

HELPFUL HINTS

Following the procedures below will help the Allotment Department run faster and more efficiently and in turn, enable us to provide better service to you and your clients. Thank you for your cooperation!

1. **SUBMITTING:** You may choose to either FAX, UPLOAD to the website, **OR** MAIL your work to us.

If you FAX: ONLY Fax to this number: 717-584-0277

When faxing please keep in mind pages can stick together, make sure all pages faxed are the same number that we received. (Most fax machines can be programmed to do this.) **If you require confirmation of receipt, please include a cover page that we can fax back to you.**

If you MAIL: Mail to: **Tower Administrative Services Attn: Allot. Dept
8 Marticville Road
Lancaster, PA 17603**

Please make sure you include a return address when mailing.

IMPORTANT-DO NOT fax AND mail! This will only bog down our system and slow the process down. Every B-4 that is submitted to us has to be verified on the system to see if it has already been entered or updated. All clients are kept in our system by SOCIAL SECURITY NUMBER. That is why it is **crucial** that all information is legible and accurate.

Agents, please make sure you keep copies of all your B-4's, as Tower does not fax your B-4's back to you.

2. **PROCEDURES:** Every agent needs to develop their own procedure for remitting paperwork; stamp, checkmark, list etc. Please **PRINT** your name so that we can identify your business.
3. **CHANGES/REFUNDS:** **ALL** changes and refund requests **MUST BE IN WRITING**. Include clients name, address, SS# and phone #. **WE CANNOT ACCEPT CHANGES OR REFUND REQUESTS OVER THE PHONE.**
4. **DRAFTS:** Always submit a VOID check (or copy) for bank drafts (**deposit slips don't always have the correct or needed information**). Keep in mind if you submit bank drafts we must have them at least 7 days before we actually draft on the debit date the client has chosen. Our draft dates are the 5th, 15th, 20th, or 25th.
5. **PROVIDER ADDRESSES:** Be sure to give us **complete** remittance information for each new provider you are requesting us to send money to. It is your responsibility to check with the provider to make sure they accept payments from a TPA biweekly or monthly (contact person and phone # as well). Account and or policy numbers will also help (if available) us process the work correctly the first time. **If we are sending money to your clients' savings or checking account we must have a routing number, account number, and whether it is a checking or savings account.**

We sincerely appreciate your assistance in helping us provide better service to you and your clients. Feel free to contact us if you have any questions or have suggestions of your own.

Phone: (800) 437-1670 EXT. 1006

All allotments must now be entered by the employee or the agent using the PostalEASE dial-up system. (877-477-3273) or online at www.liteblue.usps.gov. *

PostalEASE Worksheet

Name _____ Date _____

In order to process an allotment via the PostalEASE system, the client will need his Employee ID # (this is the 8 digit # located on the top left hand corner of their pay stub), Personal Identification Number (PIN), and last 6 digits of their Social Security #.

Follow the prompts to input the information below.

- 1) Call PostalEASE toll-free at **877-477-3273**. Listen to **all** instructions before proceeding.
- 2) Choose “**1**” for PostalEASE
- 3) When prompted, enter **Employee ID #** _____ (8 digit # found on pay stub)
- 4) When prompted, enter **PIN #** _____
- 5) Choose “**2**” for “Payroll Options”
- 6) Choose “**1**” for “Allotments”
- 7) Choose “**2**” to Continue
- 8) Choose “**3**” to “Add an Allotment” (The system will let you know if all allotments are already taken)**
- 9) When prompted, Enter the bank routing #: **071000013-JPM** or **211080725-FPCU**
- 10) When prompted, Enter the account #: **9079**_____ **JPM** or **33302640**_____ **FPCU** (enter last six digits of client's SSN)
- 11) When prompted, choose “**1**” for a **checking** account
- 12) When prompted, enter the “**dollar**” amount
- 13) When prompted, enter the “**cents**” amount
- 14) Listen to what has been entered and press “**1**” to Confirm
- 15) Record the Confirmation # _____ and the date the allotment will start ____/____/____

**If all allotments are taken, make sure neither one is currently coming to Tower. If one is, you can add your business to the existing allotment and indicate this on your B4 form. Otherwise, you can “piggyback” another allotment that is for insurance or a savings account. Do not “piggyback” money that is being used to pay a bill. Please call Tower Administrative Services for help with the “piggyback”.

*Allotments can also be set up online at www.liteblue.usps.gov.

If you have any questions, information or suggestions regarding PostalEASE, please feel free to call the **Allotment Department at 800-437-1670, ext 243, 263, or 237.**