



The American Legion Department of Iowa

2023-2024

Membership Processing Manual

NOTES:

Changes have occurred since the last printing of this manual.
Please review the manual in its entirety.

Please pay attention to the following:

- Membership Rosters – Detailed rosters available on MyLegion.org
- Renewal Notice Cut-off Dates & Target Dates
 - Transmittals must arrive at Department at least two working days prior to these dates. If membership is not processed by these dates, members will continue to receive renewal notices.

Revised May 2023

SECTION 1 – TRADITIONAL MEMBERSHIP PROCESSING

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INTRODUCTION

Processing your Post's membership can be difficult. This manual has been developed to explain the proper procedures for processing membership. *Please read the manual in its entirety before you begin to process membership.*

While the manual can be daunting, do not be intimidated. Most membership processing is routine.

Additional information can be found in the **Post Adjutant's Manual**. If you have any questions regarding the processing of membership, please feel free to contact the Department Membership Clerk at (800) 365-8387 or at membership@ialegion.org.

Thank you for your dedication in assuming this responsibility.

THE MEMBERSHIP YEAR

There is often confusion about The American Legion membership year. Does the year run from July to June or from January to December?

A member's membership card is valid from the time of issue until December 31 of the calendar year printed on the card. After December 31, the member is considered delinquent. Posts begin collecting dues in July for the following calendar year.

Think of it like a magazine subscription. With a magazine subscription, you pay in advance so that you do not miss an issue. With The American Legion, we attempt to collect all dues between July and December for the coming year so the member remains in good standing, does not become delinquent, and will not miss out on any American Legion benefits.

BEFORE YOU BEGIN

1. The membership cards are pre-printed at National Headquarters with members from the previous year received at National Headquarters before April 1. Memberships received after April 1 may not be reflected on the roster.
2. Please check your cards for errors and correct as needed using the information provided in the manual. Please take note of the following:
 - a. Missing Cards - If cards are missing, follow procedures outlined in this manual for "Renewals for which you do not have a pre-printed card".
 - b. Unknown Cards - If you receive a pre-printed card for someone who is not a member of your Post, please return the entire card (all three sections) to Department with a note explaining why the card is being returned. Keep the card separate from those for which you are transmitting dues. Do not include the card in the count on the Membership Transmittal Form. Cross the record off the Membership Roster and note on the roster that the card was returned to Department.
 - c. Duplicate Cards - If you receive more than one pre-printed card for the same member, process one of the cards (the most accurate one) as usual. Return duplicate card using procedures in "Corrections and Updates to Member's Record - Membership Record Card."
3. You should always have membership supplies on hand, like Member Data Forms, blank cards, transmittals, and applications. Reach out to your District or Department Headquarters for additional supplies.
4. Check for any Honorary Life Members to be paid by the Post.

MEMBERSHIP RECORD CARDS (Sample 1)

Each year membership cards are pre-printed at National Headquarters with the member information from the previous year received at National Headquarters before April 1.

The card has three parts. The extreme right card is the Official Membership card to be given to the member after dues have been paid. The National and Department portions of the card are known as the Record Card. The Record Card is transmitted to Department.

Important Notes:

1. Do NOT separate the National and Department portions of the Record Card.
2. Do NOT staple or tape anything to the Record Card.
3. To make corrections to a member's record, see "Corrections and Updates to Member's Record" in this manual.
4. Only use card for membership year for which you are transmitting dues.
5. **Complete and updated rosters can be found anytime during the year at mylegion.org.**

MEMBERSHIP ROSTER (*Rosters with the membership packets do NOT include all information. Complete Rosters that include PUFL members, member contact information, etc., can be found at mylegion.org.*)

The roster will list all your members from the previous year whose cards were received at National before April 1. Columns on the Membership Roster are explained as follows:

1. PAID – Record the date member pays dues to Post.
2. TRANSMITTED – Record the date the Post transmits dues to Department.
3. LAST PAID YEAR– Indicates last Membership Year the member was paid (as of April 1)
4. CONT. YEARS – Number of continuous years of membership – Corrections should be made on Member Data Form or on the Membership Record Card.
5. MEMBER ID – Member's 9-digit identification number.
6. NAME/ADDRESS/CITY/STATE/ZIP – Corrections should be made on Member Data Form.
7. CERT YEAR – Certificate Year – A number code will indicate a member has had a 50, 60, 70, 75, or 80-year continuous membership certificate printed. Only the most recent certificate code will be reflected.
8. EX FLAG – Exclusion Flag - A "C" code means the member will not receive a dues renewal notice. If a "D" code appears, the member will not receive a renewal notice, the Iowa Legionnaire or The American Legion Magazine. Call Department Headquarters for any corrections.
9. WAR ERA – Identifies the war era on file at National for the member, showing the first war era the member served. Code descriptions are located at the end of the roster. War era corrections should be reported on the Membership Record Card or on a Member Data Form.
10. TYPE – The "Type" code identifies one of three types of life membership:
 - a. "H" indicates Honorary Life membership – The Post is responsible for payment of the member's annual dues.
 - b. "P" indicates Paid Up For Life Member.
 - c. "*" (asterisk) indicates Honorary PUFL.
11. UN – A "U" identifies those individuals, reported by the U.S. Postal Service, as having an address that is not correct. The mail is undeliverable. Any member with a "U" code on their record will not receive any mail from National or the Department. Posts are asked to verify address and contact Department.

RENEWALS – TRADITIONAL MAIL

Traditional renewals will be processed in one of two ways:

- A. Renewals for which you have a preprinted card, or
- B. Renewals for which you do NOT have a preprinted card

A. Renewals for which you have a preprinted card

1. Fill in "Date Paid" on the center card.
2. Initial "Post Adjutant's Initials" on the center card.
3. Place an "X" in the "Renewal" box of the center card.
4. Sign the member's portion of the card as "Authorized Post Officer."
5. Separate the member's card from the Record Card. Give or mail the card to the member promptly.
6. Do NOT separate the National and Department portions of the Record Card.
7. Find the member's name on the roster and mark the date paid in the appropriate column.
8. To make corrections to a member's record, see the section titled "CORRECTIONS AND UPDATES TO MEMBER'S RECORD."
9. Transmit the card following procedures outlined in this manual.

B. Renewals for which you do NOT have a preprinted card

1. Take the next available blank card from those supplied by Department.
2. Type or print legibly on the left and center cards the following information exactly the way it was previously reported.
 - a. Membership ID number (obtain from previous year roster, Department, or member)
 - b. Post number
 - c. Years of continuous membership
 - d. First name, middle initial, last name of member
 - e. Mailing address
 - f. Phone number
 - g. Date of birth
 - h. Email
 - i. War Era (first war era served)
 - j. Branch of Service
 - k. Gender
3. Fill in "Date Paid" on the center card.
4. Initial "Post Adjutant's Initials" on the center card.
5. Put an "X" in the "Renewal" box.
6. Type or print member's Department (IA), Post #, and Member ID# number on the member's card above the description.
7. Type or print the member's name on the first line of the member's card.
8. Enter continuous years on the member's card.
9. Sign the member's card as "Authorized Post Officer."
10. Separate the member's card from the Record Card. Give or mail the card to the member.
11. Do NOT separate the National and Department portions of the Record Card.
12. Enter the member's in the next blank at the end of the roster.
13. Transmit the card following procedures outlined in this manual.

RENEWALS – MEMBER ONLINE

Members of The American Legion have the option to renew and pay membership online.

A. Procedures for Members

1. On the renewal notice, members will see the online renewal option and the web address, www.legion.org/renew, to process their renewal payment.
2. To begin the online renewal process, members will be asked to enter their membership ID# and last name.
3. A page verifying the member's current information on file will appear. The member can provide any missing information and update any incorrect information to his/her membership record.
4. Using a MasterCard, Visa, or Discover credit card, the member can enter payment information. Once the payment is processed, the member will see a confirmation of payment screen. To print a membership card, members will need to create a MyLegion account.
5. Members are encouraged to inform their Post of their recent payment to receive their card.

B. Procedures for Posts

1. The Post must verify which members have renewed online. The Post can attain information on which Post members have renewed online by three different methods:
 - a. The member can provide confirmation of payment to the Post.
 - b. Posts can access a report at any time through MyLegion. After navigating to Reports/Labels on the Group Profile, the Post can enter a begin date and end date to view a list of members who have paid during that period. A report can be printed from this page.
 - c. Department will mail a list to Posts who have had online renewals with statements. The report will contain the transaction date, member ID#, member's name, and the dues allocation.
2. Once the Post has confirmed the online payment, the official membership card can be issued by the Post to the member.
3. Sign the member's portion of the card as "Authorized Post Officer."
4. Separate the member's card from the Record Card. Give or mail the card to the member.
5. The Post can discard the National and Department portions of the card. **DO NOT** include members who have renewed online in your transmittal to Department.
6. Find the member's name on the roster. In the Date Paid column, indicate the date the member renewed online. In the Date Transmitted column, write "Online".
7. Post per capita (dues) will be provided in the form of a credit on the Post's membership account. Credits can be used for membership only. See section on "Account Balances" in this manual for details.
8. Online renewals will be reflected on the Department Membership Report.

Automatic Renewal Payments & Email Renewal Notices

Members have the option of signing up for automatic renewal using their credit/debit cards and to receive future renewal notices by email. To enroll, the members should follow the procedures for renewing online, then select the correct option during the renewal process. When selecting to receive notices by email, the member agrees to receive the first two renewal notices each year via email only. If the member has not renewed their membership after the first two notices, the member will begin receiving notices by standard mail in addition to the email notices.

NEW MEMBERS

Important Notes:

1. Always ask a prospective member if he/she currently belongs or has recently been a member. If the answer is yes, obtain the member's membership ID number from the member or by contacting Department Headquarters. If the member has a Membership ID number established, it should be used to prevent a duplicate record being created.
2. If the member has a current membership card, follow the procedures for a transfer as outlined later in this manual.
3. If the membership is not current (expired), process as a new member in the procedures outlined as follows using the member's established ID number.

1. Take the next available blank card from those supplied by Department.
2. Type or print legibly on the left and center cards the following information:
 - a. Membership ID number - Obtain from member, Department if former member, or use 6-digit sequence number from the next blank line on the roster if member does not have an ID number established.
 - b. Post number
 - c. Years of continuous membership
 - d. First name, middle initial, last name of member
 - e. Mailing address
 - f. Phone number
 - g. Date of birth
 - h. Email
 - i. War Era – first war era served
 - j. Branch of Service
 - k. Gender
3. Fill in "Date Paid" on the center card.
4. Initial "Post Adjutant's Initials" on the center card.
5. Put an "X" in the "New" box of the center card.
6. Type or print member's Department (IA), Post #, and Member ID# number on the member's card above the description.
7. Type or print the member's name on the first line of the member's card.
8. Enter continuous years on the member's card. (Enter 1 for new member.)
9. Sign the member's card as "Authorized Post Officer."
10. Separate the member's card from the Record Card. Give or mail the card to the member.
11. Do NOT separate the National and Department portions of the Record Card.
12. Find the on the next blank space at the end of the roster and enter the member's information.
13. Transmit the card following procedures outlined in this manual.

Important Notes:

Do NOT submit the membership application or a Member Data Form for new members. Transmit the Record Card only.

TRANSFERS

Transfers will be processed in one of two ways:

- A. Transfers for which you are transmitting dues (member needs to pay dues)
- B. Transfers for which you are NOT transmitting dues (member has already paid dues)

A. Transfers for which you are transmitting dues

1. Complete the following sections of a Member Data Form:
 - a. Member ID number (obtained from Department or member)
 - b. Department Alpha Code (State Abbreviation, ex. IA)
 - c. Post # (OLD Post #)
 - d. Name (First, MI, Last, Suffix)
 - e. Member Transferring from: Department & Post
 - f. Member Transferring to: Department & Post
 - g. Signature of Post Adjutant (required)
 - h. Signature of Member (Signature of member may be waived if Post Adjutant certifies member was contacted and agrees to transfer.)
2. Take the next available blank card from those supplied by Department.
3. Type or print legibly on the left and center cards the following information.
 - a. Membership ID number (obtain from Department, or member) or 6-digit sequence number if member does not have an ID number established.
 - b. Post number
 - c. Years of continuous membership
 - d. First name, middle initial, last name of member
 - e. Mailing address
 - f. Phone number
 - g. Date of birth
 - h. Email
 - i. War Era – first war era served
 - j. Branch of Service
 - k. Gender
4. Fill in “Date Paid” on the center card.
5. Initial “Post Adjutant’s Initials” on the center card
6. Put an “X” in the “Transfer” box of the center card.
7. Type or print member’s Department (IA), Post #, and Member ID# number on the member’s card above the description.
8. Type or print the member’s name on the first line of the member’s card.
9. Enter continuous years on the member’s card.
10. Sign the member’s card as “Authorized Post Officer.”
11. Separate the member’s card from the Record Card. Give or mail the card to the member.
12. Do NOT separate the National and Department portions of the Record Card.
13. Find the on the next blank space at the end of the roster and enter the member’s information.
14. Transmit the card following procedures outlined in this manual, as well as parts 1-3 of Member Data Form to Department Headquarters with transmittal. Retain part 4 of the Member Data Form for the Post’s records.

B. Transfers for which you are NOT submitting dues

1. Complete the following sections of the Member Data Form:
 - a. Member ID number
 - b. Department Alpha Code (IA)

- c. Post # (Old Post #)
 - d. Name (First, MI, Last, Suffix)
 - e. Member Transferring from: Department & Post
 - f. Member Transferring to: Department & Post
 - g. Signature of Post Adjutant (required)
 - h. Signature of Member (Signature of member may be waived if Post Adjutant certifies member was contacted and agrees to transfer.)
2. Mail parts 1-3 to Department Headquarters. Keep part 4 for Post records.
 3. Prepare a blank membership card for the member and discard the left and center cards. Give the prepared card to the member.
 4. Record member information on Post Roster.

LIFE MEMBERSHIPS

There are three types of Life Memberships in the Department of Iowa:

A. Honorary Life Members

1. Posts have recognized outstanding members for exceptional service or accomplishments by awarding what is known as Honorary Life Membership.
2. For Honorary Life Memberships, the Post assumes the responsibility of paying the annual dues for the remainder of the member's life. Check your Post roster for those members who have been awarded Honorary Life Member status. Honorary Life Members will be indicated by an "H". See section on "Membership Rosters" for details.
3. Process Honorary Life Members as you would a traditional renewal.
4. If your Post awards an Honorary Life Membership, it should be reported to Department and National. To report an Honorary Life Member, complete the following sections of the Member Data Form:
 - a. Member ID number
 - b. Department (IA)
 - c. Post #
 - d. Name (First, MI, Last, Suffix)
 - e. Put an "X" in the box for Honorary Life Member
 - f. Signature of Post Adjutant (required)

B. Paid Up For Life (PUFL) Member

1. Anyone who is currently an American Legion member or who is eligible for membership may become a PUFL member. Legionnaires can receive a quote by logging into MyLegion.org, talking with their Post, or contacting Customer Service at National Headquarters at 1-800-433-3318.
2. Lifetime membership can be paid either in one single lump sum or over 12 equal, monthly payments. If a member chooses the Time Pay Plan, payment must be made by credit card. Once a member fulfills the PUFL membership dues, he/she will be protected from any future dues increases at the post, department or national levels.
3. All PUFL applications must be submitted to National Headquarters by one of three methods:
 - a. Online: The member obtains a quote after logging into MyLegion.org. Once the quote is received, the member can opt to apply and pay online. Note: For those without internet access, the post or department can perform the process.
 - b. Printable applications: For those without internet access, a paper application can be printed by the post or department and forwarded to the member for completion.

- c. Call Customer Service: Members can speak to a customer service specialist by calling 1-800-433-3318. They can answer questions regarding cost, process or a member, as well as print and mail PUFL applications or take them over the phone.
4. When paid in full, the member will receive a permanent plastic card identifying him/her as a lifetime member. The PUFL member will also continue to receive an annual American Legion membership card.
5. No refund will be made if the member chooses to cancel membership, discontinue participation in the monthly payment plan, or if National Headquarters must close an account due to delinquency.
6. If a member chooses the monthly payment option and cancels or defaults, the member will not be eligible to participate in the monthly payment plan in the future. However, the member may apply with full payment at any time. Any funds previously submitted on the cancelled account will not be credited to the new application.
7. Once National Headquarters receives and processes an application, the member's post will be notified and allowed 30 days to challenge.
8. A PUFL member may transfer to another participating post with the acceptance of the gaining post.
9. Should a PUFL member hold membership in a post whose charter has been canceled, and is unable to transfer to a local post, the member will be transferred to their respective department headquarters post.
10. If the member is expelled by action of his/her post or department headquarters, the unused portion of the PUFL fee, if any, maybe reviewed upon recommendation of the post and department with final decision by National Headquarters for any possible refund.

C. Honorary PUFL

Honorary PUFL members are members who have received a PUFL membership as an award from their Post. This is the same as an Honorary Life membership, except by purchasing a PUFL membership; the Post has removed the responsibility of ensuring payment of annual dues for the member. In calculating the cost to remit, the authorizing post officers may choose to leave out some or all their share of the post dues which will reduce the amount to submit with the application. If this is an option being considered by the post, the post adjutant must contact Customer Service for the correct fee.

CORRECTIONS AND UPDATES TO MEMBER'S RECORD

Corrections can be made to a member's record in three ways:

- A. Member Data Form
- B. Membership Record Card
- C. MyLegion.org – Information on updating in MyLegion can be found in the second section of this manual

A. Member Data Form

All changes to a member's record can be done with a Member Data Form.

1. The top section must be completed on all Member Data Forms and must include:
 - a. Member ID #
 - b. Department Alpha Code (IA)
 - c. Post #
 - d. Name of the member (As it currently appears on the member's record)
2. The following corrections and updates may be done on the Member Data Form:
 - a. Deceased
 - b. Add or Delete Honorary Life
 - c. Name changes
 - d. Address changes
 - e. Telephone #
 - f. Email Address
 - g. Date of Birth
 - h. Continuous Years Membership
 - i. War Era
 - j. Branch of Service
3. The Post Adjutant's signature is required before submitting to Department.
4. Record all changes on Membership Roster.
5. Mail parts 1-3 to Department. Retain part 4 for the Post's records.

B. Membership Record Card

Important Notes:

1. Do NOT write over the Member ID number on the Membership Record Card.
2. Do NOT write over the numbers in the scan line at the top of the Record Card.

1. **You must place an "X" in the box "Update record changes as noted" on left card. If you make a change without X'ing this box, it will not be caught by the scanning equipment.**
2. The following corrections and updates can be made on the Membership Record Card:
 - a. Continuous Years
 - b. Name
 - c. Mailing Address
 - d. Phone #
 - e. Date of Birth
 - f. Email
 - g. War Era
 - h. Branch of Service
 - i. Deceased
 - j. Duplicate Membership Record

To update most changes:

- 1) Place an "X" in the box "Update record changes as noted" on the left card.
- 2) Strike out the incorrect information on all portions it is printed.
- 3) Print or type the correct continuous years on all portions of the cards.
- 4) Record corrections and updates on the Membership Roster.
- 5) Transmit the card following procedures outlined in this manual.

To update Duplicate Membership Records, where you receive more than one pre-printed card for the same member:

- 1) Process one of the cards (the most accurate one) as usual.
- 2) On the other card, put an "X" in the box next to "Duplicate" on left card and record the ID number from the card you will process.
- 3) Return all three parts of the card to Department. Keep the card separate from those for which you are transmitting dues. Do not include in the count on the Membership Transmittal Form.
- 4) Cross the duplicate record off the Membership Roster.

TRANSMITTING MEMBERSHIP BY MAIL TO DEPARTMENT

Important Notes:

1. Do NOT separate the National and Department portions of the Record Card.
2. Do NOT staple or tape anything to the Membership Record Cards or the Membership Transmittal Form.
3. Use the current version of the Membership Transmittal Form.

Memberships are transmitted to Department Headquarters using the Membership Transmittal Form. **Membership should be transmitted on a frequent basis, such as weekly.** Posts should also transmit before all Target Dates and Renewal Cut-off Dates. These dates are listed later in the manual.

Before submitting, note the following:

1. Verify all cards are completed properly using the procedures covered earlier in this manual.
2. Use the correct year's membership cards.
3. *If you are transmitting dues for a previous membership year, use the card from that year. You must also do a separate transmittal and separate check for each year.*
4. Count the cards you are transmitting and make sure the count is accurate.
5. Make sure the member's portion of the card has been removed and given to the member.
6. Make sure you are using a current version of the Membership Transmittal Form.

To Process Membership:

1. Fill in the "Date Transmitted" field on the roster for each member transmitted.
2. **Do NOT separate the National and Department portions of the Record Card.**
3. **Do NOT staple or tape anything to the Membership Record Cards or the Membership Transmittal Form.**
4. Fill in the date of the transmittal in the proper field.
5. Fill in number of members for which you are transmitting dues on appropriate lines.
6. Fill in amount for Department and National per capita.
7. Fill in amount for District Dues.
8. Total the amount. **See section in this manual on "Account Balances."*
9. Fill in the following fields:
 - a. Check No.
 - b. Amount

- c. District #
 - d. Post #
 - e. Post Location
 - f. Signature of Adjutant or Finance Officer
 - g. Contact information of person to be reached concerning the transmittal
10. To request more transmittal forms, please indicate so at the bottom of the transmittal form. Provide an address to send the additional transmittal forms to.
 11. Send white copy to the Department and keep yellow copy for Post records.
 12. Mail Membership Transmittal Form, Record Cards, and check to:
 - Iowa Department, The American Legion
 - Attn: Membership Clerk
 - 720 Lyon Street
 - Des Moines, IA 50309-5481
 13. The check for the transmittal should be for MEMBERSHIP DUES ONLY. Do NOT include any other payments with your transmittal. Make checks payable to Iowa Department, The American Legion

ACCOUNT BALANCES

Membership is processed daily at Department Headquarters. At the close of each day, the Posts' Membership Account balances are computed. Membership Statements will be prepared quarterly and mailed to the Post indicating the Post balance. Post balances and statements can be requested at any time by contacting the membership clerk at Department Headquarters.

1. Credit (Negative) Balance – Department owes Post money – If the Post has a credit, there will be a minus sign in front of the amount. A credit balance can be caused by any of the following: (a) the Post submitted too much money on a previous transmittal, (b) the Post has been credited with the Post's portion of the Paid-Up-For-Life dues, (c) the Post has been credited with the Post's portion of online renewals, or the Post and/or member paid twice for the same member. If a Post has a credit balance, it can be used on a membership transmittal done by mail. It can be used only on a transmittal for the current membership year. **Posts can elect to receive the credit as a quarterly check.**
2. Debit (Positive) Balance – Post owes Department money – A debit balance indicates the Post has not submitted enough money for membership. If your Post has a debit balance, it can be paid with your next membership transmittal. It can be used only on a transmittal for the current membership year. Be sure to note you are paying the debit balance on the Membership Transmittal Form. The debit balance can also be paid with a separate check by writing "Membership Account" on the memo line. All debit balances must be paid by June 1 of each year.

Be sure to maintain your account balance. Use credits when you have them and pay debits when you owe them. The goal is always to have a \$0 account balance.

TARGET & CUT-OFF DATES FOR RENEWAL NOTICES

The membership target dates are listed in the Adjutant's Manual each year. Every member the Post transmits in time for a Target Date helps the Department attain its overall goal. Some of the Target Dates are also Cut-off Dates for Renewal Notices. If memberships are transmitted in time for the cut-off date, it will prevent the member from receiving an unnecessary renewal notice.

In order for the transmittal to count for the target date or cutoff date, it must reach Department two working days prior to the National date. Mark the days you need to transmit on your calendar at the beginning of the membership year.

2023-2024 RENEWAL NOTICE SCHEDULES

<u>CUTOFF DATES</u>	<u>RENEWAL DATES</u>
MAY 15, 2023	JULY 1-8, 2023
SEPTEMBER 13, 2023	OCTOBER 7-14, 2023
OCTOBER 18, 2023	NOVEMBER 10-18, 2023
DECEMBER 13, 2023	JANUARY 6-12, 2024
FEBRUARY 14, 2024	MARCH 2-8, 2024
APRIL 10, 2024	MAY 4-10, 2024

The above renewal notice schedule reflects the cutoff dates on which dues must arrive at National.

2023-2024 NATIONAL MEMBERSHIP TARGET DATES

September 13, 2023	50 %
October 18, 2023	55 %
November 15, 2023	65 %
December 13, 2023	75 %
January 18, 2024	80 %
February 14, 2024	85 %
March 13, 2024	90 %
April 10, 2024	95 %
May 15, 2024	100 %

Target dates fall on the second Wednesday of the month unless there is a holiday on that day or at the beginning of that week.

TRANSMITTALS MUST ARRIVE AT DEPARTMENT TWO (2) WORKING DAYS PRIOR TO THE TARGET DATE.

POST DATA REPORT

Post Data Reports are mailed annually in February/March and should be returned before April 15. The Forms are used to correct Post information on record at National Headquarters. These forms need to be completed and returned even if there are no changes to the Post information. This is the form used to report changes in Post dues and the dues mailing address before the membership year begins.

POST DATA FORM

Post Data Forms are an abbreviated version of the Post Data Report that may be used anytime during the year to report immediate changes in Post dues or the mailing address where members submit their dues. The form is available in this manual, on the Department website at www.ialegion.org, or by request from Department.

DIRECT RENEWAL FORM

The Direct Renewal Form is used to indicate which renewal notices the Post would like to have sent by National. The forms are mailed in February/March and must be returned before April 15.

POST OFFICER REPORTING FORM

Most official mailings sent by the Department, including those related to membership processing, go to the Post Adjutant on file at Department. The Post Adjutant needs to be available throughout the year to respond to these mailings. A Post Officer Reporting Form should be completed each year or whenever a Post Officer changes. Forms are available at www.ialegion.org or by request from Department. **Forms are due annually before September 15.**

MEMBERSHIP REPORTS

Membership Reports can be found in select issues of the Iowa Legionnaire or weekly online at <https://www.ialegion.org/membership/>. If you discover a discrepancy between the Membership Report and your Post records, please report it immediately to the Department Membership Clerk.

MEMBERSHIP AWARDS

Various awards are available at the Post, District, and Department level for attaining certain membership goals. More information on these awards can be found on the Department's website, <https://www.ialegion.org/membership/>.

SNOWBIRDS

National Headquarters no longer provides the "snowbird" service of automatically changing the address of members who move between two different addresses each year. Members are now required to report seasonal address changes directly to National Headquarters by calling **800-433-3318**, through their personal MyLegion account, or by informing their Post.

DIRECT MEMBERSHIP SOLICITATION (DMS) & HQ POST 729 MEMBERS

The DMS program is a form of direct marketing used to solicit membership in The American Legion. While the DMS program has changed over the years, its purpose remains the same – to bring new members into our organization. For the DMS program to be truly effective, it is imperative these new members are personally contacted and invited to transfer into a local Post.

When a member joins through National's DMS program, the member is placed in the Department Headquarters "holding post" 0729 in accordance with the current policies of the National Executive Committee.

The Department Headquarters “holding post”, Post 0729, is comprised primarily of members acquired through the DMS program. Many wish to transfer to a local Post. Your Post may receive a “Request to Transfer to a Local Post” (Sample 2) from their District. Contact the member to see if they wish to transfer into your Post.

A Post has access to contact information for Post 0729 members in their area through MyLegion.org or by contacting their District Commander. Posts can transfer Post 0729 members, at any time using the procedures outlined in this manual. The member must consent to being transferred into your local Post.

MYLEGION.ORG

MyLegion.org is a free website designed to assist Post officers with everyday membership duties and to connect members of The American Legion to their Post and Department leadership as well as other American Legion members. This site can be accessed from any device with an internet browser and internet access.

Post Officers with access can view members who have renewed online, generate rosters, submit Consolidated Post Reports (CPR), perform Member Data Form changes online for Legion and SAL members, find potential members by utilizing lists of expired members and Headquarters Post members in their area, and more.

Processing membership in MyLegion utilizes electronic payment methods and allows posts to renew, add, and transfer-in paying members from other posts electronically. Electronic membership processing eliminates the need for posts to send the National and Department portion of the (3-part) membership cards and paper checks to the Department Headquarters office. *Note: Posts can only transfer-in members for which dues are being paid.*

Members can create a profile and get connected with other members, keep up-to-date with news, as well as print copies of their membership card or make updates to their record.

For help, see Section 2 of this manual, read the Resources available through MyLegion, or call 800-433-3318.

Sample 1

Membership Record Card

A B C D E F		0221 OF AMERICA / LE G I J K	
XXXXXXXX 22 18000000 100599 1 X		00599	
MEMBER ID #	203555121 A	DEPT/POST	IA - 9999 30
NAME (FIRST MIDDLE LAST)			
JOHN X PUBLIC			
MAILING ADDRESS			
PO BOX 1234 YOURTOWN, IA 99999-1234			
PHONE #	555-111-2222 H	DATE OF BIRTH (MM/DD/YYYY)	01/02/1948 H
EMAIL			
JXPUBLIC@EMAIL.COM H			
War Era: <input type="checkbox"/> WWII <input type="checkbox"/> Korea <input checked="" type="checkbox"/> Vietnam G <input type="checkbox"/> Lebanon/Grenada <input type="checkbox"/> Panama <input type="checkbox"/> Gulf War <input type="checkbox"/> Global War on Terror <input type="checkbox"/> Other Conflicts		Branch of Service: <input type="checkbox"/> USA <input type="checkbox"/> USMC <input type="checkbox"/> USN <input checked="" type="checkbox"/> USAF G <input type="checkbox"/> USSF <input type="checkbox"/> USCG <input type="checkbox"/> USMM (WWII Only)	
GENDER: <input checked="" type="checkbox"/> Male I <input type="checkbox"/> Female If applicable, place an "X" in the appropriate box below: <input type="checkbox"/> Deceased <input type="checkbox"/> Update record changes as noted <input type="checkbox"/> Duplicate of ID# J		DATE PAID (MM/DD/YYYY) POST ADJUTANT'S INITIALS <input type="checkbox"/> Renewed <input type="checkbox"/> New <input type="checkbox"/> Transfer	
POSTS: DO NOT SEPARATE THE NATIONAL AND DEPARTMENT CARDS. See instructions on the reverse side. 041493		2022 THE AMERICAN LEGION DEPARTMENT CARD MEMBER ID # 203555121 A DEPT/POST 100599 IA-9999 30 NAME (FIRST MIDDLE LAST) JOHN X PUBLIC MAILING ADDRESS PO BOX 1234 YOURTOWN, IA 99999-1234 DATE PAID (MM/DD/YYYY) POST ADJUTANT'S INITIALS <input type="checkbox"/> Renewed <input type="checkbox"/> New <input type="checkbox"/> Transfer	

HERE IS YOUR 2022 MEMBERSHIP CARD


Sign the card on the line provided and carry it with you. Payment of dues is hereby acknowledged. \$5.00 of which is allocated for a subscription to The American Legion Magazine and is non-deductible from dues.

2022
 The American Legion
 Membership Card
 IA 9999 203555121 30
 JOHN X PUBLIC
 YOURTOWN K
 Thanks for still serving America.

A/B/C/D/E/F – The characters that appear here make up the scan line. Do not change any of the information on this line. Do not mark in this area for any reason.

- A. The permanent 9-digit member ID number, which remains the same as long as the member continues to pay dues annually or for life
- B. The membership year
- C. The department and post (and country when applicable)
- D. These numbers serve as a counter – for example, if the post has 195 pre-printed cards for members from last year and you get an extra 25 blank cards (use for new members), the first card will have a 6-digit sequence number of 000001 and the last card will have 000220.
- E. This variable number is important only to National Headquarters.
- F. All American Legion cards have an “L,” and SAL cards have an “S.”
- G. Only the first war era and one branch of service in which a member served is indicated. Update if blank on pre-printed card.
- H. Current phone number, date of birth and member’s email address. Update if blank on pre-printed card.
- I. Member gender identifier. Update if blank on pre-existing card.
- J. Update as appropriate.
- K. City in which the post is located

Sample 2
Request to Transfer to a Local Post
Headquarters Post 729 Members

	<h2 style="margin: 0;">REQUEST TO TRANSFER TO LOCAL POST</h2>
<input type="checkbox"/>	<p>Yes! I'm interested in transferring to a local Post. <small>(The receiving Post is the final authority on a transfer.)</small></p> <p><small>To transfer to local post simply fill this out and then mail it back with your 2008 membership dues in the reply envelope enclosed.</small></p> <p><i>I understand the local Post may require a copy of my separation from active duty papers. (The Post's Service Officer will then be able to file a claim if necessary, on your behalf with no delay. The Post's Service Officer can also help you get replacement separation papers if yours have been lost or destroyed.)</i></p>
<div style="display: flex; justify-content: space-between;"><div style="width: 45%;"><p><small>Your Phone No.:</small> _____</p></div><div style="width: 55%;"><p><small>Name:</small> _____</p><p><small>Address:</small> _____</p><p><small>City:</small> _____ <small>State:</small> _____ <small>Zip:</small> _____</p><p><small>Member ID:</small> _____</p><p><small>Last Paid Membership Year:</small> _____ <small>Continuous Years:</small> _____</p><p><small>Signature:</small> _____</p></div></div>	
<small>ENCLOSE THIS TRANSFER SLIP WITH YOUR DUES NOTICE.</small>	

Forms are sent by National Headquarters with Renewal Notices to members of Headquarters Post #729.

Completed forms are sent to Department who in turn sends them to the correct District Commander and Membership Chair to forward to Posts.

The local Post is responsible for contacting member, verifying eligibility, and processing the transfer.

SECTION 2

ONLINE MEMBERSHIP PROCESSING

SECTION 2 – ONLINE MEMBERSHIP PROCESSING

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Not all functions of MyLegion explained in this Manual. For more help with MyLegion, visit <https://mylegion.org/PersonifyEbusiness/Resources/Help>.

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.

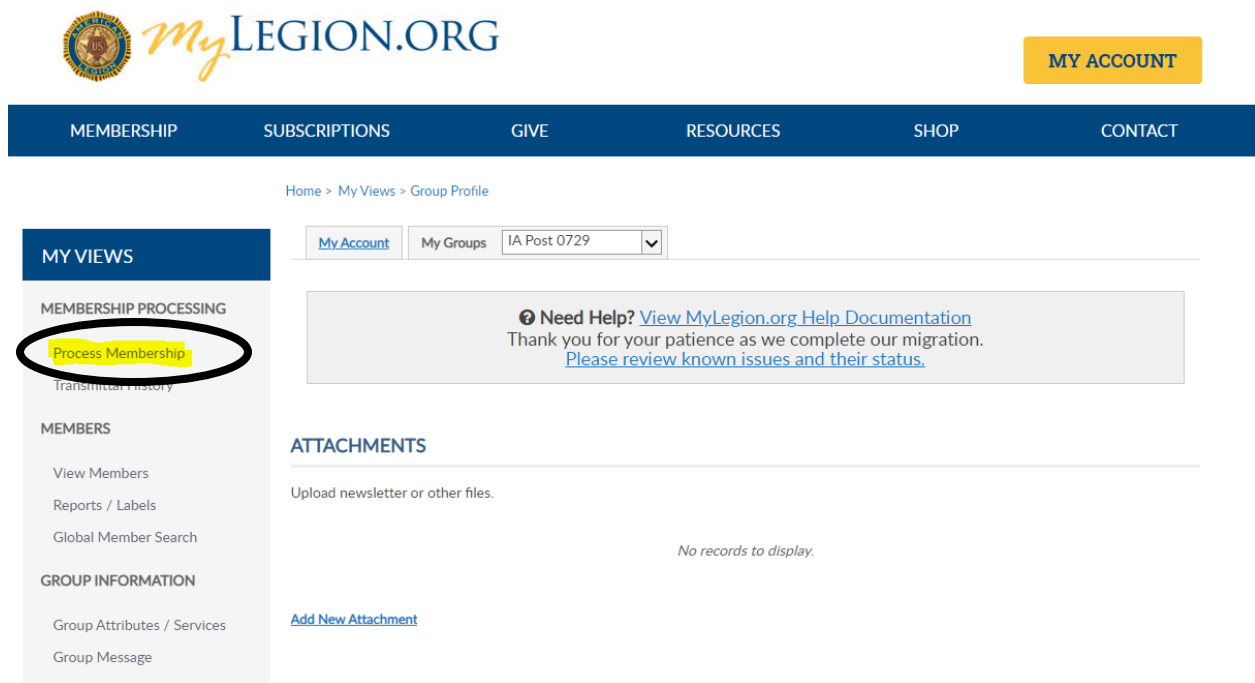
PROCESS MEMBERSHIP ONLINE

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.



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:

Actions:

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

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 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

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

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:

Gender:

* Country: [Change](#)

* Address Type:

* Address Line 1:

Address Line 2:

Address Line 3:

* City:

* State:

* Zip Code:

Phone:

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

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

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 :	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

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 /lib	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 days.

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

Add New Member

Transfer Member

123456789

Grp Admin.

email@yahoo.com

317-555-5555

Address, Cty, St, Zip

123456790

B. Sample

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

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

1 of 4

Save

Finalize

List Selected

Export to CSV

Print

CORRECTIONS AND UPDATES TO MEMBER'S RECORD

Most updates to a member's record can be done through MyLegion.

1. Access the View Members Page through the Group Profile
2. Select the member's profile from the list by clicking the member's name
3. From the left-hand menu, choose the information to update (such as Name and Demographics)
4. Click "Edit" by the appropriate information to update
5. Make the necessary changes and select "Save"

Important Notes:

1. The addition or deletion of Honorary Life to a member's profile must be submitted through a Member Data Form.
2. While changes are typically reflected quickly, allow up to 24 hours for changes to be reflected in the system.


The addition or deletion of Honorary Life to a member's profile must be submitted through a Member Data Form.

Home > My Views > Group Profile > Members > Member Profile

My Account My Groups IN Post 0495

Viewing: Viewing Member

CONTACT INFORMATION

 **EDIT ADDRESS**

* Required

* Country: United States [Change](#)

* Address Type: Home

* Full Name: Member Viewing

* Address Line 1: 5745 Lee Rd

Address Line 2:

Address Line 3:

* City: Indianapolis

* State: Indiana

* Zip Code: 46216-2063

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

Email testcmdrlogin@gmail.com [Edit](#)

Home > My Views > Group Profile > Members > Member Profile > Name & Demographics

My Account My Groups IN Post 0495

Viewing: Member's Name (Member ID: 123456789)

NAME

* Required

Prefix: Select

First Name: Member

Middle:

* Last Name: Viewing

Suffix: Select

Nickname: Jack

Credentials

☐ DDS

☐ ESQ

☐ MD

☐ PHD

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

MEMBERS PAID ONLINE REPORT

Posts can access a report at any time through MyLegion. After navigating to Reports/Labels on the Group Profile, the Post can enter a begin date and end date to view a list of members who have paid during that period. A report can be printed from this page.

Home > My Views > Group Profile > Reports / Labels

MY VIEWS

MEMBERSHIP PROCESSING

Process Membership

Transmittal History

MEMBERS

View Members

Reports / Labels

Global Member Search

GROUP INFORMATION

Group Attributes / Services

Group Message

My Account

My Groups

IA Post 0729

POST REPORTS

LABELS

• 3x10 Labels

MEMBERSHIP

• Find Members in my Area

• Member Online Renewals

• Post / Squadron Current Roster

• Roster Updates

Home > My Views > Group Profile > Reports / Labels > Reports - Member Online Renewals

Help ?

MEMBER ONLINE RENEWALS

Member Online Renewals

Group: IA Post 0729

From Date: 7/8/2021

To Date: 3/23/2022

View Report