myLegion.org

Adjutant Session

2017

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Deputy Director
Information Technology

Online Membership Processing

- *Department of Ohio Test*

- *Running since 5/1/2017*

- *Overall Status*

- *Comments from Adjutant Tom Simons*

- *How does it work?*

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

ELECTRONIC CHECK (Echeck) PROCESSING GUIDELINES

- The processing time for Echecks is up to 5-business days.

- The Post will be charged all penalty fees levied by the ACH (Automated Clearing House) processor for declined Echecks.

- Payback to the Department will be included with monthly online member renewals.

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"

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| LEGION | SAL | DOWNLOADS | CONTACT US | MY ACCOUNT | LOGOUT |

Process Membership

Database = TAL

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

Manage Bank Account

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

Back

Account on File

No record on file.

Add a Bank Account

Bank Account Description

Account Type
Checking

Routing Transit No

Bank Account No

Name on Account

Email Address

Re-Enter Email Address

Save

Memo

⑈ ⑆0⑇⑉⑆⑉⑆⑈ ⑆0⑈ ⑇⑆⑇0⑇⑆⑇⑆⑆⑈

Routing Transit Number

Account 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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Database = TAL

Member/Post Processing

List All Members

By ID#

By Name

Mbr Data Change by ID

Review Member Changes

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Registered myLgn Mbrs

PUFL Application

Process Membership

Process Membership

Manage Bank Account

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

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Publish Newsletter
Find Members in my Area
Global Member Lookup

Materials
Post Officer Manuals
Brochures
Suggested Speeches

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: Search by Member ID
Last Name: Search oy Last Name
First Name: Search by First Name

No Search Results Found

Members in this Batch

No Member(s) in batch

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.

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:

Cancel   Continue

Online Membership Processing

Complete the "ADD NEW MEMBER" form and click "Save"

Add New Member

[x]

* Required Field

First Name*	James
Middle Initial	M
Last Name*	Miller
Suffix	
Date of Birth	12 / 02 / 1955 MM/DD/YYYY
Gender	◯ Female ◉ Male
Address*	5645 Village Ct
City*	Avon
State*	INDIANA ⌄
Zip*	46123
Country	⌄ (Leave blank if US)
Phone	Enter using hyphens (000-000-0000)
Email	jmiller@yahoo.com
Branch of Service	US ARMY ⌄
Dates of Service	Dec 20, 1989 - Jan 31, 1990 ⌄

Cancel   Save

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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Possible Matches

Back

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
100118368	NEBRASKA	0500	STEVEN C EDWARDS	7123 LOGAN AVE	68507	Feb 28, 1961	- May 7, 1975

Continue and Add Member

Back

Database = TA

MemberlPost I

List All Memb

By ID#

By Name

Mbr Data Cha

Review Memb

Members Rep

Post Inquiry

Consolidated

Registered m

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Process Mem

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

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Officer's Forum
View Forum

Transmittal Batch

Back

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

Add New Member / Transfer-In   Click Here

Search for Members in My Post to Renew

Member ID: Search by Member ID
Last Name: Search by Last Name
First Name: Search by 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
99999993	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: 100

Last Name: B

First Name: Search by 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
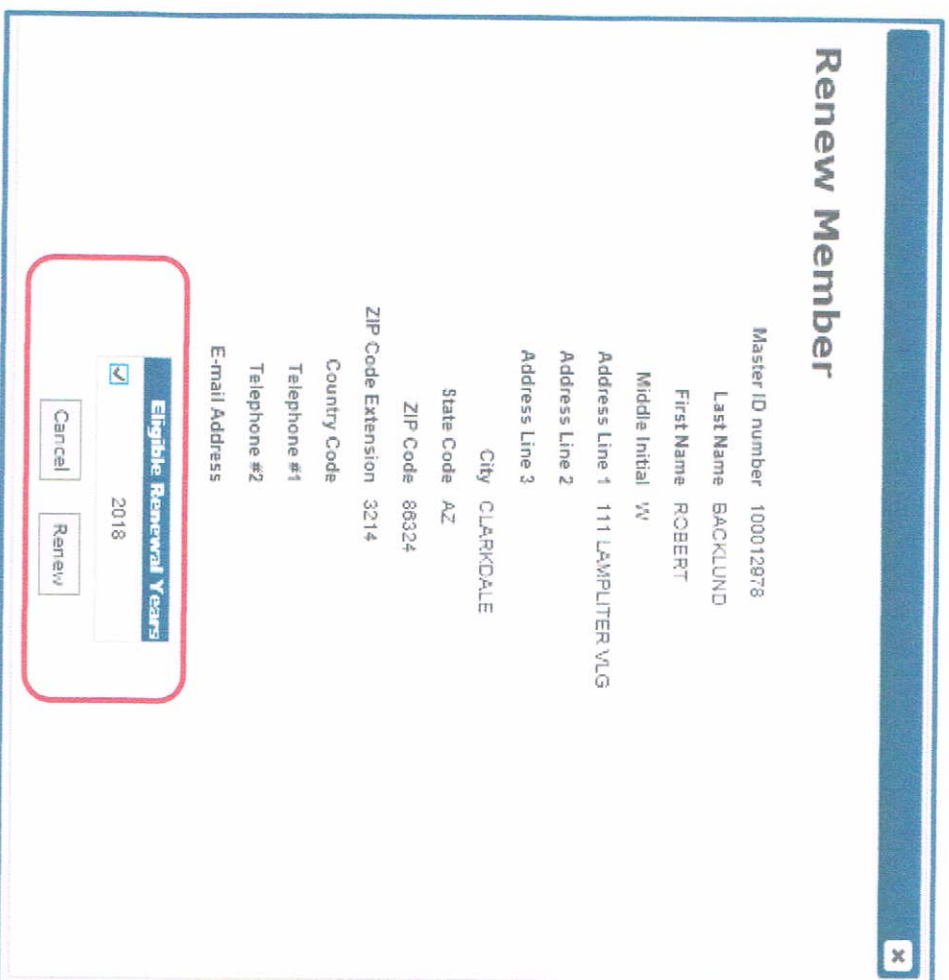
Account information must be entered before you can submit batch

Master ID number	Name	Membership Year	Edit/Remove
99999993	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	10001297B
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
☑ 2018

Cancel   Renew

Online Membership Processing

STEP 3 : SUBMIT BATCH FOR PROCESSING

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

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Transmittal Batch

Back

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

Submit Batch

Members in this Batch

Submit Batch

Master ID number	Name	Membership Year	Edit/Remove
99999993	JAMES MILLER	2017	Edit / Remove
100594324	ROBERT BROWNE	2017	Edit / Remove

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.

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

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

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