U. S. Coast Guard
Pay & Personnel Center
Direct Access II/Retired Global Pay
Self-Service

Retiree – Start/Change/Stop Allotment

Introduction

This document provides the procedure for starting, changing, and stopping an allotment in Direct Access II/Retired Global Pay Self-Service.

Before you Begin

If you haven't used Self Service before, please review the initial log-on instructions available at http://www.uscg.mil/ppc/ras/gp/ or in Issue 01/2010 of the ***Retiree Newsletter*** (http://www.uscg.mil/ppc/retnews/2010/January10newsletter.pdf).

Type of Allotments

You will be able to start, change, or stop one of the following allotments:

- Chief Petty Officer Association Dues (1)
- Coast Guard Academy Alumni Association Dues (1)
- Commercial Insurance (No Limit)
- Mutual Assistance Donation (1)
- Navy Mutual Aid Insurance (1)
- Home Loan / Mortgage / Rent - Repay Home Loans, Mortgages (No Limit)
- Savings (2)
- Support of Dependent (No Limit)
- Treasury Direct Savings Bond (1)
- Warrant Officer Association Dues (1)

Note: The information in parentheses represents the number of allotments you may have active for that type. The maximum amount of allotments you can have active at one time is 14.

Procedures on how to start an allotment begin on page 2.
Procedures on how to change an allotment begin on page 7.
Procedures on how to stop an allotment begin on page 10.

You will not be able to start, change, or stop the following allotments via Self Service:

- Federal Long Term Care Insurance (FLTCIP)
- Government Indebtedness
- Coast Guard Mutual Assistance Loan
- NSLI/USGLI Life Insurance
- TRICARE Retiree Dental Plan (TRDP)
- TRICARE Prime (Humana, Tri-West, or Healthcare)
- U. S. Family Health Plan (USFHP)
- Veterans Group Life Insurance (VGLI)

FLTCIP, NSLI/USGLI, TRDP, TRICARE Prime, USFHP, and VGLI allotments are processed by the vendors. The Government Indebtedness and Mutual Assistance Loan allotments are processed by PPC (RAS).

Continued on next page:

Retiree – Start/Change/Stop Allotment, Continued

Rules

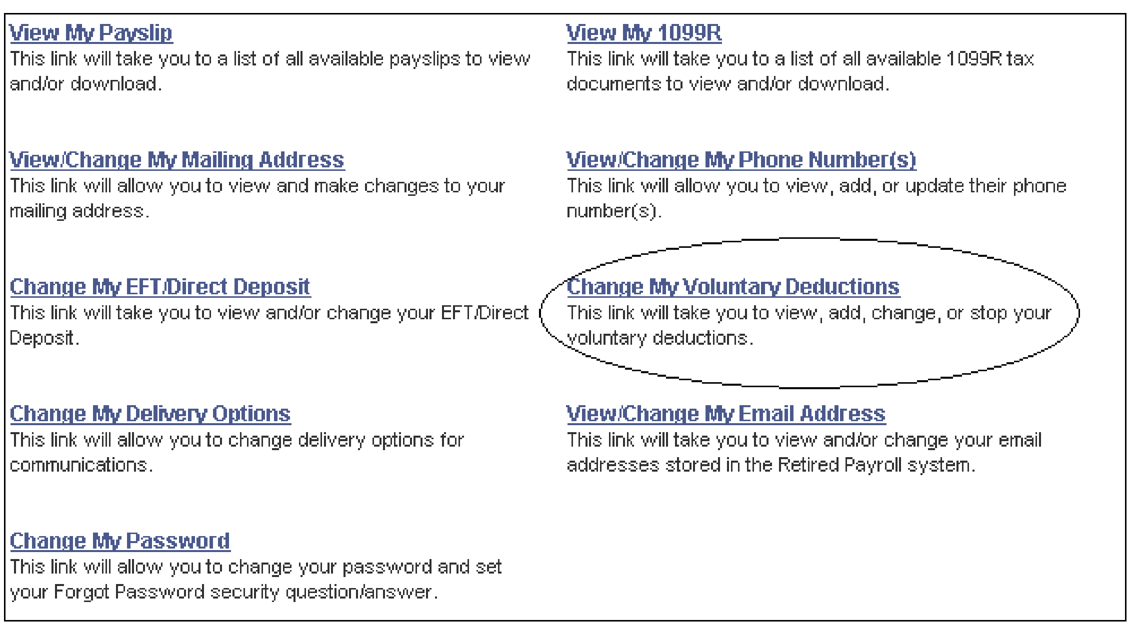
There are a few things to keep in mind when starting, changing, or stopping an allotment:

- Allotments by check will not be authorized (for starting new allotments).
- Foreign Wire transfers will not be authorized for savings allotments.
- When making a change to an allotment, you will only be able to change the amount of the allotment and the End Date of allotment (if applicable). If anything else needs to be changed, you will need to stop the allotment and start a new one up.
- You will not be able to start or change an allotment if you do not have available net pay to cover the allotment. If you are not able to start/change an allotment because the system won't let you, and you think you have available net pay to cover the allotment, contact PPC (RAS) and they will be able to start/change the allotment for you.

Procedures to Start an Allotment

Log into DA II Self-Service at https://ep.direct-access.us/psp/UCGP1PP/ and follow the steps below to start an allotment:

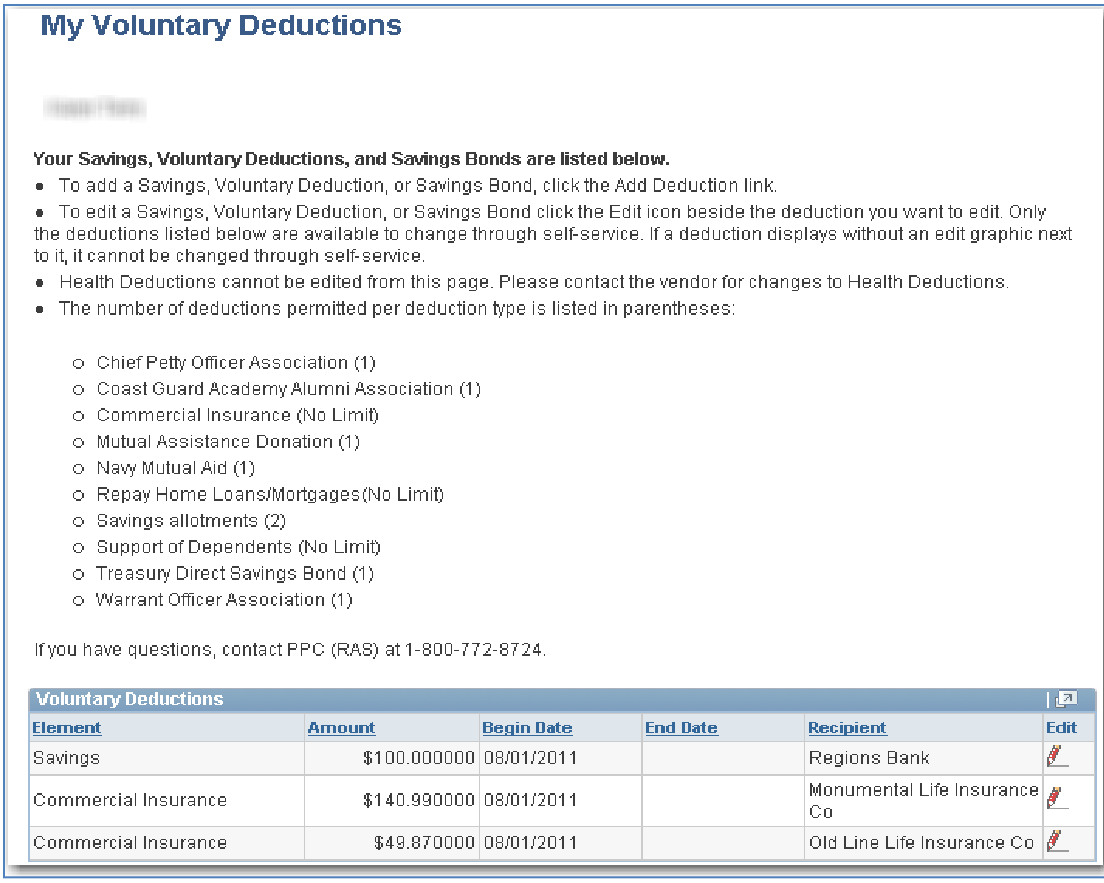
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select the "Change My Voluntary Deductions" link from the home page menu.



Note: In order to access this page, you must have the CG_SS_GP_RETMBR role assigned to you in order to update allotments via the Self Service Voluntary Deduction page. This role is automatically assigned to you when your retirement account is created in Global Payroll. If you get an unauthorized access error, please contact PPC (RAS) for assistance.</td></tr>
</table>

Continued on next page:

Retiree – Start/Change/Stop Allotment, Continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>The system will take you to the My Voluntary Deductions summary page.

My Voluntary Deductions
Your Savings, Voluntary Deductions, and Savings Bonds are listed below.

To add a Savings, Voluntary Deduction, or Savings Bond, click the Add Deduction link.
To edit a Savings, Voluntary Deduction, or Savings Bond click the Edit icon beside the deduction you want to edit. Only the deductions listed below are available to change through self-service. If a deduction displays without an edit graphic next to it, it cannot be changed through self-service.
Health Deductions cannot be edited from this page. Please contact the vendor for changes to Health Deductions.
The number of deductions permitted per deduction type is listed in parentheses:

Chief Petty Officer Association (1)
Coast Guard Academy Alumni Association (1)
Commercial Insurance (No Limit)
Mutual Assistance Donation (1)
Navy Mutual Aid (1)
Repay Home Loans/Mortgages(No Limit)
Savings allotments (2)
Support of Dependents (No Limit)
Treasury Direct Savings Bond (1)
Warrant Officer Association (1)

If you have questions, contact PPC (RAS) at 1-800-772-8724.
Voluntary Deductions
<table>
<tr><th>Element</th><th>Amount</th><th>Begin Date</th><th>End Date</th><th>Recipient</th><th>Edit</th></tr>
<tr><td>Savings</td><td>$100.000000</td><td>08/01/2011</td><td></td><td>Regions Bank</td><td></td></tr>
<tr><td>Commercial Insurance</td><td>$140.990000</td><td>08/01/2011</td><td></td><td>Monumental Life Insurance Co</td><td></td></tr>
<tr><td>Commercial Insurance</td><td>$49.870000</td><td>08/01/2011</td><td></td><td>Old Line Life Insurance Co</td><td></td></tr>
</table>

Note: All of your active allotments appear on this page. It will also show allotments that you cannot change or stop. For these types of allotments you will need to contact the Vendor for changes to FLTCIP, NSLI/USGLI, TRDP, TRICARE Prime, USFHP, and VGLI allotments; and PPC (RAS) for changes to Government Indebtedness and Mutual Assistance Loan allotments.</td></tr>
<tr><td>3</td><td>Click the Add Deduction link to start an allotment. Add Deduction</td></tr>
<tr><td>4</td><td>Click on the drop down arrow to the right of the Element Name field and select the type of allotment you want to start.

Element Name:

If an allotment type does not show, it means you already have the maximum amount of allotments for that type and the system will not let you start another one.
Note: If at any time you need to come out of the page (decided you didn't want to start the allotment or want to do it a later time), click the Return to Summary button. It will take you back to the summary page.
Return to Summary</td></tr>
</table>

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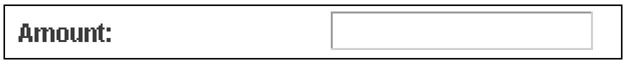
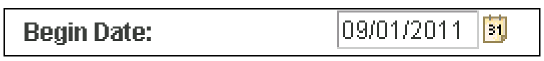
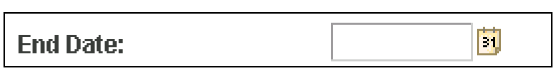
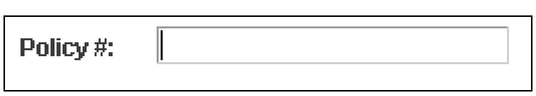
Retiree – Start/Change/Stop Allotment, Continued

Step	Action
5	In the Amount field, enter the amount of the allotment you want to start.  **Note:** Keep in mind; you cannot enter an amount that exceeds your net pay.
6	The Begin Date defaults to the first day of the current processing month. For example, if you are creating the allotment on 9/15/2011, the begin date will show 9/1/2011, since 9/1 is the first day of the September pay period. **EXCEPTION**: If you enter in a begin date for the current pay month and the pay period has already been finalized (after cutoff), the application will set the begin date to the first day of the next pay period.  **Note:** You may change the Begin Date to a future date, but the date entered must be the 1st of the month. For instance, you create the allotment on 9/15/2011 but don't want the allotment deducted from your pay until the November pay period; you would enter a begin date of 11/1/2011. The allotment will be deducted from your November retired pay and paid out on 12/1/2011.
7	Normally, the End Date field should be left blank, but if there is a need to enter it, enter it in this field.  **Note:** If an End Date is entered, it must be the last day of the month. For instance, if you want the allotment to be deducted in October 2011 but not for November 2011 pay period, then you should enter 10/31/2011.
8	If you are starting a Commercial Insurance or Repay Home Loans, or Mortgages allotment, and there is a policy number, enter it (otherwise leave it blank). Do not enter dashes or any other special characters in this field.  **Note:** For the following allotments, your SSN will appear in this field and cannot be changed: • Chief Petty Officer Association Dues • Coast Guard Academy Alumni Association Dues • Navy Mutual Aid Insurance • Warrant Officer Association Dues

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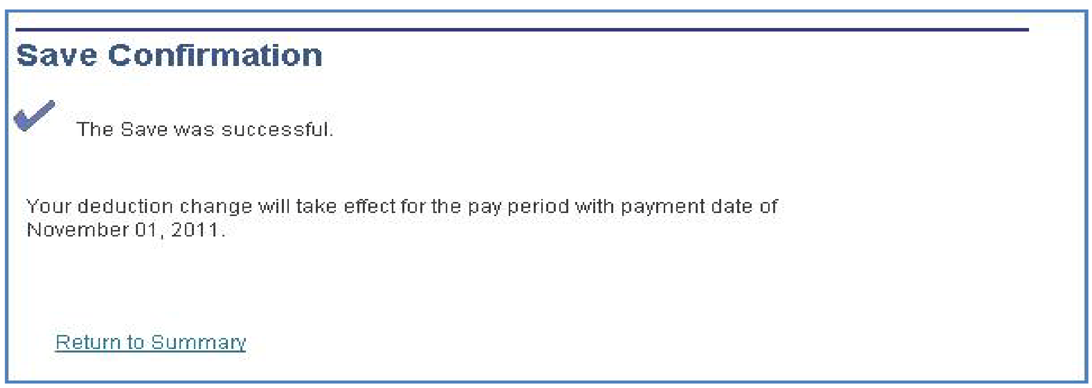
Retiree – Start/Change/Stop Allotment, Continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9</td><td>
If you are starting one of the allotments below, click the Save Deduction button (you may need to scroll down to see it).

- Chief Petty Officer Association Dues
- Coast Guard Academy Alumni Association Dues
- Mutual Assistance Donation
- Navy Mutual Aid Insurance
- Warrant Officer Association Dues

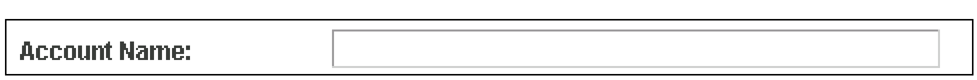
You should receive a Save Confirmation.



Click the Return to Summary Link and you'll see that the allotment has been created.

If you are starting any other type of allotment, proceed to the next step.
</td></tr>
<tr><td>10</td><td>
If you are starting one of the allotments below, enter the account holder's name within the Account Name field:

- Commercial Insurance
- Repay Home Loans, Mortgages
- Savings
- Support of Dependent



Note: For Treasury Direct Savings Bond, this field defaults to your name and is not updateable.
</td></tr>
<tr><td>11</td><td>
The Payment Method field will always show EFT and cannot be updated.

Note: All new allotments must be by EFT and cannot be by check.
</td></tr>
</table>

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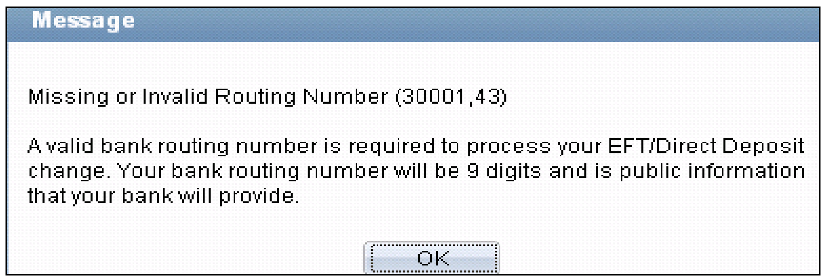
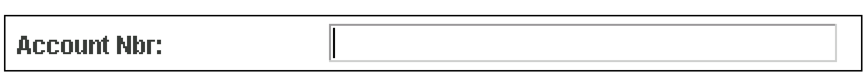
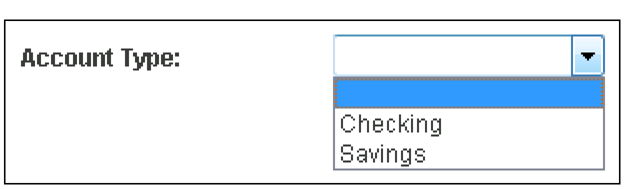
Retiree – Start/Change/Stop Allotment, Continued

Step	Action
12	Enter the bank routing number. • The routing number must be 9 digits. • If the number you entered does not match a valid number in the system, you will receive this error message after you press the Save Deduction button:  Ensure that you typed the number correctly. If it is correct, contact your financial institution to verify the ability to receive Treasury payments. If the institution verifies the routing number, contact PPC (RAS) for assistance. If the routing number you entered is valid, the name of the Bank will display in the **Bank Name** field.  **Note:** For Treasury Direct Savings Bond, this field is defaulted and is not updateable.
13	Enter the account number.  • The account number field cannot exceed 17 characters (letters and numbers are allowed). Do not enter dashes or any other special characters in this field. • You cannot specify the same account number that you already have for another allotment. It must be different than any of your other active allotments and different from the account where you net pay (direct deposit) is sent.
14	Select the account type of either checking or savings.  **Note:** For Treasury Direct Savings Bond, this field will be defaulted and is not updateable.

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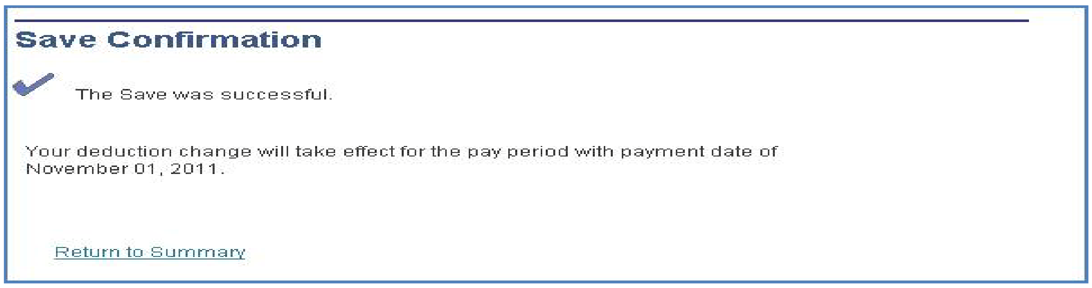
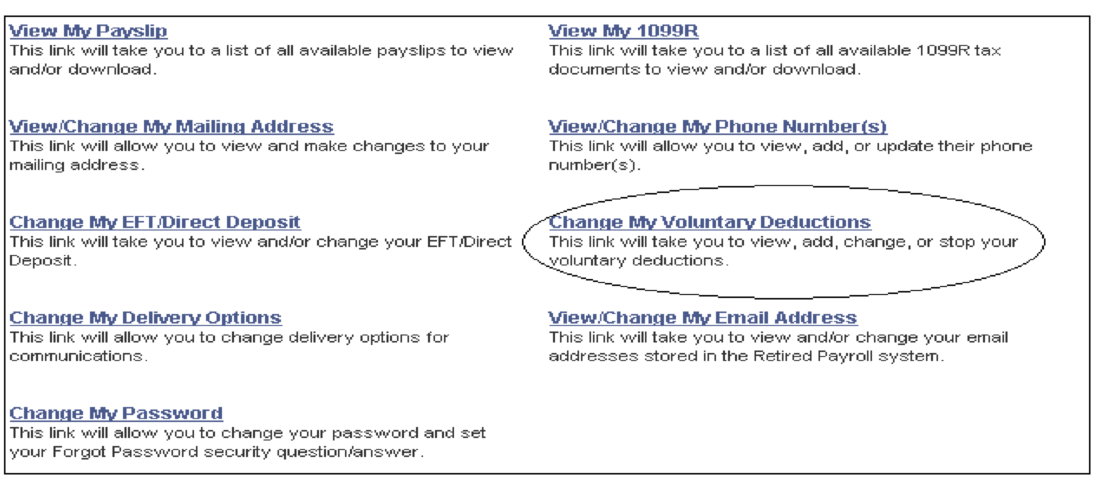
Retiree – Start/Change/Stop Allotment, Continued

Step	Action
15	Click the **Save Deduction** button (you may need to scroll down to see it).  You should see a Save Confirmation. 
16	Click the Return to Summary Link and the system will take you back to the Summary page. You should be able to see the allotment that was created.

Procedures to Change an Allotment

Log into DA II Self-Service at https://ep.direct-access.us/psp/UCGP1PP/ and follow the steps below to change an allotment:

Note: Remember, you can only change the amount of the allotment or the End Date. For all other changes, you will need to stop the allotment and start a new one up.

Step	Action
1	Select the "Change My Voluntary Deductions" link from the home page menu.  **Note:** In order to access this page, you must have the CG_SS_GP_RETMBR role assigned to you in order to update allotments via the Self Service Voluntary Deduction page. This role is automatically assigned to you when your retirement account is created in Global Payroll. If you get an unauthorized access error, please contact PPC (RAS) for assistance.

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Retiree – Start/Change/Stop Allotment, Continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>
The system will take you to the My Voluntary Deductions summary page.

My Voluntary Deductions

Your Savings, Voluntary Deductions, and Savings Bonds are listed below.

To add a Savings, Voluntary Deduction, or Savings Bond, click the Add Deduction link.
To edit a Savings, Voluntary Deduction, or Savings Bond click the Edit icon beside the deduction you want to edit. Only the deductions listed below are available to change through self-service. If a deduction displays without an edit graphic next to it, it cannot be changed through self-service.
Health Deductions cannot be edited from this page. Please contact the vendor for changes to Health Deductions.
The number of deductions permitted per deduction type is listed in parentheses:

Chief Petty Officer Association (1)
Coast Guard Academy Alumni Association (1)
Commercial Insurance (No Limit)
Mutual Assistance Donation (1)
Navy Mutual Aid (1)
Repay Home Loans/Mortgages(No Limit)
Savings allotments (2)
Support of Dependents (No Limit)
Treasury Direct Savings Bond (1)
Warrant Officer Association (1)

If you have questions, contact PPC (RAS) at 1-800-772-8724.

Voluntary Deductions
<table>
<tr><th>Element</th><th>Amount</th><th>Begin Date</th><th>End Date</th><th>Recipient</th><th>Edit</th></tr>
<tr><td>Savings</td><td>$100.000000</td><td>08/01/2011</td><td></td><td>Regions Bank</td><td></td></tr>
<tr><td>Commercial Insurance</td><td>$140.990000</td><td>08/01/2011</td><td></td><td>Monumental Life Insurance Co</td><td></td></tr>
<tr><td>Commercial Insurance</td><td>$49.870000</td><td>08/01/2011</td><td></td><td>Old Line Life Insurance Co</td><td></td></tr>
</table>

Note: All of your active allotments appear on this page. It will also show allotments that you cannot change or stop. For these types of allotments you will need to contact the Vendor for changes to FLTCIP, NSLI/USGLI, TRDP, TRICARE Prime, USFHP, and VGLI allotments; and PPC (RAS) for changes to Government Indebtedness and Mutual Assistance Loan allotments.
</td></tr>
<tr><td>3</td><td>
Click on the Edit icon for the allotment that you want to change the amount on.

<table>
<tr><th>Element</th><th>Amount</th><th>Begin Date</th><th>End Date</th><th>Recipient</th><th>Edit</th></tr>
<tr><td>Treasury Direct Savings Bond</td><td>$20.000000</td><td>09/01/2011</td><td></td><td>TreasuryDirect</td><td></td></tr>
<tr><td>Savings</td><td>$300.000000</td><td>09/01/2011</td><td></td><td>Veridian Credit Union</td><td></td></tr>
</table>
</td></tr>
<tr><td>4</td><td>
In the Amount field, enter the amount of the allotment you want it changed to:

Amount:

Note: Keep in mind; you cannot enter an amount that exceeds your net pay.
</td></tr>
</table>

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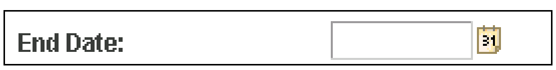
Retiree – Start/Change/Stop Allotment, Continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>
The Begin Date defaults to the first day of the current processing month. For example, if you are creating the allotment on 9/15/2011, the begin date will show 9/1/2011, since 9/1 is the first day of the September pay period.

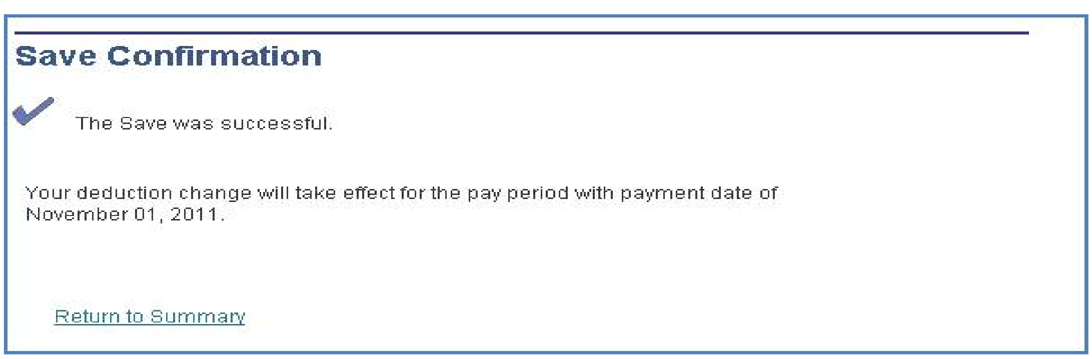
EXCEPTION: If you enter in a begin date for the current pay month and the pay period has already been finalized (after cutoff), the application will set the begin date to the first day of the next pay period.

Note: You may change the Begin Date to a future date, but the date entered must be the 1st of the month. For instance, you create the allotment on 9/15/2011 but don't want the allotment deducted from your pay until the November pay period; you would enter a begin date of 11/1/2011. The allotment will be deducted from your November retired pay and paid out on 12/1/2011.
</td></tr>
<tr><td>6</td><td>
Normally, the End Date field should not be changed, but if there is a need to change it, make the change in this field.



Note: If an End Date is entered, it must be the last day of the month. For instance, if you want the allotment to be deducted in October 2011 but not for November 2011 pay period, then you should enter 10/31/2011.
</td></tr>
<tr><td>7</td><td>
Click the **Save Deduction** button (you may need to scroll down to see it).

You should receive a Save Confirmation.



</td></tr>
<tr><td>8</td><td>Click the Return to Summary Link and the system will take you back to the Summary page. You should be able to see the allotment that was changed.</td></tr>
</table>

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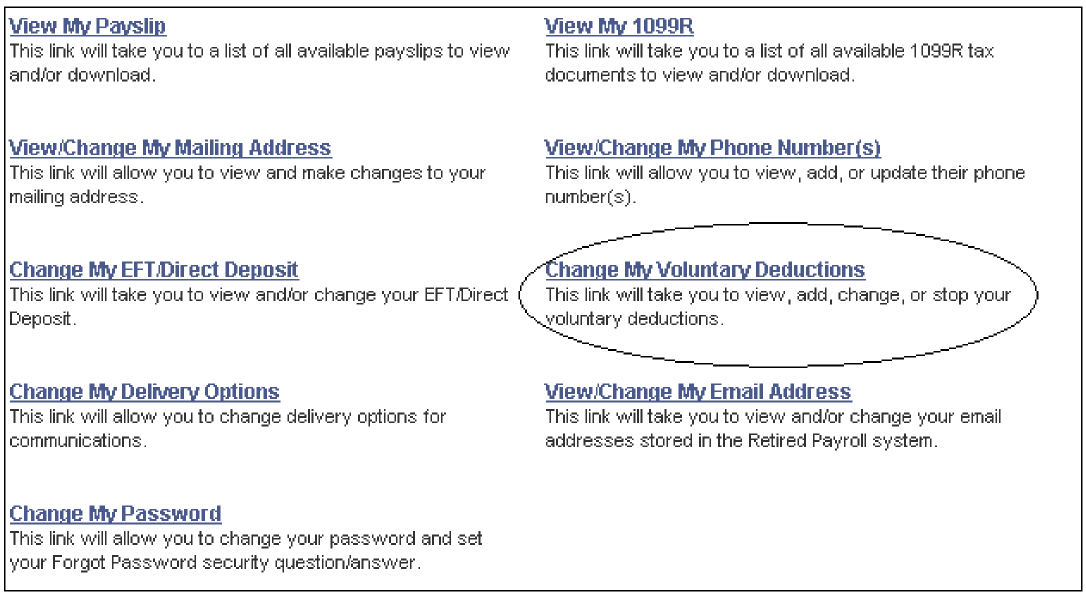
Retiree – Start/Change/Stop Allotment, Continued

Procedures to Stop an Allotment

Log into DA II Self-Service at https://ep.direct-access.us/psp/UCGP1PP/ and follow the steps below to stop an allotment:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select the “Change My Voluntary Deductions” link from the home page menu.



Note: In order to access this page, you must have the CG_SS_GP_RETMBR role assigned to you in order to update allotments via the Self Service Voluntary Deduction page. This role is automatically assigned to you when your retirement account is created in Global Payroll. If you get an unauthorized access error, please contact PPC (RAS) for assistance.</td></tr>
</table>

Continued on next page:

Retiree – Start/Change/Stop Allotment, Continued

Step	Action
2	The system will take you to the My Voluntary Deductions summary page.

My Voluntary Deductions

Your Savings, Voluntary Deductions, and Savings Bonds are listed below.

- To add a Savings, Voluntary Deduction, or Savings Bond, click the Add Deduction link.
- To edit a Savings, Voluntary Deduction, or Savings Bond click the Edit icon beside the deduction you want to edit. Only the deductions listed below are available to change through self-service. If a deduction displays without an edit graphic next to it, it cannot be changed through self-service.
- Health Deductions cannot be edited from this page. Please contact the vendor for changes to Health Deductions.
- The number of deductions permitted per deduction type is listed in parentheses:
  - Chief Petty Officer Association (1)
  - Coast Guard Academy Alumni Association (1)
  - Commercial Insurance (No Limit)
  - Mutual Assistance Donation (1)
  - Navy Mutual Aid (1)
  - Repay Home Loans/Mortgages(No Limit)
  - Savings allotments (2)
  - Support of Dependents (No Limit)
  - Treasury Direct Savings Bond (1)
  - Warrant Officer Association (1)

If you have questions, contact PPC (RAS) at 1-800-772-8724.

Voluntary Deductions

Element	Amount	Begin Date	End Date	Recipient	Edit
Savings	$100.000000	08/01/2011		Regions Bank	
Commercial Insurance	$140.990000	08/01/2011		Monumental Life Insurance Co	
Commercial Insurance	$49.870000	08/01/2011		Old Line Life Insurance Co	

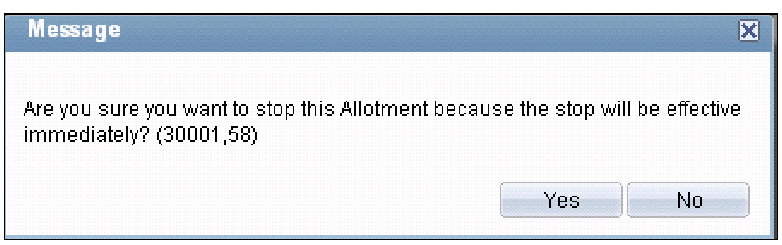
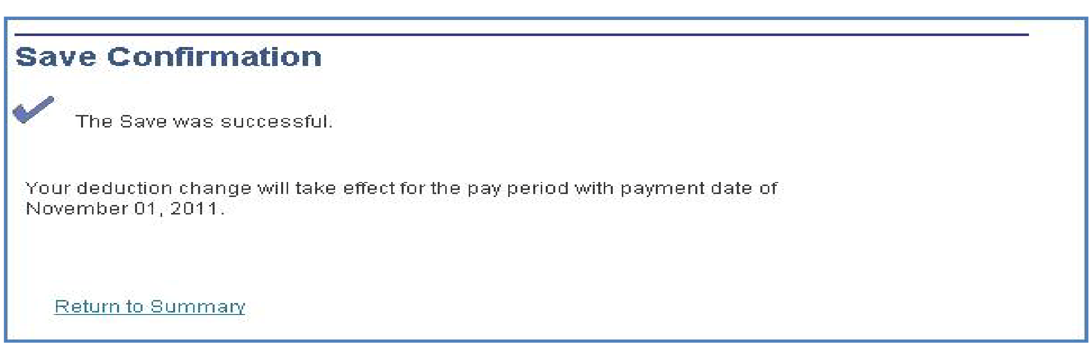
Note: All of your active allotments appear on this page. It will also show allotments that you cannot change or stop. For these types of allotments you will need to contact the Vendor for changes to FLTCIP, NSLI/USGLI, TRDP, TRICARE Prime, USFHP, and VGLI allotments; and PPC (RAS) for changes to Government Indebtedness and Mutual Assistance Loan allotments.

Step	Action
3	Click on the Edit icon for the allotment that you want to stop.

Element	Amount	Begin Date	End Date	Recipient	Edit
Treasury Direct Savings Bond	$20.000000	09/01/2011		TreasuryDirect	
Savings	$300.000000	09/01/2011		Veridian Credit Union	

Continued on next page

Retiree – Start/Change/Stop Allotment, Continued

Step	Action
4	If you want the allotment stopped right away, do not enter anything in the End Date field and click the **Stop Deduction** button (you may need to scroll down to see it).  **Note:** If the button isn't there, come out of the component and go back in and try to stop it again. Go to the next step. If you want to stop the allotment with a future date then change the End Date to the date you want it stopped. Then press the **Save Deduction** button (you may need to scroll down to see it).  Go to step 6. **Note:** The date must be the last day of the month. For instance, if you are entering the stop on 15 October and you want the allotment to be deducted in October 2011 but not for November 2011 pay period, then you should enter 10/31/2011.
5	A message will pop up asking if you're sure you want to stop it. Click 'Yes'. 
6	You should receive a Save Confirmation. 
7	Click the Return to Summary Link. The system will take you back to the Summary page. If you stopped the allotment right away, the allotment should no longer be present. If you stopped it with a future end date, then you should see the allotment with the end date.