



The American Legion Department & Detachment of Iowa

2021-2022

Membership Processing Manual Volume 2

Online Transmittals

Revised May 2021

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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. <u>If not re-submitted within the 14-day period, the batch will be deleted.</u>

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.

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

1 my	Legion.oi	RG			MY ACCOUNT
MEMBERSHIP	SUBSCRIPTIONS	GIVE	RESOURCES	SHOP	CONTACT
MY VIEWS	Home > My Views > Group <u>My Account</u> (My G	Profile Groups IA Post 0729			
			-		

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

EGION.OI	RG			MY ACCOUNT
SUBSCRIPTIONS	GIVE	RESOURCES	SHOP	CONTACT
		v		
	Thank you for	your patience as we comple	ete our migration.	
ATTACHMENTS				
Upload newsletter or othe	er files.	No records to display.		
Add New Attachment				
	SUBSCRIPTIONS Home > My Views > Group My Account My G ATTACHMENTS Upload newsletter or other	SUBSCRIPTIONS GIVE Home > My Views > Group Profile My Account My Groups I A Post 0729 I A Post 0729 <td< td=""><th>My Account My Groups IA Post 0729 My Account My Groups IA Post 0729 Please Help? Yiew MyLegion.org Help. Thank you for your patience as we comple Please review known issues and the plane revie</th><td>SUBSCRIPTIONS GIVE RESOURCES SHOP Home > Mry Groups Coroup Profile Mry Account Mry Groups IA Post 0729 Image: Coroup Profile Mry Account Mry Groups Image: Coroup Profile Image: Coroup Profile Mry Account Mry Groups Image: Coroup Profile Image: Coroup Profile Mry Account Mry Groups Image: Coroup Profile Image: Coroup Profile Mry Account Mry Groups Image: Coroup Profile Mry Account Mry Accoun</td></td<>	My Account My Groups IA Post 0729 My Account My Groups IA Post 0729 Please Help? Yiew MyLegion.org Help. Thank you for your patience as we comple Please review known issues and the plane revie	SUBSCRIPTIONS GIVE RESOURCES SHOP Home > Mry Groups Coroup Profile Mry Account Mry Groups IA Post 0729 Image: Coroup Profile Mry Account Mry Groups Image: Coroup Profile Image: Coroup Profile Mry Account Mry Groups Image: Coroup Profile Image: Coroup Profile Mry Account Mry Groups Image: Coroup Profile Image: Coroup Profile Mry Account Mry Groups Image: Coroup Profile Mry Account Mry Accoun

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.

			•						
Details for	r: IN Post	0495							
Last Name:			City:			Post/Squadron N	umber:		
First Name:			State/Province:		~	Member Status:		~	
Email:			Country:		~				
Member ID:			Paid Through Year:		~				
	Search	Clear							
		<u>Clear</u> Go			1 2 3	4 5 6 7	Add	I/Modify Tran	smittal
tions: Export Full Ro splaying 1-20 of 287 Member ID N			Location	Undeliverable	1 2 3 Contact Inform		8 9 10	//Modify Tran Continuous Years	Smittal Paid Through Year

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.

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 o	due today :			\$35.00			
Vember First N	lame			Member La	ast Name		
lember Id							
Aember Id							
	ear All						
	ear All						
		nsfer Member				@ List	Selected 🔀 Export to CSV 🕀
Search Cle add New Memb	er Tra	nsfer Member Member Name	Email Address	Phone	Address	@ List	
Search Cle add New Membe lect Membe	er Tra er Id		Email Address email@yahoo.com	Phone 317-555-5555	Address Address, Cty, S		
Search Cle dd New Membe lect Membe	er Tra er Id 66789	Member Name				t, Zip	Renewal Ye
Search Cle dd New Membe lect Membe 12345 12345	er Id 66789 66790	Member Name Grp Admin.	email@yahoo.com	317-555-5555	Address, Cty, S	t, Zip t, Zip	Renewal Ye
Search Cit add New Member 12345 12345	er Id 66789 66790 66790	Member Name Grp Admin. B. Sample B. Sample	email⊚yahoo.com email⊛yahoo.com email⊛yahoo.com	317-555-5555 317-555-5555 317-555-5555	Address, Cty, S Address, Cty, S Address, Cty, S	t,Zip t,Zip t,Zip	Renewal Ye 2020 2021
Search Ck add New Membe flect Membe 12345 12345 12345 12345	er Id 66789 66790 66790	Member Name Grp Admin. B. Sample	email⊛yahoo.com email⊛yahoo.com email⊛yahoo.com email⊛yahoo.com	317-555-5555 317-555-5555 317-555-5555 317-555-5555	Address, Cty, S Address, Cty, S	t,Zip t,Zip t,Zip	2020 2021 2021
Search Cit add New Member 12345 12345	er Id 66789 66790 66790	Member Name Grp Admin. B. Sample B. Sample	email⊚yahoo.com email⊛yahoo.com email⊛yahoo.com	317-555-5555 317-555-5555 317-555-5555	Address, Cty, S Address, Cty, S Address, Cty, S	t, Zip t, Zip t, Zip t, Zip	Renewal Ye 2020 2021

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 07	729
USTIRA	NSMITTAL	
Status :	OPEN	Per Capitas
Card Count :		
National :		\$0.00
Department :		\$0.00
Post :		\$0.00
Total amount du	e today :	
Member First Na	me	
Member Id		
Search Clea	ır All	
Add/ Transfer Mer	Delete Transm	ittal

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
-	er- never been a TAL member or SAL member former member
Continue	Cancel

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

Home > Membership > Ad	iMember	
* Required		
* First Name:		
Middle Initial:		
* Last Name:		
Suffix:	Select	~
Date of Birth:	Month V Day Vear	\sim
Gender:	Select	~
* Country:	United States Change	
* Address Type:	Home	~
* Address Line 1:		
Address Line 2:		
Address Line 3:		
* City:		
* State:	Select	~
* Zip Code:		
Phone:		
Email:		
* Branch of Service:	Select	~
* Conflict:	Select	~
Save <u>Cancel</u>		

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

	s :	OPEN	Per Capitas	Actual		
Card	Count :			2		
Natio	nal :		\$18.00	\$36.00		
Depar	rtment :		\$16.50	\$33.00		
Post :			\$8.00	\$16.00		
Total a	amount due today	:		\$70.00	Total only includes Natio	nal + Department
Memb	er First Name			Member La	st Name	
Memb	er Id					
	_					1 of 4 M
Searc	ch Clear All					Save Finalize
Add Ne	w Member Tra	ansfer Member			@ List	Selected 🔀 Export to CSV 🖨
Select	Member Id	Member Name	Email Address	Phone	Address	Renewal Y
	123456789	Grp Admin.	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	
1000	123430709					
	123456790	B. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2020
			email@yahoo.com email@yahoo.com	317-555-5555 317-555-5555	Address, Cty, St, Zip Address, Cty, St, Zip	<mark>2020</mark> 2020
•	123456790	B. Sample				
	123456790 123456791	B. Sample C. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2020
	123456790 123456791 123456792	B. Sample C. Sample D. Jample	email@yahoo.com email@yahoo.com	317-555-5555 317-555-5555	Address, Cty, St, Zip Address, Cty, St, Zip	2020 2021

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

My Account	My Groups IA Post 0729	
POSTTRAN	ISMITTAL	
Status :	OPEN	Per Capitas
Card Count :		
National :		\$0.00
Department :		\$0.00
Post :		\$0.00
Total amount due	e today :	
Member First Na	me	
Member Id		
Search Clea	r All	
Add/ Transfer Mem	Delete Transmittal	

Select Current or Former Member and continue.

Home > Membership	> AddorTransferMember
_	er- never been a TAL member or SAL member former member
Continue	Cancel

Enter the Member ID and Last Name.

Home > Membership > TransferMember	
Transfer-in Existing Member	
* Member ID:	
* Last Name:	
Continue Cancel	

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

Home > Membership > Tra	ome > Membership > TransferMember				
Transfer-in Existing N	/lember				
* 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 <u>Cance</u>	4				

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

	5:	OPEN	Per Capitas	Actual		
	Count :			3		
Natio			\$18.50	\$55.50		
	rtment :		\$16.50	\$49.50		
Post :	amount due today		\$10.00	\$30.00		
Iotal	amount due today	/:		\$105.00	Total only include	s National + Department
Memb	er First Name			Member La	ast Name	
Memb	er Id					
	_					H 1 of 4 M
Searc	ch Clear All					Save Finalize
Add Ne	w Member T	ransfer Member				
Select	Member Id	Member Name	Email Address	Phone	Address	Renewal Ye
1 2	123456789	Grp Admin.	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	
	123456790	B. Sample	<u>email@yahoo.com</u>	317-555-5555	Address, Cty, St, Zip	2020
	123456790	B. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
	123456791	C. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
	123456800	Added Member	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
~	123456789	D. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
	123456500	Transferred Mbr	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021

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.

Status	5:	OPEN	Per Capitas	Actual		
Card	Count :			3		
Natio	nal :		\$18.50	\$55.50		
Depa	rtment :		\$16.50	\$49.50		
Post :			\$10.00	\$30.00		
Total	amount due today :			\$105.00		
Memb	er First Name			Member La	st Name	
Memb	er Id					
Searc	ch Clear All					Save Finalize
Add Ne	w Member Tra	nsfer Member				● List Selected
Select	Member Id	Member Name	Email Address	Phone	Address	Renewal Yea
	123456789	Grp Admin.	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	
	123456790	<mark>B. Sample</mark>	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2020
	123456790	B. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
0	123456791	C. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
	123456800	Added Member	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
	123456789	D. Sample	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021
	123456500	Transferred Mbr	email@yahoo.com	317-555-5555	Address, Cty, St, Zip	2021

STEP 6: Click Finalize to complete the transmittal.

STEP 7: Add Payment information or select the saved bank account, then click Pay Now.

7A: Add Payment Information.

Home > Membership > PostTransmittalPayment

PAYMENT INFORMATIO	V Add new eCheck				
 Required Bank Routing Number: Re-enter Bank Routing Number: Bank Account Number: Re-enter Bank Account Number: Account Type: Account Holders Full Name: 	Checking v	What's this What's this	eCheck Billing Address 5745 Lee Rd Indianapolis, IN, 46216-2063, USA		
□ * By Clicking the Su	bmit button below, I a	uthorize the American Legion to make a one-time charge on 3/6/2021 for	the amount of 105.00.		

7B: Select saved bank account.

RANSMITTAL PAYMENT					
tal Selected	To Pay: \$105.00				
AYMENT	INFORMATION				
✓ Selec	t a Saved Bank Account				
	Bank Routing Number :	122220593			
0		****8888			
0	Account Number :	0000			

STEP 8: Print or save the receipt.

After submitting the batch for processing, the Transmittal History will show the batch in Pending status. Once processed, it will show the processed date.