

SORC REIMBURSEMENT INSTRUCTIONS

To request a reimbursement, complete the Qualtrics form that can be found on the SORC Website - [Forms | Division of Student Affairs](#).

Request a reimbursement if you have already paid for something using your personal credit card/finances and what you purchased is related to your organization. You must request a reimbursement within **30-days of purchase**.

Please note, only the individual that made the payment/their name is associated with the payment method can request a reimbursement (e.g. if your parents card was utilized to pay for something, and it's their name on the card, they should be requesting the reimbursement).

When to request a reimbursement?

- We highly recommend booking a purchasing appointment and utilizing SORC's purchasing hours, where a university credit card is utilized rather than students paying out-of-pocket.
- If you cannot make a purchasing appointment and must make a payment in the meantime, a reimbursement should be requested when a student has utilized their personal debit/credit card/ personal finances to purchase something for their organization that is affiliated with SORC.
- A reimbursement request must be approved by an officer of the group.

Payment Timeline

- Receipts must be submitted within 30-days of purchase. Failure to do so will result in SORC denying your request.
 - If you have received a travel grant, your reimbursement must be submitted maximum 30 days after travel. Failure to do so may result in imputed tax.
 - If you have not received a travel grant but your reimbursement request is travel (hotel and flight), your reimbursement must be submitted maximum 30 days after travel. Please see page 4 for more information.
- Once your request has been reviewed and approved, it can take up to 60 days for payment to be received.

When to know prior to requesting a reimbursement?

- 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 payee's name and redacted irrelevant information would also be helpful as additional documentation.
- **Venmo or Payal receipts WILL NOT** be accepted, and your reimbursement will be denied.
- **GIFT CARDS or FLOWERS** cannot be reimbursed.
- If you are requesting a reimbursement that contains food, event purchases (venue rental, tickets etc.) or travel (hotel/flights), please submit a list of attendees.
- As the form is utilized through a platform called Qualtrics, it is not linked to your organization's accounting book.
- Reimbursements that have been approved and processed will be uploaded to the organization's Ex.P Accounting Book manually by a SORC staff member.

How to request a reimbursement?

- To submit a reimbursement, visit our website [Student Organization Resource Center | Division of Student Affairs \(pitt.edu\)](#) – select the “FORMS” tile - select “Request a Reimbursement”.

Page 1: Requestor and Approval Information

PAYMENTS FORM – Reimbursement

If an Organization Business 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 Organization Business Manager approve the form.

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

Requestor Information

Name

Pitt Email Address

The student who made the payment on their personal card should type their name and their Pitt email address into the box.

Student Organization Name

Select one

Please type in your organization name that the payment was made for. A drop down selection will appear.

Instructions: The organization manager will be prompted via email to approve the form. (If you are the organization manager, you still must enter your name/email and approve the form).

Organization Approval

Name

Pitt Email Address

Organization Approval – this is the officer of the group that will be approving your Reimbursement Request. As stated at the top of the form: If the reimbursement requestor is a member of the group (without a seniority position) you will place the business manager’s name in box 1 “NAME” and type their email address in box 2 “Pitt Email Address”.

If you are the requestor AND the organization business manager, you will place the presidents name and email address.

If you are the requestor AND the organization’s president, you will place your group’s business manager’s name and email address.

- Once you submit the form, the requestor will receive an email notifying them of their reimbursement submission.
- The organization approver will also receive an email which will prompt them to either approve or deny.
 - Approval should only be granted if all documentation looks correct, your organization has enough funds to cover the cost, and the purchase was made for solely organizational use
- Once the organization approver has approved, SORC will be notified of the reimbursement submission and process as soon as possible.

Page 2: Requestor Information

- The student who made the purchase and who is requesting the reimbursement must complete all information on page 2 of the survey:
 - The address must match the address stated on the individuals W9. This is important, as this is where your check will be mailed to.
 - Only Pitt employees can receive direct deposit.
 - If you were employed by Pitt in the past, but are no longer employed, you will be paid via Check.
- If this is your first reimbursement or your address has changed since your last reimbursement request, you must complete a new W9. The link to DocuSign is provided on the form, or can be found on the SORC website.
- If you are a foreign student but have a US bank account and a SSN, you can complete a W9.
- If you are a foreign student and do not have a US bank account or a SSN, you will have to complete a W8-BEN and wire transfer banking form. This can be found on the SORC website - [DocuSign](#).
- If you are employed by Pitt, you must select Employee/Student Worker/Faculty, this will impact how staff will process your reimbursement as you already have a direct deposit set-up through the university,
- If you select “employee, student workers, and faculty”, an additional page will follow, and you will be prompted to select how a staff member can access your Concur account to process your reimbursement.

PAYMENTS FORM – Reimbursement

Payee Name and Address

Name

Address

City

State

Zip Code

Instructions: Must check the selected box and provide email and/or phone number

Payee Contact Information

Email Address

Phone Number (xxx-
xxx-xxxx)

NOTE: If this is your first reimbursement or your address has changed, you must submit a W9 form with the Payee's information & Tax ID Number online. [Click Here to submit W9 Form](#)

Is this your first reimbursement?

☐ Yes

☐ No – but my address has changed

☐ No

Please select your status at the University

☐ Employee, student workers, and faculty (already have direct deposit set up)

☐ Student

☐ Other

Page 3: Employee, Student Workers, and Faculty Concur Access

****Please disregard this section if you are not an employee, student worker, or faculty. This page will not be displayed if so.**

- You will be prompted to approve how staff can gain access to your concur report to process your reimbursement.
- Once a staff member has completed your reimbursement report within Concur, you will receive an email asking you to submit the report. Staff cannot submit the report on your behalf. If the report is not submitted, you will not be reimbursed.

PAYMENTS FORM – Reimbursement

Instructions: SAP Concur is the software utilized by Pitt to complete travel and expense reports to issue payments. If you are a student employee/employee of Pitt, a SORC staff member must create an expense report on your behalf within **YOUR** Concur Account.

We must gain your approval to access your Concur Account.

Here are the 2 options to give consent:

- **AN ADMINISTRATOR (PROXY ACCESS)** – SORC staff can access your account to create the reimbursement report without you having to do anything other than give consent on this form.
- **DELEGATE ACCESS** – You must delegate a SORC staff member to have access to your account. Please delegate both Reeves Brehm (rpb43@pitt.edu) and Dylan Vallo (dyv3@pitt.edu). How to delegate access can be found [HERE<Link>](#). If you choose to delegate and do not give access when submitting your reimbursement request, your reimbursement will not be processed by SORC until so.

What is your choice for Concur Access?

☐ An Administrator (Proxy Access)

☐ Delegate Access

Page 4: Travel and Travel Grants

- The only exception to the 30-day from purchase date policy is travel and travel grants.
- If you have not received a travel grant, but you are requesting a reimbursement for travel (hotel or flight), your travel must have occurred prior to your request. Once travel has occurred, you have 30-days to submit your reimbursement request.
 - For example, I booked and paid for a flight on January 1st. My travel dates are May 1st- May 6th. I have 30-days from May 6th to submit receipts.
- If receipts are not within 30 days, but you were awarded a travel grant, please select yes. You will be prompted to confirm the amount awarded and to submit your award documentation on the next page.
- If you have received a travel grant, your reimbursement must be submitted maximum 30 days after travel. Failure to do so may result in imputed tax.

PAYMENTS FORM - Reimbursement

SORC will not accept reimbursements if receipts are 30 days or older and this is not a travel grant reimbursement.

Please reach out to SORC2@pitt.edu if you have any additional questions/disputes.

Instructions: Only travel grants from GPSG or SGB are exempt from the 30-day policy.

Are the dates on the receipts within 30 days?

☐ Yes

☐ No

Was a travel grant awarded for the expense?

☐ Yes

☐ No

Page 4: Purchase Information

PAYMENTS FORM – Reimbursement

Please include the following information:

Date of Purchase:

Instructions: List this information for all purchases if there is more than one.

Description of Expense:

Location of Purchase:

Are the funds private or allocated?

☐ Private

☐ Allocated

Instructions: If funds are allocated, name the allocation here. If purchase is partially allocated and partially private funds, provide the breakdown here. Note any other important information relating to your purchase here.

Comment Box:

Total Reimbursement Amount

Documentation: How many documents are you providing?

☐ One

☐ Two

☐ Three

☐ Four

☐ Five

Please note the date of purchase (date noted on the receipt). If you have more than one purchase, please use the oldest date on receipt.

Please be as descriptive as possible – the reasoning for the purchase. If it was towards an event, please include the event name.

The location of purchase will most likely be Pittsburgh, unless travelling. If it is an online purchase, please put the location of where you were making the purchase at the time (locations of the device you are paying off).

Select Allocated if the purchase was made towards an awarded SGB/GPSG Allocation or funded through a Grant. The purchase must match a line item noted on the SGB/GPSG Allocation award. Please include line number and description of allocation in the comment box.

All other requests will be Private.

Total reimbursement amount must equate to the total amount shown on receipts.

If you have more than 5 documents to submit, please combine into one PDF/Document. 5 is the maximum amount that the survey allows.

Page 5: Uploading Documentation and Submit

- You will be prompted to upload all documentation.
- Once all documentation has been uploaded, you will be prompted to submit the form.
- Once submitted, you will receive an email notifying you that your submission is under review.

It's been 6 weeks and I have not received payment. What do I do?

- Double check your organization's accounting book to see if your reimbursement is listed.
- If it is listed, a Concur report number will be noted:

<input type="checkbox"/>		
#	Item Name	Entered By
1 <input type="checkbox"/>	Pizza Order for OB/GYN Interest Group Introductory Meeting on August 13, 2024 - #17773 Oct 10, 2024 Ref Number: Concur Report 614841	David Chao Student Executive Council of the School of Medicine
2 <input type="checkbox"/>	Catering for Affinity Group welcome dinner - #17774 Oct 10, 2024 Ref Number: 612629	David Chao Student Executive Council of the School of Medicine
3 <input type="checkbox"/>	Water/ice - #17775	

- Please contact Payment Processing on 412-624-3578 and reference the Concur Report Number. They will be able to tell you where your payment is.
- If it is not listed in your accounting book, it is most likely that it has not been processed due to the work volume, however we encourage you to email SORC2@PITT.EDU. A member of staff will look into your request and get back to you as soon as possible.
- For more instructions about the SORC online reimbursement form, click [here](#), or visit our SORC website (sorc2@pitt.edu).