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

o   Zone – Commissioner and Regulator travel and expenses

    Approved by the Zone and paid from Zone Funds

o   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/F2 12 Tf1 0 1 504 2538 m GC 62 reW*nBT/F3 12 Tf1 0 1 362538 m5/F2 12 Tf1 0 1 504 2538 m GC 62

Select Zone/Gr/F4 12 Tf 1 0 0 1 77.54122.93 Tm 0 0 G [( )] TJ ET Q q 0.000011802 0 792 612 re W* n BT /F2 12 Tf 1 0 0 1 90.024 3122.93 Tr

o State Restricted Training

Chrome River: Zone/Grant Funds Expense Report

o For **Zone Funds or Training Funds**, select

90 Midwestern Zone

Please ensure the Travel Type selected is one of the following
  - o State Zone Fund
  - o State Restricted Training
  - o Zone Fund
  - o Zone Technical Training

91 Western Zone

Please ensure the Travel Type selected is one of the following
  - o State Zone Fund
  - o Zone Fund
  - o Zone Technical Training

92 Northeastern Zone

Please ensure the Travel Type selected is one of the following
  - o State Zone Fund
  - o Zone Fund
  - o Zone Technical Training

93 Southeastern Zone

Please ensure the Travel Type selected is one of the following
  - o State Zone Fund
  - o State Restricted Training
  - o Zone Fund
  - o 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

- o Typing the name of the Project Code, or
- o Scrolling through the list of options
- o Select the Project Code that <u>corresponds with the Meeting</u>

    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

- o For travel or expenses <u>not related to a specific Meeting listed above</u>, 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