

# Chrome River: NAIC Funded Expense Report

## How to select the Report Type for NAIC Funded Travel & Expenses

- Click on the Report Type drop-down arrow, a list will appear
- **Select Commissioner/Regulator**
  - Commissioner and Regulator travel and expenses
    - Pre-Authorized NAIC Commissioner or Regulator travel and expenses approved by and paid by the NAIC, NIPR, or IIPRC

The screenshot shows the 'Expenses For' form with the following fields:

- Report Name: NAIC Meeting or Conference Name
- Pay Me In: USD - US Dollars
- Start Date: 11/15/2020
- End Date: 11/21/2020
- Business Purpose: Business Purpose
- Report Type: Commissioner/Regulator (highlighted with a red box)

## How to select the Travel Type for NAIC Funded Travel & Expenses

- Click on the Travel Type drop-down arrow, a list will appear
- Select the appropriate option based on the following criteria
  - **Cmsr/Reg Domestic Travel**
    - Commissioner and Regulator travel within all 50 U.S. States and Territories
    - Commissioner and Regulator non-travel expenses
  - **All International Travel**
    - Authorized NAIC Commissioner or Regulator travel outside the U.S. and U.S. Territories

The screenshot shows the 'Travel Type' dropdown menu with the following options:

- Cmsr/Reg Domestic Travel (highlighted with a red box)
- Select --
- Employee Domestic Travel
- Consumer Rep
- All International Travel
- Sales and Marketing Travel
- Midwest Grant Fund
- Western Grant Fund
- Northeast Grant Fund
- Southeast Grant Fund
- State Zone Fund
- State Restricted Training
- Zone Fund
- Zone Technical Training

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## How to select the Allocation for NAIC Funded Travel & Expenses

- After adding an expense to a report, towards the bottom of the screen, is the Allocation field
- Click into the Allocation field
- Begin to type either the
  - Department Number, or
  - Department Name
- A list of options or the specific department will appear
- Click on the appropriate Department based on travel or meeting:
  - 1 Executive (Pre-Approved Funded Travel)
    - Use for any Pre-Approved Funded Travel not listed below
  - 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

The screenshot shows a form for a 'Parking' expense. The form includes fields for Date (11/23/2020), Spent (35.00 USD), Business Purpose (Business Purpose), and Description (Optional). A 'Company Paid' checkbox is present and unchecked. Below the form, a blue instruction box reads: 'Please type the <CUSTOMER ALLOCATION DESCRIPTION> you type, a drop down list of matching items will be displayed for select'. At the bottom, the 'Allocation' dropdown menu is open, showing 'executive' as the selected item. Below the dropdown, a list of suggestions is visible: '1 Executive' and 'Executive'. The 'Allocation' section is highlighted with a red border.

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## How to select the Project Code for NAIC Funded Travel & Expenses

- 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 corrsponds 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

Allocation

1 Executive Executive

General

General Domestic Travel

General International Travel