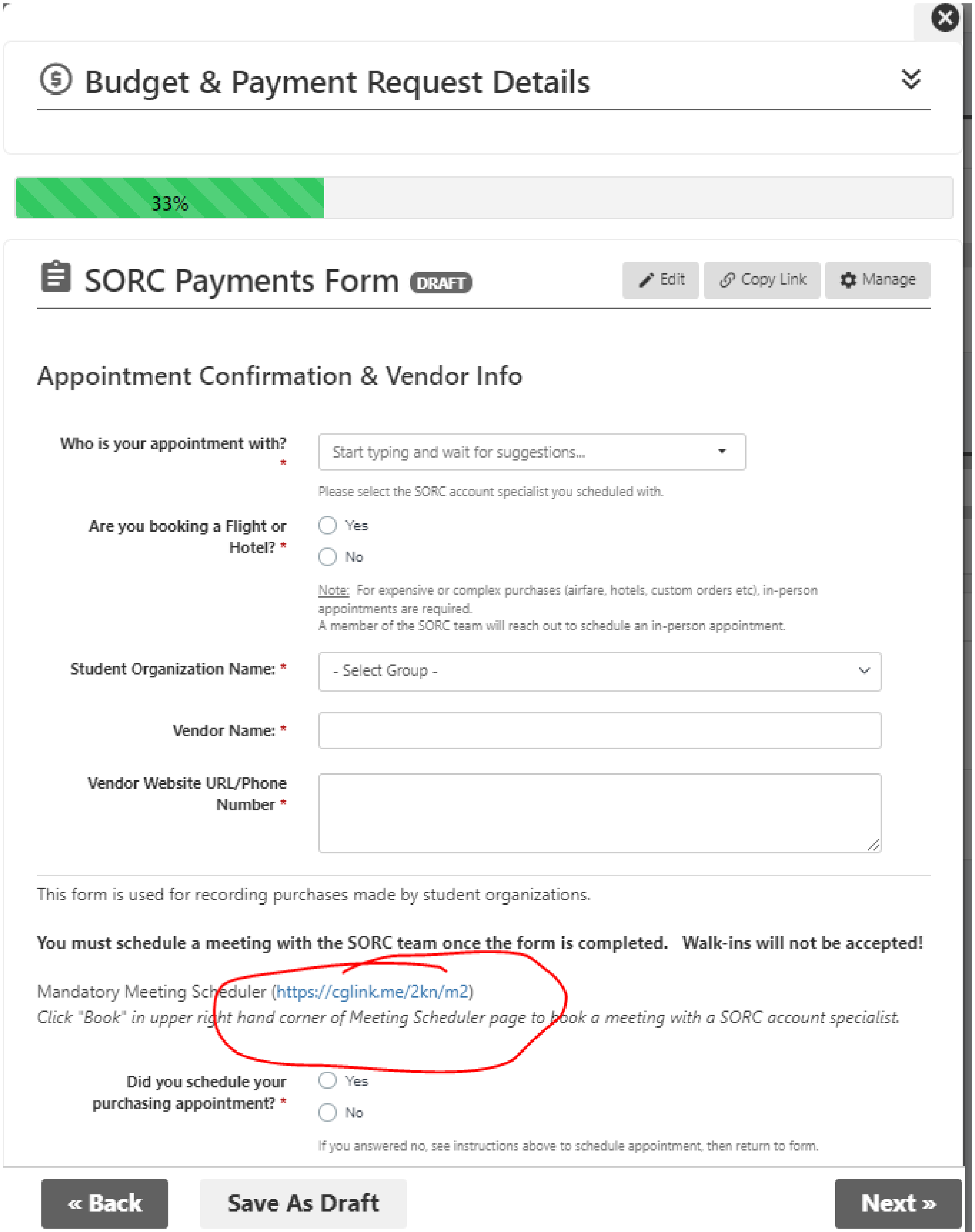
MAKING A PURCHASE REQUEST

- Please select purchase request when you would like something to be paid for with a university Credit Card for your organization.
- For purchase requests, the form below will be displayed.
- You must answer all questions that have a (*) 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).



Budget & Payment Request Details

33%

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.

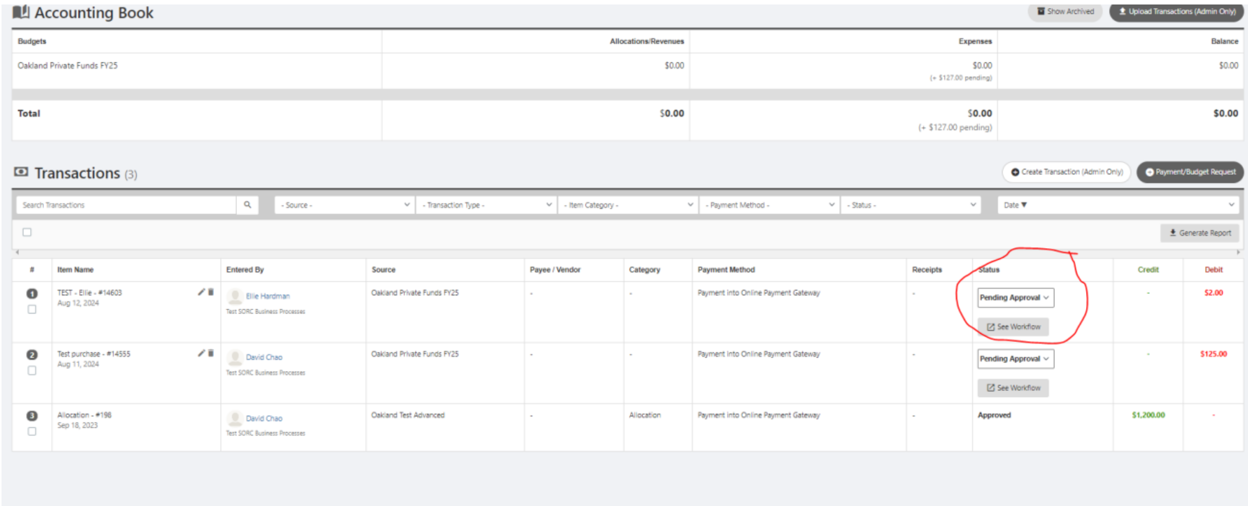
Did you schedule your purchasing appointment? *

- Yes
- No

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

« Back | Save As Draft | Next »

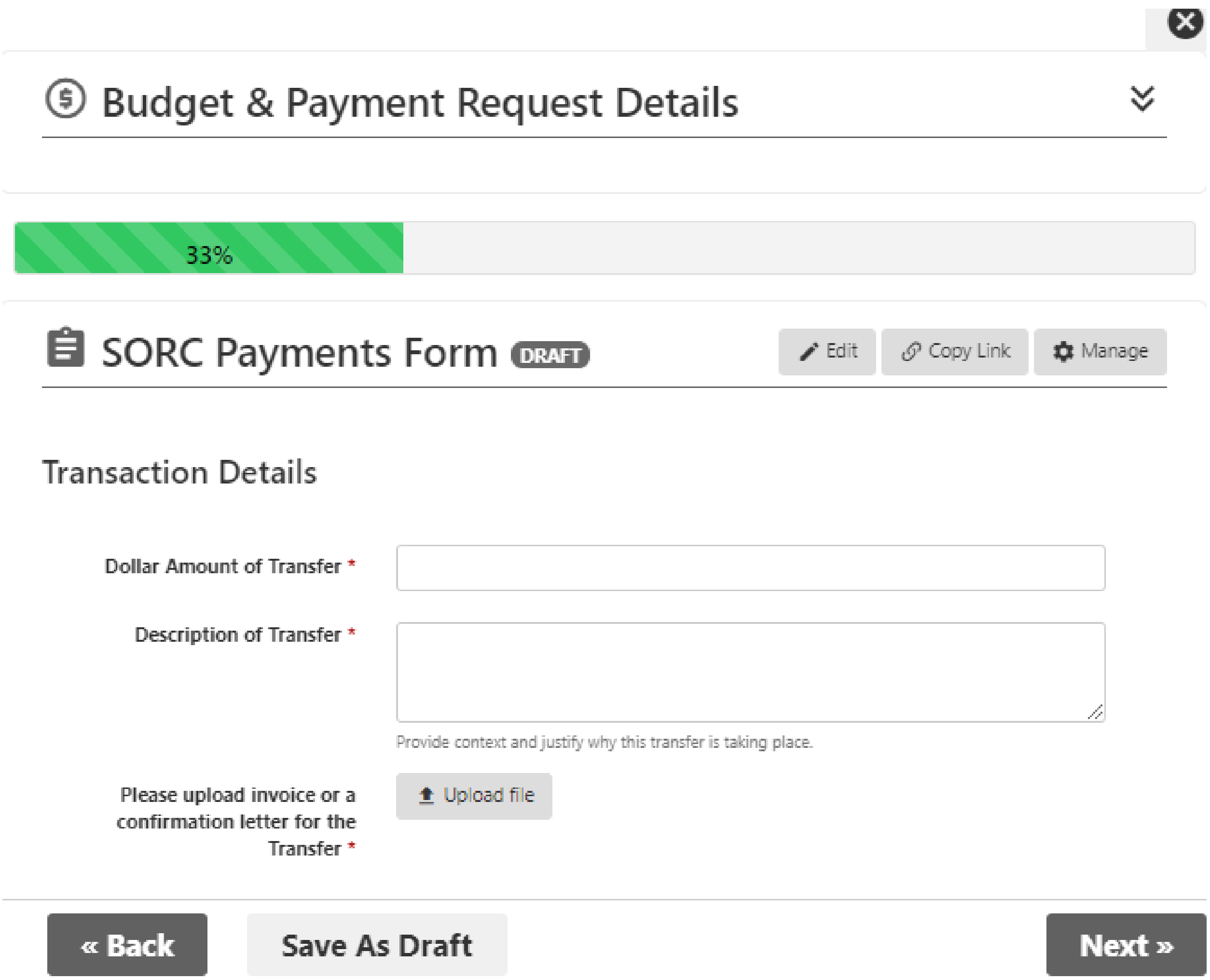
- Complete the form.
- Click Submit.
- Once you have submitted your request, it will be displayed in your accounting book:



- 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.

MAKING AN INTER-DEPARTMENTAL TRANSFER REQUEST

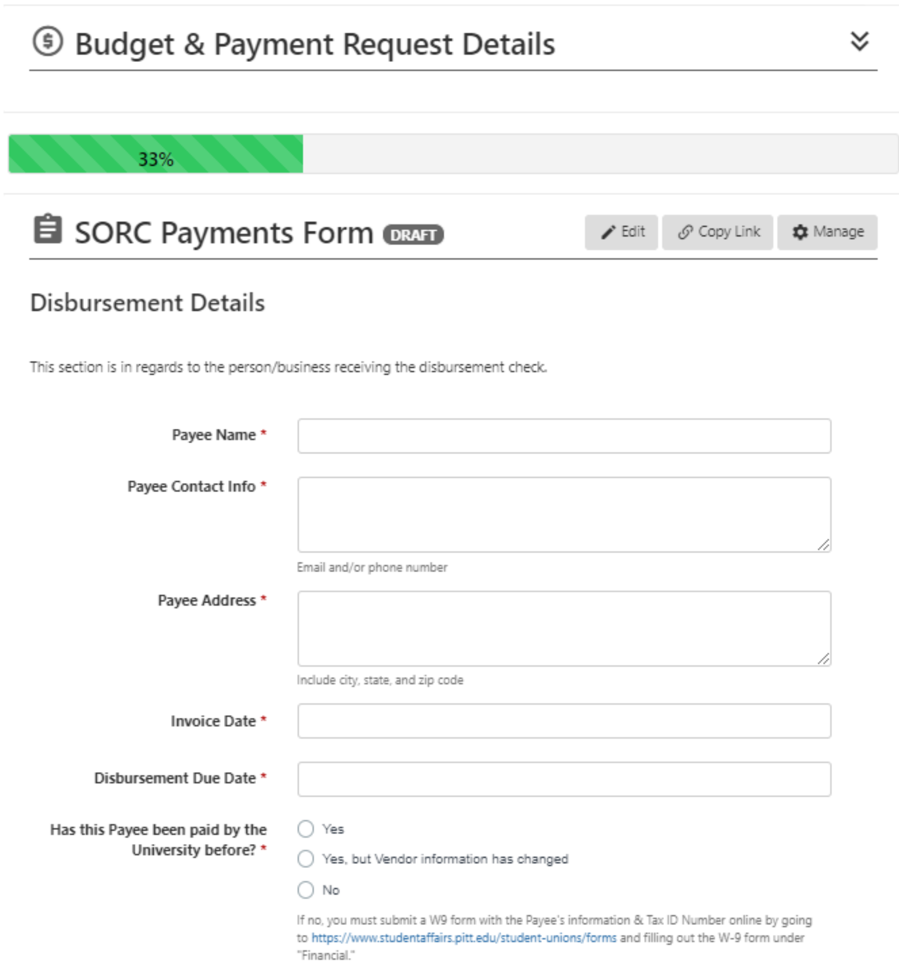
- An interdepartmental request is when an organization would like money to be transferred to or from a department or organization within the University,
- Typically, this is utilized when a department is sponsoring an organization, an organization needs to pay a department, or an organization is donating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



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

MAKING A DISBURSEMENT REQUEST

- A disbursement request is when an organization needs to pay a vendor via Check or credit card **BEFORE** the event has occurred. This option is typically when the vendor only accepts checks as a form of payment. Credit Card payments can be subject to a processing fee (often 2.5-3%).
- 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

33%

SORC Payments Form DRAFT

Edit | Copy Link | 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.