

# Chrome River: Zone/Grant Funds Expense Report

## How to select the Report Type for Zone/Grant Fund Travel & Expenses

- Click on the Report Type drop-down arrow, a list will appear
- **Select 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

The screenshot shows the 'Expenses For' form in Chrome River. The form includes fields for Report Name (NAIC Meeting or Conference Name), Pay Me In (USD - US Dollars), Start Date (11/15/2020), End Date (11/21/2020), and Business Purpose (Business Purpose). The 'Report Type' dropdown menu is highlighted with a red box and is currently set to 'Zone/Grant'.

## How to select the Travel Type for Zone/Grant Fund Travel & Expenses

- Click on the Travel Type drop-down arrow, a list will appear
- Select the one of the following options, based on the criteria below:
  - **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
  - **State Zone Fund**
    - Commissioner and Regulator travel, and/or education and training expenses for
      - NAIC sponsored education and training programs
      - NAIC sponsored meetings

The screenshot shows the 'Travel Type' dropdown menu in Chrome River. The menu is open, showing a list of options. The options are: -- 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, and Zone Technical Training. The options from 'Midwest Grant Fund' to 'Zone Fund' are highlighted with a red box.

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- **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
- **Zone Fund**
  - Commissioner and Regulator travel expenses funded by a vote of zone funds to attend Zone Conferences
- **Zone Technical Training**
  - Commissioner and Regulator travel expenses funded by a vote of zone technical training funds

## How to select the Allocation for Zone/Grant Fund 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 the following:
  - For **State Grant Fund** travel and expenses, **regardless of the meeting attended**, select
    - **3 Finance Finance Grant Funds**
    - Please ensure the Travel Type selected is one of the following
      - Midwest Grant Fund
      - Western Grant Fund
      - Northeast Grant Fund
      - Southeast Grant Fund

The screenshot shows a form titled "Parking" with the following fields:

- Date:** 09/02/2021
- Spent:** 35.00 USD
- Business Purpose:** Business Purpose
- Description (Optional):** (Empty text area)
- Company Paid:**

Below the form, there is a blue instruction box: "Please type the <CUSTOMER ALLOCATION DESCRIPTION> you would like to use. As you type, a drop down list of matching items will be displayed for selection".

The **Allocation** field is highlighted with a red box. It contains the text "finance" and a dropdown menu showing "3 Finance Finance Grant Funds".

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- For **Zone Funds or Training Funds**, select
  - **90 Midwestern Zone**
    - Please ensure the Travel Type selected is one of the following
      - State Zone Fund
      - State Restricted Training
      - Zone Fund
      - Zone Technical Training
  - **91 Western Zone**
    - Please ensure the Travel Type selected is one of the following
      - State Zone Fund
      - Zone Fund
      - Zone Technical Training
  - **92 Northeastern Zone**
    - Please ensure the Travel Type selected is one of the following
      - State Zone Fund
      - Zone Fund
      - Zone Technical Training
  - **93 Southeastern Zone**
    - Please ensure the Travel Type selected is one of the following
      - State Zone Fund
      - State Restricted Training
      - Zone Fund
      - Zone Technical Training
- The Allocation selected will automatically populate on additional expenses added to the report

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## How to select the Project Code for Zone/Grant Fund 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

The screenshot shows a web interface with a header 'Allocation'. Below it, a dropdown menu is open, showing a search bar with the text 'General' and a list of options: 'General Domestic Travel' and 'General International Travel'. A red rectangular box highlights the entire dropdown menu area.