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

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
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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
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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
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