



myLegion.org

Online Membership Processing

Online Membership Processing

The ***“Process Membership”*** feature in myLegion allows American Legion Post Officers to:

- ***Renew Existing Members***
- ***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.***
- ***EXCEPTION: Foreign Posts can use credit cards ... US Bank or Non US Banks.***

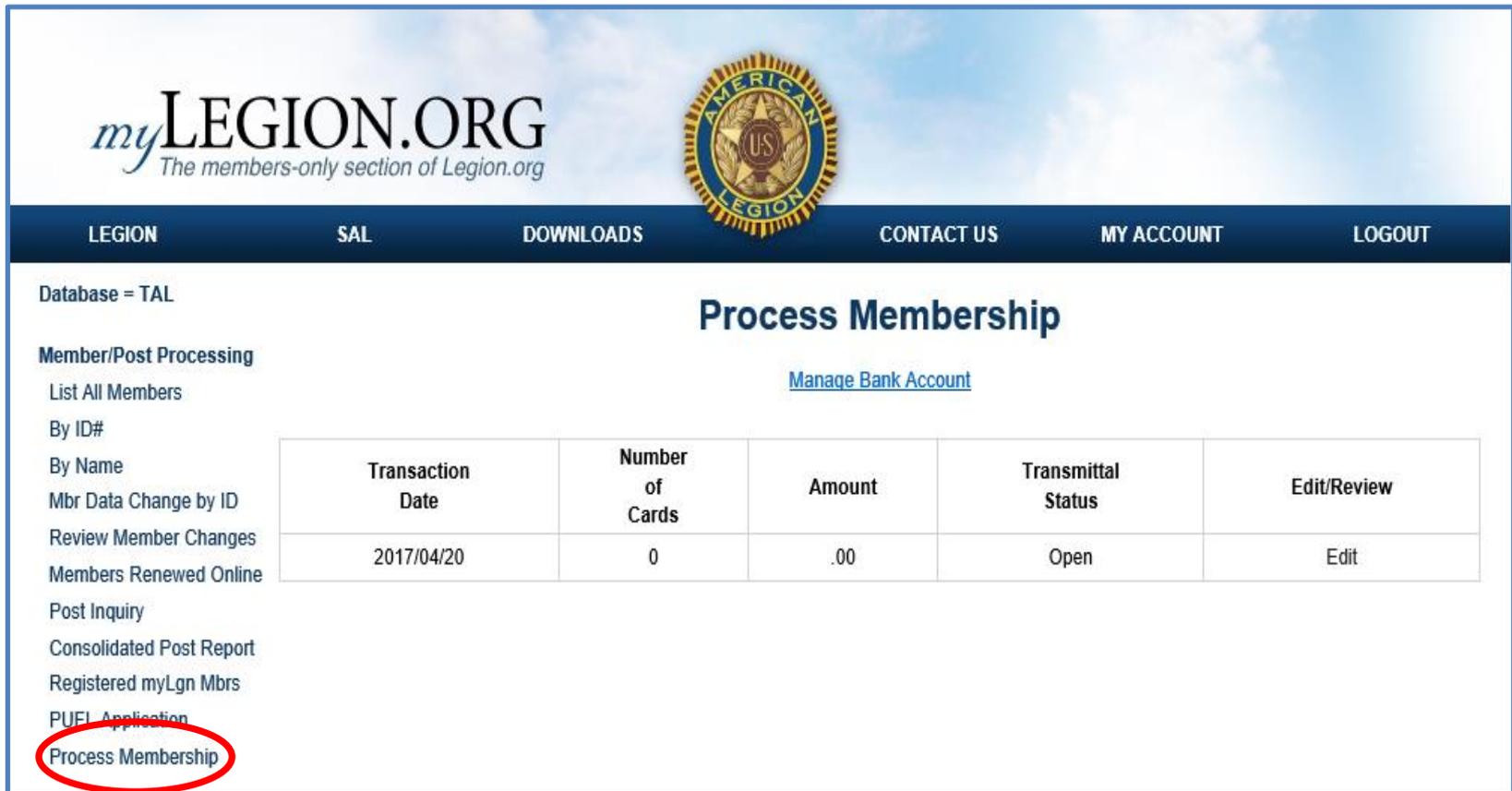
Online Membership Processing

BENEFITS

- Significantly improves membership processing time.
- Member Renewals/New Adds take place in 5-days or less ... as opposed to 5+ weeks.
- Member benefits are activated much quicker.
- Significantly improve Customer Service by eliminating unnecessary renewal notices and complaints by members.
- Reduce cost of Direct Renewal Program
- Reduce processing workload at the Department and National Level.

Online Membership Processing

From the left-menu, choose “Process Membership”



myLEGION.ORG
The members-only section of Legion.org



LEGION SAL DOWNLOADS CONTACT US MY ACCOUNT LOGOUT

Database = TAL

Process Membership

[Manage Bank Account](#)

Member/Post Processing

- List All Members
- By ID#
- By Name
- Mbr Data Change by ID
- Review Member Changes
- Members Renewed Online
- Post Inquiry
- Consolidated Post Report
- Registered myLgn Mbrs
- PUFL Application
- Process Membership**

Transaction Date	Number of Cards	Amount	Transmittal Status	Edit/Review
2017/04/20	0	.00	Open	Edit

Online Membership Processing

STEP 1: Click “Manage Bank Account” to enter your Post’s Bank Information.

Manage Account

Account on File

No record on file.

Add a Bank Account

Bank Account Description

Account Type

Routing Transit No.

Bank Account No.

Name on Account

Email Address

Re-Enter Email Address

Memo _____

⑈080989430⑈ 0014409843⑈

Routing Transit Account
Number Number

Online Membership Processing

STEP 2: ADD RENEWALS AND/OR NEW MEMBERS TO AN “Open” BATCH.

Only one “Open” Membership batch is available for processing. The Open batch must be completed and submitted before a new batch becomes available. In addition a \$10,000 maximum limit is in effect for each batch.



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Process Membership

Member/Post Processing [Manage Bank Account](#)

List All Members

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By Name

Mbr Data Change by ID

Review Member Changes

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PUFL Application

Process Membership

Transaction Date	Number of Cards	Amount	Transmittal Status	Edit/Review
2017/04/20	0	.00	Open	Edit

Online Membership Processing

The “Transmittal Batch” form allows you to Add New Members, Transfer-in and pay for a member from a different Post..as-well-as select from a list of members that currently reside in your Post for renewal.



LEGION SAL DOWNLOADS CONTACT US MY ACCOUNT LOGOUT

Database = TAL

Transmittal Batch

[Back](#)

Cards: 0
Total Amount: \$0.00
Status: Open
Batch Date: 2017/04/20

[Add New Member / Transfer-In](#) [Click Here](#)

Search for Members in My Post to Renew

Member ID:

Last Name:

First Name:

No Search Results Found

Members in this Batch

No Member(s) in batch

Member/Post Processing

- List All Members
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Tools

- Publish Post Message
- Publish Post Image
- Publish Newsletter
- Find Members in my Area
- Global Member Lookup

Materials

- Post Officer Manuals
- Brochures
- Suggested Speeches

Online Membership Processing

ADD NEW MEMBER/Transfer-in

Choose whether you are adding a new member (never-before-Legionnaire), or transferring-in an existing member from a different Post.

The screenshot displays the myLEGION.ORG website interface. At the top left is the logo "myLEGION.ORG" with the tagline "The members-only section of Legion.org". To its right is the American Legion seal. A dark blue navigation bar contains the following links: LEGION, SAL, DOWNLOADS, CONTACT US, MY ACCOUNT, and LOGOUT. Below the navigation bar, the page title is "Transmittal Batch". On the left side, there is a sidebar menu under "Member/Post Processing" with items: List All Members, By ID#, By Name, Mbr Data Change by ID, Review Member Changes, Members Renewed Online, Post Inquiry, Consolidated Post Report, Registered myLgn Mbrs, PUFL Application, and Process Membership. Under "Tools", there are: Publish Post Message, Publish Post Image, and Publish Newsletter. In the main content area, the text "Database = TAL" is visible. To the right of the sidebar, there is a "Back" button and summary statistics: "# Cards: 0", "Total Amount: \$0.00", and "Status: Open". A modal window is open in the center, titled "Add New Member / Transfer-In". It contains two radio button options: "Add New Member" and "Transfer-In Existing Member and Renew".

Online Membership Processing

Member ID# and name are required to transfer-in a member from another Post.



Add New Member / Transfer-In

Add New Member

Transfer-In Existing Member and Renew

Member ID:

Last Name:

Online Membership Processing

Complete the “ADD NEW MEMBER” form and click “Save”

Add New Member

* Required Field

First Name*

Middle Initial

Last Name*

Suffix

Date of Birth MM/DD/YYYY

Gender Female Male

Address*

City*

State*

Zip*

Country (Leave blank if US)

Phone
Enter using hyphens (000-000-0000)

Email

Branch of Service

Dates of Service

Online Membership Processing

If you chose “Add Member” (never-before-Legionnaire), this feature sweeps the entire database looking for potential matches.



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The members-only section of Legion.org

AMERICAN LEGION US

LEGION SAL DOWNLOADS CONTACT US MY ACCOUNT LOGOUT

Database = TA

Possible Matches

The information you entered matches the members shown below. Click on the member id to transfer the member in rather than adding them as a new member. If the members below are not a match, click on Continue and Add Member.

Member ID	Department	Post	Name	Address	Zip	Date of Birth	War Era
100119366	NEBRASKA	0500	STEVEN C EDWARDS	7123 LOGAN AVE	68507	Feb 28, 1961 - May 7, 1975	

Continue and Add Member

Online Membership Processing

After “Save”, notice the member shows up under “Members in this Batch”. Click “Edit” to change demographic information, or “Remove” to delete this member from the batch.

Database = TAL

Transmittal Batch

Cards: 1
Total Amount: \$27.00
Status: Open
Batch Date: 2017/04/20

[Back](#)

Member/Post Processing

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- Publish Newsletter
- Find Members in my Area
- Global Member Lookup

Materials

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- Brochures
- Suggested Speeches

Officer's Forum

- View Forum

Add New Member / Transfer-In [Click Here](#)

Search for Members in My Post to Renew

Member ID:

Last Name:

First Name:

No Search Results Found

Members in this Batch

Account information must be entered before you can submit batch.

Master ID number	Name	Membership Year	Edit/Remove
999999993	JAMES MILLER	2017	Edit / Remove

Account information must be entered before you can submit batch.

Online Membership Processing

Use the Search feature to find the member in your Post that you want to renew. Notice that the search feature follows along with you as you type. The example above shows “100” entered for “Member ID:” , and “b” for last name. The form then finds all members in your Post where Member ID begins with “100” and Last Name starts with “b”. Select the member by clicking “Renew”.

Search for Members in My Post to Renew

Member ID:

Last Name:

First Name:

Member ID	Name	Renew Year	
100594324	ROBERT BROWNE	2017	Renew
100578704	CHARLES BOYLES	2017	Renew
100575272	JAMES BORK	2015	Renew
100750043	EDWARD BONDS	2017	Renew
100610576	VIRGINIA BLACKFORD	2017	Renew
100610574	JAMES BIDDLE	2017	Renew
100609410	WILLIS BAUR	2017	Renew
100664184	CLYDE BANGIOLA	2017	Renew
100610567	CHARLES BALLARD	2017	Renew
100012978	ROBERT BACKLUND	2017	Renew

Members in this Batch

Account information must be entered before you can submit batch.

Master ID number	Name	Membership Year	Edit/Remove
999999993	JAMES MILLER	2017	Edit / Remove

Account information must be entered before you can submit batch.

Online Membership Processing

Select the Renewal Year(s) and click “Renew”

Renew Member

Master ID number 100012978
Last Name BACKLUND
First Name ROBERT
Middle Initial W
Address Line 1 111 LAMPLITER VLG
Address Line 2
Address Line 3
City CLARKDALE
State Code AZ
ZIP Code 86324
ZIP Code Extension 3214
Country Code
Telephone #1
Telephone #2
E-mail Address

Eligible Renewal Years	
<input checked="" type="checkbox"/>	2018

Cancel Renew

Online Membership Processing

STEP 3 : SUBMIT BATCH FOR PROCESSING

When your batch is complete, click “Submit Batch” to initiate payment.



LEGION SAL DOWNLOADS CONTACT US MY ACCOUNT LOGOUT

Database = TAL

Transmittal Batch

Member/Post Processing Back

List All Members

By ID# # Cards: 2

By Name Total Amount: \$54.00

Mbr Data Change by ID Status: Open

Review Member Changes Batch Date: 2017/04/20

Members Renewed Online

Post Inquiry

Consolidated Post Report

Registered myLgn Mbrs

PUFL Application

Process Membership

Add New Member / Transfer-In Click Here

Search for Members in My Post to Renew

Member ID:

Last Name:

First Name:

No Search Results Found

Members in this Batch

Submit Batch

Master ID number	Name	Membership Year	Edit/Remove
999999993	JAMES MILLER	2017	Edit / Remove
100594324	ROBERT BROWNE	2017	Edit / Remove

Submit Batch

Tools

Publish Post Message

Publish Post Image

Publish Newsletter

Find Members in my Area

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Brochures

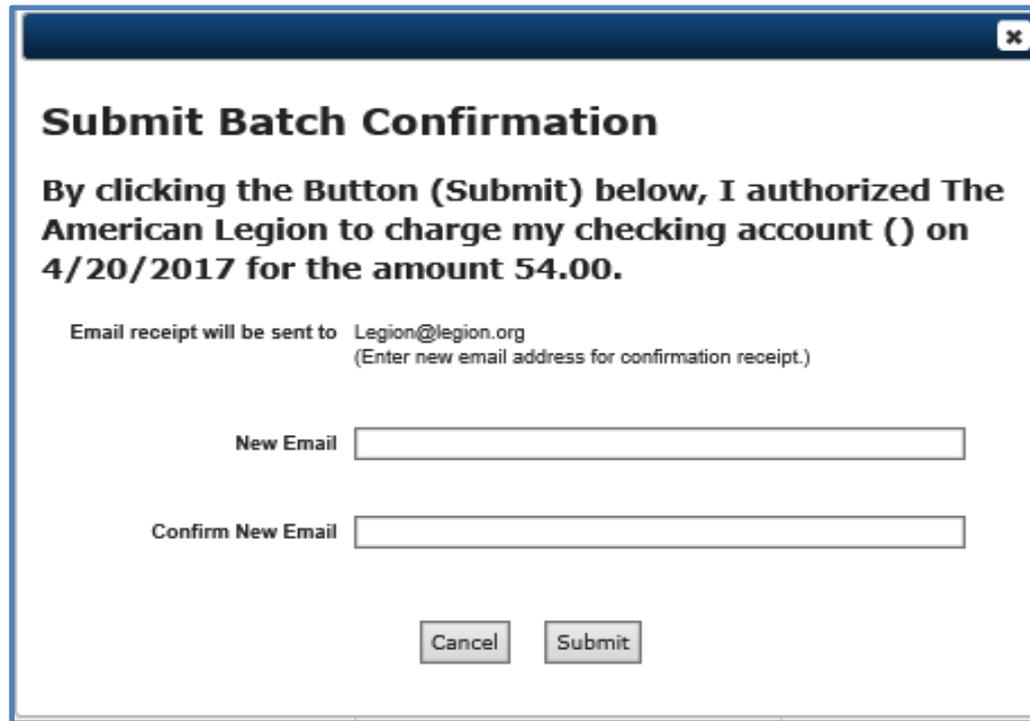
Suggested Speeches

Officer's Forum

View Forum

Online Membership Processing

A confirmation screen will appear with the email address where the transaction receipt will be sent. This screen also allows you to change where the email receipt will be sent. Click “Submit” to initiate payment for the batch.



The screenshot shows a web browser window with a dark blue title bar containing a close button (X). The main content area has a white background with a blue border. At the top, the title "Submit Batch Confirmation" is displayed in bold black text. Below the title, a paragraph of text reads: "By clicking the Button (Submit) below, I authorized The American Legion to charge my checking account () on 4/20/2017 for the amount 54.00." Underneath this, it says "Email receipt will be sent to Legion@legion.org" followed by a smaller instruction: "(Enter new email address for confirmation receipt.)". There are two text input fields: the first is labeled "New Email" and the second is labeled "Confirm New Email". At the bottom of the form, there are two buttons: "Cancel" and "Submit".

Submit Batch Confirmation

By clicking the Button (Submit) below, I authorized The American Legion to charge my checking account () on 4/20/2017 for the amount 54.00.

Email receipt will be sent to Legion@legion.org
(Enter new email address for confirmation receipt.)

New Email

Confirm New Email

Online Membership Processing

After submitting the batch for processing, the “Process Membership” form will show the batch in a pending status. Once the transaction has completed processing in the ACH network, the Transmittal Status will change to “Applied”. Allow up to 5-business days for the transaction to clear through the ACH network.



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AMERICAN LEGION

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2017/04/20	2	54.00	Pending	Review

Online Membership Processing

Where do we go from here?

Challenges

Membership Reports

Membership Statements for Posts

How does Ohio do it?

All reporting from myLegion

Timing issues

*Current build out for Departments Entering
online renewals*

****Rollout****



myLegion.org

Download a copy of this Presentation

@

www.members.legion.org/legion/adj2017.zip