



The American Legion Department & Detachment of Iowa

2021-2022

Membership Processing Manual Volume 2

Online Transmittals

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PROCESS MEMBERSHIP

INTRODUCTION

The “Process Membership” feature in myLegion allows American Legion Post Officers to renew, add new members and transfer-in existing members from other Posts. **(NOTE: Posts can only transfer-in members that dues are being paid for.)** This feature utilizes electronic payment methods via myLegion and eliminates the need for Post Officers to send the National/Department portion of the (3-part) membership cards and paper-checks to the Department Headquarters office.

Electronic check (eCheck) is the only payment method available when using this feature. The account must be a valid business checking or savings account held with a US Bank. Credit card payments are only accepted for foreign Posts outside of the US that do not have a checking/savings account with a US Bank.

Each dues payment charged for a member is the sum of the National plus Department plus District Per Capita in effect at the time of the transaction. National Headquarters will handle payment of the Department Per Capita back to the Department Headquarters office.

ELECTRONIC CHECK (eCheck) PROCESSING GUIDELINES

The processing time for eChecks is 5-8 business days. During the 5-8 business day period, a “Pending” charge will be placed on the funds in the checking/savings account designated by the American Legion Post. In addition, the batch status in myLegion will also show a “Pending” status for the 5-8 business day period. After a successful transfer of funds to the bank at National Headquarters, the transmittal status of the batch will change to “Closed”, and the member information will be applied to the National Database.

Credit card transactions should clear within 24-hours

Declined eChecks

If a Post submits payment for a batch of transactions and the eCheck is declined, the transmittal status of the batch in myLegion will be set to “Declined”. Common reasons for declined eCheck are:

- 1) Insufficient funds
- 2) Bank Account has been closed
- 3) Invalid Bank Information

In the event a membership batch is declined, the Post Officer will be notified via email, and the batch will NOT be applied to the National database. Declined batches can be re-submitted within 14-days. **If not re-submitted within the 14-day period, the batch will be deleted.**

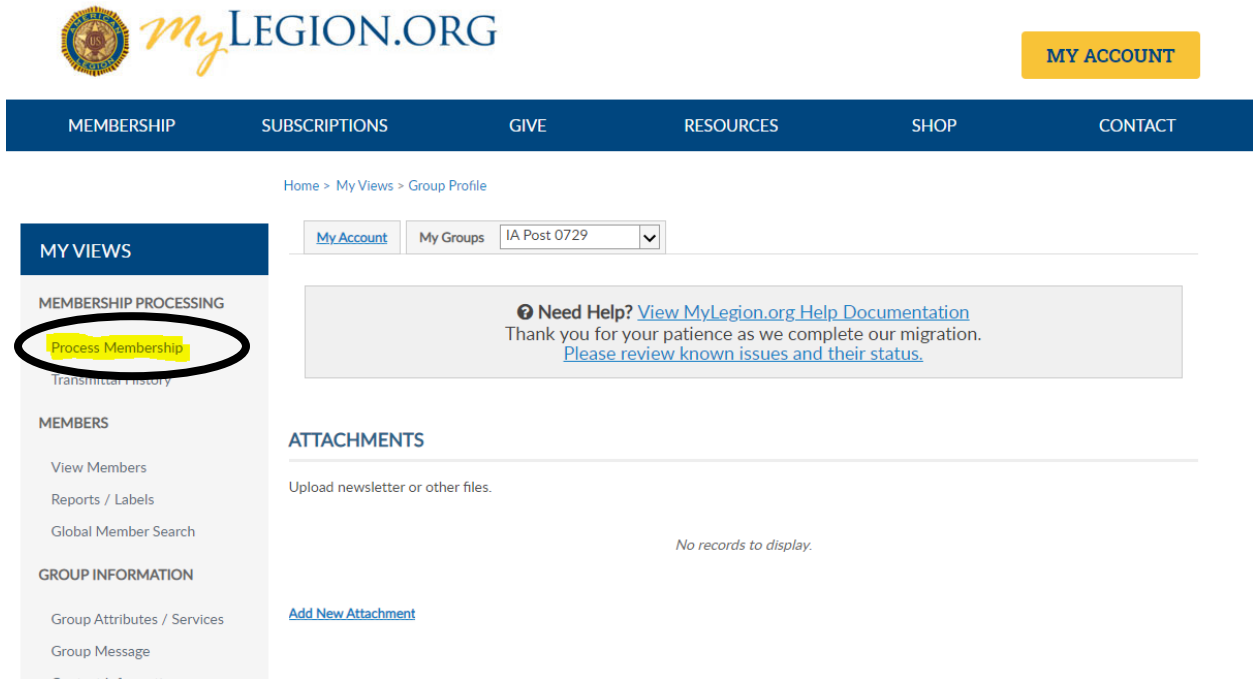
The Post will be charged all penalty fees levied by the ACH (Automated Clearing House) processor for declined eChecks. The American Legion National Headquarters reserves the right to suspend the “Process Membership” feature for a Post at any time due to a high volume of declined transactions, or malicious use of the myLegion site.

PROCESS MEMBERSHIP

STEP 1: From the My Account page, enter My Groups to access the Group Profile.
Select the Post in the My Groups tab.



STEP 2: Select “Process Membership” on the left-hand side.



PROCESS MEMBERSHIP

STEP 3: Click Add/Modify Transmittal.

Only one "Open" Membership batch is available for processing. The Open batch must be completed and submitted before a new batch becomes available. Transmittals must be submitted within 14 days of being opened.

My Account My Groups IN Post 0495

Details for: IN Post 0495

Last Name: City: Post/Squadron Number:
 First Name: State/Province: Member Status:
 Email: Country:
 Member ID: Paid Through Year:

[Search](#) [Clear](#)

Actions: Export Full Roster **Add/Modify Transmittal**

Displaying 1-20 of 287

<input type="checkbox"/>	Member ID	Name	Post/Squadron Number	Location	Undeliverable	Contact Information	Branch	Conflict/War Era	Continuous Years	Paid Through Year
<input type="checkbox"/>	123456789	Grp Admin.	IN Post 495	Address, Cty, St, Zip		email@yahoo.com 317-555-5555		OTHER		

STEP 4: Search members to renew and check the box to the left of the Member's ID to add them to the batch.

If you do not see a member, they have already paid, are in a pending batch, have transferred out of your Post/Squadron, or are expired for more than 2 years.

My Account My Groups IN Post 0510

POST TRANSMITTAL

Status : OPEN Per Capitas Actual
 Card Count : 1
 National : \$18.50 \$18.50
 Department : \$16.50 \$16.50
 Post : \$5.00 \$5.00
 Total amount due today : \$35.00

Member First Name Member Last Name
 Member Id

[Search](#) [Clear All](#)

[Add New Member](#) [Transfer Member](#) [List Selected](#) [Export to CSV](#) [Print](#)

Select	Member Id	Member Name	Email Address	Phone	Address	Renewal Year
<input type="checkbox"/>	123456789	Grp Admin.	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	
<input checked="" type="checkbox"/>	123456790	B. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2020
<input type="checkbox"/>	123456790	B. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
<input type="checkbox"/>	123456791	C. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
<input type="checkbox"/>	123456792	D. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
<input type="checkbox"/>	123456793	E. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2020
<input type="checkbox"/>	123456794	F. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021

PROCESS MEMBERSHIP

STEP 4A: Add New Member by selecting Add/Transfer Member. This can also be used to find a member who has been expired for more than 1 year.

[My Account](#) | [My Groups](#) | IA Post 0729

POST TRANSMITTAL

Status :	OPEN	Per Capitas
Card Count :		
National :		\$0.00
Department :		\$0.00
Post :		\$0.00
Total amount due today :		

Member First Name

Member Id

Search

Clear All

Add/ Transfer Member

Delete Transmittal

If the new member has never been a Legion or SAL member, select “New Member – never been a TAL member or SAL member.”

[Home](#) > [Membership](#) > [AddorTransferMember](#)

☐ New member- never been a TAL member or SAL member

☐ Current or former member

Continue

Cancel

PROCESS MEMBERSHIP

Complete the requested information and **Save**. *This does NOT add the member to the transmittal.*

Home > Membership > AddMember

** Required*

* First Name:

Middle Initial:

* Last Name:

Suffix:

Date of Birth: Month Day Year

Gender:

* Country: United States [Change](#)

* Address Type:

* Address Line 1:

Address Line 2:

Address Line 3:

* City:

* State:

* Zip Code:

Phone: EXT

Email:

* Branch of Service:

* Conflict:

[Save](#) [Cancel](#)

Search the New Member and check the box to the left of the Member to add them to the batch.

[My Account](#) [My Groups](#) [IN Post 0495](#)

POST TRANSMITTAL

Status :	OPEN	Per Capitas	Actual
Card Count :			2
National :		\$18.00	\$36.00
Department :		\$16.50	\$33.00
Post :		\$8.00	\$16.00
Total amount due today :			\$70.00

Total only includes National + Department

Member First Name Member Last Name

Member Id

[Search](#) [Clear All](#)

[Add New Member](#) [Transfer Member](#)

[List Selected](#) | [Export to CSV](#) | [Print](#)

Select	Member Id	Member Name	Email Address	Phone	Address	Renewal Year
<input checked="" type="checkbox"/>	123456789	Grp Admin	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	
<input checked="" type="checkbox"/>	123456790	B. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2020
<input type="checkbox"/>	123456791	C. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2020
<input type="checkbox"/>	123456792	D. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
<input checked="" type="checkbox"/>	123456800	Added Member	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
<input type="checkbox"/>	123456793	E. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2020
<input type="checkbox"/>	123456794	F. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021

PROCESS MEMBERSHIP

STEP 4B: Transfer a Member by selecting Add/Transfer Member.

[My Account](#) | [My Groups](#) | IA Post 0729

POST TRANSMITTAL

Status :	OPEN	Per Capitas
Card Count :		
National :		\$0.00
Department :		\$0.00
Post :		\$0.00
Total amount due today :		

Member First Name

Member Id

Search

Clear All

Add/ Transfer Member

Delete Transmittal

Select Current or Former Member and continue.

[Home](#) > [Membership](#) > [AddorTransferMember](#)

-
- ☐ New member- never been a TAL member or SAL member
 - ☐ Current or former member

Continue

Cancel

Enter the Member ID and Last Name.

[Home](#) > [Membership](#) > [TransferMember](#)

Transfer-in Existing Member

* Member ID:

* Last Name:

Continue

Cancel

PROCESS MEMBERSHIP

Verify Member information and select Save. *This does NOT add the member to the transmittal.*

Home > Membership > TransferMember

Transfer-in Existing Member

** Required*

First Name: **Member First Name**

Middle Initial:

Last Name: **Member Last Name**

Suffix:

Date of Birth: Month Day Year

Gender: Male

* Country: United States [Change](#)

* Address Type: Home

* Address Line 1: Member Address Info

Address Line 2:

Address Line 3:

* City: Fairland

* State: Indiana

* Zip Code: 46126

Phone: () - EXT

Email:

* Branch of Service: Select

* Conflict: PERSIAN_GULF

[Save](#) [Cancel](#)

Search the Transferred Member and check the box to the left to the Member to add them to the batch.

[My Account](#) | [My Groups](#) | IN Post 0495

POST TRANSMITTAL

Status :	Per Capitas	Actual
OPEN		
Card Count :		3
National :	\$18.50	\$55.50
Department :	\$16.50	\$49.50
Post :	\$10.00	\$30.00
Total amount due today :		\$105.00

Total only includes National + Department

Member First Name Member Last Name

Member Id

[Search](#) [Clear All](#) [Save](#) [Finalize](#)

[Add New Member](#) [Transfer Member](#) [List Selected](#) [Export to CSV](#) [Print](#)

Select	Member Id	Member Name	Email Address	Phone	Address	Renewal Year
<input checked="" type="checkbox"/>	123456789	Grp Admin	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	
<input checked="" type="checkbox"/>	123456790	B. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2020
<input type="checkbox"/>	123456790	B. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
<input type="checkbox"/>	123456791	C. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
<input checked="" type="checkbox"/>	123456800	Added Member	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
<input checked="" type="checkbox"/>	123456789	D. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
<input checked="" type="checkbox"/>	123456500	Transferred /by	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021

PROCESS MEMBERSHIP

STEP 5: Repeat as needed to add Members to transmittal. Saving the Batch allows you to exit the Transmittal and return to submit later. Transmittals must be submitted within 14 day.

STEP 6: Click Finalize to complete the transmittal.

Status :	OPEN	Per Capitas	Actual
Card Count :			3
National :		\$18.50	\$55.50
Department :		\$16.50	\$49.50
Post :		\$10.00	\$30.00
Total amount due today :			\$105.00

Member First Name

Member Last Name

Member Id

Search Clear All

Save

Finalize

Add New Member

Transfer Member

List Selected

Export to CSV

Print

Select	Member Id	Member Name	Email Address	Phone	Address	Renewal Year
<input checked="" type="checkbox"/>	123456789	Grp Admin.	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	
<input checked="" type="checkbox"/>	123456790	B. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2020
<input type="checkbox"/>	123456790	B. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
<input type="checkbox"/>	123456791	C. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
<input checked="" type="checkbox"/>	123456800	Added Member	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
<input checked="" type="checkbox"/>	123456789	D. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
<input checked="" type="checkbox"/>	123456500	Transferred Mbr	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021

