

PROCESS MEMBERSHIP

INTRODUCTION

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

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

Each dues payment charged for a member is the sum of the National Per Capita plus Department 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 Echecks 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

From the left-menu, choose “Process Membership”



Database = TAL

Process Membership

[Manage Payment Method](#)

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

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**

STEP 1: Click “Manage Payment Method” to enter your Post’s Bank Information. Click “Switch to Credit Card” to enter credit card information.



Database = TAL

Manage Account

[Back](#)

Account on File

No record on file.

[Switch to Credit Card](#)

Add a Bank Account

Account Type:

Routing Transit No.

Bank Account No.

Name on Account *Name on account can be abbreviated.

Email Address

Re-Enter Email Address

[Save](#)

Memo.

Routing Transit Number: 080989430

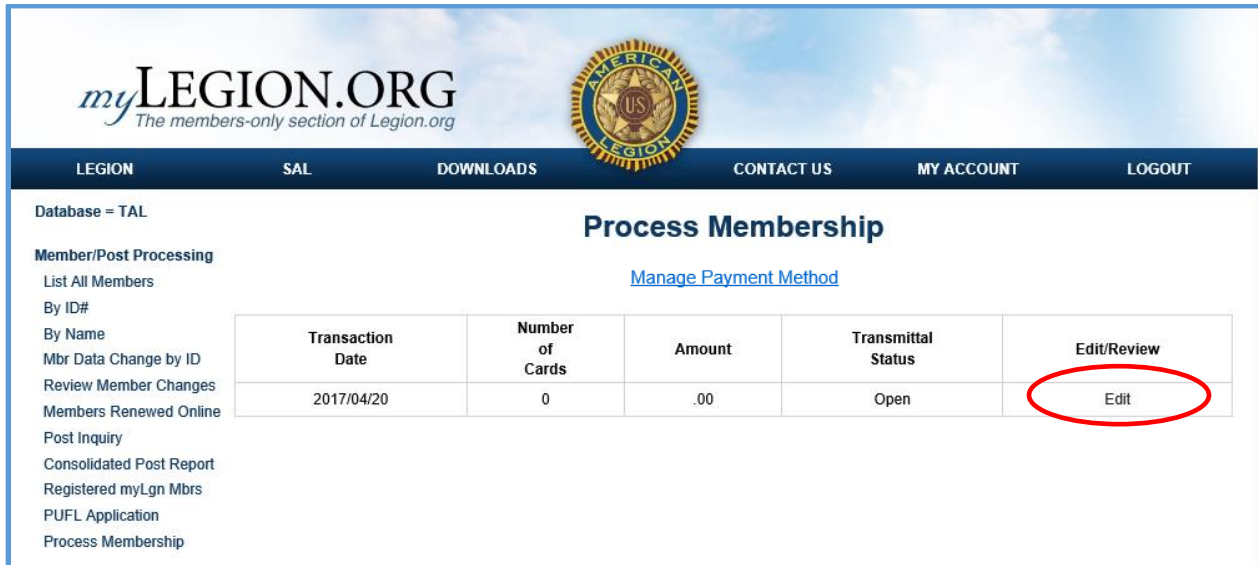
Account Number: 0014409843

Enter the required information on the “Manage Account” screen and click “Save”

PROCESS MEMBERSHIP

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.



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

LEGION SAL DOWNLOADS CONTACT US MY ACCOUNT LOGOUT

Database = TAL

Process Membership

[Manage Payment Method](#)

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

Click “Edit” to begin adding members to the batch.



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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

Tools

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

Materials

- Post Officer Manuals
- Brochures
- Suggested Speeches

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.

PROCESS MEMBERSHIP

ADD NEW MEMBER/Transfer-in

The screenshot shows the myLEGION.ORG website interface. The header includes the logo and navigation links: LEGION, SAL, DOWNLOADS, CONTACT US, MY ACCOUNT, and LOGOUT. The main content area is titled 'Transmittal Batch' and displays statistics: # Cards: 0, Total Amount: \$0.00, and Status: Open. A modal window titled 'Add New Member / Transfer-In' is open, showing two radio button options: 'Add New Member' and 'Transfer-In Existing Member and Renew'. The background page also lists various links under 'Member/Post Processing' and 'Tools'.

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

This is a close-up of the modal window from the previous image. It features the title 'Add New Member / Transfer-In' and two radio button options. The first option, 'Add New Member', is unselected. The second option, 'Transfer-In Existing Member and Renew', is selected. Below these options are two text input fields: 'Member ID:' and 'Last Name:'. At the bottom of the modal are two buttons: 'Cancel' and 'Continue'.

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

PROCESS MEMBERSHIP

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

Cancel

Save

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

Database - TAL

Transmittal Batch

Back

Cards: 1

Total Amount: \$27.00

Status: Open

Batch Date: 2017/04/20

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

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PUFL Application

Process Membership

Add New Member / Transfer-In

Click Here

Search for Members in My Post to Renew

Member ID: Search by Member ID

Last Name: Search by Last Name

First Name: Search by First Name

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

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.

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.

PROCESS MEMBERSHIP

Search for Members in My Post to 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.

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”.

Renew Member

Master ID number 100033312

Last Name COMMONS

First Name ROBERT

Middle Initial B

Address Line 1 POSTFACH 1512

Address Line 2 67804 KAISERSLAUTERN

Address Line 3 GERMANY

City

State Code

ZIP Code

ZIP Code Extension

Country Code GR

Telephone #1

Telephone #2

E-mail Address

Eligible Renewal Years

☒ 2018

☐ 2017

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

PROCESS MEMBERSHIP

STEP 3 : SUBMIT BATCH FOR PROCESSING

Database = TAL

Transmittal Batch

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View Forum

Cards: 2

Total Amount: \$54.00

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

[Submit Batch](#)

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

[Submit Batch](#)

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

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

[Cancel](#) [Submit](#)

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.

PROCESS MEMBERSHIP



LEGIONSALDOWNLOADSCONTACT USMY ACCOUNTLOGOUT

Database = TAL

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- Post Inquiry
- Open/Edited Post Report

Process Membership

[Manage Payment Method](#)

Transaction Date	Number of Cards	Amount	Transmittal Status	Edit/Review
2017/04/20	0	.00	Open	Edit
2017/04/20	2	54.00	Pending	Review

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 “Closed”. Allow up to 5-business days for the transaction to clear through the ACH network.