Child Welfare Education for Baccalaureates (CWEB)
Expense Reimbursement Guide
for CWEB Students
2023-2024

Child Welfare Education and Research Programs (CWERP)

School of Social Work, University of Pittsburgh

The Child Welfare Education and Research Programs are a collaborative effort of the University of Pittsburgh, School of Social Work and its partner schools, the Pennsylvania Department of Human Services, and the Pennsylvania Children and Youth Administrators

CWEB Expense Reimbursement Guide

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Remember Your Important CWEB Contacts

School Questions	Dr. Brooke Rawls	bnr21@pitt.edu
Reimbursement Questions	Mr. Joe DiPasqua	jfd28@pitt.edu
Internship Questions	Professor Laura Borish	lbb14@pitt.edu
Overall Program Operations	Dr. Helen Cahalane	hcupgh@pitt.edu

Introduction

Welcome to the CWEB expense system, all of which is online.

You must enter your expenses online at **www.cwerp.pitt.edu** (the same portal you already use to enter your Student Information). You will digitally sign a signature sheet and then email it with receipts and other supporting documents to cwerp@pitt.edu

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TIPS: *Before Completing Your Expense Report Online*

✓ **Read this entire Expense Reimbursement Guide!!!**
✓ Download and read the Expense Report PowerPoint presentation on the CWERP website
✓ Consultations are available for those having technical difficulties by contacting Joe DiPasqua at jfd28@pitt.edu

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Prerequisites

To access the Online Expense Report, you will need to have provided the following:

a) Course and internship information for the semesters you are in the CWEB program in the Child Welfare Education and Research Programs (CWERP) Student Information System (SIS) at **www.cwerp.pitt.edu**.
b) Current or previous Child Welfare Course Information

TIP: *Completing Your CWEB Information*

✓ This includes entering 'No courses' for any semester in which you do not have classes or internship.

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c) Permission to Release Student Information form (FERPA) (except for Pitt students)
d) CWEB Contract (completed online through DocuSign)

General Requirements

1. **CWEB funds run from July 1st to June 30th each year.** Submissions for expenses from a previous fiscal year <u>cannot</u> be honored in a new fiscal year once the prior year's funds have been closed out. If a book expense was incurred BEFORE you came into the CWEB program, please contact Dr. Brooke Rawls for approval.

2. It takes **at least six weeks** to completely process reimbursements, from the time we authorize your reimbursement request until you receive a check from the University of Pittsburgh. (Reimbursement checks are processed and issued by the University, not directly by the CWEB Program.)

   Processing takes longer around holiday periods, winter breaks, the fiscal year end (June 30) and other times when all university offices are closed.

   Please wait at least 6 weeks after submission (or resubmission of corrections) to inquire about the progress of your book reimbursement.

3. Incorrectly completed expense reports or issues with supporting documentation will require correction and resubmission.

4. When submitting Expense Reports, only record book expenses for which you have receipts.

5. When you have completed the online portion of the process, email the **signed** signature page together with your supporting receipts and/or documents.

   a) Include **all relevant** receipts.
   b) Remember to keep a copy of your receipts for your own records.

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Expense Report Statuses

1. Expired Expense Reports

    a) If, after 60 days, a student has not submitted supporting documentation for their expense report, they will receive an email from CWERP.
    b) At that that time a student will have 15 days to send in all supporting documentation for an Expense Report.
    c) After 15 days, if documentation is not received or the student has not contacted CWERP, the Expense report status will be changed to "Expired."
    d) If an expense report has expired, the student will have to create a new Expense Report to be reimbursed for those expenses.

2. Expense Reports and the End of the Fiscal Year

    a) Any expense reports still in created status or without supporting documentation will expire at the end of the fiscal year (June 30th).
    b) This includes Expense Reports created on or prior to June 30th in the fiscal year.
    c) Expense reports for the prior fiscal year submitted after the start of the new fiscal year will not be accepted or reimbursed.

3. Rejected Expense Reports

    a) An Expense Report will be rejected when submitted expenses are **not** allowable under program policy

Logging In to CWERP STUDENT INFORMATION SYSTEM (SIS)

Go to www.cwerp.pitt.edu

Enter your CWERP Username and password (created at time of application)

If your log-in attempt is unsuccessful, you will receive the above message in red. Try entering your information again. If you have forgotten your password, you can click the highlighted link to receive your password by email.
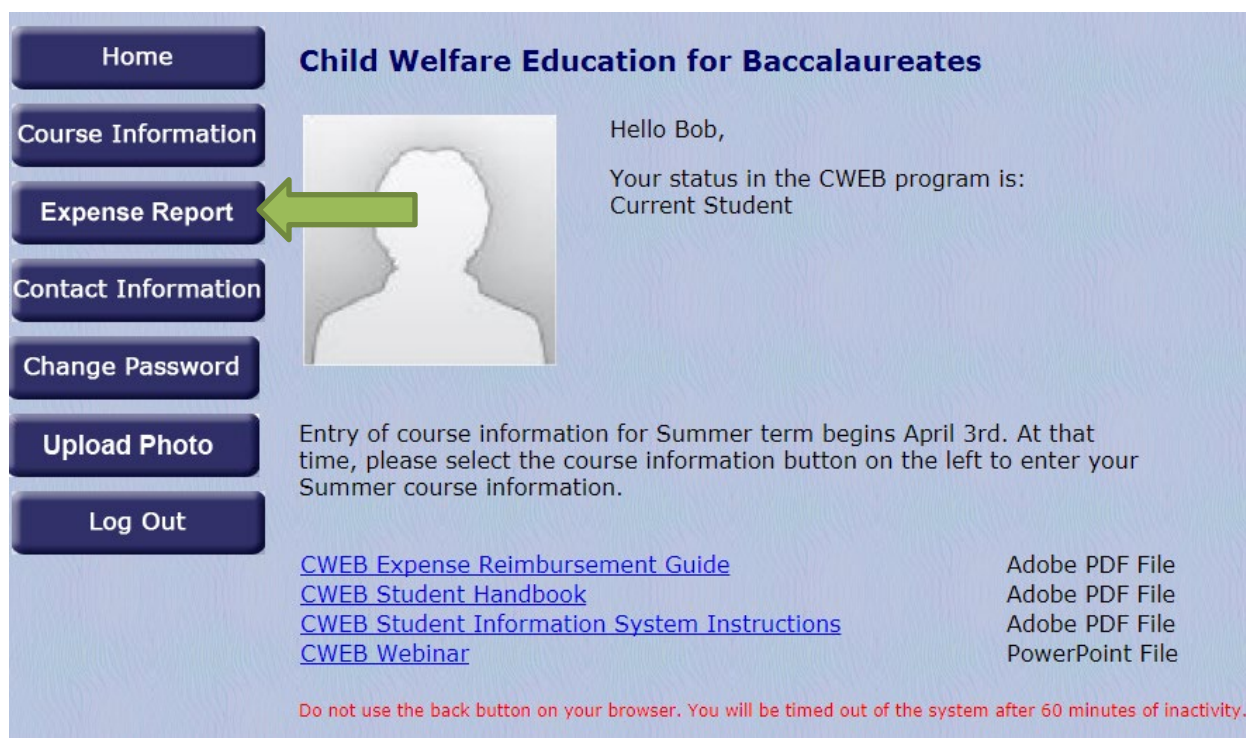
> **TIP!**
> When navigating between Online Expense Report pages DO NOT use the back button on your browser. Instead, use the "Back" and "Next" buttons located at the bottom of each page.
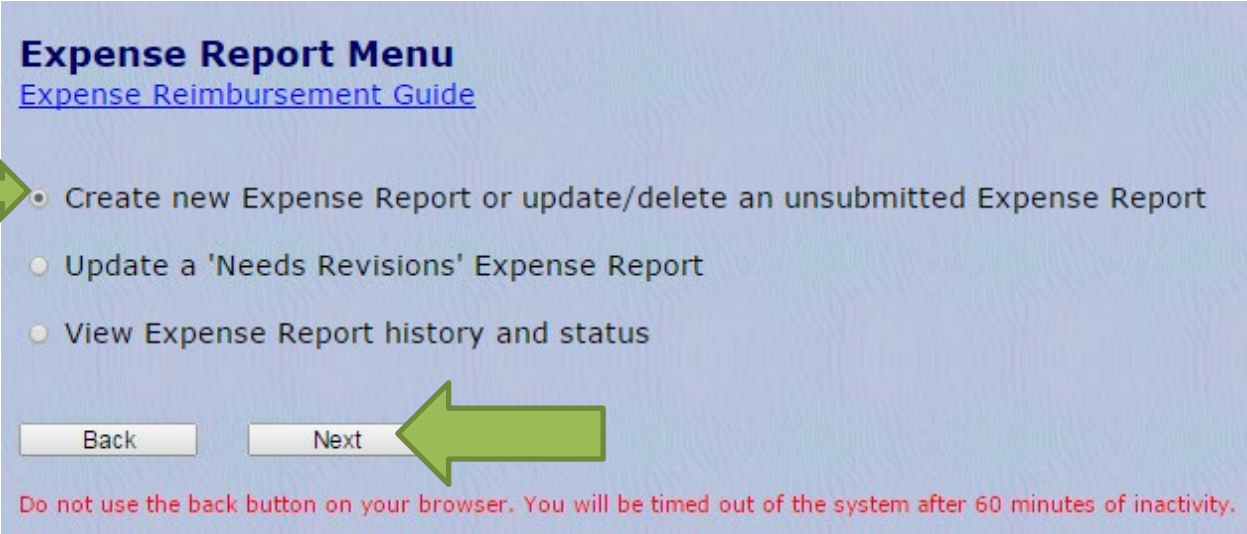>
>
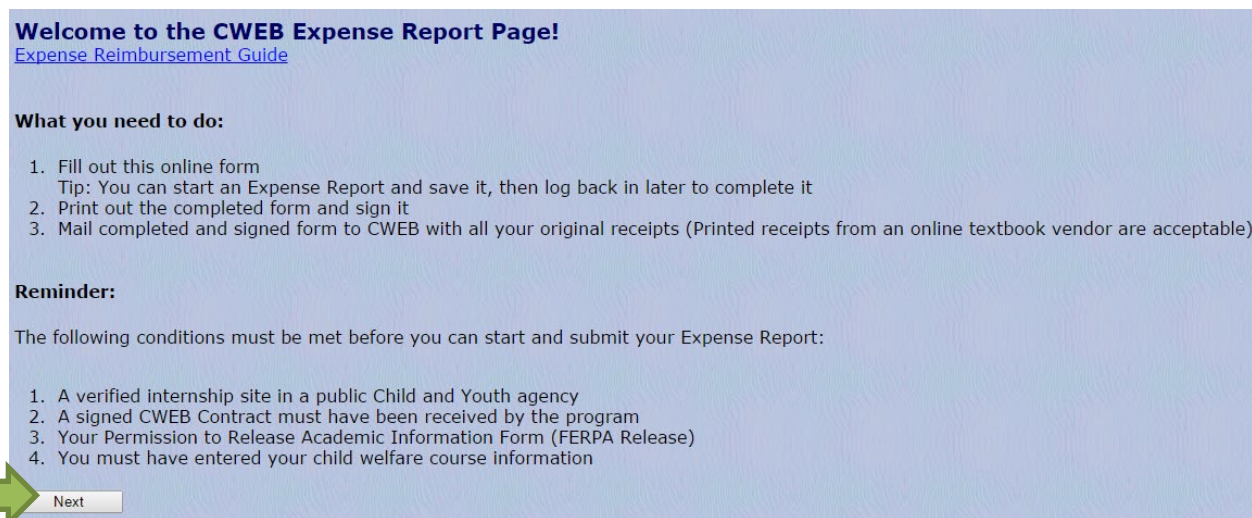
Accessing the Expense Report

Once you have successfully logged into the site, you will reach this **Welcome Screen**. From here, click on the **Expense Report** button, highlighted above.

Read all the instructions on the screen and click **"Next".**

Creating a New Expense Report
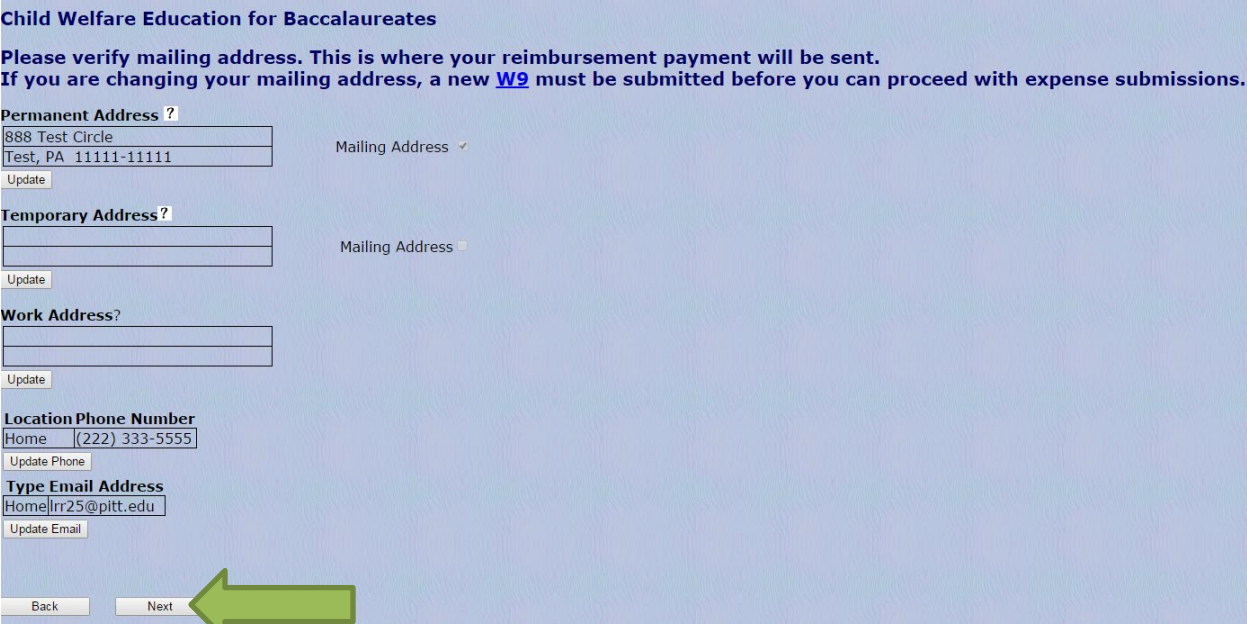
Click on **"Create New Expense Report"** and then **"Next".**

At this screen, verify that all your contact information is correct. If the information is not correct, click the appropriate update button. When you are ready to proceed, click **"Next"**.

Book Expenses

1. $100 is allocated towards books for your Child Welfare course. Students must purchase books and supplies directly and submit an Expense Report; funds cannot be disbursed ahead of time.

2. If you do not use all your $100 book allowance, you may use the remaining funds to purchase another child welfare-related book.

3. Keep in mind that anything over $100 cannot be reimbursed. You will be able to see your balance as you enter your expenses.

4. If you rent a book and wish to purchase it at the end of the rental period, you may do so as long as the total price (initial rental price plus buyout) does not exceed the book's cover price. CWEB will reimburse you up to the amount of the original purchase price.

> **EXAMPLE**
>
> You rented a textbook book for $65 and the original purchase price is $100. At the end of the rental period you may submit for the remaining $35 of the original price should you choose to convert your rental into a purchase.

a) Receipts or other documents must show:
   a. Vendor name
   b. Date of purchase (**not** the shipping date)
   c. Amount
   d. How you paid for the item
      Examples: Cash, credit card, check, money order.
   e. Proof that payment has been made
      Examples:
      i. For checks, proof that check was cashed (copy of both sides of your cashed check or a bank statement)
      ii. NOT a packing slip, which usually does not show amount or proof of payment
   f. Itemized description of items purchased
   g. If ordering in someone else's name or using someone else's credit card, please indicate their relationship to you.

Child Welfare Education for Baccalaureates
Book Expense
Sample Book Receipt
Expense Reimbursement Guide

Allowed expense   100.00
Submitted expense   0.00
Pending expense   0.00
Remaining balance   100.00

* Click 'Add' button to insert new information into the table.

	Expense Date	Vendor	Description	Amount $
* Add Cancel	7/30/2016	Amazon	Child Welfare Book	78.57

Back   Next

Enter book/supply expenses on the day incurred. Enter the **Expense Date**, **Vendor** (Amazon, Wal-Mart, etc.), **Description** (books) and **Amount**. If there is more than one vendor for a particular day, enter all vendor names (e.g. Amazon/Wal-Mart). Once you have finished entering your expense **YOU MUST CLICK "ADD"** to save the entered information. When you have finished entering your book/supply expenses click **"Next".**

Glossary of Book/Supply Expense Terms

==Allowed Expense== - amount of your book allowance.

==Submitted Expense== - expenses previously submitted, approved and processed by CWERP

==Pending Expense== - expenses that have been submitted but are pending CWERP approval

==Remaining Balance== - amount of your book allowance left after subtracting both pending and submitting expenses from allowed expense.

Review Page

At this screen, please carefully review all the currently entered Expense Report information. You can make revisions by using the **"Back"** button. Use the **"Select"** button to edit a corresponding expense line. After clicking **"Select"** you will be taken to the appropriate Expense Report entry screen where you will be able to make changes.

If your Expense Report is correct or you have made necessary changes click **"Next".**

Submission

CWEB Expense Reimbursement

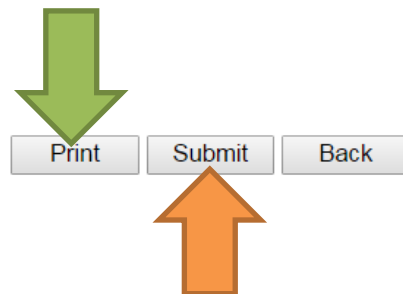After printing use SUBMIT button to finish processing expenses.

Student Name: Weber, Bob C.	Expense ID: 3033
Address: 888 Test Circle	CWERP ID: 22222
Test, PA 11111-11111	

[Print] [Submit] [Back]

Expense Date	Expense Category	Expense Description	Expense Amount
7/30/2016	Book	Vendor: Amazon, Description: Child Welfare Book	$78.57

Expense Summary

Books	$78.57
Total Expense:	**$78.57**

I attest that expenses listed here are valid and conform to the provisions established in the Travel and Business Expense Policy and expenses have not been paid through a Business Travel Request, Disbursement Request, Travel Advance or outside organization.

_____

Student Signature

| Check!	➡	Print!	➡	Submit!

- ✓ **Check** that your expense report totals are correct one last time.

- ✓ **You must next** click **"Print"** to print a copy of your CWEB Expense Reimbursement. This print out MUST be signed and sent to CWEB with all necessary supporting documentation.

- ✓ **After you have printed the page**, click **"Submit"** to complete the online reimbursement process.

Child Welfare Education for Baccalaureates

Expense Reimbursement Guide

Expense Report# 51483 has been successfully submitted.

This screen confirms that your expense report has been successfully submitted to cwerp@pitt.edu. Please record your Expense Report number for future reference.

Sign	➡	Attach receipts	➡	Email!
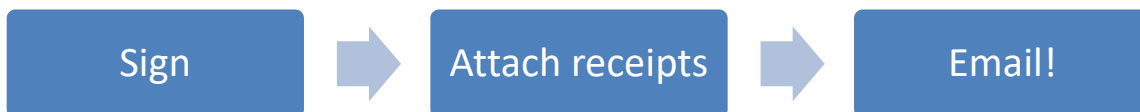
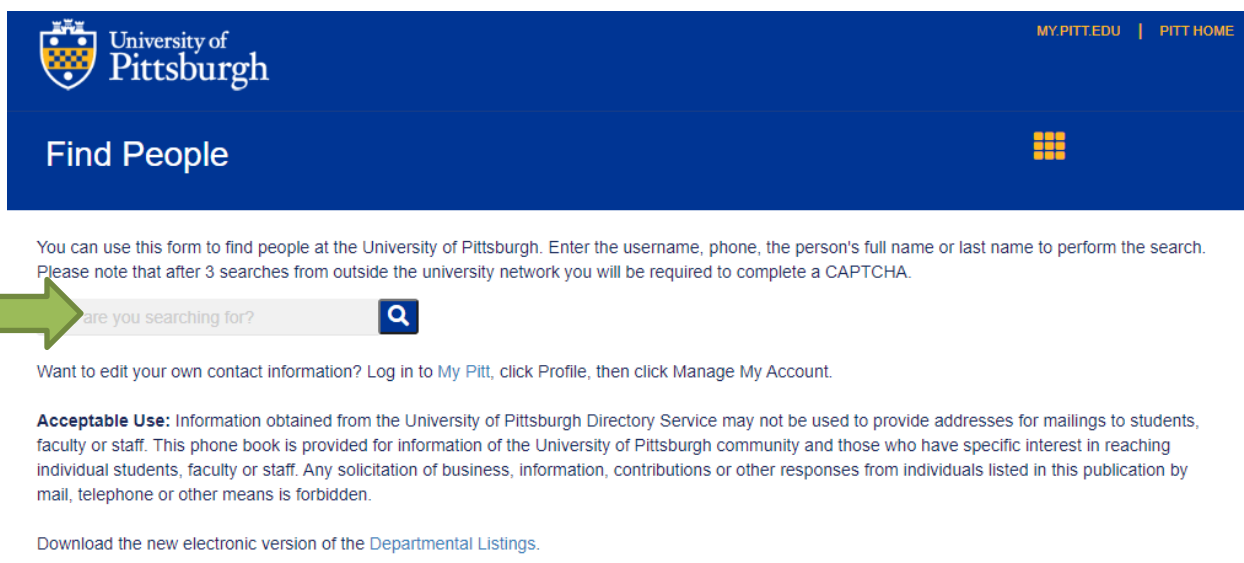Next, sign the printed Expense Report and email to CWEB with all the necessary supporting documentation.

If your CWEB fellowship was paid directly by your internship county you must complete and forward a W9 to Joe DiPasqua at jfd28@pitt.edu. Once you have forwarded the W9, your signature page, and supporting receipts there are no more steps for you to take.

If your CWEB fellowship was **not** directly paid by your internship county, soon after you have emailed your Expense Report and supporting documentation, you will receive an email directing you to the University of Pittsburgh's Concur website. There, you will log-in using the credentials used to complete your PittWorx onboarding. If you have not set up those credentials yet, please follow the instructions below.

Once you have logged into Concur you will be able to approve your book expense by following the onscreen instructions. Once you have approved your expenses, the reimbursement process will be complete.

Setting Up and Logging into Concur

1.) Navigate to the University's Find People website, https://find.pitt.edu/. From there, type your name into the search bar.

2.) Your username will be your email address. For example: cli4@pitt.edu
Username: cli4

3.) To get your initial password you must call the Technology Help Desk at (412) 624-4357. You will be required to email (helpdesk@pitt.edu) or fax (412-383-7000) two forms of identification to obtain your password. One of the forms of identification **must** be a photo ID. Valid forms of ID include: passport, driver's license, voter registration cards, birth certificates, and social security card.

4.) Enter your University of Pittsburgh username and password at the University portal, my.pitt.edu. Enter your username and password and click "Submit."
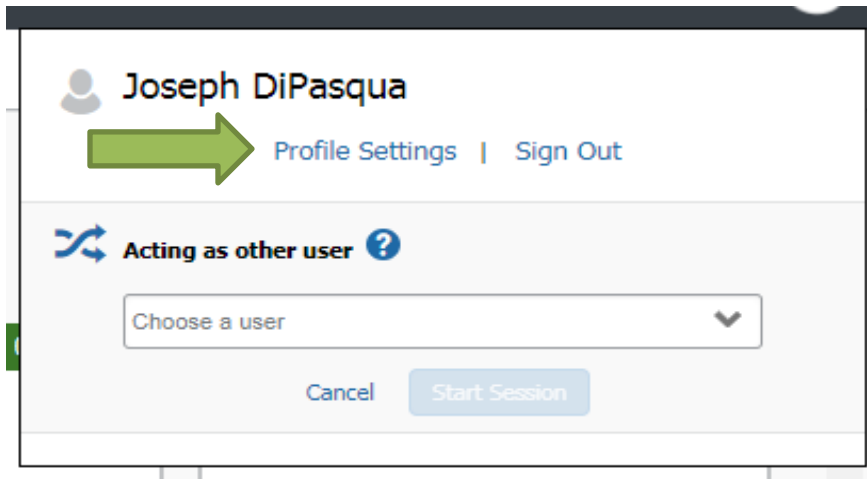

5.) Click on "Concur Travel & Expenses" located under "Most Popular" in the middle of the screen.
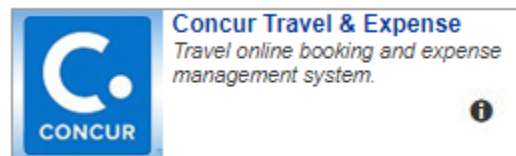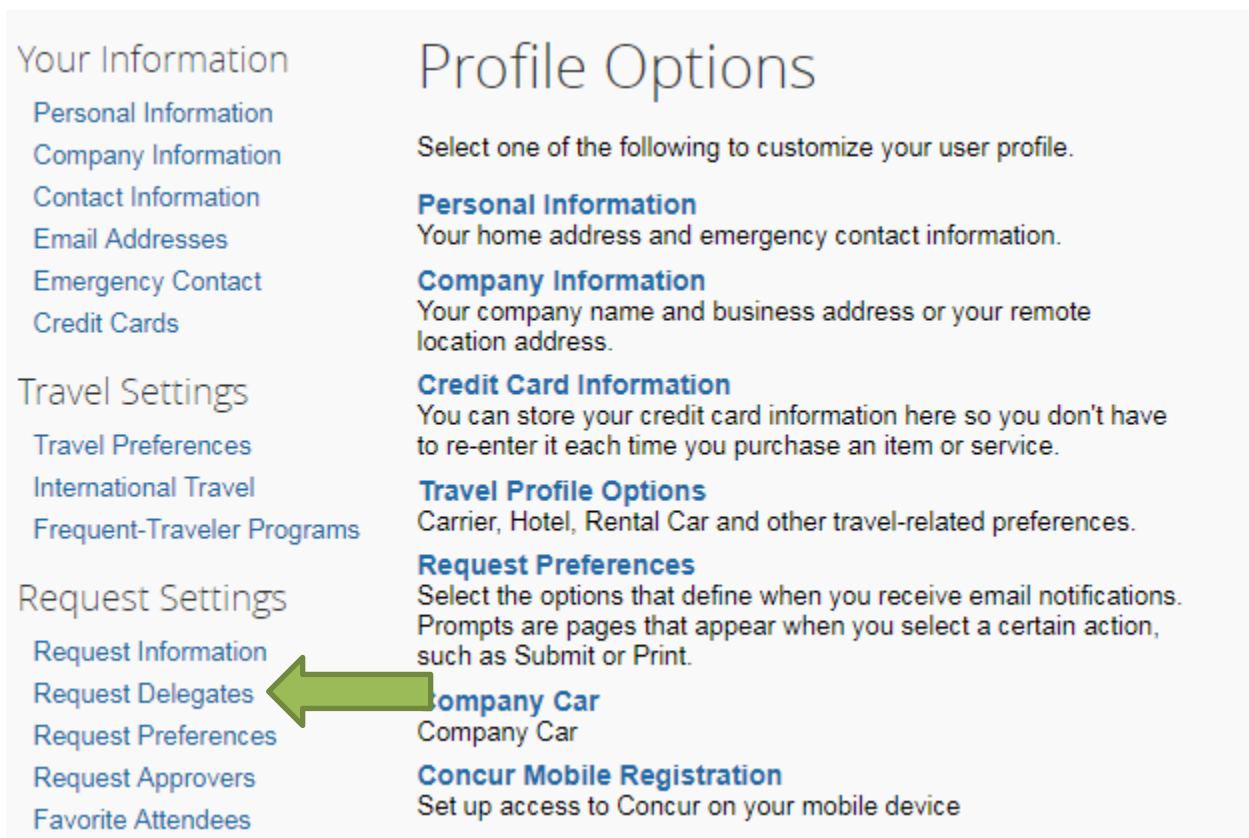

6.) One logged in, click profile in the top right corner of the screen
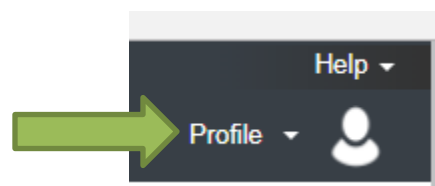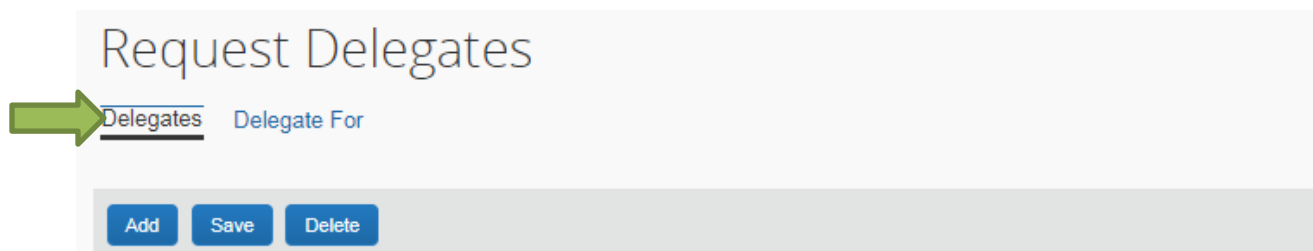
7.) Click profile settings

8.) Click request delegates under the "Request Settings" heading on the left side of the screen
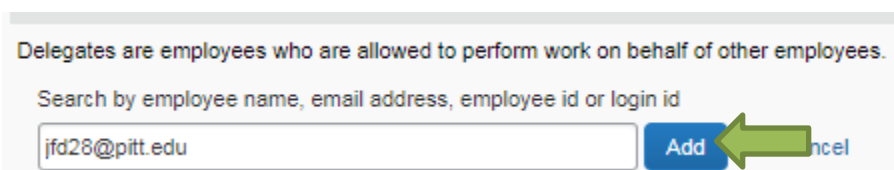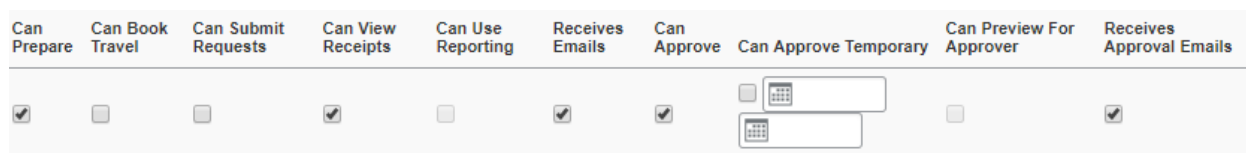
9.) Click "Add"

Request Delegates

Delegates   Delegate For

Add   Save   Delete

10.) Enter Joe DiPasqua's email, jfd28@pitt.edu, in the search bar and click "Add"

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

jfd28@pitt.edu   Add   ncel

11.) Once Joe has been added as a delegate, make sure the selections below are checked.

Can Prepare	Can Book Travel	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
✔	☐	☐	✔	☐	✔	✔	☐ 📅 / 📅	☐	✔

11.) One all selections have been added click "Save"

Request Delegates

Delegates   Delegate For

Add   Save   Delete

- Enter course/field Info
- Complete online expense process
- Email receipts & signed signature page
- Wait at least 6 weeks