

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:

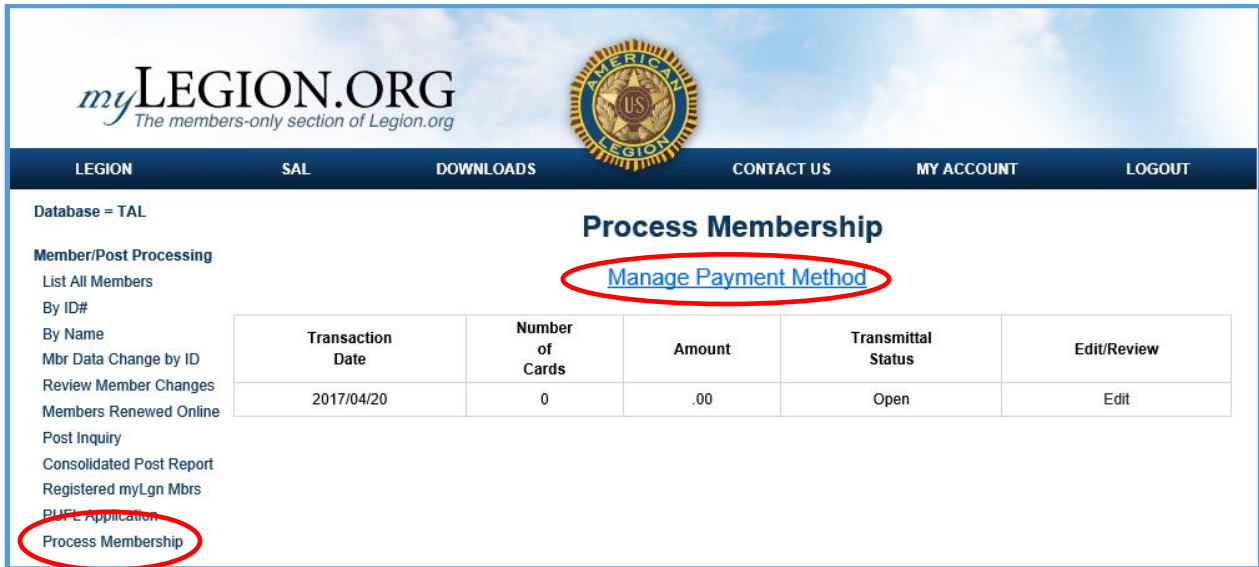
- 1.) Insufficient funds
- 2) Bank Account has been closed
- 3) Invalid Bank Information

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"



The screenshot shows the myLEGION.ORG website interface. At the top, there is a navigation bar with links for LEGION, SAL, DOWNLOADS, CONTACT US, MY ACCOUNT, and LOGOUT. Below the navigation bar, the page title is "Process Membership". On the left side, there is a menu with various options, and "Process Membership" is circled in red. In the main content area, there is a table with the following data:

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

Below the table, there is a link "Manage Payment Method" circled in red.

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



The screenshot shows the myLEGION.ORG website interface for the "Manage Account" page. The page title is "Manage Account". On the left side, there is a menu with various options, and "Process Membership" is circled in red. In the main content area, there is a form with the following fields:

- Account on File:** No record on file. A "Switch to Credit Card" button is visible.
- 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:

At the bottom of the form, there is a "Memo" field with a yellow background. Below the memo field, there is a routing transit number and an account number, both circled in red:

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

Member/Post Processing

List All Members [Manage Payment Method](#)

By ID#

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

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

Click "Edit" to begin adding members to the batch.

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

LEGION SAL DOWNLOADS CONTACT US MY ACCOUNT LOGOUT

Database = TAL

Transmittal Batch

Member/Post Processing

List All Members [Back](#)

By ID# # Cards: 0

By Name Total Amount: \$0.00

Mbr Data Change by ID Status: Open

Review Member Changes Batch Date: 2017/04/20

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

Post Inquiry

Consolidated Post Report

Registered myLgn Mbrs

PUFL Application

Process Membership

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. At the top, there is a navigation bar with links for LEGION, SAL, DOWNLOADS, CONTACT US, MY ACCOUNT, and LOGOUT. The main content area is titled 'Transmittal Batch' and includes a 'Back' button. A modal window is open, titled 'Add New Member / Transfer-In', with two radio button options: 'Add New Member' and 'Transfer-In Existing Member and Renew'. The background page shows a sidebar with various menu items under 'Member/Post Processing' and 'Tools', and a main area with statistics like '# Cards: 0', 'Total Amount: \$0.00', and 'Status: Open'.

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. The title is 'Add New Member / Transfer-In'. There are two radio button options: 'Add New Member' (unselected) and 'Transfer-In Existing Member and Renew' (selected). Below the options are two 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

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

Database = TAL

Transmittal Batch

Member/Post Processing

List All Members

By ID# # Cards: 1

By Name Total Amount: \$27.00

Mbr Data Change by ID Status: Open

Review Member Changes Batch Date: 2017/04/20

Members Renewed Online

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Officer's Forum

View Forum

Add New Member / Transfer-In

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.

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

Cancel Renew

Select the Renewal Year(s) and click "Renew"

PROCESS MEMBERSHIP

STEP 3 : SUBMIT BATCH FOR PROCESSING

Database = TAL

Transmittal Batch

Cards: 2
Total Amount: \$54.00
Status: Open
Batch Date: 2017/04/20

[Back](#)

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



Database = TAL

Process Membership

[Manage Payment Method](#)

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

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.