

Self Service – Allotments

Overview

Introduction This guide provides the procedures for how to view, change, add or stop an allotment using Direct Access Self Service Voluntary Deductions.

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>).

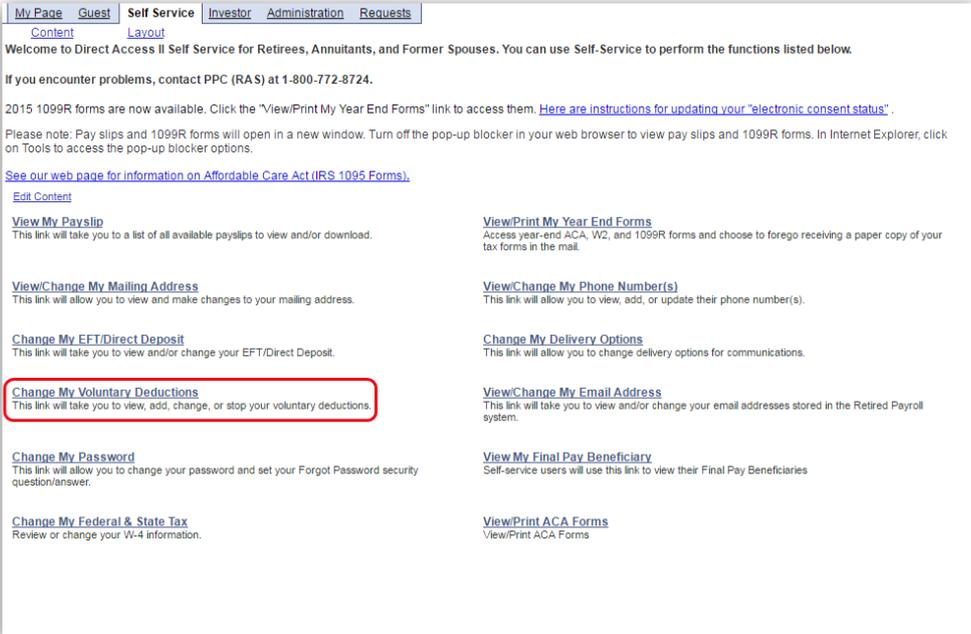
In this guide

Topic	See Page
Starting an Allotment	2
Changing an Allotment	7
Stopping an Allotment	9

Starting an Allotment

Allotment Start Date The start date for all allotments must always be the first of the month. If starting an allotment while the current pay calendar is open (e.g. Prior to on or about the 20th of the month), the start date will default to the first of the current month. If starting an allotment during after the current calendar has close (e.g. On or about the 20th of the month), the start date must be the first of the next month.

Procedure Log into DA II Self-Service at <https://portal.direct-access.us/> and follow these steps to start a new allotment.

Step	Action
1	<p>Select the Change My Voluntary Deductions link on the Self Service page.</p>  <p>The screenshot shows the 'Self Service' menu with various options. The 'Change My Voluntary Deductions' link is highlighted with a red rectangular box. Other visible links include 'View My Payslip', 'View/Change My Mailing Address', 'Change My EFT/Direct Deposit', 'Change My Password', 'Change My Federal & State Tax', 'View/Print My Year End Forms', 'View/Change My Phone Number(s)', 'Change My Delivery Options', 'View/Change My Email Address', 'View My Final Pay Beneficiary', and 'View/Print ACA Forms'.</p>
2	<p>Your current Allotments will display. Review the bullets before making any changes. In this example, a deduction will be added. Click Add Deduction</p>

Continued on next page

Starting an Allotment, Continued

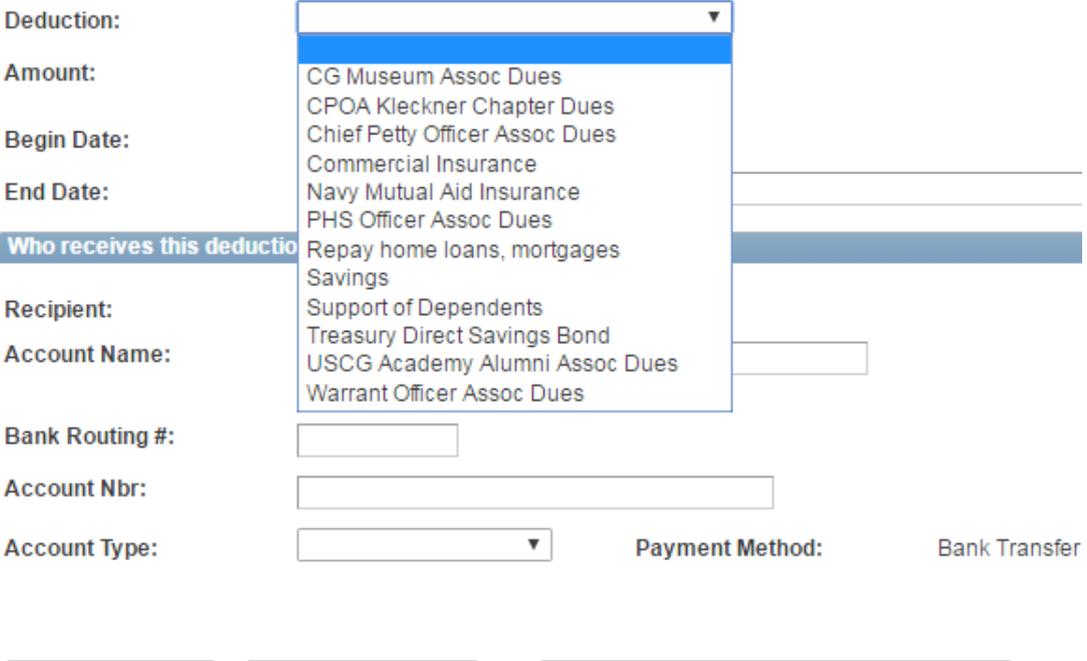
Procedure (continued)

Step	Action																								
2	<div data-bbox="338 459 1291 1305" style="border: 1px solid gray; padding: 10px;"> <h3 style="margin: 0;">My Voluntary Deductions</h3> <p style="margin: 5px 0 0 20px;">Your Savings, Voluntary Deductions, and Savings Bonds are listed below.</p> <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> ◦ Chief Petty Officer Association (1) ◦ Coast Guard Academy Alumni Association (1) ◦ PHS Commissioned Officers 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) <p style="margin: 5px 0 0 20px;">If you have questions, contact PPC (RAS) at 1-800-772-8724.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin: 5px 0 0 0;"> <thead> <tr style="background-color: #e1eef6;"> <th style="text-align: left;">Element</th> <th style="text-align: right;">Amount</th> <th style="text-align: left;">Begin Date</th> <th style="text-align: left;">End Date</th> <th style="text-align: left;">Recipient</th> <th style="text-align: center;">Edit</th> </tr> </thead> <tbody> <tr> <td>Chief Petty Officer Assoc Dues</td> <td style="text-align: right;">\$2.000000</td> <td>01/01/2004</td> <td></td> <td>Chief Petty Officer Assn Uscg</td> <td style="text-align: center;"></td> </tr> <tr> <td>Warrant Officer Assoc Dues</td> <td style="text-align: right;">\$5.000000</td> <td>06/01/2016</td> <td></td> <td>Warrant Officer Association</td> <td style="text-align: center;"></td> </tr> <tr> <td>TRICARE Dental</td> <td style="text-align: right;">\$60.150000</td> <td>12/01/2015</td> <td></td> <td>DELTA DENTAL FEDERAL SERVICES</td> <td></td> </tr> </tbody> </table> <p style="margin: 5px 0 0 20px;">Add Deduction</p> </div> <p style="margin-top: 10px;">Click Add Deduction</p>	Element	Amount	Begin Date	End Date	Recipient	Edit	Chief Petty Officer Assoc Dues	\$2.000000	01/01/2004		Chief Petty Officer Assn Uscg		Warrant Officer Assoc Dues	\$5.000000	06/01/2016		Warrant Officer Association		TRICARE Dental	\$60.150000	12/01/2015		DELTA DENTAL FEDERAL SERVICES	
Element	Amount	Begin Date	End Date	Recipient	Edit																				
Chief Petty Officer Assoc Dues	\$2.000000	01/01/2004		Chief Petty Officer Assn Uscg																					
Warrant Officer Assoc Dues	\$5.000000	06/01/2016		Warrant Officer Association																					
TRICARE Dental	\$60.150000	12/01/2015		DELTA DENTAL FEDERAL SERVICES																					

Continued on next page

Starting an Allotment, Continued

Procedure (continued)

Step	Action
3	<p>The new deduction page will open.</p> <p>Begin by selecting a Deduction type from the dropdown list.</p> <p>Enter your Voluntary Deduction information.</p> <ul style="list-style-type: none"> • Deduction information can be changed for the current payroll processing month or a future payroll processing month. • TRICARE and dental deductions cannot be edited from this page. Please contact the vendor for changes to Health Deductions. • Start and stop dates entered for Voluntary Deductions cannot exceed sixty days past today's date. Your start and/or stop dates cannot exceed August 15, 2016 . • Voluntary deductions must be set up for payment by direct deposit / electronic funds transfer.  <p>Deduction: [Dropdown menu open showing options]</p> <p>Amount: [Text input field]</p> <p>Begin Date: [Text input field]</p> <p>End Date: [Text input field]</p> <p>Who receives this deduction: [Dropdown menu open showing 'Savings' selected]</p> <p>Recipient: [Text input field]</p> <p>Account Name: [Text input field]</p> <p>Bank Routing #: [Text input field]</p> <p>Account Nbr: [Text input field]</p> <p>Account Type: [Dropdown menu]</p> <p>Payment Method: Bank Transfer</p> <p>[Save Deduction] [Stop Deduction] [Return to Summary]</p>

Continued on next page

Starting an Allotment, Continued

Procedure (continued)

Step	Action
4	<p>Enter the Account information. In this example we have selected a Savings type deduction. Other types are similar, however, in some cases much of the account information will be pre-filled.</p> <p>Note: When entering the Account Number, the number must start completely aligned to the left of the block (make sure there are no spaces before the number).</p> <div data-bbox="304 645 1323 1585" style="border: 1px solid blue; padding: 5px;"> <p>My Voluntary Deductions</p> <p><u>TAFFYTA MUTTONFUDGE</u></p> <p>Enter Allotment information:</p> <ul style="list-style-type: none"> Allotments for current month can be started or changed prior to current mid month payroll cut. Click on the Processing Schedule link to determine the mid month payroll cutoff dates. Allotments can be started or changed for future month. If you want to stop your allotment immediately, press the Stop Deduction button below. If pressed prior to end-month Compute cutoff, your stop will be effective at the end of the prior month (any deductions from your mid-month pay will be refunded in your end-month pay). If pressed after end-month Compute cutoff, your stop will be effective at the end of the current month. If you want to stop your allotment during a future month, or at the end of the current month, you can stop the allotment by entering an End Date below and then pressing the Save Deduction button. Allotments must be set up for payment by direct deposit / electronic funds transfer. <p>Deduction: <input type="text" value="Savings"/></p> <p>Amount: <input type="text" value="150.000000"/></p> <p>Begin Date: <input type="text" value="09/01/2014"/>  Type: <input type="text"/></p> <p>End Date: <input type="text"/>  Policy #: <input type="text"/></p> <p>Who receives this deduction</p> <p>Recipient:</p> <p>Account Name: <input type="text" value="MY SAVINGS"/></p> <p>Bank Routing #: <input type="text" value="314074269"/> Usaa Federal Savings Bank</p> <p>Account Nbr: <input type="text" value="123456789"/></p> <p>Account Type: <input type="text" value="Savings"/> Payment Method: Bank Transfer</p> <p><input type="button" value="Save Deduction"/> <input type="button" value="Stop Deduction"/> <input type="button" value="Return to Summary"/></p> </div> <p>Next, click the Save Deduction.</p>
5	<p>Once saved, this screen will display. Click Return to Summary.</p> <div data-bbox="304 1659 681 1899" style="border: 1px solid blue; padding: 5px;"> <p>Save Confirmation</p> <p> The Save was successful.</p> <p><input type="button" value="Return to Summary"/></p> </div>

Continued on next page

Starting an Allotment, Continued

Procedure,
continued

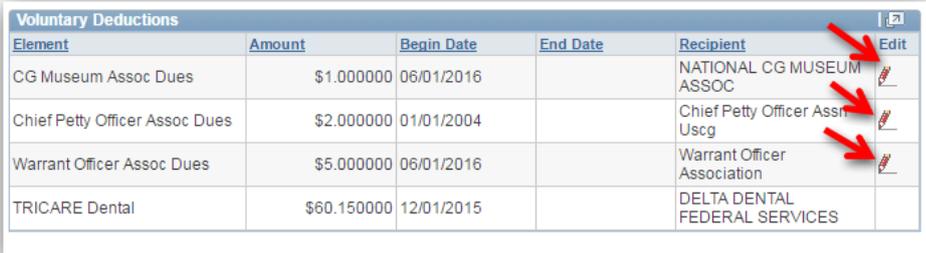
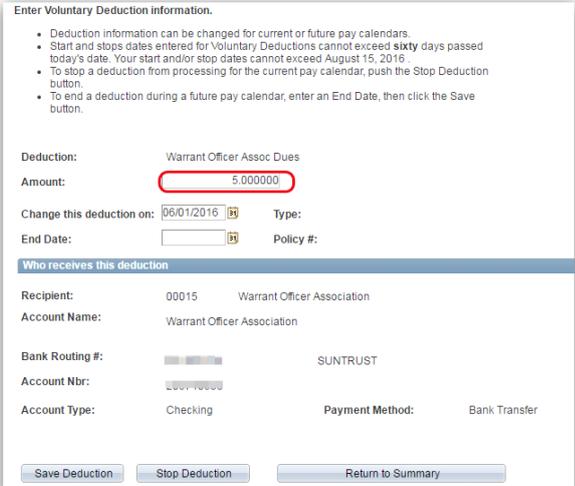
Step	Action																								
6	<p>The change will be reflected in the Allotments list.</p> <div style="border: 1px solid blue; padding: 5px;"> <p>My Voluntary Deductions</p> <p><u>TAFFYTA MUTTONFUDGE</u></p> <p>Your current allotments are listed below:</p> <ul style="list-style-type: none"> To add an allotment, click the Add Deduction link. To edit an allotment, click the Edit icon beside the allotment you want to update. Dependent Dental Plan and Federal Long Term Care Insurance Program (FLTCIP) allotments cannot be edited. Please contact the vendor for changes to these allotments. Only the allotments listed below are available to change through self-service. If an allotment displays without an edit graphic next to it, it cannot be changed through self-service. Click on the Allotment Worksheet link to determine the types of allotments allowed and how many are permitted for each. If you have any questions, please contact your SPO. <table border="1" data-bbox="360 837 1369 965"> <thead> <tr> <th colspan="6">Voluntary Deductions</th> </tr> <tr> <th>Element</th> <th>Amount</th> <th>Begin Date</th> <th>End Date</th> <th>Recipient</th> <th>Edit</th> </tr> </thead> <tbody> <tr> <td>Savings</td> <td>\$150.000000</td> <td>09/01/2014</td> <td></td> <td>MY SAVINGS</td> <td></td> </tr> <tr> <td>Tricare Dependent Dental</td> <td>\$10.960000</td> <td>01/01/2014</td> <td></td> <td>METLIFE DENTAL PROGRAM</td> <td></td> </tr> </tbody> </table> <p>Add Deduction</p> </div>	Voluntary Deductions						Element	Amount	Begin Date	End Date	Recipient	Edit	Savings	\$150.000000	09/01/2014		MY SAVINGS		Tricare Dependent Dental	\$10.960000	01/01/2014		METLIFE DENTAL PROGRAM	
Voluntary Deductions																									
Element	Amount	Begin Date	End Date	Recipient	Edit																				
Savings	\$150.000000	09/01/2014		MY SAVINGS																					
Tricare Dependent Dental	\$10.960000	01/01/2014		METLIFE DENTAL PROGRAM																					

Changing an Allotment

Introduction This section provides the procedure to change an allotment amount.

Changing an allotment Changes to account names and account types are not allowed on existing allotments. If one of these need to be changed, stop the allotment and restart it with the new information. Enter the amount in dollars and cents. Do not enter a dollar sign. If changing the Routing/Account numbers, the change date must be greater than or equal to the first of the current month no matter which pay calendar it is entered. If changing the End Date, it must be the last day of the month.

Procedure Log into DA II Self-Service at <https://portal.direct-access.us/> and follow these steps to change an allotment.

Step	Action
1	Select the Change My Voluntary Deductions link on the Self Service page.
2	Click the Pencil icon in the row for the allotment you want to change. Note: Health Deductions cannot be edited from this page. Please contact the vendor for changes to Health Deductions.
	
4	The deduction information page will display. Change the amount as desired.
	

Continued on next page

Changing an Allotment, Continued

Procedure (continued)

Step	Action
5	Click the Save Deduction button at the bottom of the page.
6	Once saved, this screen will display. Click Return to Summary . 
7	The change will be reflected in the Allotments list.

Stopping an Allotment

Introduction

This section provides the procedure to stop an allotment.

Stopping an allotment

Log into DA II Self-Service at <https://portal.direct-access.us/> and follow these steps to stop an allotment. See the [Changing an Allotment](#) section to access the allotment to change.

Voluntary Deductions					
Element	Amount	Begin Date	End Date	Recipient	Edit
CG Museum Assoc Dues	\$1.000000	06/01/2016		NATIONAL CG MUSEUM ASSOC	
Chief Petty Officer Assoc Dues	\$2.000000	01/01/2004		Chief Petty Officer Assn Uscg	
Warrant Officer Assoc Dues	\$5.000000	06/01/2016		Warrant Officer Association	
TRICARE Dental	\$60.150000	12/01/2015		DELTA DENTAL FEDERAL SERVICES	

There are two ways to stop an allotment:

1. Enter an End Date in the End Date field and click the Save Deduction button at the bottom of the page. Enter the last day of the month the allotment deduction shall be made. For example, if you want the last allotment payment to be made on 1 March 2017 payday, enter 02/28/2017 as the End Date:

Deduction: CG Museum Assoc Dues

Amount:

Change this deduction on: BT **Type:**

End Date: BT **Policy #**

Click **Save Deduction**.

Verify the allotment stop date appears in the end date column correctly. If there is an error, click the **Edit** icon (pencil), correct it and save the deduction again.

Voluntary Deductions					
Element	Amount	Begin Date	End Date	Recipient	Edit
Chief Petty Officer Assoc Dues	\$2.500000	06/01/2016		Chief Petty Officer Assn Uscg	
Warrant Officer Assoc Dues	\$5.000000	06/01/2016		Warrant Officer Association	
TRICARE Dental	\$60.150000	12/01/2015		DELTA DENTAL FEDERAL SERVICES	
CG Museum Assoc Dues	\$1.000000	06/01/2016	02/28/2017	NATIONAL CG MUSEUM ASSOC	

Continued on next page

Stopping an Allotment, Continued

Stopping an allotment (cont'ed)

2. To stop an allotment **immediately**, click **Stop Deduction** at the bottom of the page. If stopping an allotment while the current month calendar is open, the stop date will default to the last day of the previous month. If stopping an allotment after the current month calendar is closed, the stop date will default to the last day of the current month.



The **Stop Deduction** can also be used to “delete/Undo” a pending allotment. For example, if an allotment is input with a Start Date of 02/01/2015, and then prior to the end-month February payroll finalize date, the member decides he/she does not want the allotment to start, click the **Stop Deduction** button. This will stop/swap the allotment effective 01/31/15, and the allotment will be deleted from the Allotment Summary page.

When the Stop Deduction button is used on an existing allotment, it will be removed from the Allotment Summary page.

Voluntary Deductions					
Element	Amount	Begin Date	End Date	Recipient	Edit
Chief Petty Officer Assoc Dues	\$2.500000	06/01/2016		Chief Petty Officer Assn Uscg	
Warrant Officer Assoc Dues	\$5.000000	06/01/2016		Warrant Officer Association	
TRICARE Dental	\$60.150000	12/01/2015		DELTA DENTAL FEDERAL SERVICES	

Note that the row for the *CG Museum Assoc Dues* allotment has been completely removed because the “Stop Deduction” button was used in the same month as the month of the allotment start. This effectively undid the allotment start.

Element	Amount	Begin Date	End Date	Recipient	Edit
CG Museum Assoc Dues	\$1.000000	06/01/2016		NATIONAL CG MUSEUM ASSOC	