Chrome River: Allocations and Project Codes for External User

When the first expense is added to an expense report, the Allocation and Project Code are selected

How to select the Allocation

- After adding an expense to a report and entering the expense information (date, amount, etc.), towards the bottom of the screen, is the Allocation field
  - Allocation is the Meeting the expense(s) will be charged to
- Click into the Allocation field
- Begin to type either the
  - Meeting Number, or
  - Meeting Name
- A list of options or the specific Meeting will appear
- Click on the appropriate Meeting
  - 1 Executive (Pre-Approved Funded Travel)
    - Use for any Pre-Approved Funded Travel not listed below
  - 3 Finance Grant/Funds Finance (Pre-Approved Zone/Grant Travel)
  - 19 Committee Assignment Meeting
  - 21 Spring Natl Meeting
  - 22 Summer Natl Meeting
  - 23 Fall Natl Meeting
  - 24 Insurance Summit
  - 26 Commissioner’s Conference
  - 27 Commissioner Fly-In
  - 28 Commissioner Roundtable
  - 29 International Insurance Forum
  - 72 Financial Regulatory Services
- The Allocation selected will automatically populate on additional expenses added to the report

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How to select the Project Code

- Once the Allocation is selected, a field under Allocation will display
- Click into the field
- A drop-down list with Project Codes will populate
- Select the appropriate Project Code for the expense by
  - Typing the name of the Project Code, or
  - Scrolling through the list of options
  - Select the Project Code that corresponds with the Meeting
    - All Commissioners DC Fly-In
    - Commissioners Conference
    - Committee Assignment Mtg
    - Disaster Relief
    - Fall National Meeting
    - Insurance Summit
    - Interim Exec Comm Mtg-Mid Year Updt
    - International Fellows
    - Intl Forum, DC
    - MAWG Meeting
    - NIPR Travel/Exp
    - Spring National Meeting
    - Summer National Meeting
    - US Asia Pacific Forum
  - For travel or expenses not related to a specific Meeting listed above, select
    - “General Domestic Travel” for domestic travel or expenses, or
    - “General International Travel” for international travel or expenses
- The Project Code selected will automatically populate on additional expenses added to the report
How to change the Allocation or Project Code

- Click into the Allocation field and select another Meeting Name/Number using the instructions above
- Click into the Project Code filed and select another Project Code using the instructions above