

Allotments

Introduction This guide provides the procedures for how to view, change, add or stop your Voluntary Deductions (Allotments).

Important Information Allotments do not process retroactively. If you start an allotment late (after the mid-month pay 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 your 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.**

Starting an Allotment

- Allotments will only pay out ONCE A MONTH on the first.
- **DO NOT** expect a payment until the first of the month.
- **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 **SHOULD 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.**

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.
- If changing the amount during a mid-month calendar, the change date will default to the first day of the current month.
- If changing the amount during the end-month calendar, the change date must be greater than or equal to the first of the next month.
- 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.

Continued on next page

Allotments, Continued

**Allotment
Rules**

You are permitted to start, change, and stop the following allotments in DA:

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

Keep the following rules in mind when processing allotments:

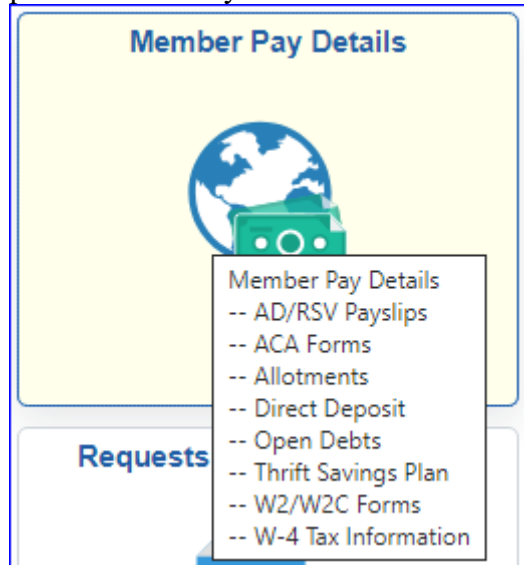
- Allotments for personal property loans (autos, furniture, electronics, etc.) are no longer authorized.
- You cannot allot more than the amount you are entitled to. The system does not edit allotments against your available pay, it is up to you to determine if there is sufficient net pay available to 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).
- You are 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.**

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Allotments, Continued

Changes to Direct Access Homepage

You will notice a change in how Direct Access displays upon login. There is a new “hover” feature that shows what is covered under a particular tile as your mouse moves over the tile as shown below.

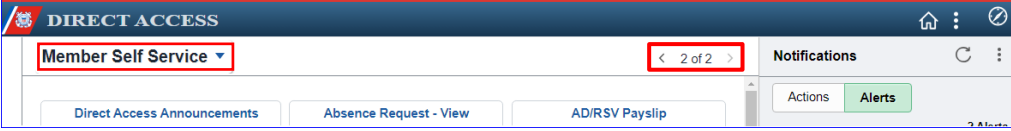
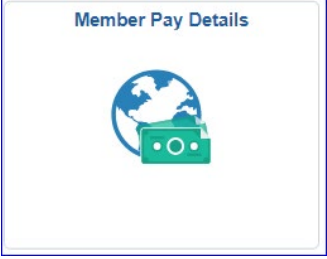
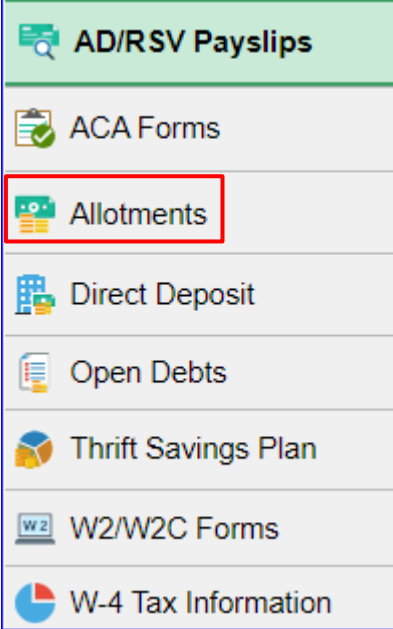


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Viewing Allotments







Procedures Use the following procedures to view current allotments in DA.

Step	Action
1	<p>Navigate to Member Self Service via the drop-down or by page arrows.</p> 
2	<p>Click the Member Pay Details tile.</p> 
3	<p>Select the Allotments option.</p> 

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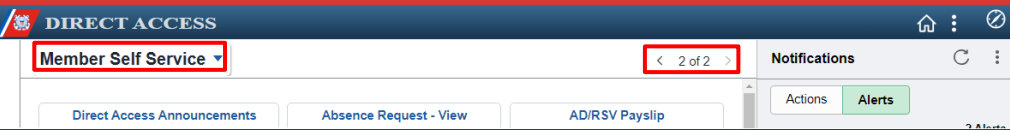
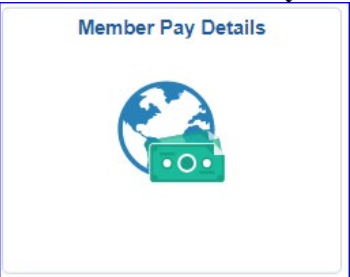
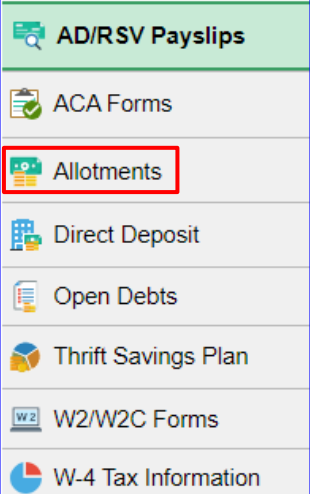
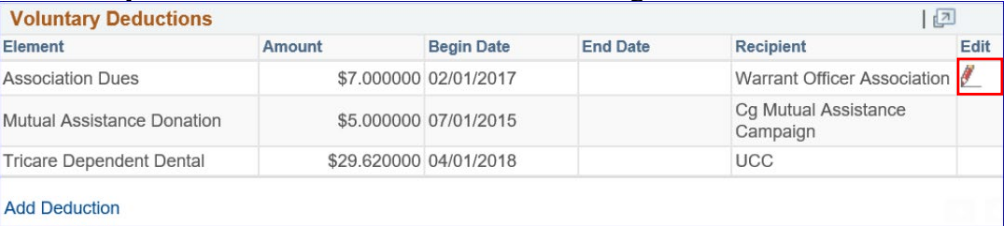
Viewing Allotments, Continued

Procedures,
continued

Step	Action																																				
4	<p>A listing of all current allotments in DA will display.</p> <table border="1" data-bbox="352 495 1361 719"> <thead> <tr> <th colspan="6" data-bbox="352 495 1361 524">Voluntary Deductions </th> </tr> <tr> <th data-bbox="352 524 611 553">Element</th> <th data-bbox="611 524 775 553">Amount</th> <th data-bbox="775 524 932 553">Begin Date</th> <th data-bbox="932 524 1086 553">End Date</th> <th data-bbox="1086 524 1315 553">Recipient</th> <th data-bbox="1315 524 1361 553">Edit</th> </tr> </thead> <tbody> <tr> <td data-bbox="352 553 611 584">Association Dues</td> <td data-bbox="611 553 775 584">\$7.000000</td> <td data-bbox="775 553 932 584">02/01/2017</td> <td data-bbox="932 553 1086 584"></td> <td data-bbox="1086 553 1315 584">Warrant Officer Association </td> <td data-bbox="1315 553 1361 584"></td> </tr> <tr> <td data-bbox="352 584 611 636">Mutual Assistance Donation</td> <td data-bbox="611 584 775 636">\$5.000000</td> <td data-bbox="775 584 932 636">07/01/2015</td> <td data-bbox="932 584 1086 636"></td> <td data-bbox="1086 584 1315 636">Cg Mutual Assistance Campaign</td> <td data-bbox="1315 584 1361 636"></td> </tr> <tr> <td data-bbox="352 636 611 667">Tricare Dependent Dental</td> <td data-bbox="611 636 775 667">\$29.620000</td> <td data-bbox="775 636 932 667">04/01/2018</td> <td data-bbox="932 636 1086 667"></td> <td data-bbox="1086 636 1315 667">UCC</td> <td data-bbox="1315 636 1361 667"></td> </tr> <tr> <td colspan="6" data-bbox="352 680 1361 719">Add Deduction</td> </tr> </tbody> </table>	Voluntary Deductions 						Element	Amount	Begin Date	End Date	Recipient	Edit	Association Dues	\$7.000000	02/01/2017		Warrant Officer Association 		Mutual Assistance Donation	\$5.000000	07/01/2015		Cg Mutual Assistance Campaign		Tricare Dependent Dental	\$29.620000	04/01/2018		UCC		Add Deduction					
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Changing Allotments

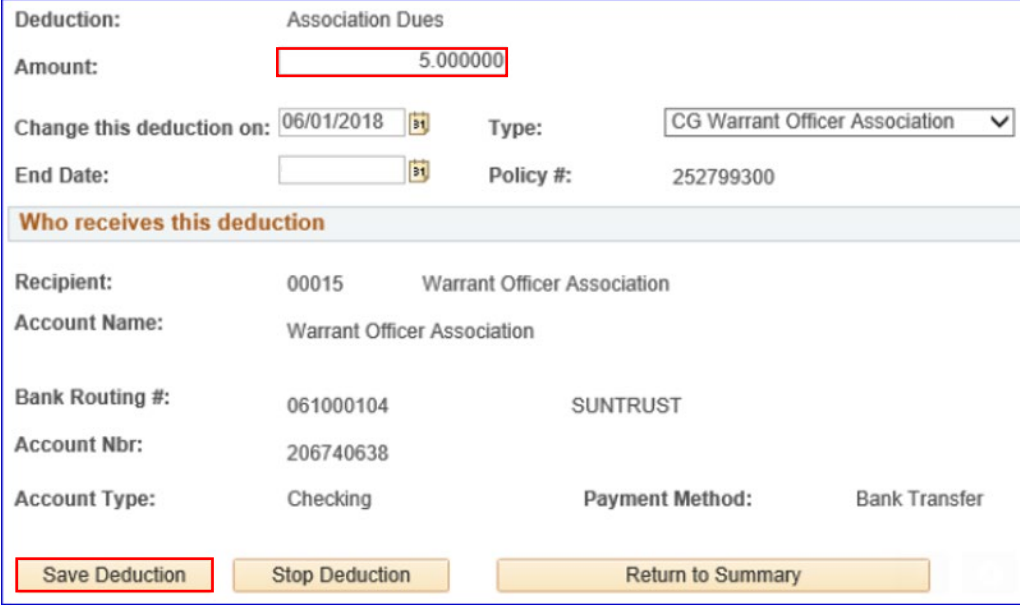
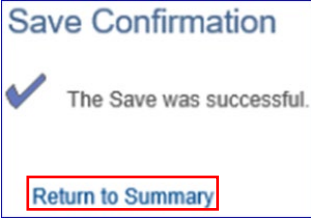
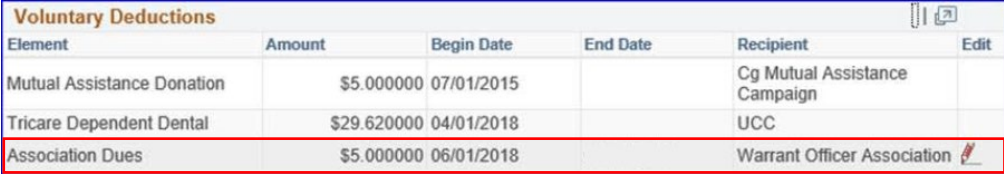
Procedures Use the following procedures to change an allotment in DA.

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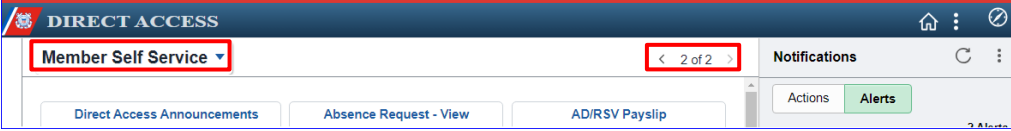
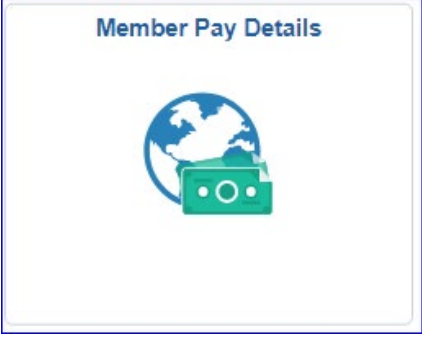
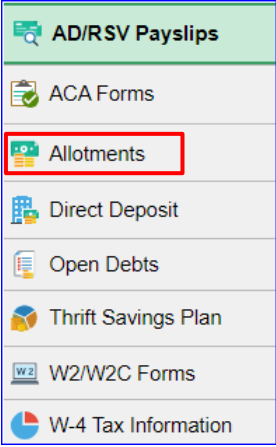

Changing Allotments, Continued

Procedures,
continued

Step	Action																								
5	<p>In the Amount field, enter the new monthly amount of the deduction in dollars and cents. Do NOT enter a dollar sign. In this example the Chief Warrant Officer Association dues will be changed from \$7.00 to \$5.00.</p> <p>When finished, click the Save Deduction button.</p> 																								
6	<p>You will receive a Save Confirmation message. Click the Return to Summary link.</p> 																								
7	<p>The Voluntary Deductions page will display with the new deduction amount.</p>  <table border="1" data-bbox="352 1648 1359 1821"> <thead> <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>Mutual Assistance Donation</td> <td>\$5.000000</td> <td>07/01/2015</td> <td></td> <td>Cg Mutual Assistance Campaign</td> <td></td> </tr> <tr> <td>Tricare Dependent Dental</td> <td>\$29.620000</td> <td>04/01/2018</td> <td></td> <td>UCC</td> <td></td> </tr> <tr style="border: 2px solid red;"> <td>Association Dues</td> <td>\$5.000000</td> <td>06/01/2018</td> <td></td> <td>Warrant Officer Association</td> <td></td> </tr> </tbody> </table>	Element	Amount	Begin Date	End Date	Recipient	Edit	Mutual Assistance Donation	\$5.000000	07/01/2015		Cg Mutual Assistance Campaign		Tricare Dependent Dental	\$29.620000	04/01/2018		UCC		Association Dues	\$5.000000	06/01/2018		Warrant Officer Association	
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Starting an Allotment

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Starting an Allotment, Continued

Procedures,
continued

Step	Action
5	<p>A new Allotment page will display. Enter the information for the new allotment.</p> <ul style="list-style-type: none"> Deduction: Click the Deduction drop-down and select the type of allotment to start. In this example we will start a Savings Allotment. <div data-bbox="373 640 719 831" style="border: 1px solid blue; padding: 2px; margin: 5px 0;"> Association Dues Commercial Insurance Navy Mutual Aid Insurance Private Venture Housing Repay home loans, mortgages Savings Support of Dependents Treasury Direct Savings Bond </div> Amount: Enter the monthly amount of the deduction in dollars and cents. Do Not use the dollar sign. Then press the Tab key. <div data-bbox="399 938 1307 1491" style="border: 1px solid blue; padding: 5px; margin: 5px 0;"> <p>Deduction: Savings ▼</p> <p>Amount: 100.000000</p> <p>Begin Date: 06/01/2018 <small>BT</small> Type:</p> <p>End Date: <small>BT</small> Policy #:</p> <p>Who receives this deduction</p> <p>Recipient:</p> <p>Account Name: Yosemite Sam</p> <p>Bank Routing #: 314074269 USAA FEDERAL SAVINGS BANK</p> <p>Account Nbr: 987654321</p> <p>Account Type: Savings ▼ Payment Method: Bank Transfer</p> <p> Save Deduction Stop Deduction Return to Summary </p> </div>

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Starting an Allotment, Continued

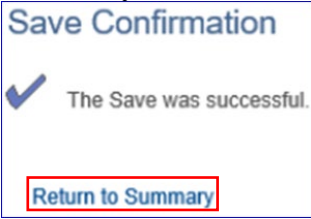
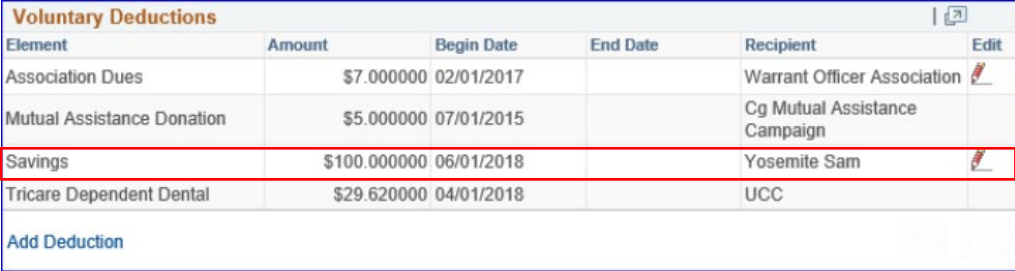
Procedures,
continued

Step	Action
<p>5 (cont.)</p>	<ul style="list-style-type: none"> • Begin and End Date. If starting an allotment prior to the mid-month pay cycle, you can enter the first day of the current month. Otherwise, you must enter the first day of the following month. You can leave the End Date blank for a continuing deduction. • Account Name. Enter the name of the person on the account. • Bank Routing #. Enter the bank routing number for the bank. After entering the routing number, press the Tab key. The name of the financial institution will display. It is VERY IMPORTANT to ensure the routing number is correct. • Account Nbr. Enter the account number. • Account Type. Click the Account Type drop-down and select the appropriate option. <p>When finished, review the information for accuracy. Then click the Save Deduction button.</p> <div data-bbox="400 1162 1307 1715" style="border: 1px solid black; padding: 5px;"> <p>Deduction: Savings <input type="text" value="Savings"/></p> <p>Amount: <input type="text" value="100.000000"/></p> <p>Begin Date: <input type="text" value="06/01/2018"/> <input type="button" value="BT"/> Type: <input type="text"/></p> <p>End Date: <input type="text"/> <input type="button" value="BT"/> Policy #: <input type="text"/></p> <p>Who receives this deduction</p> <p>Recipient:</p> <p>Account Name: <input type="text" value="Yosemite Sam"/></p> <p>Bank Routing #: <input type="text" value="314074269"/> <small>USAA FEDERAL SAVINGS BANK</small></p> <p>Account Nbr: <input type="text" value="987654321"/></p> <p>Account Type: <input type="text" value="Savings"/> <input type="button" value="v"/> 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>

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Starting an Allotment, Continued

Procedures,
continued

Step	Action																														
6	<p>You will receive a Save Confirmation message. Click the Return to Summary link.</p> 																														
7	<p>The new allotment will be listed in the Voluntary Deductions section.</p>  <table border="1"> <thead> <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>Association Dues</td> <td>\$7.000000</td> <td>02/01/2017</td> <td></td> <td>Warrant Officer Association</td> <td></td> </tr> <tr> <td>Mutual Assistance Donation</td> <td>\$5.000000</td> <td>07/01/2015</td> <td></td> <td>Cg Mutual Assistance Campaign</td> <td></td> </tr> <tr style="border: 2px solid red;"> <td>Savings</td> <td>\$100.000000</td> <td>06/01/2018</td> <td></td> <td>Yosemite Sam</td> <td></td> </tr> <tr> <td>Tricare Dependent Dental</td> <td>\$29.620000</td> <td>04/01/2018</td> <td></td> <td>UCC</td> <td></td> </tr> </tbody> </table> <p>Add Deduction</p>	Element	Amount	Begin Date	End Date	Recipient	Edit	Association Dues	\$7.000000	02/01/2017		Warrant Officer Association		Mutual Assistance Donation	\$5.000000	07/01/2015		Cg Mutual Assistance Campaign		Savings	\$100.000000	06/01/2018		Yosemite Sam		Tricare Dependent Dental	\$29.620000	04/01/2018		UCC	
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Stopping an Allotment

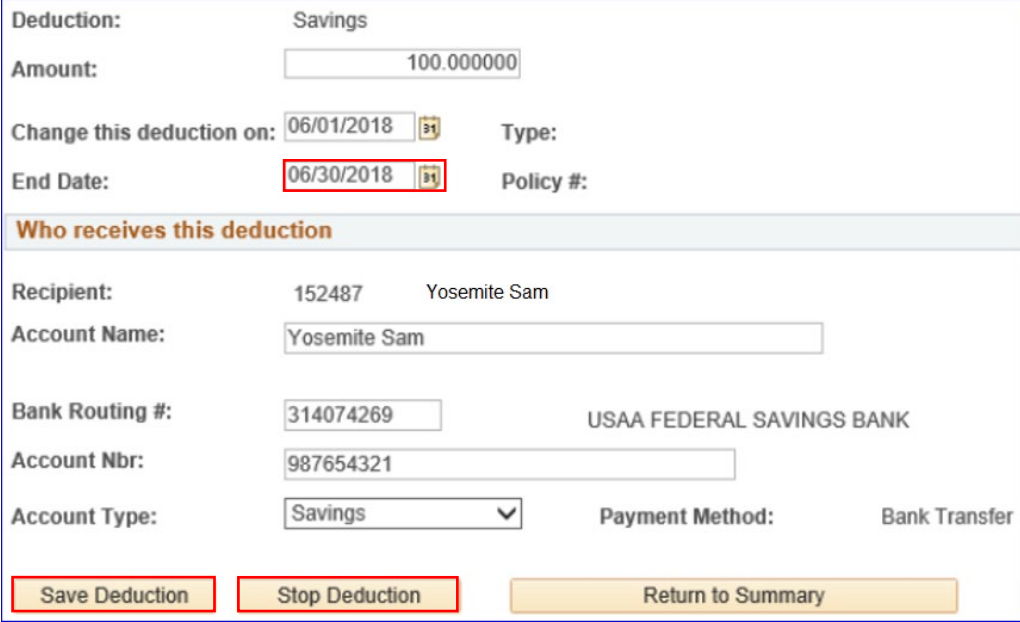
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1	<p>Navigate to Member Self Service via the drop-down or by page arrows.</p> 																																				
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Stopping an Allotment, Continued

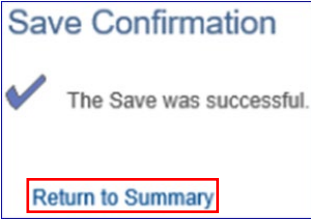

Procedures,
continued

Step	Action
5	<p>The Allotment information page will display. There are two ways to stop an allotment.</p> <ul style="list-style-type: none"> You can click the Stop Deduction button on the bottom of the screen to immediately stop an allotment. If stopping prior to the mid-month pay cycle, the allotment will stop the last day of the previous month, and the final payment would have been 1 June 2018. For example, member entered a stop deduction in DA prior to the mid-month pay cycle (10 June 2018), which will stop the allotment the last day of the previous month (31 May 2018). Or enter an End Date. To stop an allotment after a mid-month pay cycle, enter the End Date to stop the deduction. The date must be after the Change this deduction on date. You can future date the End Date for stopping the allotment for future dates, but it must always be the last day of that month. For example, the member entered a stop deduction after the mid-month pay cycle (10 June 2018) but prior to the end-month pay cycle (22 June 2018). The soonest the member can affect the stop is the end of the current month (30 June 2018). After entering the End Date, click the Save Deduction button. 

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Stopping an Allotment, Continued

Procedures,
continued

Step	Action																																				
6	<p>If you clicked the Stop Deduction button or entered an End Date and clicked the Save Deduction button, you will receive a Save Confirmation message.</p> <p>Click the Return to Summary link.</p> 																																				
7	<p>You will return to the Voluntary Deduction page.</p> <ul style="list-style-type: none"> • If you elected to stop the deduction immediately, the allotment will no longer be listed. • If you elected to enter an End Date, the date will appear in the Voluntary Deductions.  <table border="1" data-bbox="352 1115 1375 1328"> <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>Association Dues</td> <td>\$7.000000</td> <td>02/01/2017</td> <td></td> <td>Warrant Officer Association</td> <td></td> </tr> <tr> <td>Mutual Assistance Donation</td> <td>\$5.000000</td> <td>07/01/2015</td> <td></td> <td>Cg Mutual Assistance Campaign</td> <td></td> </tr> <tr style="border: 2px solid red;"> <td>Savings</td> <td>\$100.000000</td> <td>06/01/2018</td> <td>06/30/2018</td> <td>Yosemite Sam</td> <td></td> </tr> <tr> <td>Tricare Dependent Dental</td> <td>\$29.620000</td> <td>04/01/2018</td> <td></td> <td>UCC</td> <td></td> </tr> </tbody> </table>	Voluntary Deductions						Element	Amount	Begin Date	End Date	Recipient	Edit	Association Dues	\$7.000000	02/01/2017		Warrant Officer Association		Mutual Assistance Donation	\$5.000000	07/01/2015		Cg Mutual Assistance Campaign		Savings	\$100.000000	06/01/2018	06/30/2018	Yosemite Sam		Tricare Dependent Dental	\$29.620000	04/01/2018		UCC	
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