

Chrome River: Report and Travel Types

During the initial set up of a new expense report, two fields to complete are Reporting Type and Travel Type

How to select the Report Type

- Click on the Report Type drop-down arrow, a list will appear
- Select the appropriate option based on the following criteria:
 - Employee:
 - NAIC, NIPR, or IIPRC Employee
 - Zone/Grant:
 - Zone – Commissioner and Regulator travel and expenses
 - Approved by the Zone and paid from Zone Funds
 - Grant – Commissioner and Regulator travel and expenses for NAIC sponsored education and training programs
 - Approved by the State and paid from State Grant Funds
 - Commissioner/Regulator:
 - Commissioner and Regulator travel and expenses
 - Approved by and paid by the NAIC, NIPR, or IIPRC
 - Consumer Reps:
 - Consumer Liaison Representatives approved travel and expenses

Expenses For

Report Name: Conference

Pay Me In: USD - US Dollars

Start Date: 11/15/2020

End Date: 11/21/2020

Business Purpose: Conference

Report Type: -- Select --

Travel Type: -- Select --, Employee, Zone/Grant, Commissioner/Regulator, Consumer Reps

How to select the Travel Type

- Click on the Travel Type drop-down arrow, a list will appear
 - The Travel Type codes the expenses to the Account Number
- Select the appropriate option based on the following criteria
 - **Employee Domestic Travel**
 - Employee travel within all 50 U.S. States and Territories
 - Employee non-travel expenses
 - Expenses will be coded to Account Number **59000**
 - **Consumer Rep**
 - Consumer Liaison Representative travel and non-travel expenses
 - Expenses will be coded to Account Number **59001**

Travel Type: -- Select --

Employee Domestic Travel

Consumer Rep

Cmsr/Reg Domestic Travel

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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- **Cmsr/Reg Domestic Travel**
 - Commissioner and Regulator travel within all 50 U.S. States and Territories
 - Commissioner and Regulator non-travel expenses
 - Expenses will be coded to Account Number **59100**
- **All International Travel**
 - Employee travel outside the U.S. and U.S. Territories
 - Authorized NAIC Commissioner or Regulator travel outside the U.S. and U.S. Territories
 - Expenses will be coded to Account Number **59150**
- **Sales and Marketing Travel**
 - Employee travel and expenses associated with Sales and Marketing
 - Expenses will be coded to Account Number **59200**
- **Midwest, Western, Northeast, or Southeast Grant Funds**
 - Commissioner and Regulator travel, and/or education and training expenses for
 - NAIC sponsored education and training program
 - NAIC sponsored meetings
 - Expenses will be coded to the corresponding Zone Account
- **State Zone Fund**
 - Commissioner and Regulator travel, and/or education and training expenses for
 - NAIC sponsored education and training programs
 - NAIC sponsored meetings
 - Expenses will be coded to Account Number **75075**
- **State Restricted Training**
 - Commissioner and Regulator travel, and/or education and training expenses funded by a vote of zone technical training funds allocated to the state
 - Expenses will be coded to Account Number **75076**
- **Zone Fund**
 - Commissioner and Regulator travel expenses funded by a vote of zone technical training funds to attend Zone Conferences
 - Expenses will be coded to Account Number **82000**
- **Zone Technical Training**
 - Commissioner and Regulator travel expenses funded by a vote of zone technical training funds
 - Expenses will be coded to Account Number **82050**