# Change My Voluntary Deductions (Allotments) Overview

#### Introduction

This guide provides the procedures for Retirees to view, start, change, or stop voluntary deductions (allotments) using Direct Access (DA).

# For Your Information

Only the deductions listed below may be entered through DA Self Service. The number of deductions allowed for each deduction type is noted in parenthesis.

- Chief Petty Officer Association (1)
- Coast Guard Academy Alumni Association (1)
- Commercial Insurance (no limit)
- Mutual Assistance Donation (1)
- Navy Mutual Aid (1)
- PHS Commissioned Officers Association (1)
- Repay Home Loans/Mortgages (no limit)
- Savings Allotments (2)
- Support of Dependents (no limit)
- Treasury Direct Savings Bond (1)
- Warrant Officer Association (1)

Questions concerning any of your voluntary deductions should be directed to PPC (RAS) at 785-339-2200 or 1-866-772-8724.

#### Starting a Voluntary Deduction (Allotment)

The start date for all voluntary deductions (allotments) must always be the first of the month. If starting a voluntary deduction while the current pay calendar is open (i.e., prior to about the 20<sup>th</sup> of the month), the start date will default to the first of the current month. If starting a voluntary deduction after the current pay calendar has closed (i.e., on or after the 20<sup>th</sup> of the month), the start date must be the first of the following month.

#### Changing a Voluntary Deduction (Allotment)

Depending on the type of voluntary deduction will depend on the changes that may be made. Changes to account names, account type and bank account/routing numbers may not be altered for Association dues or donations. If changes are required to anything other than the amount and effective dates, the deduction will need to be stopped and a new deduction started with the correct/updated information.

If changing the End Date, it must be the last day of the month.

Stopping a Voluntary Deduction (Allotment) The end date for all voluntary deductions (allotments) must always be the last day of the month. If stopping a voluntary deduction while the current pay calendar is open (i.e., prior to about the  $20^{th}$  of the month), the end date will be the last day of the current month. If stopping a voluntary deduction after the current pay calendar has closed (i.e., on or after the  $20^{th}$  of the month), the end date must be the last day of the following month.

#### **Contents**

Topic	See Page
Viewing My Voluntary Deductions (Allotments)	3
Starting a Voluntary Deduction (Allotment)	5
Changing a Voluntary Deduction (Allotment)	14
Stopping a Voluntary Deduction (Allotment)	19

# **Viewing My Voluntary Deductions (Allotments)**

**Introduction** This section provides the procedures for Retirees to view their current

voluntary deductions (allotments) in Direct Access (DA).

**Information** Log into DA Self Service at <u>Direct Access Self Service</u>.

**Procedures** See below.

**Step** Action

1 Select **Retiree Self Service** from the My Homepage drop-down.

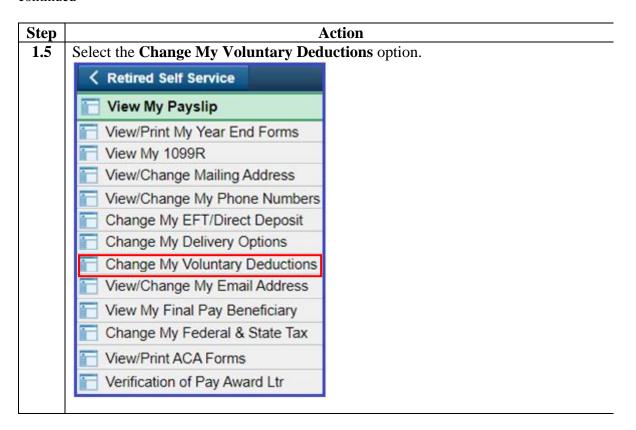
**NOTE:** Some Retirees may have more than one user access; in which case, you will need to select the **Member Self Service** tile to view the Self Service menu.



# Viewing My Voluntary Deductions (Allotments), Continued

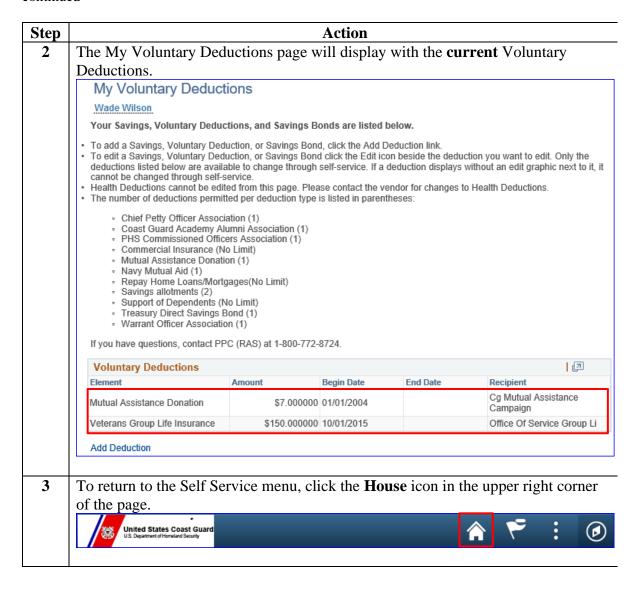
#### Procedures,

continued



# Viewing My Voluntary Deductions (Allotments), Continued

#### Procedures,



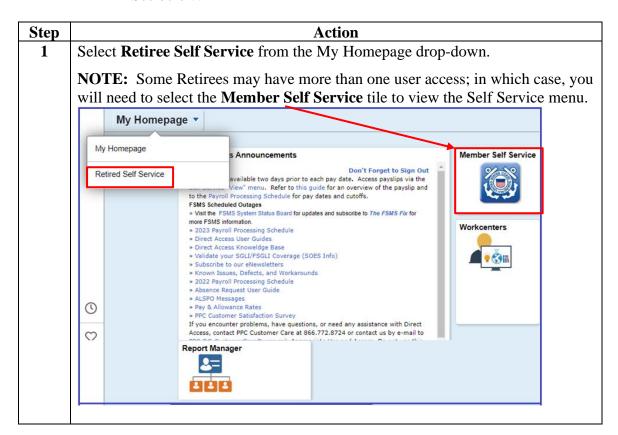
# **Starting a Voluntary Deduction (Allotment)**

**Introduction** This section provides the procedures for Retirees to start a voluntary

deduction (allotment) in Direct Access (DA).

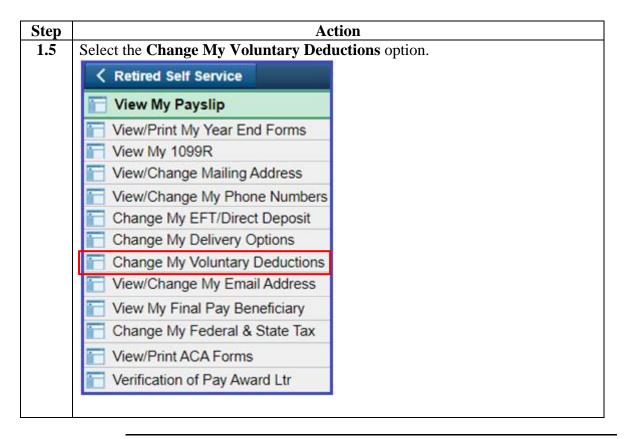
**Information** Log into DA Self Service at <u>Direct Access Self Service</u>.

**Procedures** See below.



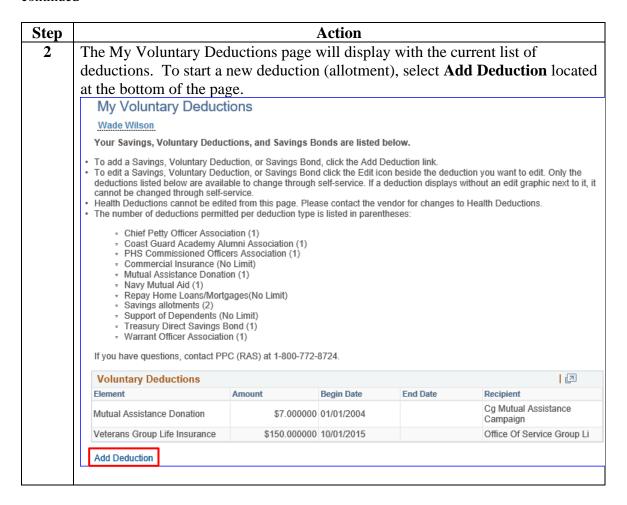
#### Procedures,

continued



#### Procedures,

continued

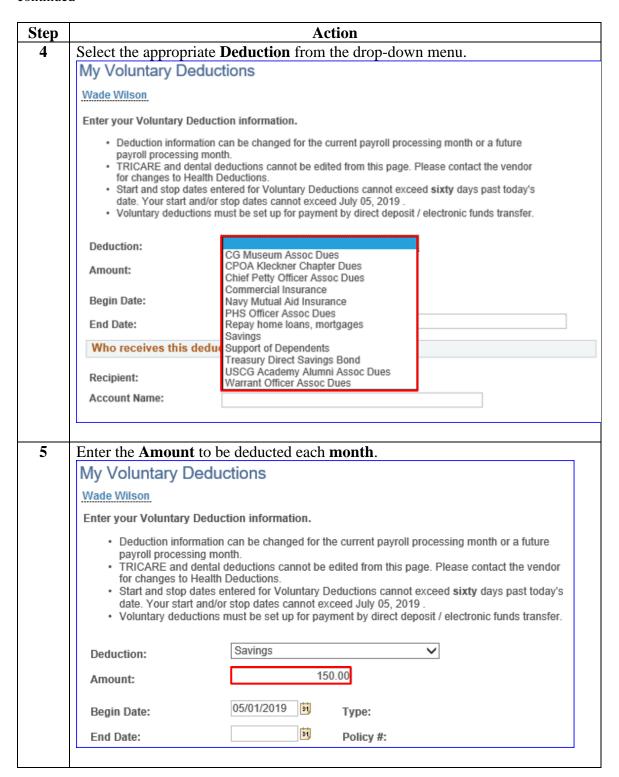


### Procedures,

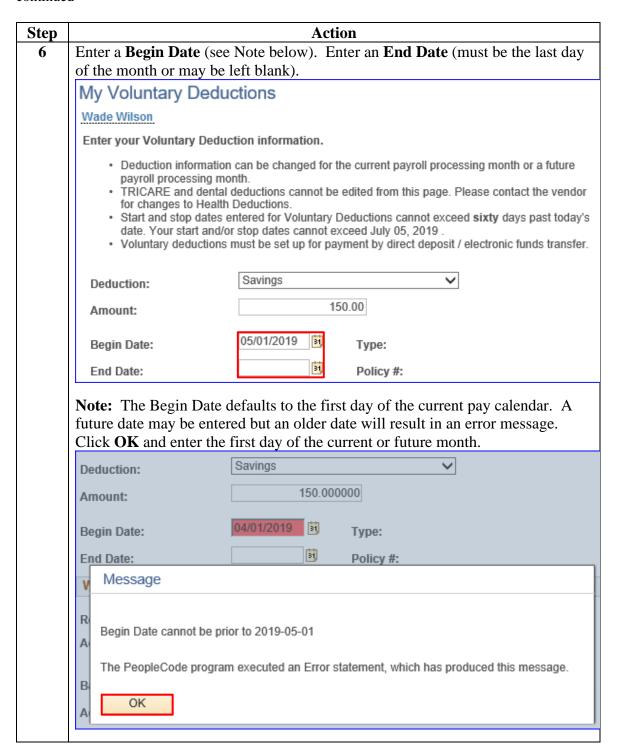
continued

Step	Action			
3	A new voluntary deduction page will display.			
	C	e will default to the first day of the current pay calendar – changed to a future pay calendar.		
	Enter your Voluntary Deduction information.			
	Deduction information payroll processing mo     TRICARE and dental for changes to Health     Start and stop dates e date. Your start and/o	can be changed for the current payroll processing month or a future inth.  deductions cannot be edited from this page. Please contact the vendor		
	Deduction:	~		
	Amount:			
	Begin Date:	05/01/2019 Type:		
	End Date:	Policy #:		
	Who receives this deduction			
	Recipient:			
	Account Name:			
	Bank Routing #:			
	Account Nbr:			
	Account Type:	Payment Method: Bank Transfer		
	Save Deduction	Stop Deduction Return to Summary		

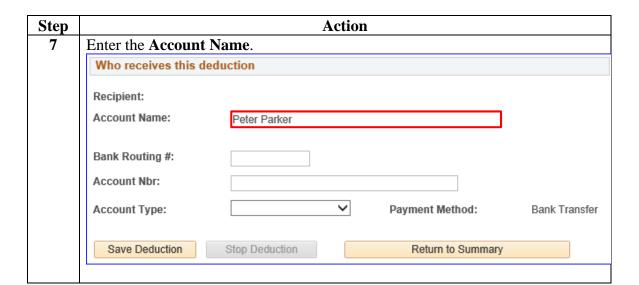
#### Procedures,



#### Procedures,



# **Procedures**, continued



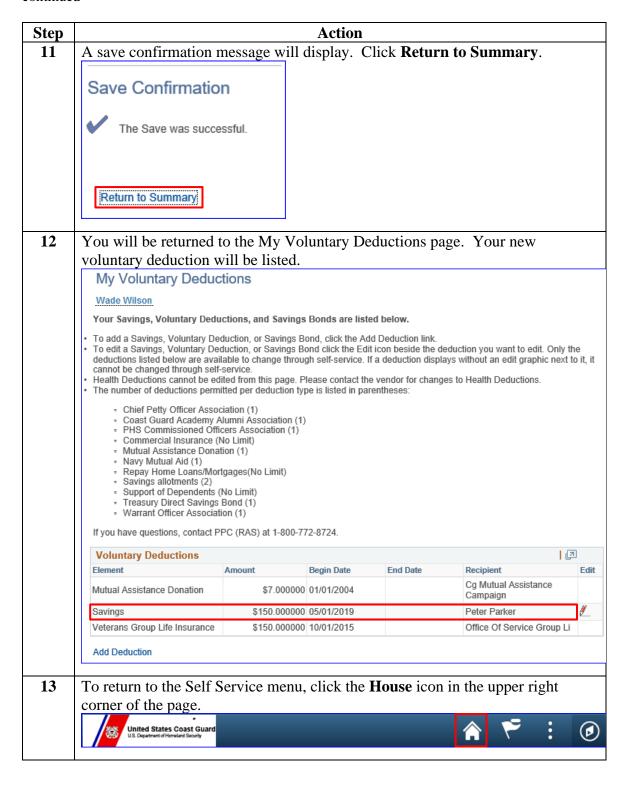
### Procedures,

		Ac				
Enter the 9-digit <b>Bank Routing number</b> and press the Tab key. This will						
populate the Bank Name.						
W	/ho receives this d	leduction				
Re	ecipient:					
Ac	count Name:	Peter Parker				
Ва	ank Routing #:	314074269		USAA FEDERAL	SAVINGS I	BANK
Ac	count Nbr:					
Ac	count Type:		/	Payment Metho	d:	Bank Transf
	Save Deduction	Stop Deduction		Return to St	ımmary	
me nui abi nui	essage after pres mber correctly. ility to receive T	valid number in the dates ing the Tab key. Clist If it is correct, contact reasury payments. If PC (RAS) for assistant deduction	ck O t you the i	<b>K</b> . Ensure you ur financial inst	ı have ty titution t	ped the to verify the
me nui abi nui W	essage after pres mber correctly. ility to receive T mber, contact Pl	ssing the Tab key. Cli If it is correct, contac Freasury payments. If PC (RAS) for assistan	tabas ck <b>O</b> et you the i	<b>K</b> . Ensure you ur financial inst	ı have ty titution t	ped the to verify the
me nui abi nui W Re	essage after pres mber correctly. ility to receive T mber, contact Pl Who receives this d ecipient:	If it is correct, contact reasury payments. If PC (RAS) for assistant deduction	tabas ck <b>O</b> et you the i	<b>K</b> . Ensure you ur financial inst	ı have ty titution t	ped the to verify the
me nun abi nun W Re Ac	essage after pres mber correctly. ility to receive T mber, contact Pl Who receives this d ecipient: ccount Name:	ssing the Tab key. Cli If it is correct, contact Treasury payments. If PC (RAS) for assistant deduction	tabas ck <b>O</b> et you the i	<b>K</b> . Ensure you ur financial inst	ı have ty titution t	ped the to verify the
me nun abi nun W Re Ac	essage after presumber correctly. ility to receive Tomber, contact Playho receives this decipient: ccount Name:	If it is correct, contact reasury payments. If PC (RAS) for assistant deduction	tabas ck <b>O</b> et you the i	<b>K</b> . Ensure you ur financial inst	i have ty titution the fies the r	ped the to verify the
me nun abi nun Re Acc	essage after presumber correctly. ility to receive Tomber, contact Playho receives this decipient: ccount Name: ank Routing #: ccount Nbr:	If it is correct, contact reasury payments. If PC (RAS) for assistant deduction	tabas ck <b>O</b> et you the i	K. Ensure your financial institution verif	i have ty titution the fies the r	ped the coverify the couting

### Procedures,

Step		Action				
9	Enter the <b>Account Number</b> and select the <b>Account Type</b> (Checking or					
	Savings) from the drop-down menu.					
	Who receives this dedu	ction				
	Recipient:					
	Account Name:	Peter Parker				
		reterrance				
	Bank Routing #:	314074269 USAA FEDERAL SAVINGS BANK				
	Account Nbr:	1234567890				
	Account Type:	Savings Payment Method: Bank Transfer				
	Save Deduction	Stop Deduction Return to Summary				
10	Ensure all the inform	nation entered is correct. Click <b>Save Deduction</b> .				
	My Voluntary Dedu					
	Wade Wilson					
	Enter your Voluntary Dedu	ction information.				
		n can be changed for the current payroll processing month or a future				
	<ul> <li>Payroll processing month.</li> <li>TRICARE and dental deductions cannot be edited from this page. Please contact the vendor for changes to Health Deductions.</li> <li>Start and stop dates entered for Voluntary Deductions cannot exceed sixty days past today's date. Your start and/or stop dates cannot exceed July 05, 2019.</li> <li>Voluntary deductions must be set up for payment by direct deposit / electronic funds transfer.</li> </ul>					
	Deduction:	Savings				
	Amount:	150.000000				
	Amount					
	Begin Date:	05/01/2019 Type:				
	End Date:	Policy #:				
	Who receives this deduction					
	Recipient:					
	Account Name:	Peter Parker				
	Bank Routing #:	314074269 USAA FEDERAL SAVINGS BANK				
	Account Nbr:	1234567890				
	Account Type:	Savings Payment Method: Bank Transfer				
	Save Deduction	Stop Deduction Return to Summary				

#### Procedures.



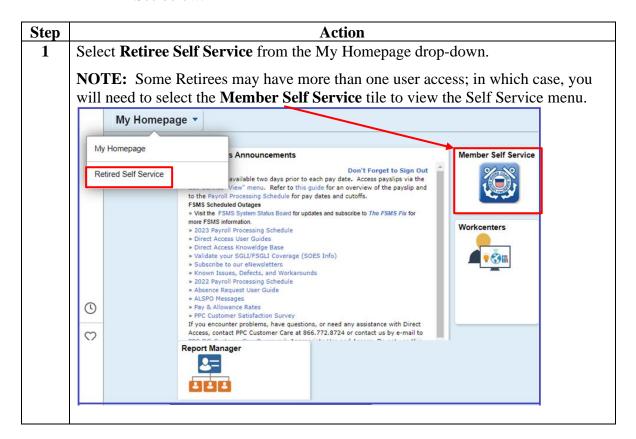
# **Changing a Voluntary Deduction (Allotment)**

**Introduction** This section provides the procedures for Retirees to change a voluntary

deduction (allotment) in Direct Access (DA).

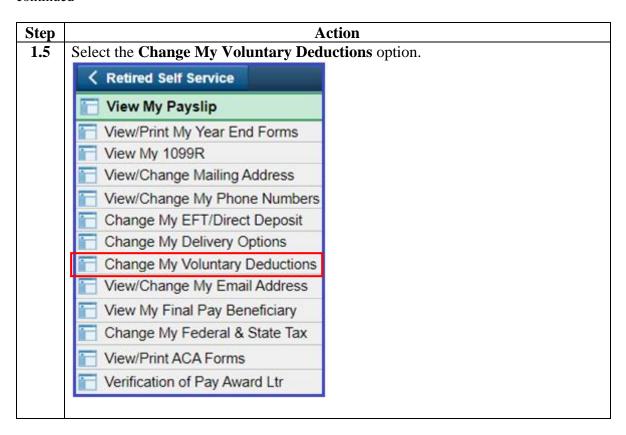
**Information** Log into DA Self Service at <u>Direct Access Self Service</u>.

**Procedures** See below.



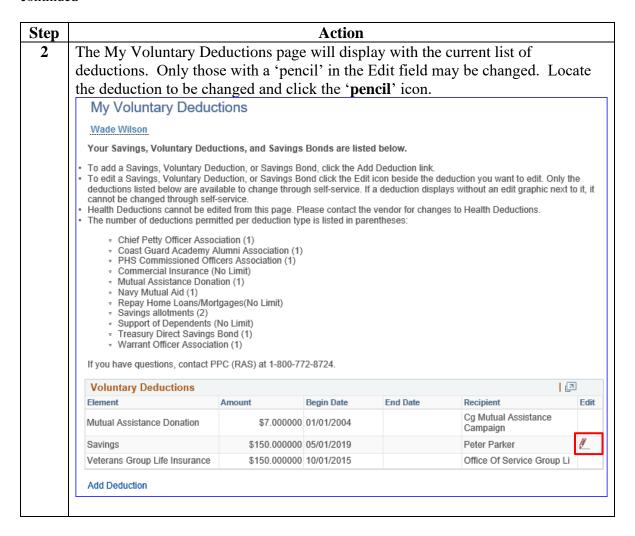
#### Procedures,

continued



#### Procedures.

continued

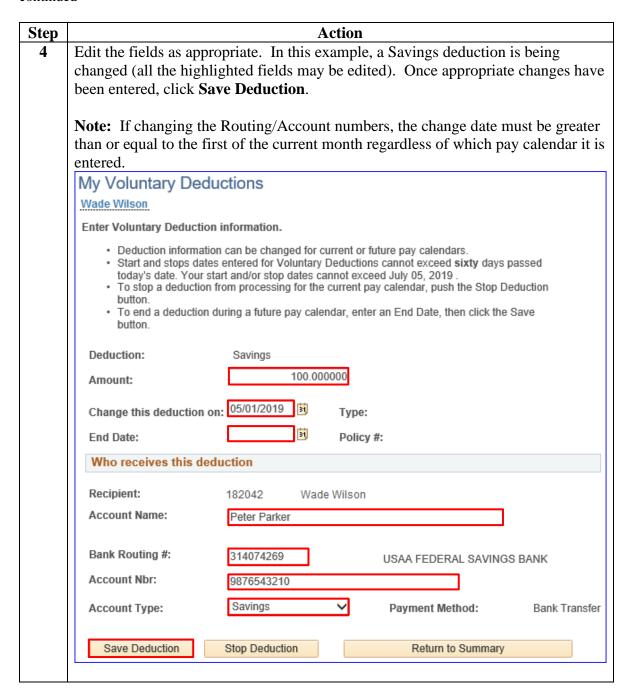


#### Procedures,

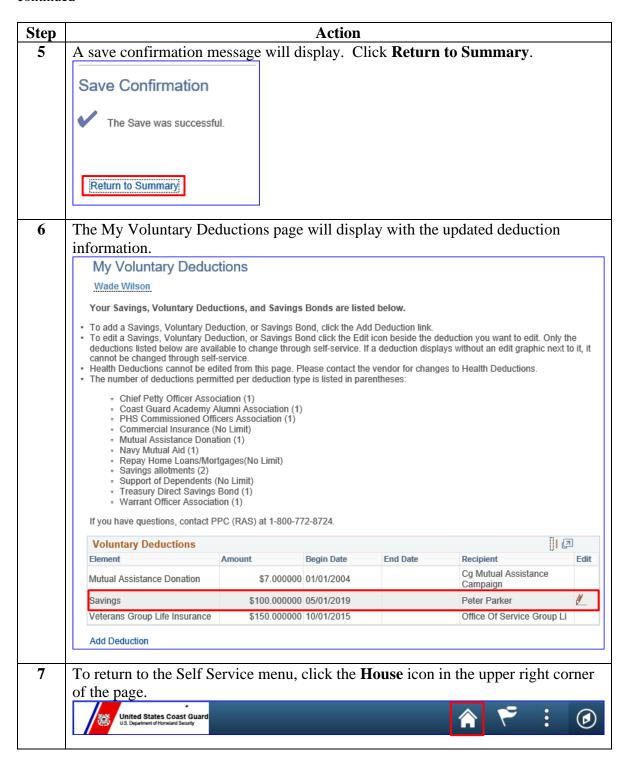
Step	Action			
3	Details for the voluntary deduction will display.			
	made. Changes to accommumbers may <b>NOT</b> be required to anything other	antary deduction will depend on the changes that may be bunt names, account type and bank account/routing altered for Association Dues or Donations. If changes are her than the amount and begin/end dates of these types of on will need to be stopped and a new deduction started with ormation.		
	My Voluntary Deductions			
	Wade Wilson			
	Deduction information.     Deduction information can be changed for current or future pay calendars.     Start and stops dates entered for Voluntary Deductions cannot exceed sixty days passed today's date. Your start and/or stop dates cannot exceed July 05, 2019.     To stop a deduction from processing for the current pay calendar, push the Stop Deduction button.     To end a deduction during a future pay calendar, enter an End Date, then click the Save button.  Deduction:  Savings  Amount:  150.000000			
	Change this deduction on:	05/01/2019 Type:		
	End Date:  Who receives this deduction  Recipient: 182042 Wade Wilson  Account Name: Peter Parker			
	Bank Routing #:	314074269 USAA FEDERAL SAVINGS BANK		
	Account Nbr:	1234567890		
	Account Type:	Savings Payment Method: Bank Transfer		
	Save Deduction	Stop Deduction Return to Summary		

#### Procedures,

continued



#### Procedures,



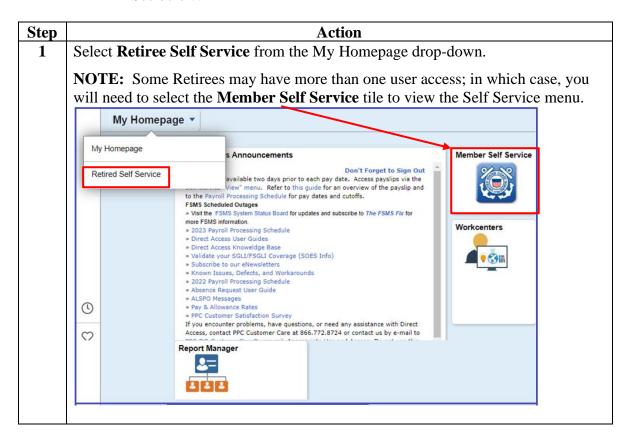
# **Stopping a Voluntary Deduction (Allotment)**

**Introduction** This section provides the procedures for Retirees to stop a voluntary

deduction (allotment) in Direct Access (DA).

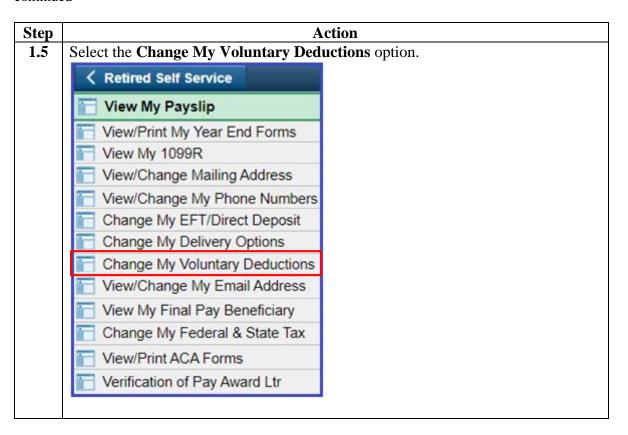
**Information** Log into DA Self Service at <u>Direct Access Self Service</u>.

**Procedures** See below.



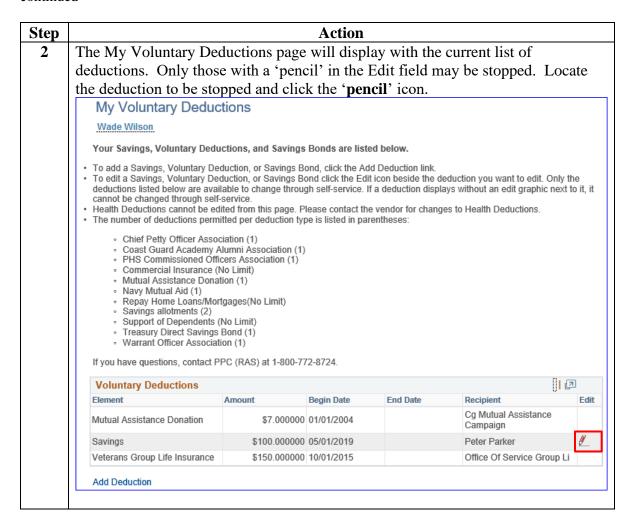
#### Procedures,

continued

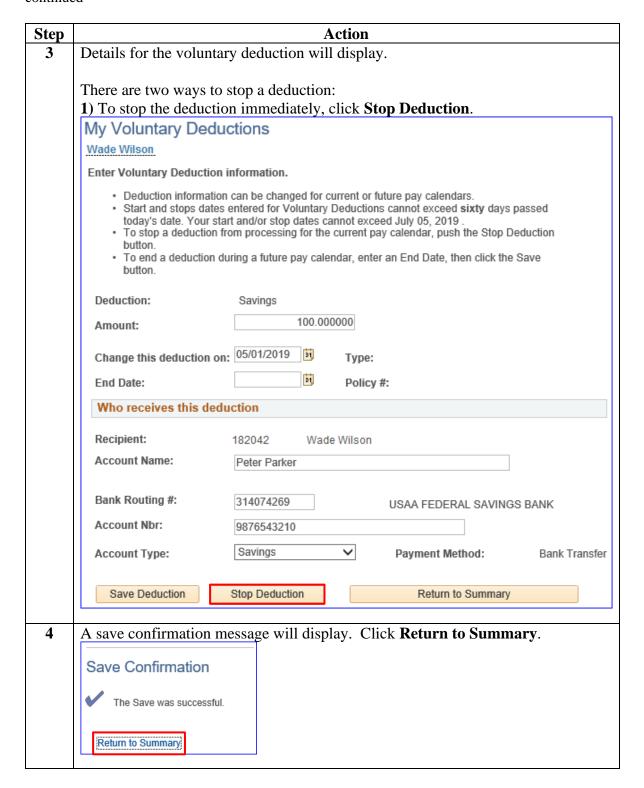


#### Procedures,

continued

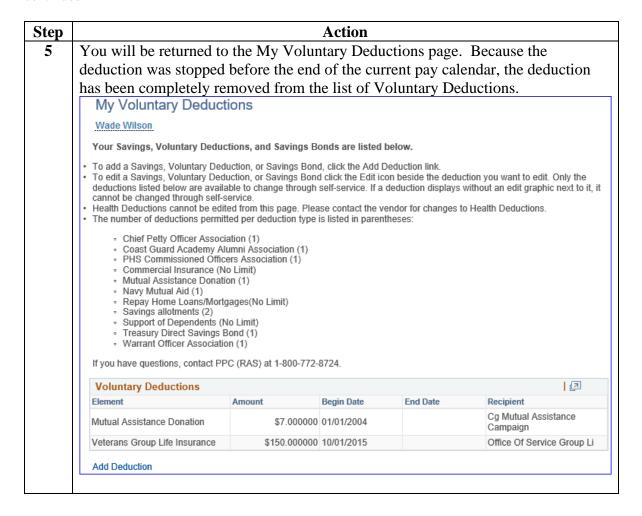


#### Procedures.



#### Procedures,

continued



#### Procedures,

continued

Step	Action				
6	2) If the deduction isn't to be stopped immediately, enter the <b>End Date</b> of the last				
	day of the month the deduction is to be stopped. For this example, the last month				
	monies should be deducted is June 2019, so the End Date is entered as 06/30/2019				
	Click Save Deductions  My Voluntary Deductions  Wade Wilson  Enter Voluntary Deduction information.  Deduction information can be changed for current or future pay calendars. Start and stops dates entered for Voluntary Deductions cannot exceed sixty days passed today's date. Your start and/or stop dates cannot exceed July 05, 2019. To stop a deduction from processing for the current pay calendar, push the Stop Deduction button. To end a deduction during a future pay calendar, enter an End Date, then click the Save button.				
	Deduction:	Savings			
	Amount:	100.000000			
	Change this deduction on: 05/01/2019 Type:				
	End Date:	06/30/2019 Policy #:			
	Who receives this deduction				
	Recipient:	182042 Wade Wilson			
	Account Name: Peter Parker				
	Bank Routing #:	314074269 USAA FEDERAL SAVINGS BANK			
	Account Nbr:	9876543210			
	Account Type:	Savings Payment Method: Bank Transfer			
	Save Deduction	Stop Deduction Return to Summary			

#### Procedures,

