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

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
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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
  o Department Number, or
  o Department Name
• A list of options or the specific department will appear
• Click on the appropriate Department based on travel or meeting:
  o 1 Executive (Pre-Approved Funded Travel)
    ▪ Use for any Pre-Approved Funded Travel not listed below
  o 19 Committee Assignment Meeting
  o 21 Spring Natl Meeting
  o 22 Summer Natl Meeting
  o 23 Fall Natl Meeting
  o 24 Insurance Summit
  o 26 Commissioner’s Conference
  o 27 Commissioner Fly-In
  o 28 Commissioner Roundtable
  o 29 International Insurance Forum
  o 72 Financial Regulatory Services
• The Allocation selected will automatically populate on additional expenses added to the report
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 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