



# Complete eFinance Guide

*Your step-by-step guide to submitting financial documents through  
eFinance*



# **Table of Contents**

Each entry is a link to the correct page.

Press —CTRL then click on the entry.

## Introduction

Overview .....	4
----------------	---

## Getting Started

Access .....	5
--------------	---

Entitlements .....	8
--------------------	---

Adding Dependents .....	8
-------------------------	---

Start, Stop or Change Basic Allowance for Housing (BAH) .....	11
---	----

Family Separation Allowance .....	12
-----------------------------------	----

State of Legal Residence Certification .....	13
--	----

Query Request .....	14
---------------------	----

Frequently Asked Questions .....	15
----------------------------------	----

Submission Guide .....	16
------------------------	----

Transaction Information .....	17
-------------------------------	----

# Introduction

## Overview:

The eFinance system is designed to allow for paperless submission of a variety of financial documents. This is done using an interactive –Turbo Tax|| approach that progressively builds each form based on the answers provided by the member. This resource is designed to be your complete guide through eFinance transactions. The eFinance system is easy to follow but at times there may be additional questions or assistance needed. Please feel free to email the 366 FAS finance help box with any questions you may have at:

366CPTS.FinanceCustomerService@us.af.mil

# Getting Started

## Access

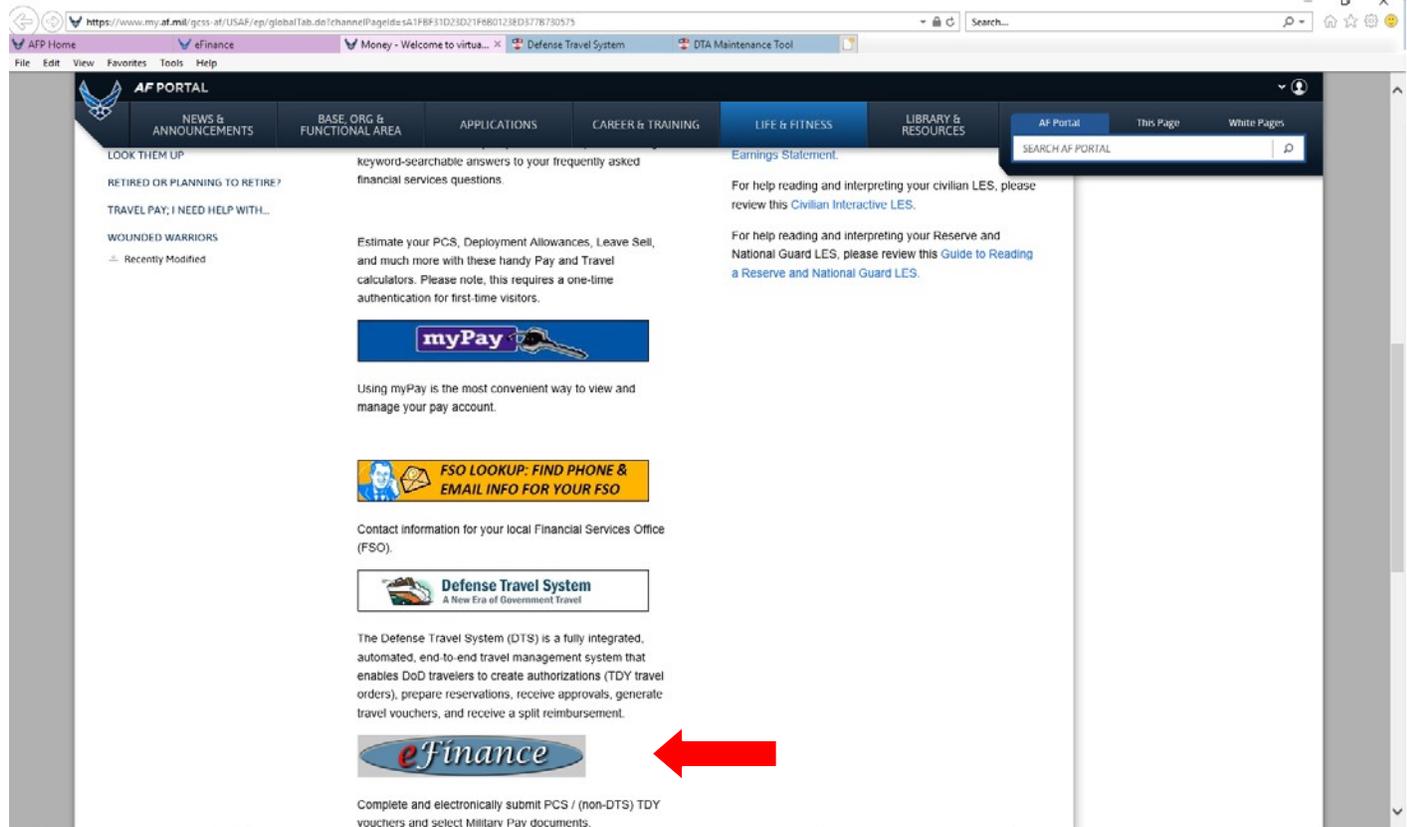
**eFinance website:** You will need a CAC reader and internet access (If you are located at an AF installation or other and have access to a .mil network, this is the preferred way to access eFinance Workspace)

<https://efinance.sso.cce.af.mil/login?3>

### Through the portal:

Click on the –Life & Fitness link.

Then click on the –Virtual Finance link scroll down and click the –eFinance link.



The screenshot shows the 'eFinance' web application interface. At the top right, it indicates the user is logged in as 'Davis, Christian T'. Below the header, there are navigation links for 'PCS', 'IDY', 'Forms', and 'Help'. The main content area is titled 'Manage Your Profile' and contains several tabs: 'Personal Information', 'Addresses', 'Dependents', 'Personal Documents', and 'Roles'. The 'Personal Information' tab is active, displaying a form with the following fields:

- First Name:** Christian
- MI:** T
- Last Name:** Davis
- Initials:** cld
- Date of Birth:** [empty]
- SSN:** [empty]
- Email:** [empty]
- Time Zone:** (GMT-07:00) Mountain Time (US & Canada)
- Current Marital Status:** Single
- Date of Marriage:** [empty]
- Personal Phone Number:** [empty]
- Commercial Number:** [empty]
- DSN:** [empty]
- Current Assigned Base:** Mountain Home AFB, ID
- Current Organization Unit:** 366 CPTS
- Service Type:** Active Duty
- Pay Grade:** E-5
- Office Symbol:** FMF
- Supervisor's Base:** Mountain Home AFB, ID
- Supervisor's Unit:** 366 CPTS
- Supervisor:** Sutanya Allen-Nix

At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

Enter the necessary information. Anything marked with an \* is required to be completed before continuing. When finished, click [Save](#).

## Getting Started

The screenshot displays the 'eFinance' web application interface. At the top, the user is logged in as 'Davis, Cristian T.' and has access to 'PCS', 'TDY', 'Forms', and 'Help' links. The main section is titled 'Manage Your Profile' and contains several tabs: 'Personal Information', 'Addresses', 'Dependents', 'Personal Documents', and 'Roles'. The 'Addresses' tab is active, showing a table with columns: 'Address Name', 'Street', 'City', 'State', 'Zip/Postal Code', 'Country', 'Current', and 'Actions'. The table currently contains no data, with the text 'No addresses found' displayed below it. Below the table is a form titled 'Add Address' with the following fields and options:

- This is my current Address
- This is a PSC address
- Address Name: \*
- Street 1: \*
- Street 2:
- City:
- State: \* (Choose One dropdown)
- Zip Code: \*
- Country: \* (United States dropdown)

At the bottom of the form are 'Add' and 'Cancel' buttons. The footer of the page indicates 'EQUO | Version 1.1.1.4.1'.

In the addresses tab, enter the necessary information. Anything marked with an \* is required to be completed before continuing. When finished, click [Save](#).

**Note:** You must enter a physical mailing address. Please enter your current PSC or CMR mailbox address.

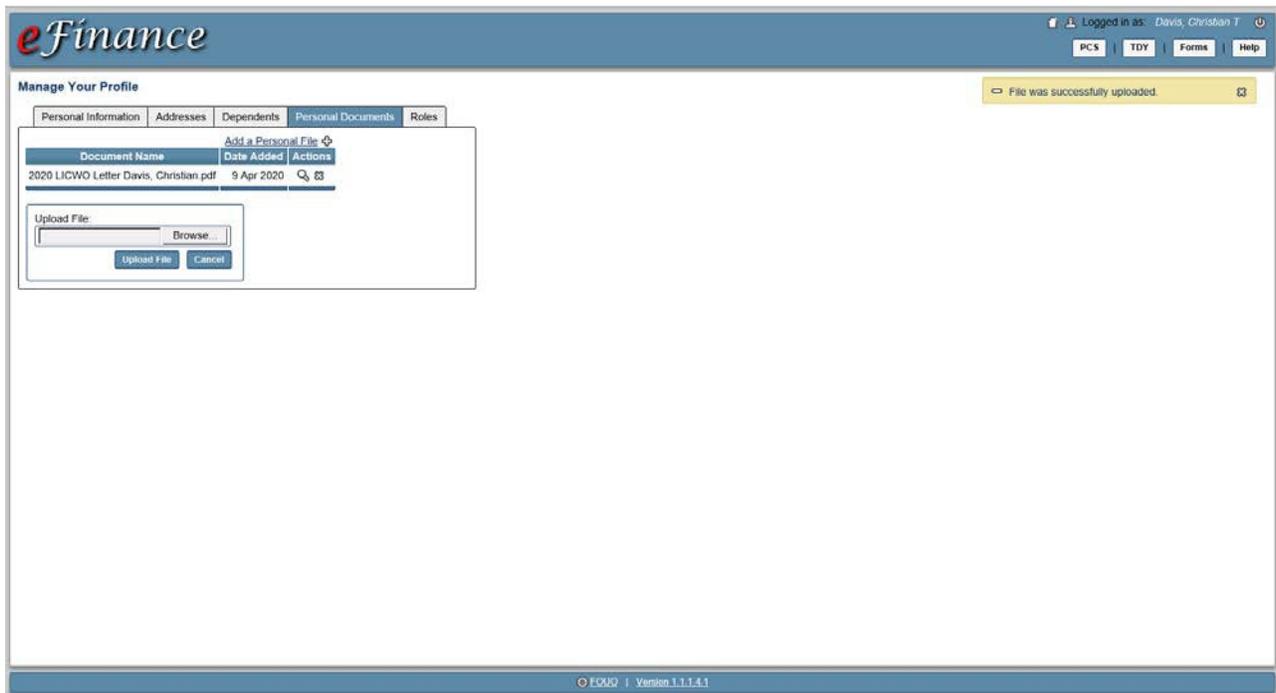
## Adding Dependents

The screenshot shows the 'eFinance' web application interface. At the top, the user is logged in as 'Davis, Christian T'. The main navigation bar includes 'PCS', 'TDY', 'Forms', and 'Help'. The 'Manage Your Profile' section has tabs for 'Personal Information', 'Addresses', 'Dependents', 'Personal Documents', and 'Roles'. The 'Dependents' tab is active, showing a table with columns: 'First Name', 'Last Name', 'Dependent Type', 'Auto Claimed', 'Active Dependent', and 'Actions'. The table currently displays 'No dependents found'. Below the table is a 'Dependent' form with two main sections: 'Dependent's System Settings' and 'Address'. The 'System Settings' section includes a 'Relationship' dropdown menu, checkboxes for 'Auto-claim this dependent', 'Active dependent', and 'Dependent has same address as sponsor', and input fields for 'First Name', 'Last Name', 'SSN', and 'Date of Birth'. The 'Address' section includes a checkbox for 'This is a PSC address', input fields for 'Street 1', 'Street 2', and 'City', and dropdown menus for 'State' and 'Country'. 'Save' and 'Cancel' buttons are located at the bottom of the form.

In the dependents enter the necessary information.

When finished, click — [Save](#).

**Note:** You will also need to update your dependency status with the Military Personnel Flight (MPF) in DEERS



In the Personal Documents you now have the opportunity to scan and upload your supporting documentation. Once all documents are in the personal documents tab they will be available for future use

At this point you're ready to start! Select the action you want to complete and refer to the appropriate section in this guide.

Form Name	Form Number	Description	Actions
<input type="checkbox"/> Advance BAH	DD 1039	Advance Housing Allowance	↕
<input type="checkbox"/> Advance Pay	DD 2560	PCS Advance Pay	↕
<input type="checkbox"/> Adverse Effect	AF 2282	Statement of Adverse Effect - Use of Government Facilities - (TDY missed meal)	↕
<input type="checkbox"/> Allotment	DD 2558	Start, Stop, or Change Allotment (Insurance - Mortgage - Priv. Housing)	↕
<input type="checkbox"/> BAH	AF 594	Start, Stop or Change Basic Allowance for Housing (BAH) or Dependency Redetermination	↕
<input type="checkbox"/> BAS	AF 220	Request, Authorization, and Pay Order Basic Allowance for Subsistence (BAS)	↕
<input type="checkbox"/> BAS Certification	DD 1475	BAS Certification - Permanent party missed meal claim	↕
<input type="checkbox"/> COLA	DD 114	Cost of Living Allowance (Military Pay Order)	↕
<input type="checkbox"/> Direct Deposit	FMS 2231	Fast Start - Direct Deposit - Federal Payments	↕
<input type="checkbox"/> Emergency Pay	DD 1337	Authorization / Designation for EMERGENCY PAY and Allowances	↕
<input type="checkbox"/> FSA	DD 1561	Family Separation Allowance - Statement to Substantiate Payment	↕
<input type="checkbox"/> MIHA	DD 2556	Move-In Housing Allowance (MIHA)	↕
<input type="checkbox"/> OHA	DD 2367	Individual Overseas Housing Allowance (OHA)	↕
<input type="checkbox"/> Remit / Waive Debt	DD 2789	Waiver / Remission of Indebtedness	↕
<input type="checkbox"/> SOLR	DD 2058	State of Legal Residence	↕
<input type="checkbox"/> State Tax (Native American)	DD 2058-2	Native American State Income Tax Withholding Exemption Certificate	↕
<input type="checkbox"/> TLA Request	AF 1357	Request for Temporary Lodging Allowance	↕
<input type="checkbox"/> TV - Actual Expenses	DD 1351-3	Statement of Actual Expenses	↕
<input type="checkbox"/> TV - Advance/Cover	DD 1351	Travel Voucher - Advance/Cover	↕

[Create Custom Package](#) [Cancel](#)

To create a custom package of forms, select the desired form above and click this button.

© FOLIO | Version 1.1.1.4.1

To see step-by-step instructions on how to complete each action, see the Table of Contents and turn to the corresponding page.

Refer to the transaction information on pg.17 for a detailed description of each action.

For example:

### Statement to Substantiate Payment of Family Separation Allowance *Start or Stop payment of FSA*

Members married to military and those with dependents may be authorized FSA. This form is used to capture information needed for the FSO to determine proper application of FSA. FSA is normally authorized when orders separate the member from the family for more than 30 days. The form is completed using eFinance, signed by member, then routed to the FSO for Certifying Official signature and processing. (eFinance will allow members to attach/fax a copy of the complete travel voucher claim)

# Basic Allowance for Housing

**eFinance** Logged in as: Davis, Christian T  
PCS | TDY | Forms | Help

**Edit Form: BAH** Status: In Work

Your profile shows you are single and have no dependents.  
Dependent-specific form elements have been disabled.

**Non-Custodial Parent**

I am a Non-Custodial Parent

I pay the full amount of with dependent rate BAH

I pay a partial amount \$

Based on:

**Dependents**

I am claiming BAH for dependent(s)

IN My Custody

NOT In My Custody (but paying child support)

Effective Date:

Select up to six (6) dependents

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Dependent(s) named above is a Child whose Parent is a military member, or the spouse of a military member.  
Please provide the following:

Name	SSN	Branch of Service	Duty Station
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**BAH for Secondary Dependents**

Secondary dependents are parents, parents-in-law, stepparents, parents by adoption, or in-loco-parentis, students 21 and 22 years of age, incapacitated children over age 21, or Ward of a court

I have no secondary dependents.

This is my first BAH application.

This is NOT my first BAH application. Previous BAH filed on:

Save Cancel

© 2000 | Version 1.1.1.4.1

This is the BAH update page. It will pull in your dependents from your eFinance profile automatically. Complete the questions accordingly, attached any required documents (marriage certificate, divorce decree, birth certificate, etc) and submit for finance processing.

## Family Separation Allowance

This is the first FSA screen. Determine if you are entitled to the Family Separation Allowance.

There are three types of FSA:

### FSA – T

- On TDY for more than 30 days
- Have dependents in your legal/physical custody
- And/or have a military spouse with whom you reside

Only post TDY FSA can be processed in eFinance. To establish FSA prior to departure or during your TDY, contact the Ramstein FSO.

### FSA-R (Mil-to-Mil)

- Married to another military member currently on active duty
- Your spouse resided with you immediately before departing
  - You are being separated by execution of military orders

### FSA – R (Dependents Restricted)

- Must be on a dependent restricted unaccompanied tour where transportation of dependents is not authorized at government expense
- Your dependents do not live at or near your new duty station

Scan and upload necessary TDY or PCS orders along with a copy of your travel voucher. Once all documents are uploaded and appear in the **-Imported** box below, click **-Save**.

For FSA-T claimed before a TDY you will need a copy of the TDY orders (Front and Back) and a completed and signed DD-1561.

# State of Legal Residence/State Tax

The screenshot displays the eFinance web application interface. At the top left is the 'eFinance' logo. The top right corner shows the user is logged in as 'Davis, Christian T.' with navigation links for 'PCS', 'TIDY', 'Forms', and 'Help'. On the left side, there is a vertical navigation menu with the following items: 'Introduction', 'Edit Form', 'Required Documents', 'Submit', and 'Download / Print'. The main content area is titled 'Edit Form: SOLR' and shows a status of 'In Work'. The form contains a text input field for 'City or County' and a dropdown menu for 'State' which is currently set to 'Iowa'. Below the form are 'Save' and 'Cancel' buttons. At the bottom of the page, there is a footer that reads 'EQD | Version 1.1.1.4.1'.

This is the State of Legal Residence/State Tax section. Choose the appropriate action and continue.

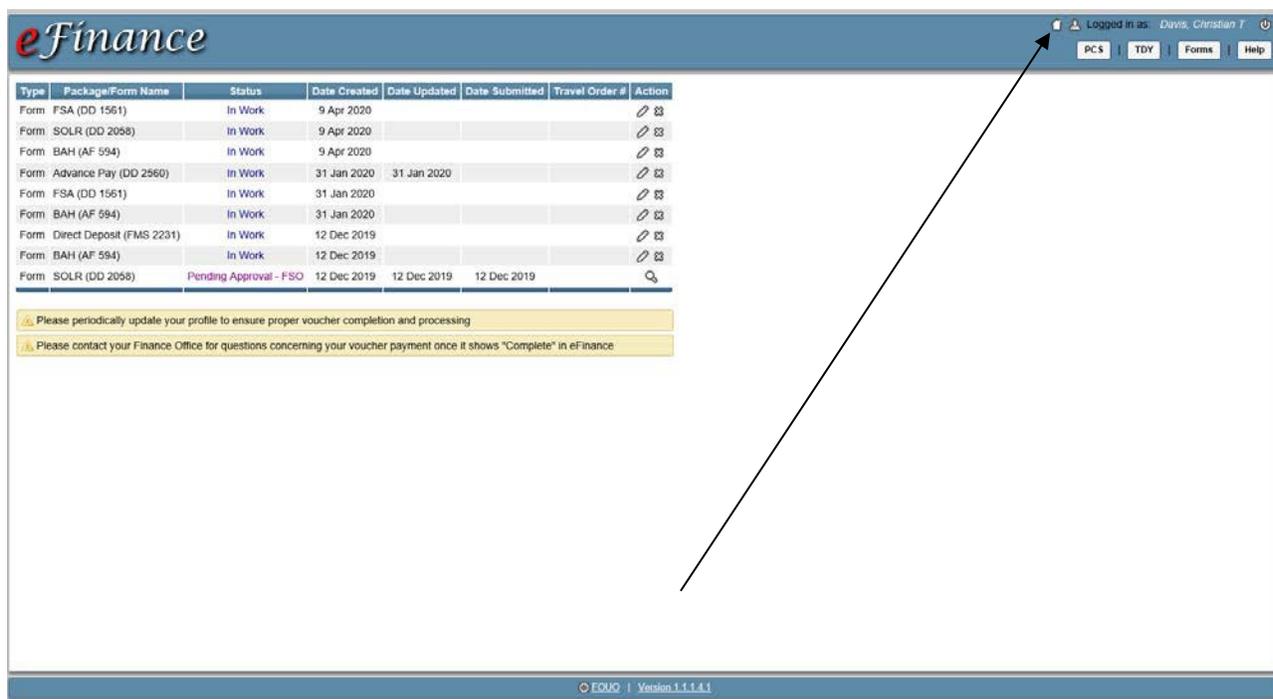
## State of Legal Residence Certification

This is used by members to report changes of legal state of residence to the FSO. Members should consult with the legal office regarding any questions on the legality and requirements when changing the state of legal residence for payroll tax purposes. The form is completed by the member in eFinance.

## State Income Tax Exemption Test Certificate

When meeting certain requirements, members can be exempt from state withholding tax. When members determine they are exempt, they can process this exemption using **myPay.**

# Query Request



The screenshot shows the eFinance application interface. At the top, there is a navigation bar with tabs for 'PCS', 'TDY', 'Forms', and 'Help'. The 'Forms' tab is selected. The main content area displays a table of voucher packages. The table has columns for Type, Package/Form Name, Status, Date Created, Date Updated, Date Submitted, Travel Order #, and Action. Below the table, there are two yellow warning messages. At the bottom of the page, there is a footer with the text 'EOUO | Version 1.1.1.4.1'.

Type	Package/Form Name	Status	Date Created	Date Updated	Date Submitted	Travel Order #	Action
Form	FSA (DD 1561)	In Work	9 Apr 2020				<a href="#">✎</a> <a href="#">🖨</a>
Form	SOLR (DD 2058)	In Work	9 Apr 2020				<a href="#">✎</a> <a href="#">🖨</a>
Form	BAH (AF 594)	In Work	9 Apr 2020				<a href="#">✎</a> <a href="#">🖨</a>
Form	Advance Pay (DD 2560)	In Work	31 Jan 2020	31 Jan 2020			<a href="#">✎</a> <a href="#">🖨</a>
Form	FSA (DD 1561)	In Work	31 Jan 2020				<a href="#">✎</a> <a href="#">🖨</a>
Form	BAH (AF 594)	In Work	31 Jan 2020				<a href="#">✎</a> <a href="#">🖨</a>
Form	Direct Deposit (FMS 2231)	In Work	12 Dec 2019				<a href="#">✎</a> <a href="#">🖨</a>
Form	BAH (AF 594)	In Work	12 Dec 2019				<a href="#">✎</a> <a href="#">🖨</a>
Form	SOLR (DD 2058)	Pending Approval - FSO	12 Dec 2019	12 Dec 2019	12 Dec 2019		<a href="#">🔍</a>

Please periodically update your profile to ensure proper voucher completion and processing

Please contact your Finance Office for questions concerning your voucher payment once it shows "Complete" in eFinance

EOUO | Version 1.1.1.4.1

Click on the [Home](#) tab above to get to this menu.

This will bring up a list of all the active/pending documents that you have created in eFinance. This is the screen you will come to anytime you need to change or update and pending submission.

- Click on the blue link in the 'Status' column to view, edit, or print the eFinance package.
- The [Date Submitted](#) column will give you the date the package was submitted.
- Move your cursor over the alpha numeric Status symbol in the [Status](#) column to see the current status of the package.

## Helpful Hints:

- You can start a package and come back at another time to finish.
- If your voucher is rejected, you will be notified immediately by email.
- To edit a rejected voucher, click on the [Query Request](#) tab and click on the appropriate voucher. A description of why the voucher was rejected will be in the email notification that was sent.

## Frequently Asked Questions

### **What if I need to go back and change my voucher once it has been submitted to my supervisor or approving official?**

No problem, just contact your supervisor or approving official and let them know you need to make a change. After they return the package to you, log into eFinance, select the –Query Request tab and click the appropriate voucher. It will indicate that the voucher has been returned and you may click –Edit to make changes.

### **What happens when my voucher gets rejected?**

Log back into eFinance, select the –Query Request tab, and click on the appropriate voucher. It will indicate that the voucher has been returned and you may click –Edit to make any changes.

#### By Supervisor:

You will be notified by email. Go back into eFinance and make necessary changes. You will need to re-submit the voucher and get supervisor approval again.

#### By Approving Official:

You will be notified by email. Go back into eFinance and make necessary changes. You will need to re-submit the voucher and get supervisor and approving official approval.

#### By the Financial Services Office (FSO):

You will be notified by email. Go back into eFinance and make necessary changes. You will need to re-submit the voucher and get both supervisor and approving official approval again.

#### By the Financial Services Center:

The FSO will be notified of the reject. If any additional information is needed, you will be contacted by the FSO.

## Submission Guide

MyPay	eFinance	Paper Submission
Leave & Earnings Stmt. (LES)	Family Separation Allowance	DITY Moves
Allotments (Financial Institutions)	State of Legal Residence	Lost Receipt Form
Taxes (FITW, SITW, W2)	BAH	BAS
Direct Deposit		BAH
Savings Bonds		Travel Voucher Advances
State Tax Exemption Certification		Classified Travel
Thrift Savings Plan		
Savings Deposit Program		
Address/E-mail Changes		
Travel Voucher Advice of Payment		

# Transaction Information

1. Request, Authorization and Pay Order Basic Allow for Subsistence (BAS)  
*Start or Stop BAS or meal deductions*

This form is used to add or remove members from Essential Station Messing, which either starts or stops meal deductions on the pay record. The member submits the request and the unit Commander recommends approval. The Mission Support Group Commander is the final approval authority. These signatures are required as well as Financial Services Office (FSO) Certifying Official signature. All airmen moving out of the dormitory should initiate this form. Each unit should have these forms which are processed manually to the FSO.

2. Start, Stop or Change Basic Allowance for Housing (BAH)  
*Start, adjust or stop entitlement to BAH or Dependency Determination*

Most all dependency changes are reported using this form. Also, the housing office uses this form when assigning or terminating members from government quarters. Use this form whenever a member gets married, divorced or legally separated to include to/from a military member. Also use to update dependency upon the birth of first child. The 594 is also used when claiming secondary dependents like a parent or parent-in-law. This form requires backup documentation and/or Housing Management Office approval as well as FSO Certifying Official signature.

3. Statement to Substantiate Payment of Family Separation Allowance  
*Start or Stop payment of FSA*

Members married to military and those with dependents may be authorized FSA. This form is used to capture information needed for the FSO to determine proper application of FSA. FSA is normally authorized when orders separate the member from the family for more than 30 days. The form is completed using eFinance, digitally signed by member, then routed to the FSO for Certifying Official signature and processing. (eFinance will allow members to attach/fax a copy of the complete travel voucher claim).

**Start/Adjust Allotments**

4. Authorization to Start, Stop or Change an Allotment  
*Starts, changes, or stops insurance allotments and other allotments not supported by myPay*

This form is used for allotments other than to a Financial Institution or Savings Bonds. Most members will use this for Insurance allotments and Air Force Aid Society (AFAS) allotments. For these, use eFinance to complete the allotment. Once digitally signed by the member in eFinance, the form will be electronically routed to the FSO for processing.

5. Financial Institution Allotment (MyPay)  
*Starts, changes, or stops Financial Institution Allotments*

These allotments use a bank routing and account number. Any new starts, stops, or changes to these bank allotments are to be accomplished in myPay.

6. Savings Bond Allotment Authorization (MyPay)  
*Starts, changes or stops to bond allotments*

Any transaction to start or change a Savings Bonds allotment are to be processed using myPay.

To stop a Savings Bond allotment complete DD Form 2559 and submit to your local Financial Services Office.

**Start/Adjust Direct Deposit**

7. Direct Deposit of Military Pay  
*Starts or changes net pay*

For those members just entering the Air Force, this form is used to start your direct deposit. Complete this form and give to the FSO for processing. To change the direct deposit of your military pay, use myPay.

8. Direct Deposit of Travel Pay (Non DTS)  
*Starts or changes net travel pay*

For those members who wish to have their non-DTS travel deposits credited to an account other than their military pay, use this form. The form is completed by the member and routed to the FSO for processing a change to the Reserve Travel System.

9. Direct Deposit of Travel Pay (DTS)  
*Starts or changes net travel pay*

All changes to bank information for the DTS payments should be accomplished within DTS under the personal information page. When creating a new DTS travel authorization this data can be updated.

**State of Legal Residence/State Tax**

10. State of Legal Residence Certification  
*Establish or change state of legal residence*

**State of Legal Residence Certificate**

This is used by members to report changes of legal state of residence to the FSO. Members should consult with the legal office regarding any questions on the legality and requirements when changing the state of legal residence for payroll tax purposes. The form is completed by the member in e-Finance.

**Native American State Income Tax Withholding Exemption Certificate**

When meeting certain requirements, Native American members can be exempt from state withholding tax. When members determine they are exempt, they can process this exemption using myPay.

11. State Income Tax Exemption Test Certificate  
*Stop withholding of state income tax*

When meeting certain requirements, members can be exempt from state withholding tax. When members determine they are exempt, they can process this exemption using myPay.