Allotments/Voluntary Deductions

Overview

Introduction

This guide provides the procedures for how to view, change, add or stop a members' Voluntary Deductions (Allotments). This component is used for the following types of voluntary deductions:

- Association Dues
- CG Exchange
- Combined Federal Campaign
- Commercial Insurance
- Mutual Assistance Donation
- Mutual Assistance Loan
- Navy Mutual Aid Insurance
- Private Venture Housing
- Repay home loans, mortgages
- Savings
- Support of Dependents
- Treasury Direct Savings Bond

Important

- Allotments do not process retroactively.
- If you start an allotment late (after the mid-month finalization), there will be no allotment processed for that month.
- If you STOP an allotment late, you will typically need to contact the allotment recipient and request the money be returned.

VERY IMPORTANT: Verify the correct PVH location and ACCT/RTN with the member's management company. Once you select the PVH location, double check the ACCT/RTN numbers correctly match the information provided by the management company. **FAILURE TO CORRECTLY SELECT THE PVH LOCATION WILL RESULT IN MISROUTING RENT AND A SERIOUS DELAY IN FUNDS RECOVERY.**

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Overview, Continued

Allotment Rules

Keep the following rules in mind when processing allotments:

- Allotments for personal property loans (autos, furniture, electronics, etc.) are no longer authorized.
- A member may not allot more than the amount of pay he or she is entitled to. The system does not edit allotments against the member's available pay, it is up to the user to determine if there is sufficient net pay available to start or change an allotment amount. You may be able to start or increase an allotment that would exceed your available pay, but the system will not process that allotment if it exceeds your available pay.
- All allotment payments must be made by electronic funds transfer (EFT).
- A member is only permitted to have only one current allotment of the following types:
  - Mutual Assistance Donation
  - Navy Mutual Aid Insurance
  - Private Venture Housing*
  - Treasury Direct Savings Bonds
- Except for loans, only one allotment of any type to the same payee is authorized. Multiple loan allotments to **same payee must have unique account numbers**.

A member can start, change, and stop the following allotments via self-service:

- **Association Dues**
- **Commercial Insurance**
- **Navy Mutual Aid Insurance**
- **Private Venture Housing**
- **Repay home loans/mortgages**
- **Savings**
- **Support of Dependents**
- **Treasury Direct Savings**

A member cannot start, change, or stop the following allotments via self-service.

- **Thrift Savings Plan (TSP).** TSP contributions may be adjusted using the Thrift Savings Plan self-service page.
- **CG Mutual Assistance Loans and contributions.**
  - Allotments for CGMA contributions are entered by the member's Servicing Personnel Office. A CGMA pledge card may be submitted to start allotments for contributions to CGMA.
  - Commandant (ARL) enters allotments for loan repayment in the CGMA computer system.

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Overview, Continued

Allotment Rules, continued

- **American Red Cross Loans**. Allotments for repayment of Red Cross loans are entered by the member's Servicing Personnel Office. Complete an Allotment Worksheet (CG-2040) from the CG Forms web site and forward it to the SPO to start, stop or change.
- **Armed Forces Relief Loans**. Allotments for repayment of AFRS loans are entered by the member's Servicing Personnel Office. Complete an Allotment Worksheet (CG-2040) and forward it to the SPO to start, stop or change.
- **Voluntary Payment of Government Debt**. Allotments for government debt are entered by PPC (MAS).
- **Combined Federal Campaign (CFC) donations**. CFC payroll contributions are managed via a self-service application provided by the Office of Personnel Management (OPM).
- **Montgomery GI Bill (MGIB)**. MGIB pay reductions are started by the TRACEN Cape May Recruit Servicing Personnel Office or PPC.
- **MGIB Additional Amount.** Not handled via allotments/voluntary deductions. Increments of $20. Total contribution not to exceed $600.
  - Member needs to call PPC and pay via credit card or send check to pay by Credit Card: Contact PPC Customer Care, 866-772-8724 or 785-339-2200 (Do not submit credit card information via e-mail).
  - To pay by Check:
    Make check out to US Coast Guard, enter the member's EMPLID in the notes section and include a memo or cover sheet describing the purpose of the payment.
    Mail check to:

    Commanding Officer
    US Coast Guard
    Pay & Personnel Center
    ATTN: FAR
    444 SE Quincy St
    Topeka, KS 66683
- **Tricare Dental Program (TDP)** premiums (Not displayed or updated in Direct Access, contact the contractor, at 1-855-638-8371 to start/stop/change TDP deductions).

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Adding a Voluntary Deduction

Introduction

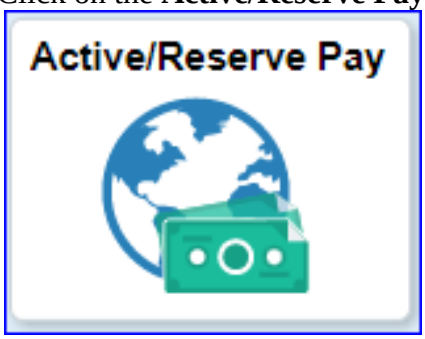
This section provides the procedures for adding a Voluntary Deduction for a member in DA.

Before you begin

- The start date for all allotments must always be the first of the month.
- If starting an allotment during a mid-month calendar, the start date will default to the first of the current month.
- If starting an allotment during an end-month calendar, the start date must be greater than or equal to the first of the next month.

Procedures

See below.

Step	Action
1	Click on the **Active/Reserve Pay** Tile. 

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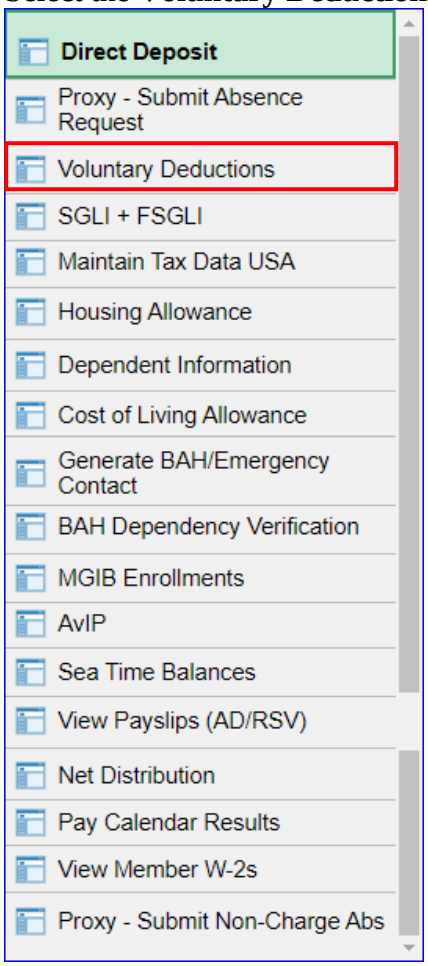
Adding a Voluntary Deduction, Continued

Procedures,
continued

Step	Action
1.5	Select the **Voluntary Deductions** option. 

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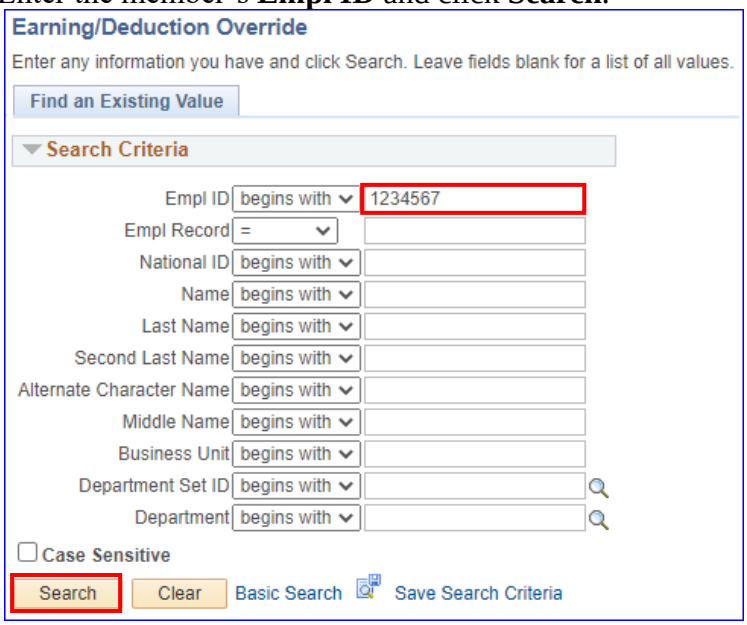
Adding a Voluntary Deduction, Continued

Procedures,
continued

Step	Action
2	Enter the member's **Empl ID** and click **Search**. 

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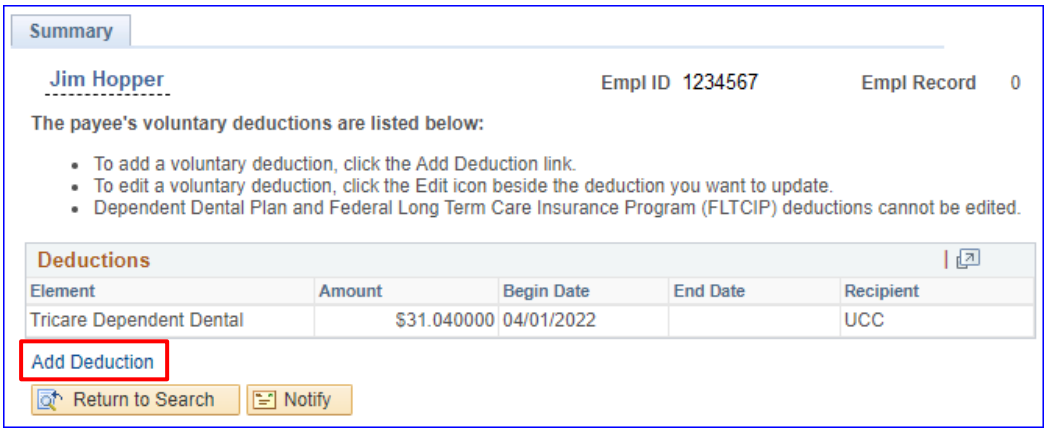
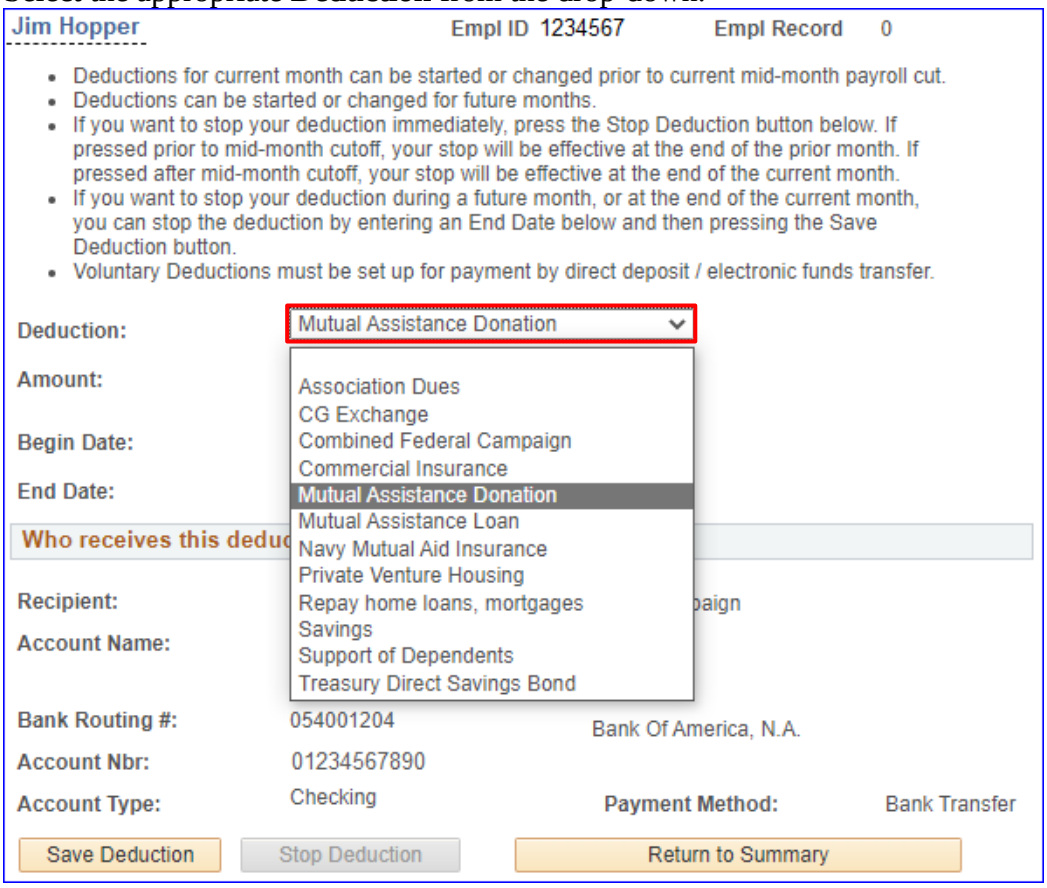
Adding a Voluntary Deduction, Continued

Procedures,
continued

Step	Action
3	The member's current allotments (if any) will be listed. Click **Add Deduction** to add an allotment. 
4	Select the appropriate **Deduction** from the drop-down. 

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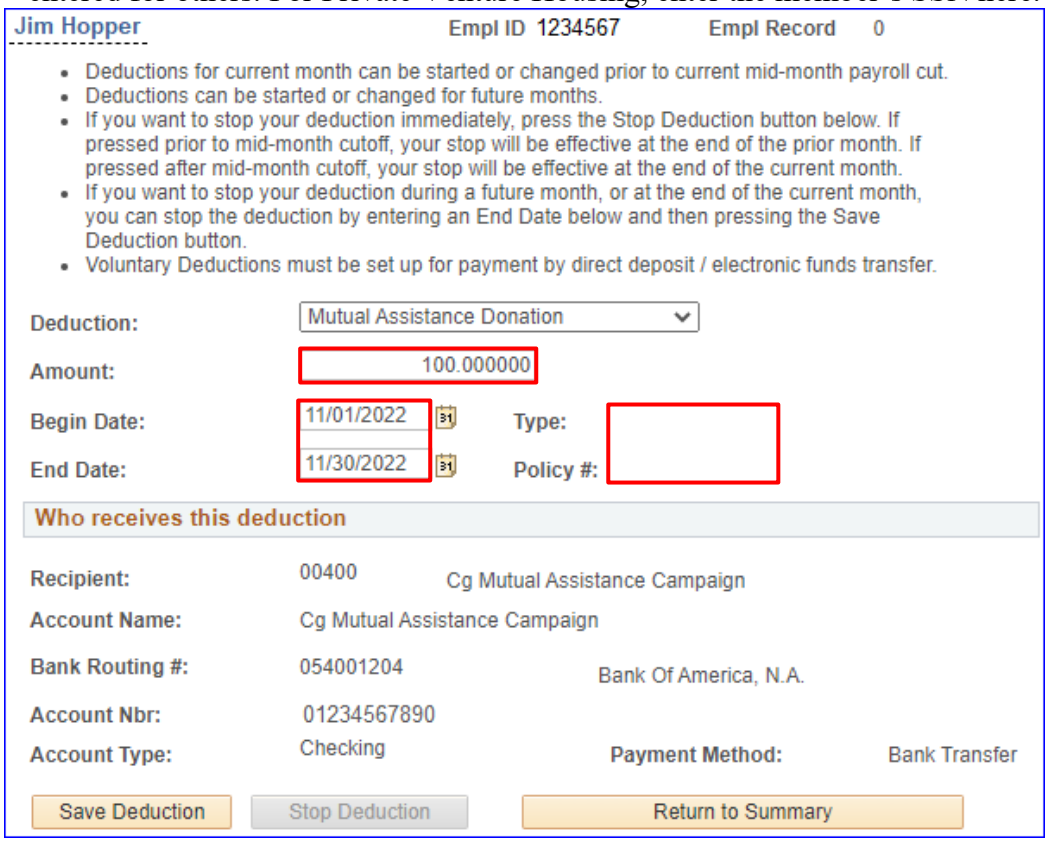
Adding a Voluntary Deduction, Continued

Procedures,
continued

Step	Action
5	Once the deduction is selected, enter the following: • **Amount –** Enter the amount in dollars and cents. Do not enter a dollar sign. Example: Ten dollars and fifty cents is entered as 10.50. Upon saving, the amount will change to 10.500000 (default format for fields holding monetary information). • **Begin Date –** This field is defaulted to the earliest month the member may start the allotment. This date can be changed to a future date but must always be the 1st of the month. • **End Date –** With the exception of CGMA Loan allotments, this field is not required to be completed. However, it may be completed if the member wants the allotment to automatically stop on a known date and must always be the last day of the month. • **Type –** Only available for Association Dues and Private Venture Housing. • **Policy # –** This field auto-populates for some deduction choices and can be entered for others. For Private Venture Housing, enter the member's SSN here. 

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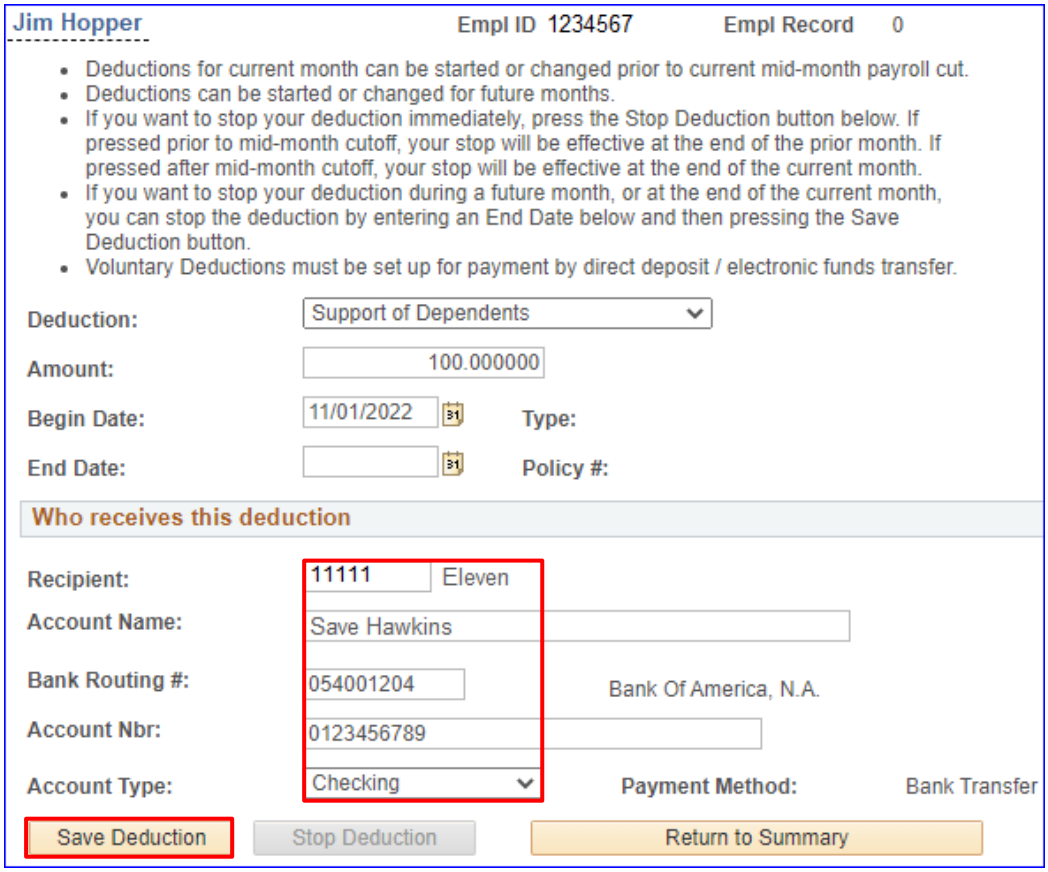
Adding a Voluntary Deduction, Continued

Procedures,
continued

Step	Action
6	• The **Recipient** and other fields will auto-populate for the following deductions: Mutual Assistance Donation, Mutual Assistance Loan, and Navy Mutual Aid Insurance. • If the **Recipient** field is not used, complete all the **bank information** fields. • 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). It is recommended to not copy and paste into this block. **VERY IMPORTANT:** Verify the correct PVH location and ACCT/RTN with the member's management company. Once you select the PVH location, double check the ACCT/RTN numbers correctly match the information provided by the management company. *****FAILURE TO CORRECTLY SELECT THE PVH LOCATION WILL RESULT IN MISROUTING RENT AND A SERIOUS DELAY IN FUNDS RECOVERY.** Click **Save Deduction**. 

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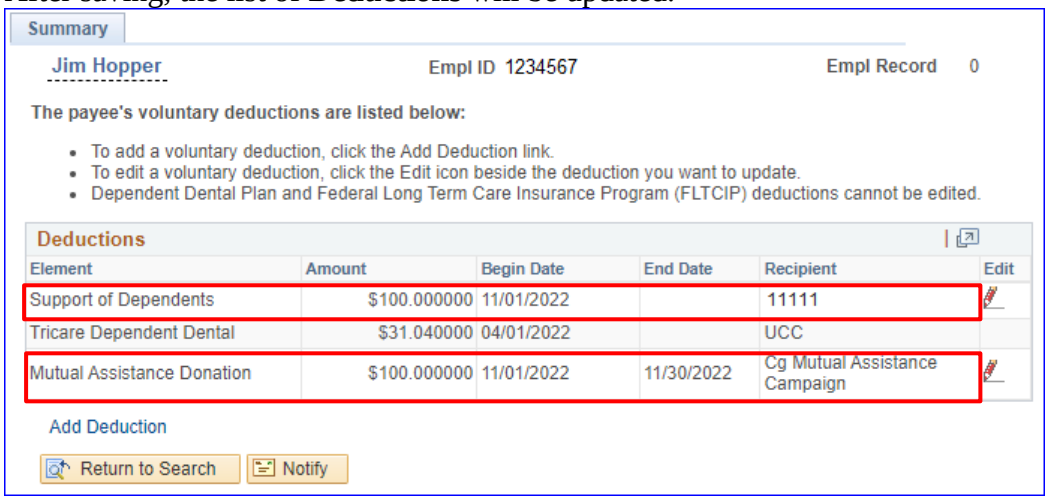
Adding a Voluntary Deduction, Continued

Procedures,
continued

Step	Action
7	After saving, the list of **Deductions** will be updated. 

Summary

Jim Hopper Empl ID 1234567 Empl Record 0

The payee's voluntary deductions are listed below:

- To add a voluntary deduction, click the Add Deduction link.
- To edit a voluntary deduction, click the Edit icon beside the deduction you want to update.
- Dependent Dental Plan and Federal Long Term Care Insurance Program (FLTCIP) deductions cannot be edited.

Deductions

Element	Amount	Begin Date	End Date	Recipient	Edit
Support of Dependents	$100.000000	11/01/2022		11111	
Tricare Dependent Dental	$31.040000	04/01/2022		UCC	
Mutual Assistance Donation	$100.000000	11/01/2022	11/30/2022	Cg Mutual Assistance Campaign	

Add Deduction

Return to Search Notify

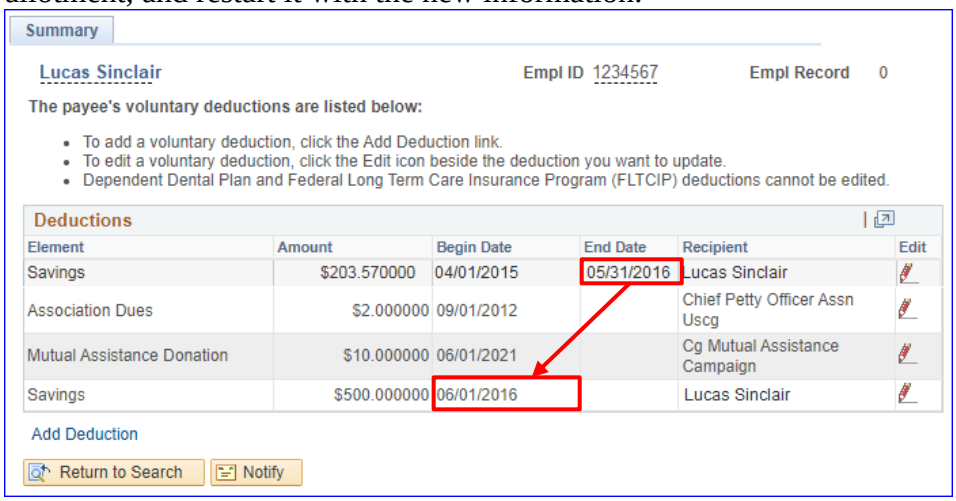
Changing a Voluntary Deduction

Introduction

This section provides the procedures for changing the Amount or End Date of a Voluntary Deduction for a member in DA.

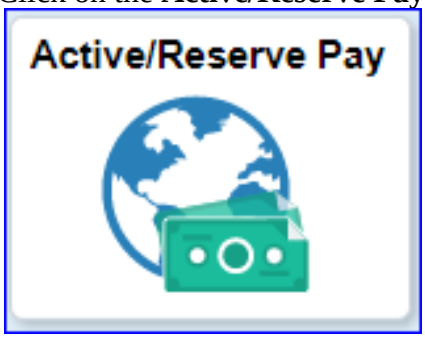
Information

Changes to **bank 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.



Procedures

See below.

Step	Action
1	Click on the **Active/Reserve Pay** Tile. 

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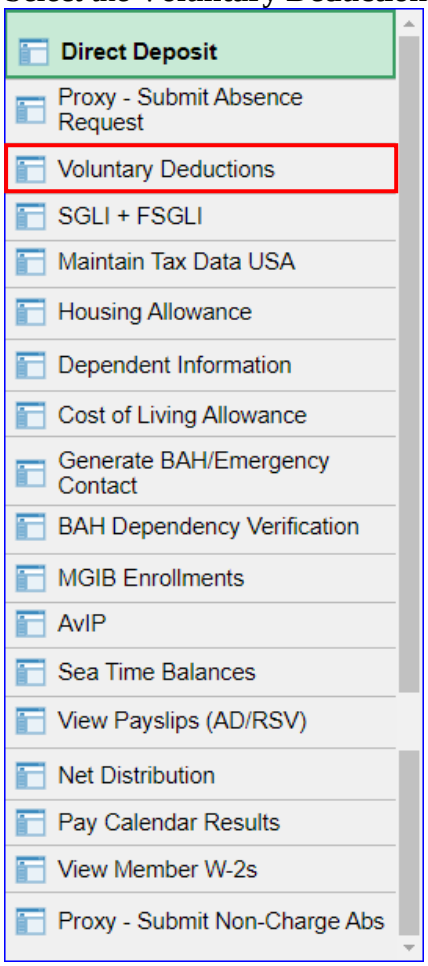
Changing a Voluntary Deduction, Continued

Procedures,
continued

Step	Action
1.5	Select the **Voluntary Deductions** option. 

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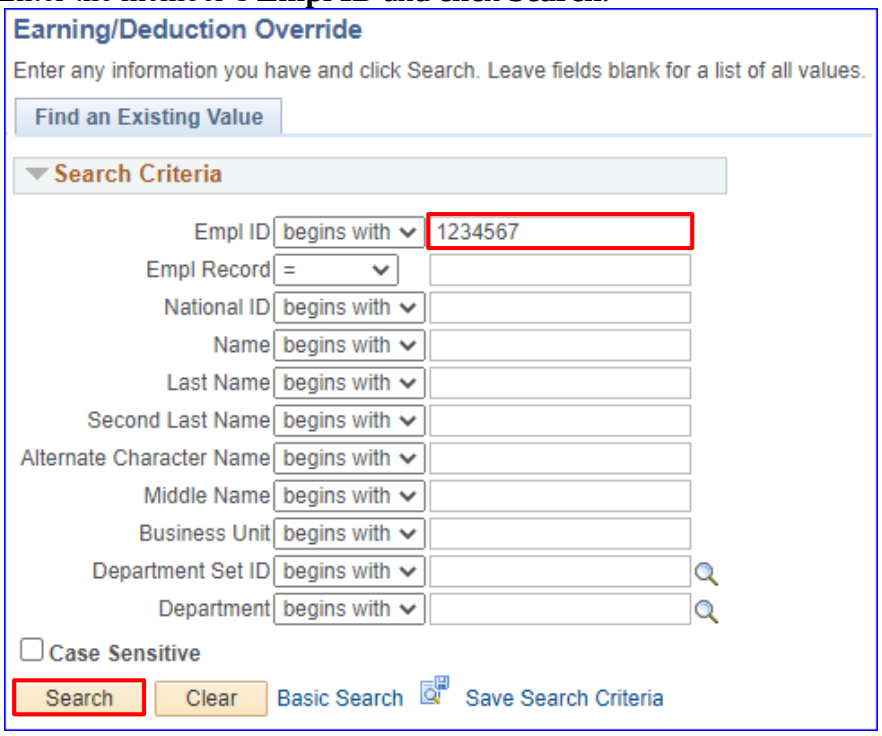
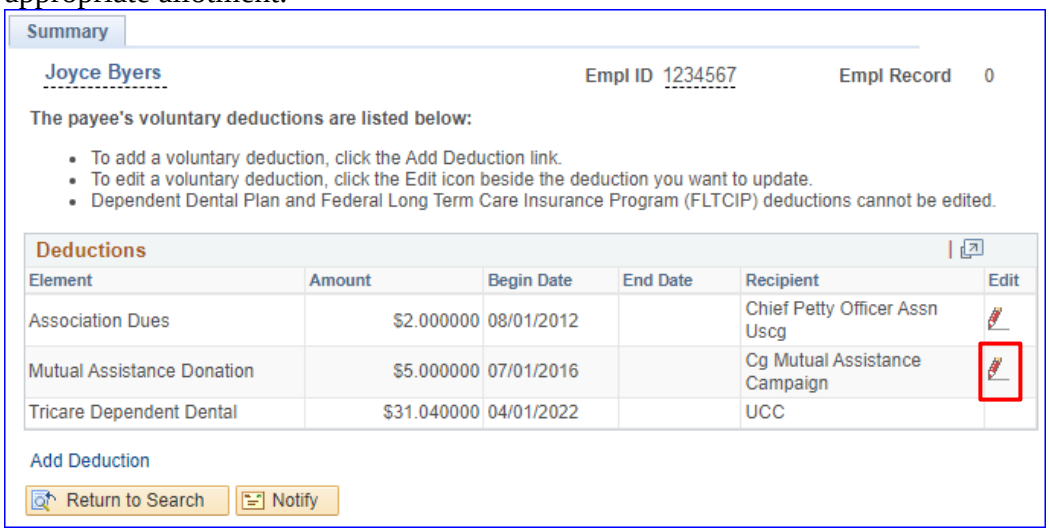
Changing a Voluntary Deduction, Continued

Procedures,
continued

Step	Action
2	Enter the member's **Empl ID** and click **Search**. 
3	The member's current allotments will be listed. Select the **Edit** pencil for the appropriate allotment. 

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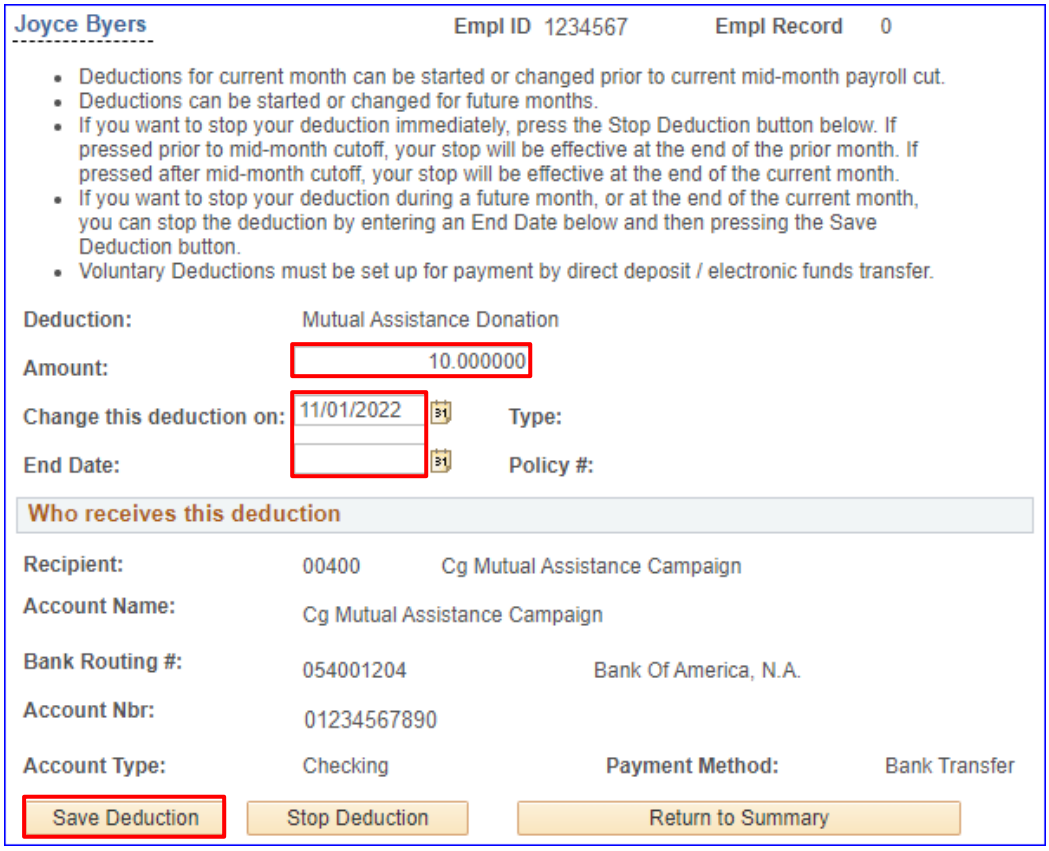
Changing a Voluntary Deduction, Continued

Procedures,
continued

Step	Action
4	The details for the allotment will display. Enter new information (as applicable): • **Amount –** If changing the amount during a mid-month calendar, the date will default to the first day of the current month. If changing the amount during the end-month calendar, the date must be greater than or equal to the first of the next month. Enter the amount in dollars and cents. Do not enter a dollar sign. Example: Ten dollars and fifty cents are entered as 10.50. Upon saving, the amount will change to 10.500000 (default format for fields holding monetary information). • **Change this deduction on** – Defaults to first of the month for the affected month. If future dating, the date must always be the first day of the month. • **End Date –** The date must be the last day of the month. Click **Save Deduction**. 

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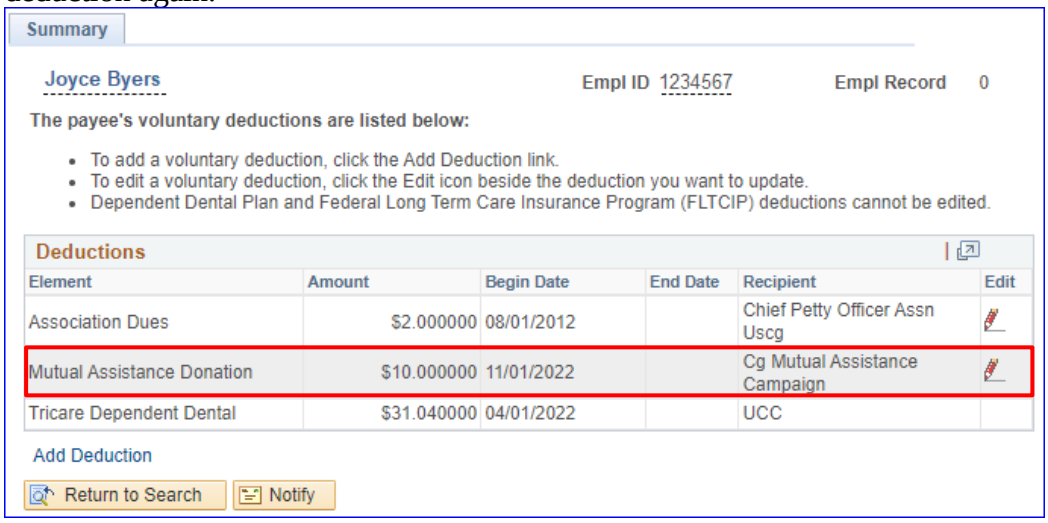
Changing a Voluntary Deduction, Continued

Procedures,
continued

Step	Action
5	The allotment Summary will display. Verify the **changes** display correctly as updated. If there is an error, click the Edit pencil, correct it and save the deduction again.



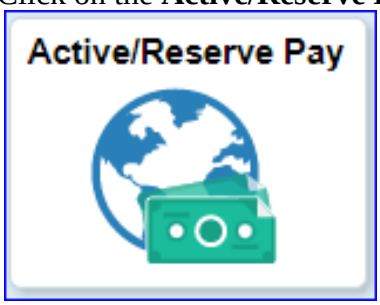
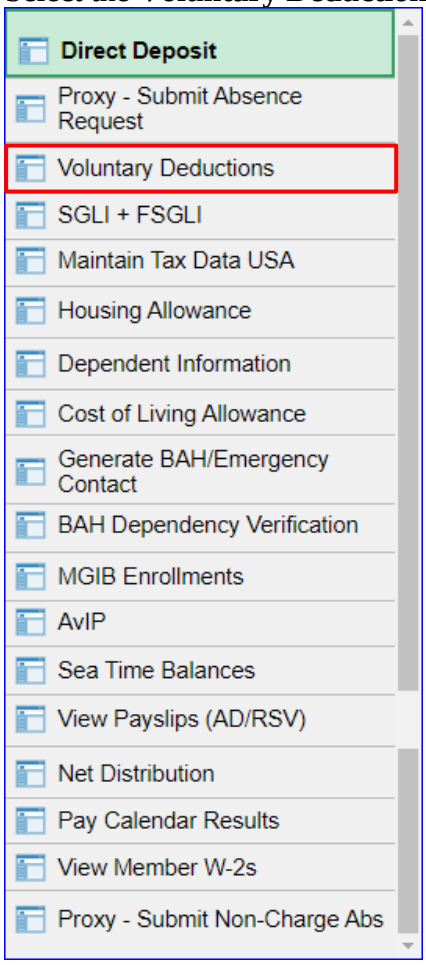
Stopping a Voluntary Deduction

Introduction

This section provides the procedures for stopping a Voluntary Deduction for a member in DA.

Procedures

See below.

Step	Action
1	Click on the **Active/Reserve Pay** Tile. 
1.5	Select the **Voluntary Deductions** option. 

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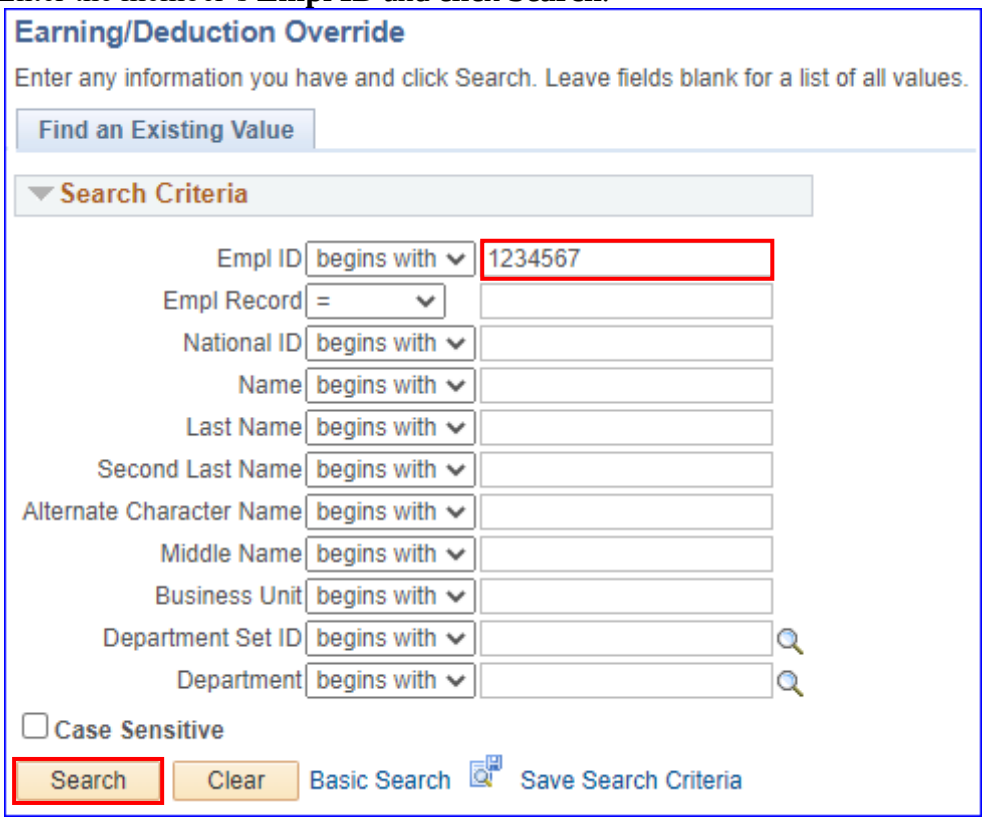
Stopping a Voluntary Deduction, Continued

Procedures,
continued

Step	Action
2	Enter the member's **Empl ID** and click **Search**. 

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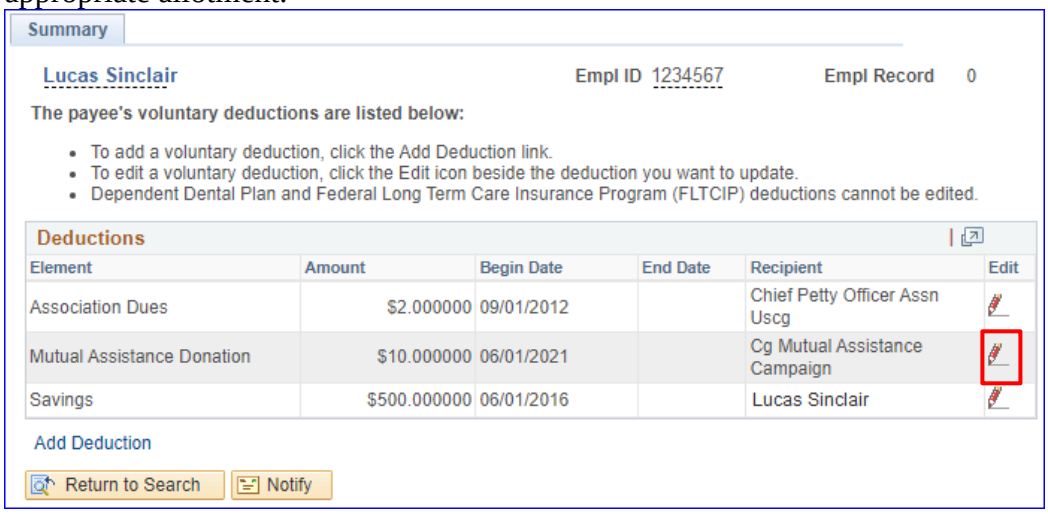
Stopping a Voluntary Deduction, Continued

Procedures,
continued

Step	Action
3	The member's current allotments will be listed. Select the **Edit** pencil for the appropriate allotment.



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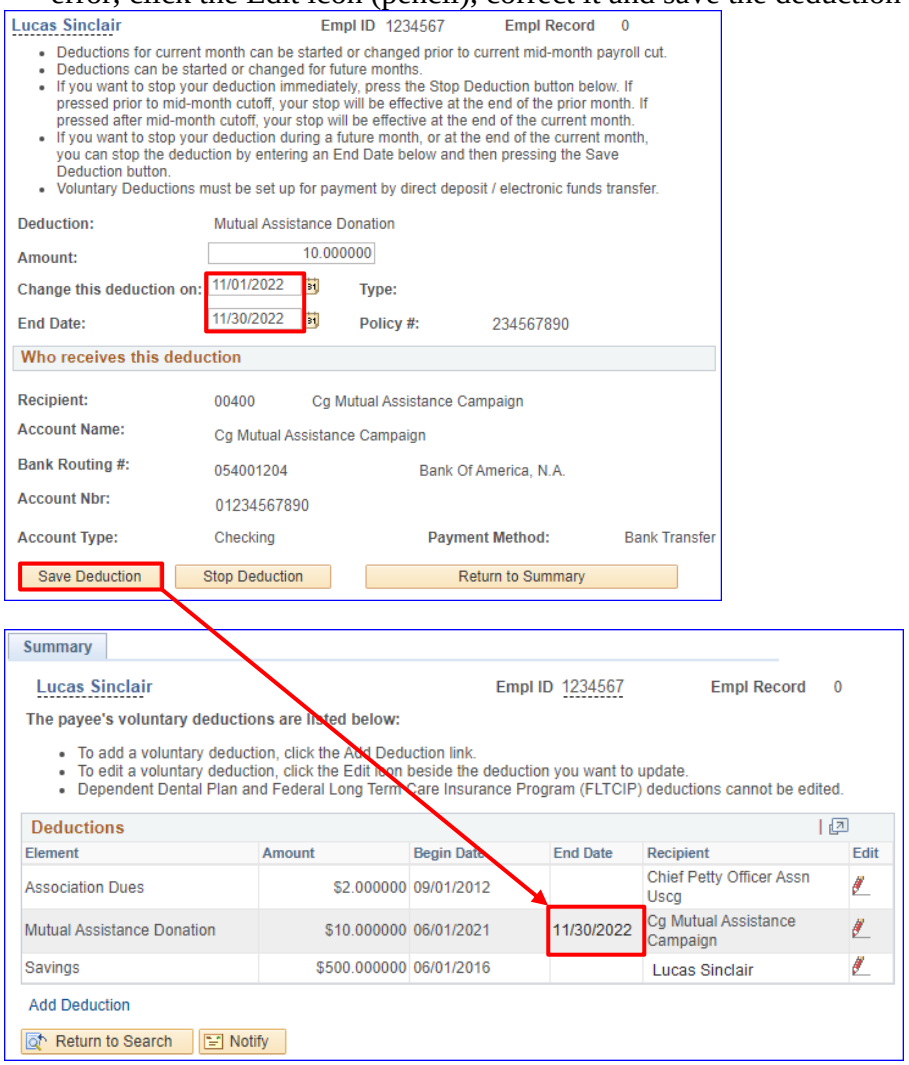
Stopping a Voluntary Deduction, Continued

Procedures,
continued

Step	Action
4	Details for the allotment will display. **Change this deduction on –** Auto-populates to the first day of the affected month and CANNOT be changed to an earlier date. There are two ways to stop an allotment (shown in 2 steps): 1. To stop an allotment for a future date, enter a date in the **End Date** field (last day of the month) and click **Save Deduction**. For example, if the member wants the last allotment payment to be made on 1December 2022 payday, enter 11/30/2022 as the End Date and 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. 

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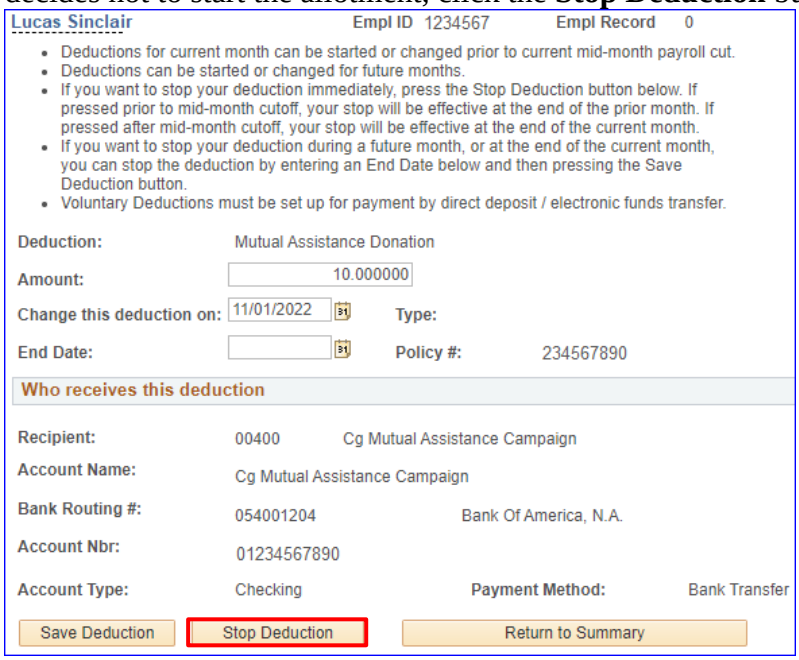
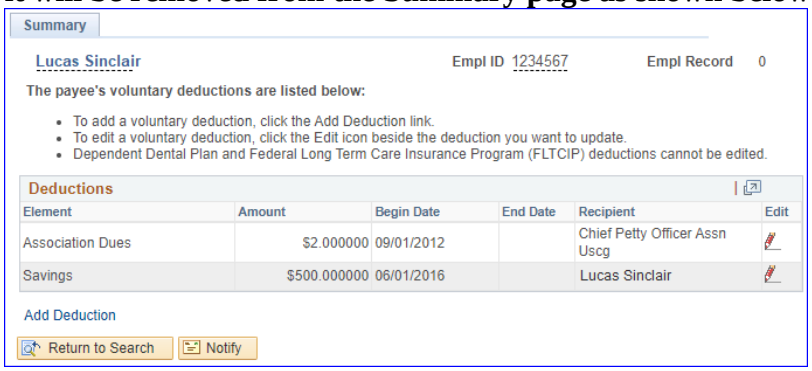
Stopping a Voluntary Deduction, Continued

Procedures,
continued

Step	Action
5	2. To stop an allotment **immediately**, click **Stop Deduction**. If stopping during the mid-month calendar, the stop date will default to the last day of the previous month. If stopping during the end-month calendar, the stop date will default to the last day of the current month (11/30) and will pay out for the last time on the first of the next month (12/1). **NOTE:** 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 11/01/2022, and then prior to the end-month October payroll finalize date, the member decides not to start the allotment, click the **Stop Deduction** button.  **Warning: When the Stop Deduction button is used on an existing allotment, it will be removed from the Summary page as shown below.**