



Sons of The American Legion Detachment 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:

- New section on member online payments
- Squadron Account Balances
- 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.

If you have any questions regarding the processing of membership, please feel free to contact the Detachment 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 the 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. Remember to check for any Honorary Life Members to be paid by the Squadron.

MEMBERSHIP RECORD CARDS

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 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 in exact alphabetical order all your previous year's members whose cards were received at National before April 1. Columns on the Membership Roster are explained below.

1. PAID – Record the date member pays dues to the Squadron.
2. TRANSMITTED – Record date Squadron transmits to the Detachment.
3. LAST PAID YEAR– Indicates last year member was paid (as of April 1)
4. CONT. YEARS – Number of continuous years membership – Corrections should be made on Member Data Form or on the Membership Record Card.
5. MEMBER ID
6. NAME/ADDRESS/CITY/STATE/ZIP – Corrections should be made on Member Data Form.
7. CER FLAG – Not used for SAL membership.
8. EX FLAG – Exclusion Flag - A "B" code means the member will not receive a newsletter. A "C" Code indicates the member will not receive a renewal notice from National. Call Detachment Headquarters for any corrections.
9. ERA – Not used for SAL membership.
10. TYPE – "H" indicates Honorary Life membership – The Squadron is responsible for payment of the member's annual dues.
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 Detachment. Squadrons are asked to verify address and contact Detachment.

RENEWALS – TRADITIONAL MAIL

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 "Squad 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 Squadron 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 Detachment 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 the Detachment. The serial number on the card will be the same as the 6-digit sequence number printed on the roster explained earlier.
2. Type or print legibly on the left and center cards the following information exactly the way it was previously reported.
 - a. Membership ID # (obtain from previous year roster, Detachment or member)
 - b. Squadron 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
3. Put an "X" in the Dual Member box if the member is also a member of The American Legion.
4. Fill in "Date Paid" on the center card.
5. Initial "Sqdn Adjutant's Initials" on the center card.
6. Put an "X" in the "Renewal" box.
7. Type or print member's Detachment (IA), Squadron #, 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 Squadron Officer."
11. Separate the member's card from the Record Card. Give or mail the card to the member promptly.
12. Do NOT separate the National and Detachment portions of the Record Card.
13. Find the sequence number of the card on the roster and enter the member's information on the roster.
14. 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 Squadron of their recent payment to receive their card.

B. Procedures for Squadron

1. The Squadron 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 Squadron.
 - b. Squadrons can access a report at any time through MyLegion. After navigating to Reports/Labels on the Group Profile, the Squadron 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. Detachment will mail a list to Squadrons 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 Squadron has confirmed the online payment, the official membership card can be issued by the Squadron to the member.
3. Sign the member's portion of the card as "Authorized Squadron Officer."
4. Separate the member's card from the Record Card. Give or mail the card to the member.
5. The Squadron can discard the National and Department portions of the card. **DO NOT** include members who have renewed online in your transmittal to Detachment.
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. Squadron per capita (dues) will be provided in the form of a credit on the Squadron'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 Detachment Membership Reports.

NEW MEMBERS

Important Notes:

1. Always ask a prospective member if he 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 Detachment 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 Detachment.
2. Type or print legibly on the left and center cards the following information:
 - a. Membership ID number - Obtain from member, or Detachment 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. Squadron number
 - c. Years of continuous membership (1 for new members)
 - d. First name, middle initial, last name of member
 - e. Mailing address
 - f. Phone number
 - g. Date of birth
 - h. Email
3. Put an "X" in the Dual Member box if the member is also a member of The American Legion.
4. Fill in "Date Paid" on the center card.
5. Initial "Sqdn Adjutant Initials" on the center card.
6. Put an "X" in the "New" box of the center card.
7. Type or print member's Detachment (IA), Sqdn #, and Member ID# number (or sequence 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 (1 for new member).
10. Sign the member's card as "Authorized Squadron Officer."
11. Separate the member's card from the Record Card. Give or mail the card to the member promptly.
12. Do NOT separate the National and Detachment 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.

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 # (obtained from Detachment or member)
 - b. Detach. Alpha Code ("IA")
 - c. Squadron # (OLD Squadron #)
 - d. Name (First, MI, Last, Suffix)
 - e. Transferring from: Detachment & Former Squadron #
 - f. Transferring to: Detachment & New Squadron #
 - g. Complete eligibility section for transfers only.
 - h. Signature of Post/Squadron Adjutant (required)
 - i. Signature of Member/Guardian (Signature may be waived if Post/Squadron Adjutant certifies member was contacted and agrees to transfer.)
2. Take the next available blank card from those supplied by the Detachment. The serial number on the card will be the same as the 6-digit sequence number printed on the roster explained earlier.
3. Type or print legibly on the left and center cards the following information:
 - a. Membership ID No. (obtained from Detachment or member)
 - b. Squadron number
 - c. Continuous years of membership
 - d. First name, middle initial, last name of member
 - e. Mailing address
 - f. Phone number
 - g. Date of birth
 - h. Email
4. Put an "X" in the Dual Member box if also a member of The American Legion.
5. Fill in "Date Paid" on the center card.
6. Initial "Sqdn Adjutant Initials" on the center card.
7. Put an "X" in the "Transfer" box of the center card.
8. Type or print member's Detachment (IA), Squadron #, and Member ID# number on the member's card above the description.
9. Type or print the member's name on the first line of the member's card.
10. Enter continuous years on the member's card
11. Sign the member's card as "Authorized Squadron Officer."
12. Separate the member's card from the Record Card. Give or mail the card to the member promptly.
13. Do NOT separate the National and Detachment portions of the Record Card.
14. Find the on the next blank space at the end of the roster and enter the member's information.
15. 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 #

- b. Detach. Alpha Code (IA)
 - c. Sqdn # (Old Squadron #)
 - d. Name (First, MI, Last, Suffix)
 - e. Transferring from: Detachment Alpha Code & Former Squadron #
 - f. Transferring to: Detachment Alpha Code (IA) & New Squadron #
 - g. Complete eligibility section for transfers only.
 - h. Signature of Post/Squadron Adjutant (required)
 - i. Signature of Member (Signature of member may be waived if Post/Sqdn Adjutant certifies member was contacted and agrees to transfer.)
2. Mail parts 1-3 to Detachment Headquarters. Keep part 4 for Squadron 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.

HONORARY LIFE MEMBERSHIPS

1. Squadrons have recognized outstanding members for exceptional service or accomplishments by awarding what is known as Honorary Life Membership.
2. For Honorary Life Memberships, the Squadron assumes the responsibility of seeing the yearly dues are paid annually for the remainder of the member's life. Check your Squadron roster for those members who have been awarded Honorary Life Member status. See the section on "Membership Rosters" in this manual for details.
3. If your Squadron awards an Honorary Life Membership, it should be reported to the Detachment. To report an Honorary Life Member, complete the following sections of the Member Data Form:
 - a. Member ID #
 - b. Detachment Alpha Code (IA)
 - c. Squadron #
 - d. Name (First, MI, Last, Suffix)
 - e. Put an "X" in the box for Honorary Life Membership
 - f. Signature of Post/Squadron Adjutant (required)

CORRECTIONS AND UPDATES TO MEMBER'S RECORD

Corrections can be made to a member's record in two 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. Detachment Alpha Code ("IA")
 - c. Squadron #
 - d. Name of the member (As it currently appears on the member's record)
2. The following corrections and updates may be Member Data Form:
 - a. Deceased
 - b. Add or Delete Honorary Life

- c. Name changes
 - d. Address Changes
 - e. Telephone #
 - f. Email
 - g. Date of Birth
 - h. Continuous Years Membership
3. The Post/Squadron Adjutant's signature is required before submitting to Department.
 4. Record all changes on Membership Roster.
 5. Mail parts 1-3 to Detachment. Retain part 4 for the Squadron'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. Dual Member
 - h. Deceased
 - i. 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) If you receive more than one pre-printed card for the same member, 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 TO DETACHMENT HEADQUARTERS

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. Make sure you are using a current version of the Membership Transmittal Form.

Memberships are transmitted to Detachment Headquarters using the Membership Transmittal Form. **Membership should be transmitted on a frequent basis, such as weekly.** Pay special attention to Target 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. **Do NOT separate the National and Detachment portions of the Record Card.**
2. **Do NOT staple or tape anything to the Membership Record Cards or the Membership Transmittal Form.**
3. Fill in the date of the transmittal in the proper field.
4. Fill in number of members for which you are transmitting dues on appropriate lines.
5. Fill in amount for Detachment National dues.
6. Total the amount. **See section in this manual on "Account Balances."*
7. Fill in the following fields:
 - a. Check No.
 - b. Amount
 - c. Squadron No.
 - d. Squadron Location
 - e. Signature of Adjutant or Finance Officer
 - f. Phone # of person to be contacted concerning the transmittal.
8. 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.
9. Send white copy to the Detachment and keep yellow copy for squadron records.
10. 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
11. 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

Note: Online payments by members not available at time of printing.

Membership is processed daily at Detachment Headquarters. At the close of each day, the Squadrons' Membership Account balances are computed. Squadron balances and statements can be requested at any time by contacting the membership clerk at Detachment Headquarters.

1. Credit (Negative) Balance – Detachment owes Squadron money – If the Squadron 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 Squadron submitted too much money on a previous transmittal, (b) the Squadron has been credited with the Squadron's portion of online renewals, or (c) the Squadron and/or member paid twice for the same member. If a Squadron 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.
2. Debit (Positive) Balance – Squadron owes Detachment money – A debit balance indicates the Squadron has not submitted enough money for membership. If your Squadron 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 you transmit in time for a Target Date helps the Detachment 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.

For the transmittal to count for the target date, it must reach the Detachment 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> |
|----------------------------|-----------------------------|
| SEPTEMBER 29, 2023 | OCTOBER 23-27, 2023 |
| FEBRUARY 23, 2024 | MARCH 25-29, 2024 |
| APRIL 22, 2024 | MAY 27-31, 2024 |

2023-2024 NATIONAL MEMBERSHIP TARGET DATES

| | |
|-------------------------|-------|
| September 13, 2023 | 10 % |
| October 18, 2023 | 25 % |
| November 15, 2023 | 35 % |
| December 13, 2023 | 45 % |
| January 18, 2024 | 60 % |
| February 14, 2024 | 75 % |
| March 13, 2024 | 80 % |
| April 10, 2024 | 90 % |
| May 15, 2024 | 100 % |
| July 24, 2024 | 105 % |
| *Delegate Strength Date | |

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. Since Veterans Day falls on a Wednesday, the November target date falls on a Thursday.

Please submit transmittals to arrive at Detachment two (2) working days prior to the target date.

SQUADRON DATA REPORT

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

MEMBERSHIP REPORTS

Membership Reports can be found online at www.ialegion.org/sal. If you discover a discrepancy between the Membership Report and your Squadron records, please report it immediately to the Detachment Membership Clerk.

SQUADRON OFFICER REPORTING FORM

Throughout the year the Detachment sends forms and information to the Squadrons. Most official mailings, including those related to membership processing go to the Squadron Adjutant on record at Detachment. The Squadron Adjutant needs to be available throughout the year to respond to these mailings. A Squadron Officer Reporting Form should be completed each year or whenever a Squadron Officer changes. Forms are available at www.ialegion.org or by request from Detachment. **Forms are due annually before September 15.** *Note: New Membership cards will NOT be sent without a current report on file.*

RENEWAL NOTICES

A. National Renewal Notices

A renewal postcard has been designed to assist Squadrons in their efforts to renew as many members as possible. In October, March, and May, every SAL member whose record at National shows he has not paid will be sent a renewal postcard. Squadrons should transmit members promptly to avoid members receiving unnecessary renewal notices. Membership should be transmitted weekly, but special care should be taken to transmit before the September, February and April cutoff dates to prevent members who have paid from receiving renewal notices.

B. Squadron Renewal Notices

Squadrons are encouraged to send their own renewal notices in addition to the National notices. A sample notice is included in this manual. Be sure to include the address for dues remittance.

RECORDING DATE OF BIRTH (DOB)

Date of Birth information has been added to the Membership Register and the Member Record Card. If the line is blank, please forward the Date of Birth information to National Headquarters. The purpose of the information is to compile information for future program development for the Sons of The American Legion. The information also precludes mailings to very young members and allows for special targeted mailings when needed.

Date of Birth for members can be reported in three ways.

A. Member Data Form – Used to report a single member's DOB. Complete the following fields:

1. Member ID #
2. Detachment Alpha Code (IA)
3. Sqdn #

4. Name of the member (As it currently appears on the member's record)
5. Date of Birth
6. Signature of Post/Sqdn Adjutant

B. Member Record Card – Use procedures outlined in “Corrections and Updates to Member's Record” in this manual.

C. MyLegion - See Section 2.

Membership Record Card

| 2018 SONS OF THE AMERICAN LEGION NATIONAL CARD | | | | 2018 SAL DETACHMENT CARD | | HERE IS YOUR 2018 MEMBERSHIP CARD | |
|--|---|--|---|--------------------------|---|-----------------------------------|--|
| A | B | C | D | E | F | | |
| 900000024 18 99999900 000024 X S | | | | | | | |
| SAL | | | | | | | |
| <input type="checkbox"/> Also belongs to The American Legion (Dual Member) G | | | | | | | |
| If applicable, place an "X" in the appropriate box below: <input type="checkbox"/> Deceased <input type="checkbox"/> Update record changes as noted I <input type="checkbox"/> Duplicate of ID# | | | | | | | |
| <input type="checkbox"/> Renewal <input type="checkbox"/> New <input type="checkbox"/> Transfer | | | | | | | |
| MEMBER ID # 900000024 A DETACHMENT 9999 COUNTY 29 NAME (FIRST MIDDLE LAST) JOHN X PUBLIC MAILING ADDRESS PO BOX 1234 ANYTOWN ST 99999-3729 PHONE # 555-555-1234 H DATE OF BIRTH (MM/DD/YYYY) 01/13/1968 H EMAIL JXPUBLIC@EMAIL.COM H | | MEMBER ID # 900000024 A DETACHMENT 9999 COUNTY 29 NAME (FIRST MIDDLE LAST) JOHN X PUBLIC MAILING ADDRESS PO BOX 1234 ANYTOWN ST 99999-3729 DATE PAID (MM/DD/YYYY) SQUADRON ADJUTANT'S INITIALS | | | | | |

SQUADONS: DO NOT SEPARATE THE NATIONAL AND DETACHMENT CARDS. See instructions on the reverse side.

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 – This is the permanent 9-digit member ID Number– it will stay the same as long as the member continues to pay dues annually.

B – This number represents the membership year.

C – These positions identify the Detachment & Squadron.

D –These numbers serve as a counter – for example, if your Squadron 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 has importance only to National’s scanning equipment.

F – All Legion cards have an “L,” and the SAL cards carry an “S.”

G – Check this box if member is also a member of The American Legion.

H – Current phone number, date of birth and member’s email address. Update if blank on the pre-printed card.

I – If using the Membership Record Card to update or correct the membership record, this box must be checked.

J – City in which the squadron is located.

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

[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 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 : | Per Capitas | Actual |
|--------------------------|-------------|----------------|
| OPEN | | 2 |
| Card Count : | | |
| 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](#) [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 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 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 : | | | 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](#)

| 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 checked="" type="checkbox"/> | 123456800 | Added Member | email@yahoo.com | 317-555-5555 | Address, Cty, St, Zip | 2021 |
| <input 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 |

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

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

Save

Finalize

1 of 4

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 |

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](#)