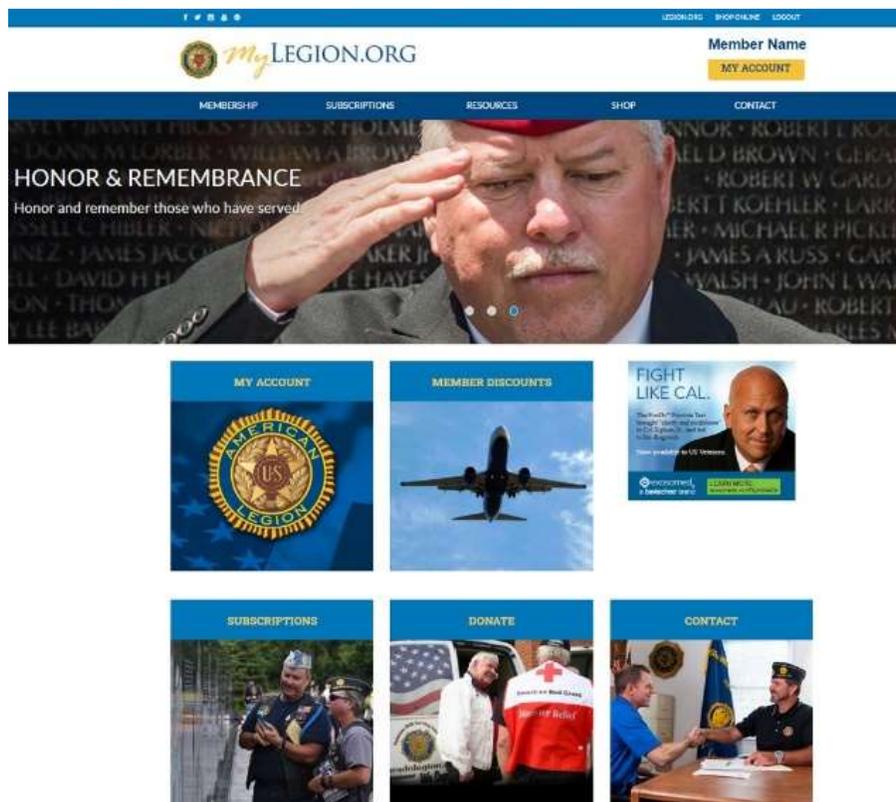




New MyLegion.org Instructions/Information for Membership Processing, Group Permissions & More!



Now that the myLegion site is live, all accounts are now MEMBER accounts. This includes Legion and SAL members. The first requirement to access post and squadron data is to create a myLegion member account using the email address on your membership record. The new myLegion Home page will look like the image above. It provides links to your subscriptions, discounts and resources. MY ACCOUNT provides more information about your own membership. Please see enclosed material to learn more, or visit www.mainelegion.org. The information is available on the home page or by clicking NEWS & EVENTS located on the menu bar.

New MyLegion.org is live!

The American Legion
APR 01, 2021

The wait is over.

The newly designed MyLegion.org and user-friendly interface improvements are here.

Registered users of the free and secure website MyLegion.org – American Legion members, Sons of The American Legion members, and post, district and department officers – will see new membership and account enhancements.

TO START

- **No sharing of credentials.** Administrative officers no longer have to share login credentials. You can assign a group administrator access using their own MyLegion.org credentials.
- **One user profile.** Each registered user will have one profile. Once logged in, you will have access to your personal membership data in MY ACCOUNT. District/county/post/detachment/squadron officers will see additional officer tools under MY GROUPS to manage membership, and have full access to electronic rosters.
- If a member holds two or more titles (e.g., post adjutant and district commander) there are no more multiple logins. You may have additional groups within your account based on the office(s) you hold, and permissions assigned by administrators.
- **Membership roster access.** Adjutants and commanders alike will have access to the membership rosters.
- **Access granted to membership roster.** Other officers/individuals can be granted access to the membership roster by the adjutant or commander.
- **MyLegion.org is now for SAL members.** MyLegion.org is now for Sons of The American Legion members. This means that mySAL.org goes away and squadron members log in through MyLegion.org.
- If you have both a MyLegion.org and MySAL.org account, your MyLegion.org account will be your only login now. Your SAL information will be included in your member profile.
- **Administrative access.** Post commanders and adjutants will be assigned administrative access automatically on April 1.

YOUR QUESTIONS ANSWERED

MyLegion.org member-only account answers – **see pg. 5**, or visit:
https://www.legion.org/documents/pdf/MyLegion_memberaccounts.faq.pdf

MyLegion.org administration officer answers – **see pgs. 6-7**, or visit
https://www.legion.org/documents/pdf/MyLegion_MyGroups_faq.pdf

Here are a few examples

Q: If we were previously doing transmittals on the old MyLegion.org system, do we have to resubmit our account information?

A: Yes. You will be asked for a one-time setup for bank account when you first access MyLegion.org after April 1, 2021. This will include your post/squadron banking information, which may be saved in your account.

Q: We are entering new elections. How are you able to monitor administrative access after these elections and the change in officer positions?

A: MyLegion.org provides tools that allow your departments to update officer data quickly. Access will be reassigned as updates are entered, so providing that post data to your department headquarters is essential.

Q: If you are a new district commander, do you still have to submit a form to National to be able to have MyLegion.org access?

A: Request forms are no longer necessary. When you create a member account, you will have access based on your assigned office(s) on file.

Q: As post adjutant I have been handing all the dues for both our post and squadron. Will I still be able to do this?

A: Yes, you can be assigned both administrative roles.

TRAINING ON THE NEW MYLEGION.ORG

American Legion National Headquarters staff conducted training on March 30, on how to register a MyLegion.org account, navigate through an individual account, and manage My Groups. Visit <https://www.legion.org/training/training-tuesdays> for the PowerPoint slides and video presentation. **Presentation material (including print notes with slides) is also enclosed with this packet starting on page 12.**

COMING SOON

Training videos on how to use the new system are available on MyLegion.org. These videos share how to:

1. Get started on MyLegion.org
2. Manage your MyLegion.org account
3. Manage GROUPS in MyLegion.org (e.g., assign administrative permissions, email members of your group)
4. Process membership – online membership processing for posts and squadrons (renew, add, & transfer members)
5. Manage group membership (create roster and reports; edit member profiles; and global member search)

See pages 8-11 of this manual for step by step instructions using the new MyLegion.org for processing membership, group permissions, transmittals and more.

REMINDER

If you completed the single sign MyLegion.org registration as of Jan. 1, 2021, you will not have to re-register once logging in April 1.

If April 1 is your first time to log in to the new MyLegion.org system, here is what you need to do.

- If you have not updated your personal account since Jan. 1, 2021, you will need to create a new account.
- Registration for your new account on the system will be achieved using the email address on your membership record. The email address must be present on your membership record to access district/county/post/squadron rosters online.
- Double check your current membership record to make sure an email address is populated by logging on to the MEMBERS SECTION at MyLegion.org. If you are a MySAL.org user, log into your squadron account and make sure your email address is up to date.

FORGOT YOUR PASSWORD?

MyLegion.org requires an email address and password for access. If you re-registered your MyLegion.org as of Jan. 1, 2021, but forgot your password, here is how to retrieve it.

1. In the MyLegion.org login/register window select "Forgot Password"
2. Enter your username and "Submit". A confirmation window will appear to check your email to reset your password.
3. Open your email and click on the link to reset your password. This email is from American Legion Identity Provider.
4. Reset your password. Enter new password and confirm password. Click "Reset."
5. Password has been successfully updated message appears.

CONTACT

For questions or issues on MyLegion.org, email CS2@legion.org or mylegion@legion.org or call 833-253-9995. You may also contact your state HQ at 207-873-3229 | Email: legionme@mainelegion.org.

MyLegion.org Individual Member Q&A

Question: How do you register for a MyLegion.org account?

Answer: Go to MyLegion.org. Go to login and select to register for a new account. You will be walked through the process.

Question: If I completed the single sign on, will I have to re-register?

Answer: As long as you've had an account in use since January 1, 2021, you will be able to log in without re-registering.

Question: If a member has already set up auto renew will they have to do it again under this system?

Answer: Those having a credit card on file for auto-renewal should experience a seamless transition.

Question: Will my MyLegion.org profile list officer positions held (if any) in post, district, department and National?

Answer: Yes, any office you hold will be listed on your membership account.

Question: I am a dual member with MyLegion.org and MySAL.org accounts. Will this change?

Answer: Yes, your MyLegion.org account will be your only login now, with your SAL information included on your member profile.

Question: Does the individual lose access to the account if their dues are not current?

Answer: They will not lose access to the account, but their membership will show as expired and they will lose access to member benefits until they renew.

Question: Is there a way to stop certain mailings or solicitations?

Answer: There are opt-out capabilities within the member profile.

Question: Is there a plan for Riders to be integrated as well?

Answer: Riders are members of the Legion Family so they can register accounts on MyLegion.org if they are Legion or Sons member. We are having conversations on how to best identify them.

Question: Will American Legion Auxiliary members be able to register on MyLegion.org?

Answer: No, American Legion Auxiliary is a separate organization and maintain their own membership database.

MyLegion.org – My Groups (officer administration)

Frequently Asked Questions

Question: Why is MyLegion.org changing?

Answer: The MyLegion.org platform is currently powered by an outdated network which The American Legion is replacing. The MyLegion.org look is changing because of the new network configuration. We are working to ensure the capabilities you need most will be available along with some enhancements.

Question: If we were previously doing transmittals on the old system, will we have to re-input the account information in new system?

Answer: Yes. You will be asked for a one-time setup for bank account when you first access MyLegion.org after April 1, 2021. This will include your post/squadron banking information, which may be saved in your account.

Question: What is the “group profile”?

Answer: Group Profile is the administrative side of MyLegion.org. The new MyLegion.org site will have familiar features available in the left hand “My Views” menu.

Question: Are post adjutants and commanders the only ones allowed to be group administrators?

Answer: Many posts and squadrons have situations occur when the group administrative officer is not the person maintaining membership. The Administrative Officer can assign a member of their group permission to access group profile. Only members of the group can be provided permission.

Question: Will district leaders have the same access with the updated design?

Answer: Yes, all accesses should work the same. District and county leadership access includes membership rosters and reports and do not have member management (edit) or online membership processing.

Question: Will the rules for sending transmittals change?

Answer: No, posts and squadrons are encouraged to transmit memberships as soon as possible just as before. The screens may look slightly different, but the process and payment methods are the same.

Question: Can transfers be included in transmittals?

Answer: In addition to renewing and adding members, online processing includes transferring members as long as the member renews in the same transaction.

Question: How will membership cards be printed?

Answer: Membership cards will still be distributed by National Headquarters, and members can print their own cards through MyLegion.org.

Question: If a member renews online, how does the post/squadron get the money?

Answer: This business practice remains the same. National will send post dues to the department to distribute.

Question: Do we still have to send member data forms for transfer?

Answer: If the member is not paying at the time of transfer, a member data form will still need to be submitted.

Question: As district adjutant, will I be able to look up post reports and transmittals in my district group?

Answer: Current reports will remain the same. The reports section is still in development. If you do not have access to a report previously available, contact MyLegion@legion.org or CS2@legion.org

Question: If a member holds two or more titles (e.g., post adjutant and district commander) will more than one account log in be required?

Answer: There are no more multiple logins. You may have additional groups within your account based on the office(s) you hold, and permissions assigned by administrators.

Question: Will rosters still be sent to each post?

Answer: Traditional paper (green bar) rosters will be mailed for 2022. Current rosters can be created at any time through MyLegion.org by both the adjutant and commander.

Question: Will National Headquarters send members a renewal notice for the new 2022 year?

Answer: Membership cards and renewal notice schedules for 2022 remain the same.

Question: We are entering the election season. How are you able to effectively monitor administrative access after these elections and the change in officer positions?

Answer: MyLegion.org provides tools that allow your departments to update officer data quickly. Access will be reassigned as updates are entered, so providing that post data to your department headquarters is essential.

Question: If you are a new district commander, do you still have to submit a form to national to be able to have access?

Answer: Request forms are no longer necessary. When you create a member account, you will have access based on your assigned office(s) on file.

Question: As post adjutant I have been handing all the dues for both our post and squadron. Will I still be able to do this?

Answer: Yes, you can be assigned both administrative roles.

NEW MYLEGION.ORG MEMBERSHIP PROCESSING/GROUP PERMISSION INSTRUCTIONS

ASSIGN GROUP PERMISSION

Home > My Views>Assign Group Permissions

1. From your My Account page, enter My Groups to access Group Profile
2. Go to “View Members”
3. Search the member to assign permission and click on their name to open member profile.
4. From the member’s profile, select “Assign Group Permissions” from left MY VIEWS panel.
5. Select “Edit” in Management Settings
6. Check permissions to grant and “Save”
 - i. Online Group Manager – This is the minimum permission requirement. It provides access to export and print electronic membership roster and a quick link to member email addresses. It does not give access to additional member information not listed on the roster to view or edit.
 - ii. Edit Individual Profile - Grants access to the post roster and authority to view and manage member information.
 - iii. Edit Group Profile- Provides roster, membership management and access to administrative membership reports, labels, CPR, CSR, online membership processing and officer materials.
 - iv. Register or Order for a Group–Not recommended. This authority will be used in future enhancements and does not provide any access at this time.
 - v. Identify Group Manger – Not recommended. This permission allows the group administrator to assign group permissions to someone other than the adjutant or commander.

PROCESS MEMBERSHIP – ONLINE TRANSMITTAL TRANSMITTAL – RENEW MEMBERS

Home >Membership > Post Transmittal

1. From your My Account page, enter My Groups to access Group Profile
2. Go to “Process Membership” from the left MY VIEWS menu.
3. Click “Add/Modify Transmittal” to open Post Transmittal window
4. Search the member to renew and check the box to the left of the member to renew.
 - i. No search results? The member is already paid, in a pending batch, or transferred out of your post/squadron. Results in this search only provide members eligible for renewal.
5. Review post transmittal summary that updates with amount due.
 - i. Dues amount not correct? Contact your department headquarters.
6. Repeat with each member to renew.
 - i. Saving the batch allows you to exit post transmittal and return to submit later. All transmittals are to be submitted within 14 days.
7. View the members in the batch click “List Selected”
8. Click “Finalize”.
9. Add Payment information or select the saved bank account and “Pay Now”.
 - I. Authorization checkbox required.
10. Got an error message need next step.
11. Print or Save Receipt

TRANSMITTAL – ADD NEW MEMBER

Home > Membership > Post Transmittal

1. From your My Account page, enter My Groups to access Group Profile
2. Go to “Process Membership” from the left MY VIEWS menu.
3. Click “Add/Modify Transmittal” to open Post Transmittal window
4. Click “Add New Member”
5. Add member information and “Save”
 - i. Saving the batch allows you to exit post transmittal and return to submit later. All transmittals are to be submitted within 14 days.
6. View the members in the batch click “List Selected”
7. Click “Finalize”.
8. Add Payment information or select the saved bank account and “Pay Now”.
 - i. Authorization checkbox required.
12. Add Payment information or select the saved bank account and “Pay Now”.
 - i. Authorization checkbox required.
13. Got error message need next step.
14. Print or Save Receipt.

TRANSMITTAL – TRANSFER MEMBER

Home > Membership > Post Transmittal

1. From your My Account page, enter My Groups to access Group Profile
2. Go to “Process Membership” from the left MY VIEWS menu.
3. Click “Add/Modify Transmittal” to open Post Transmittal window
4. Click “Transfer Member”
5. Enter Member ID# and Last Name (required) and “Continue”
6. Verify member information, make any updates and “Save” to add to the transmittal.
 - i. Saving the batch allows you to exit post transmittal and return to submit later. All transmittals are to be submitted within 14 days.
7. View the members in the batch click “List Selected”
8. Click “Finalize”.
9. Add Payment information or select the saved bank account and “Pay Now”.
 - i. Authorization checkbox required.
10. Add Payment information or select the saved bank account and “Pay Now”.
 - i. Authorization checkbox required.
11. Got error message need next step.
12. Print or Save Receipt.

TRANSMITTAL HISTORY

Home > Membership > Transmittal History

1. From your My Account page, enter My Groups to access Group Profile
2. Go to “Transmittal History” from the left MY VIEWS menu.
3. Table displays with summary of transmittal history. Select Transmittal Number to view members in the transmittal.

REGISTERED MEMBERS

Home > My Views > Group Profile > Registered Members

This area is not fully developed.

View a listing of all members that have created a myLegion member account.

REPORTS / LABELS LABELS – 3/10

Home > My Views > Group Profile > Reports / Labels

1. From your My Account page, enter My Groups to access Group Profile
2. Go to “Reports/Labels” from the left MY VIEWS menu.
3. Select the 3x10 label option. Names display one column.

FIND MEMBERS IN MY AREA

Home > My Views > Group Profile > Reports / Labels

1. From your My Account page, enter My Groups to access Group Profile
2. Go to “Reports/Labels” from the left MY VIEWS menu.
3. Select “Find Members In My Area”. Names display one column.

POST CURRENT ROSTER

Home > My Views > Group Profile > Reports / Labels

1. From your My Account page, enter My Groups to access Group Profile
2. Go to “Reports/Labels” from the left MY VIEWS menu.
3. Select the “Current Roster”. Names display one column.

ROSTER

Home > My Views > Group Profile > Members

1. From your My Account page, enter My Groups to access Group Profile
2. Go to “View Members” from the left MY VIEWS menu.
3. The roster appears on the Group Profile window.
 - i. Print/Save full roster
 1. select all records by checking the box to the left of Member ID
 2. from Actions pulldown, “Export Full Roster” or “Print Roster”
 - ii. Print/Save selected records
 1. select desired records by checking the box to the left of Member ID
 2. from Actions pulldown, “Export SelectedRecords”

TRAINING REQUESTS

The Training White Paper project was presented at the Spring & Fall meetings (2017), which resulted in the creation of the 21st Century Committee that defines our training methods. In summary, the leadership decided National should provide materials online for departments, districts and posts to conduct their own local trainings as much as possible.

Respond to myLegion Training Requests using the text below.

National will provide materials online for departments, districts and posts to conduct their local trainings as much as possible.

Online training sessions, accompanying PowerPoints and Q&A summaries are available at <https://www.legion.org/training/training-tuesdays> for download and to use at the local level. If these do not meet your need, contact National Member Engagement & Training Coordinator at legiontraining@legion.org.

VIEW MEMBERS

Home > My Views> Group Profile > Members

View members opens the group roster with search options to locate a specific member or group of members. For more information about managing a member's record go to [MEMBER MANAGEMENT](#)

1. From your My Account page, enter My Groups to access Group Profile
2. Go to "View Members" from the left MY VIEWS menu.
 - i. Search using search options.
 - ii. Select Member's Name to open more information.
 - iii. Select Member's Email to open an email from your provider.



New MyLegion – April 2021 Post and Squadron Online Membership

- Access Roster
- Member Information
- Assign Group Permission
- Membership Processing

In April 2021, myLegion will have a new design.

The remainder of this presentation will serve as a preview of the new myLegion site, how to access post and squadron membership rosters, view and edit member records and process membership online.

We will also demonstrate how administrative officers can provide permissions to allow others online membership tools.



When the new myLegion site goes live, all accounts are MEMBER accounts. This includes Legion and SAL members. The first requirement to access post and squadron data is to create a myLegion member account using the email address on your membership record. The new myLegion Home page will look like this. It provides links to your subscriptions, discounts and resources. MY ACCOUNT provides more information about your own membership.

To access rosters and online membership tools you first go to my Account.

MY ACCOUNT displays information on your membership record allowing you to view and edit.

Post and squadron member information, rosters, reports and resources are located in My Groups.

My Groups is only available if you hold an officer position authorized to maintain membership, or have been assigned permission by an administrative officer.



Groups and Administrative Officers

GROUP	ADMINISTRATIVE OFFICER
Post	Post Adjutant Post Commander
Squadron	Squadron Adjutant Squadron Commander
County	County Adjutant County Commander
District	District Adjutant District Commander

***Groups are defined as Post, Squadron, County and District.
Administrative Officers are Adjutants and Commanders.***

The screenshot displays the MyLEGION.ORG website interface. At the top, the logo and navigation menu are visible. The main content area is divided into several sections:

- MY ACCOUNT** (Left Sidebar):
 - MY INFORMATION: Name & Demographics, Military Service, Contact Information, Addresses, Emergency Contacts, Communication Preferences, Username / Password
 - MEMBERSHIP: Membership Card, Membership Details, Member Discounts, Committees
 - SUBSCRIPTIONS: Dispatch, E-newsletters, Magazine
 - PURCHASES: Purchase History, Pay Open Orders, Donation History, Saved Credit Cards
 - CONTACT INFORMATION: National Headquarters, Department
- MY CONTACT INFORMATION** (Main Content):
 - Member: 123 Anyw Indiana
 - Phone: (xx) [redacted]
 - Email: [redacted]
 - Mbr: [redacted]
 - Delivery: Print
 - Status: Active
 - The American Legion Magazine (Expires: 4/30/2021)
 - The American Legion Dispatch (Expires: 12/31/2020)
- AL MEMBERSHIP SUMMARY** (Right Sidebar):
 - Status: Active
 - Valid Thru Date: 12/31/2021
 - Member Post: 1 Year Membership Indiana Post 0500
 - Member Number: 00011222333
 - View Details
 - There are no memberships to display
- MY ORDER BALANCE** (Right Sidebar):
 - Your Account shows no balance due at this time.

The my Groups menu includes all groups you can access. Post Adjutants and Commanders by default will have access to the Squadron group. With each group an additional group leadership is included to display officers on file.

My Account My Groups IN Post 0500

IN Post 0500
 IN Post 0500
 IN Post 0500 Leadership
 IN Post 0500 Leadership
 IN Sqdn 0500
 IN Sqdn 0500
 IN Squadron
 0500 Leadership
 IN Squadron
 0500 Leadership

MY CONTACT INFORMATION

 **Member**
 123 Anyw
 Indianapo

Phone: (xx
 Email:
 Mbr.

[Add](#)

Displaying 1-2 of 2								
<input type="checkbox"/>	Last/First Name	Position	Post/Squadron Number	Location	From/To	Contact Information	Voting Status	Status
<input type="checkbox"/>		Adjutant	American Legion IN Post 0500	PO Box 1050 Indianapolis, IN 46206	06/15/2020	Email:	VOTING	ACTIVE
<input type="checkbox"/>		Commander	American Legion IN Post 0500	PO Box 1050 Indianapolis, IN 46206	05/16/2019	Phone:	VOTING	ACTIVE

Displaying 1-2 of 2

Information in this area is reported through your department headquarters. Please contact your department to update or add leadership information.

The screenshot shows the MyLEGION.ORG website interface. At the top left is the logo and the text "MyLEGION.ORG". To the right, there is a "Member Name" field and a "MY ACCOUNT" button. Below this is a navigation bar with links for MEMBERSHIP, SUBSCRIPTIONS, RESOURCES, SHOP, and CONTACT. The main content area is titled "Home > My Account". On the left, there is a sidebar menu with categories: MY ACCOUNT, MY INFORMATION, MEMBERSHIP, SUBSCRIPTIONS, PURCHASES, and CONTACT INFORMATION. The main content area is titled "MY CONTACT INFORMATION" and features a profile picture placeholder with an "Add" button. To the right of the profile picture, there is a dropdown menu for group selection, currently showing "IN Post 0500". The dropdown menu is open, displaying a list of options: "IN Post 0500", "IN Post 0500", "IN Post 0500", "Leadership", "IN Post 0500", "Leadership", "IN Sqdn 0500", "IN Sqdn 0500", "IN Squadron", "0500 Leadership", "IN Squadron", and "0500 Leadership". Below the profile picture, there is a "Member" section with the text "123 Anyw Indianapo" and a "Phone: (xx)" and "Email: Mbr." section. At the bottom, there is an "Expires: 12/31/2020" field, a "Delivery: Print" field, and a "Status: Active" field.

Let's view a Post Group. From the pulldown menu select Post.



Group Profile is the administrative side of myLegion. The new myLegion site, will have familiar features available in the left hand “My Views” menu.

View and print membership rosters, search members and create a transmittal in “View Members”.

THE AMERICAN LEGION

Membership Roster

LEGION.ORG SHOP ONLINE LOGOUT

MyLEGION.ORG Member Name MY ACCOUNT

MEMBERSHIP SUBSCRIPTIONS GIVE RESOURCES SHOP CONTACT

Home > My Views > Group Profile > Members

My Account My Groups IN Post 0500

Details for: IN Post 0500

Last Name: [] City: [] Post/Squadron Number: []
 First Name: [] State/Province: [] Member Status: []
 Email: [] Country: []
 Member ID: [] Paid Through Year: []

Search Clear

Actions: Export Full Roster Go Add/Modify Transmittal

Displaying 1-20 of 1411

Member ID	Name	Post/Squadron Number	Location	Undeliverable	Contact Information	Branch	Conflict/War Era	Continuous Years	Paid Through Year	
<input type="checkbox"/>	xxxxxxxxxx	Name	Post/Squad	Address	UN	email and phone	BOS	Conflict	Cont Yr	Paid Thru
<input type="checkbox"/>										
<input type="checkbox"/>										
<input type="checkbox"/>										

The membership roster displays as a listing and is identified as Members in your Group Profile. (zoom into breadcrumbs)

Your membership roster includes members paid for the current membership year, minus 2. To print, export or send the roster, use the Actions pulldown. After selecting the Action click Go to proceed.



Membership Roster

Actions: Export Full Roster

Display	Member ID	Undeliverable	Contact Information	Branch	Conflict/War Era	Continuous Years	Paid Through Year
<input type="checkbox"/>	000			USA	OTHER	0	

Roster includes:
Member ID
Name
Post/Squad
Location/Address
Undeliverable
Contact Info: Email and Phone
Branch of Service
Conflict/War Era
Continuous Years
Paid Through Year

To print the roster, first select the records to print using the check boxes in the left column. Select all records by clicking the checkbox in the title row, Member ID#. From the Actions pulldown, choose “Print Roster”. and “GO”. This produces a PDF document.

The screenshot shows the 'Membership Roster' interface for The American Legion. At the top left is the organization's logo and name. The main heading is 'Membership Roster'. Below this, there is an 'Actions' dropdown menu with 'Export Full Roster' selected, and a 'Go' button. To the right is an 'Add/Modify Transmittal' button. A table of members is visible in the background with columns for 'Location', 'Undeliverable', 'Contact Information', 'Branch', 'Conflict/War Era', 'Continuous Years', and 'Paid Through Year'. A 'Full Export Information' dialog box is open in the center, displaying the message 'All records have been selected for export:' and three buttons: 'Excel', 'CSV', and 'Word'. A 'Cancel' link is also present at the bottom of the dialog.

Export options allow you to save the roster in Excel, MS Word, or in CSV format.



Member Search

My Account My Groups IN Post 0500

Details for: IN Post 0500

Last Name: City: Post/Squadron Number:
First Name: State/Province: Member Status:
Email: Country:
Member ID: Paid Through Year: 2020

Search Clear

Actions: Export Selected Reco Go Please select 1 or more individuals

Add/Modify Transmittal

Displaying 1-20 of 1411

Member ID	Name	Post/Squadron Number	Location	Undeliverable	Contact Information	Branch	Conflict/War Era	Continuous Years	Paid Through Year
xxxxxxx	Name	Post/Squad	Address	Undeliverable	email/phone	BOS	Conflict	Cont Yr	Paid Thru

To view a member's record or make updates, use the search options to find the member.



Member Search

Home > My Views > Group Profile > Members

My Account My Groups IN Post 0500

Details for: IN Post 0500

Last Name:	<input type="text" value="Enter Last Name"/>	City:	<input type="text"/>	Post/Squadron Number:	<input type="text"/>
First Name:	<input type="text"/>	State/Province:	<input type="text"/>	Member Status:	<input type="text"/>
Email:	<input type="text"/>	Country:	<input type="text"/>		
Member ID:	<input type="text"/>	Paid Through Year:	<input type="text"/>		

Search Clear

Actions: Export Full Roster Go

Add/Modify Transmittal

Displaying 1-2 of 2

<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"/>	xxxxxxxxxx	Name	Post/Squad	Address	Undeliverable	email and phone	BOS	Conflict	Cont Yr	Paid Thru

Displaying 1-2 of 2

Actions: Export Full Roster Go

Add/Modify Transmittal

Click on the member's name to view member information. Clicking on the member email address will automatically open up an email to send.



The member information page provides name and demographics. To view and edit member information select the area and use the Edit links. Most information can be updated: Name, Address, Phone, Email, War Era, BOS and even a picture can be uploaded.

Many posts and squadrons have situations occur when the group administrative officer is not the person maintaining membership. The Administrative Officer can assign a member of their group permission to access Group Profile. Only members of the group can be provided permission.

In the member profile select “Assign Group Permissions”.



Permissions

Home > My Views > Assign Group Permissions

LEGION.ORG SHOP ONLINE LOGOUT

Member Name
MY ACCOUNT

MEMBERSHIP SUBSCRIPTIONS RESOURCES SHOP CONTACT

Home > My Views > Assign Group Permissions

MY VIEWS My Account My Groups IN Post 0500

Viewing: **Member Searched**

MANAGEMENT SETTINGS [Edit](#)

You have not selected any management settings.

Management Settings will display any permissions currently assigned to this member. To add or edit permissions, click Edit.



Permissions

Edit Manager Settings

Select the options this person can manage for IN Post 0500

- Online Group Manager**
Allows a chapter member to manage this online group. This is a minimum requirement for any group manager.
- Edit Individual Profile**
Allows a manager to update a chapter member's account information, e.g. update contact information or preferences. If this is not selected, the manager can view but not edit a chapter member's record.
- Edit Group Profile**
Allows a manager to access the Chapter's account information, e.g. run reports or attach a file.
- Register or Order for a Group**
Allows a manager to conduct a group registration or other group order on behalf of Chapter members in this group.
- Identify Group Manager**
Can identify other Chapter members as group managers and modify existing permissions

Save **Cancel**

- Export and print electronic membership roster
- Quick link to email address. Click on the email address and opens email to send
- View and edit member information
- Online Membership Tools: View Members, Members Renewed Online, Registered Members, Global Member Lookup, Reports/Labels, Process Membership, CPR, Officer Materials

These permissions provide access to membership information, reports, and tools currently available to the Administrative Officer.

Check the following:

Online Group Manager. This is the minimum permission requirement. It provides access to export and print electronic membership roster and a quick link to member email addresses.

Edit Individual Profile grants authority to view and edit member records.

Edit Group Profile provides access to online membership tools in View Members – Members Renewed Online – Registered Members – Global Member Search - Reports/Labels – Process Membership. Consolidated Post Report – and Officer Materials.

After the desired management settings are assigned, Save them and the permission will be assigned to the members myLegion account.



Permissions

Edit Manager Settings

Select the options this person can manage for IN Post 0500

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Allows a manager to conduct a group registration or other group order on behalf of Chapter members in this group.

Identify Group Manager
Can identify other Chapter members as group managers and modify existing permissions

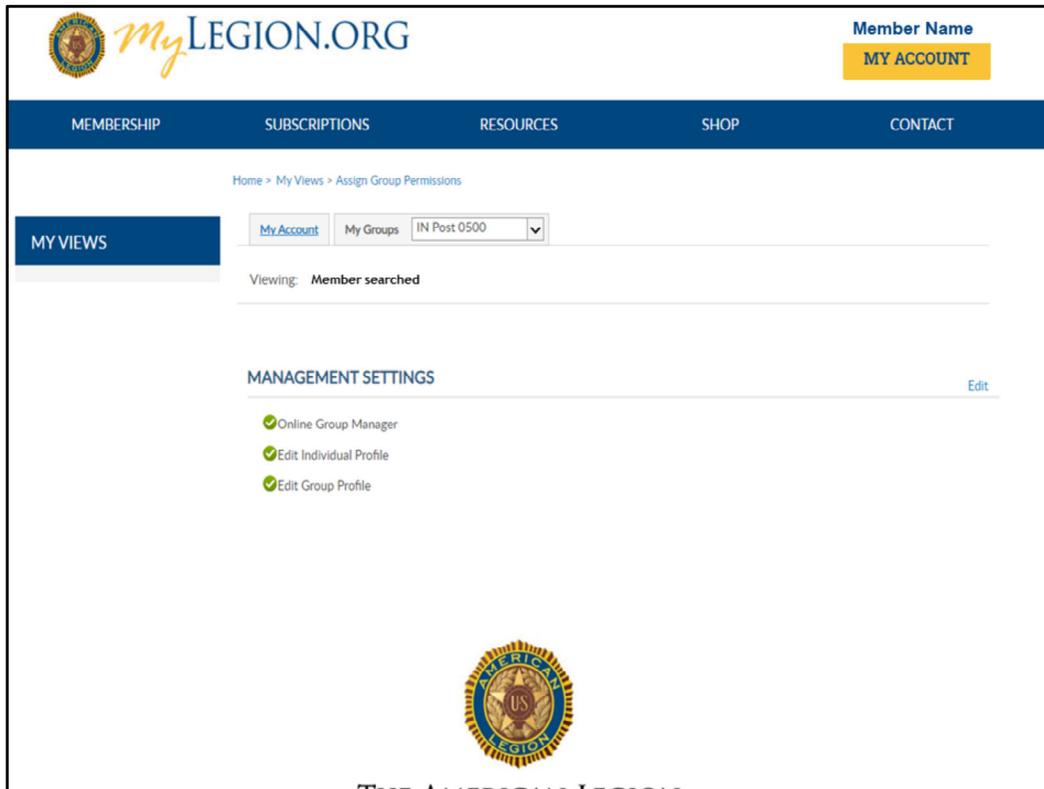
Save **Cancel**

- Register or order for a group
- Identify group manager

There are a few additional group permissions that are focused on future enhancements.

Register or Order for a Group provides permission to make purchases, donations and register events on behalf of the group with the credit card saved on the account. This permission is for future enhancements purposes only.

The last setting to check is Identify Group Manager. This permission provides this member to add or edit other online group managers with full administrative rights. If you do not want this member to make group permissions do not check this box.



Permissions added will display. The next time the member logs into their myLegion account, that member will have access to the Group and only that group.

For example, this Legion member has been assigned post access but does not get group selections for squadron or Leadership.

If the member does not have a current myLegion account, an email will be sent that includes a link to create Login Credentials. Notify the member and have them open their email, follow the link and create an account.

If the link expires the member can go to myLegion.org and Register.

To return to Post membership select My Groups. The My Account button will return you to your personal membership and exits Group Profile.

The screenshot shows the MyLEGION.ORG website interface. At the top, there is a logo and navigation menu with options: MEMBERSHIP, SUBSCRIPTIONS, GIVE, RESOURCES, SHOP, and CONTACT. A 'Member Name' field and a 'MY ACCOUNT' button are also visible.

The main content area is titled 'Details for: IN Post 0500'. It contains a search form with the following fields:

- Last Name:
- First Name:
- Email:
- Member ID:
- City:
- State/Province:
- Country:
- Paid Through Year:
- Post/Squadron Number:
- Member Status:

Buttons for 'Search' and 'Clear' are located below the search form.

Below the search form, there is an 'Actions' section with a dropdown menu set to 'Export Selected Reco' and a 'Go' button. To the right, there is a button labeled 'Add/Modify Transmittal'.

A table of member records is displayed below, showing columns for Member ID, Name, Post/Squadron Number, Location, Undeliverable, Contact Information, Branch, Conflict/War Era, Continuous Years, and Paid Through Year. The first row shows a member ID of 'xxxxxxxx', Name, Post/Squad, Address, Undeliverable, email and phone, BOS, Conflict, Cont Yr, and Paid Thru.

Online membership processing will also have familiar business practices. Let's review how to submit an online transmittal for the Post. Sons of the American Legion processing is the same when in the Squadron group.

To create or edit a transmittal, click Add/Modify Transmittal from the member listing to access the transmittal page.

The screenshot shows the 'Membership Processing Post Transmittal' page. At the top left is the American Legion logo. The main title is 'Membership Processing Post Transmittal'. Below this is a navigation menu with 'MY VIEWS' and 'MEMBERS' sections. The 'MEMBERS' section includes links like 'View Members', 'Members Renewed Online', 'Registered Members', 'Reports / Labels', 'PUFL Application', 'Global Member Search', and 'Process Membership'. The 'POST INFORMATION' section includes 'Post Message', 'Contact Information', 'Publish Newsletter', 'Consolidated Post Report', and 'Transmittal History'. The 'MATERIALS' section includes 'Post Officer Manuals', 'Brochures', and 'Suggested Speeches'. The main content area is titled 'POST TRANSMITTAL' and contains a summary table:

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

Below the table are search filters for Member First Name, Member Last Name, and Member Id. There is a 'Search' button and a 'Clear All' link. Below the search filters are buttons for 'Add New Member' and 'Transfer Member'. A table of members is displayed with checkboxes for selection. The table has columns for 'Select', 'Member Id', 'Member Name', 'Email Address', 'Phone', 'Address', and 'Renewal Year'. The text 'Members to renew listing. Check box next to name to add to transmittal.' is displayed in the table area. At the bottom of the table area are buttons for 'Save' and 'Finalize'.

In the Process Membership area, a post transmittal will display with a summary that includes transmittal status, number of cards, and per capita allocations. The total amount will include national and department only.

Online membership processing allows renewals for the current and previous membership year, add new members, and transfer members renewing at the time of the transfer.

Members of your post can be added to the transmittal by checking the box next to their name. This example has one card to be processed. The member to be renewed has a check in the checkbox. The total amount due equals the department and national per capita only.

Search boxes allows you to search a specific member without navigating through the list.

To change the way the list is sorted, click on the blue labels. Go from an alphabetically sort to a list that is sorted by membership number or even by membership year.

The transmittal page allows you to renew members, add new

Members and Transfer Members into your post. Please note that online transfers can only be included if the member is also renewing current dues.

The Save button allows you to save the transmittal and finalize on a later date. Transmittals are to be finalized within 14 days. Members pay their dues with the expectation they will be removed from future renewal notices, receive their membership card in a timely manner, and receive their magazine. When posts do not transmit in the allotted time frame, they run the risk of upsetting their members and making them not want to belong to the Legion.

Open transmittals not submitted in 14 days will receive a reminder to submit and are deleted if no action is taken.

To view or print the transmittal, use the view/print icons. List Selected allows you to view all the members in the transmittal, you can export the data to an excel file, or print directly to PDF.

Let's add a new member to the transmittal using the Add New Member button.



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:

[Cancel](#)

When adding a new member enter as much member information as possible. Fields with an asterisk are required. To enter a foreign address, use the pulldown menu to select the appropriate choice.

After all the information is entered, click Save.

Home > Membership > Post Transmittal

[My Account](#) | [My Groups](#) | [IN Post 0500](#)

POST TRANSMITTAL

Status :	OPEN	Per Capitas	Actual
Card Count :			2
National :		\$18.50	\$37.00
Department :		\$16.50	\$33.00
Post :		\$10.00	\$20.00
Total amount due today :			\$70.00

Member First Name Member Last Name

Member Id

[Search](#) [Clear All](#)

[Add New Member](#) [Transfer Member](#) [List Selected](#) | [Export to CSV](#) | [Print](#)

Select	Member Id	Member Name	Email Address	Phone	Address	Renewal Year
<input checked="" type="checkbox"/>		Members in Transmittal				
<input checked="" type="checkbox"/>	000200081884	Timothy B. [Redacted]		(317)957-4545	7546 Harding Dr Indianapolis, IN 46220-3114	2021
<input checked="" type="checkbox"/>		[Redacted]		(317)293-9009	2236 Country Club Rd Indianapolis, IN 46224	2021

After adding the member, return the roster list and check the member's name to add to the batch. The Summary recalculates with the amount due.

In addition to renewing and adding members, online processing includes transferring members as long as the member renews in the same transaction.

To transfer a member, select Transfer Member.



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Home > Membership > TransferMember

Transfer-in Existing Member

* Member ID:

* Last Name:

[Continue](#) [Cancel](#)

Home > Membership > TransferMember

Transfer-in Existing Member

* Required

First Name: **First Name**

Middle Initial:

Last Name: **Last Name**

Suffix:

Date of Birth: Month Day Year

Gender: Male

* Country: United States [Change](#)

* Address Type: Home

* Address Line 1: **MemberAddressInfo**

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](#)

Enter the member ID# and last name. This information is required.

Update any information needed and Save to add to the transmittal.

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View Members in the Transmittal

Home > Membership > Post Transmittal

My Account | My Groups | IN Post 0500

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

Member First Name Member Last Name

Member Id

[Search](#) [Clear All](#)

[Add New Member](#) [Transfer Member](#) [List Selected](#) [Export to CSV](#) [Print](#)

Select	Member Id	Member Name	Email Address	Phone	Address	Renewal Year
<input checked="" type="checkbox"/>	xxxxxxxx	Name	email Address	Phone	Address	Renewal Yr
<input checked="" type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

11 of 15M

2908

[Save](#) [Finalize](#)

After the member to transfer is saved to your list, check the member's name to add to the batch. The Summary recalculates with the amount due.

The post transmittal summary updates.

View the members in the transmittal using the List Selected icon.



Finalize Transmittal

Home > Membership > Post Transmittal

[My Account](#) | [My Groups](#) | [IN Post 0500](#)

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

Member Id	Member Name	Email Address	Phone	Address	Renewal Year
Members in Transmittal					
00					
00					
00					

[Go Back](#)

[Finalize](#)

After reviewing the batch, Finalize to submit.



Payment Information

Home > Membership > PostTransmittalPayment

TRANSMITTAL PAYMENT

Total Selected To Pay: \$210.00

PAYMENT INFORMATION

▼ Add new eCheck

* Required

* Bank Routing Number: [What's this](#)

* Re-enter Bank Routing Number:

* Bank Account Number: [What's this](#)

* Re-enter Bank Account Number:

* Account Type:

* Account Holders Full Name:

* By Clicking the Submit button below, I authorize the American Legion to make a one-time charge on 10/12/2020 for the amount of 210.00.

eCheck Billing Address
5745 Lee Rd
Indianapolis, IN, 46216-2063,
USA

Pay Now

Payment information must be entered prior to finalizing the transmittal. Enter the bank account information. The only payment method for US posts is eCheck. Enter the bank account information, authorize the one-time charge by clicking the checkbox and Pay Now.

This information will be stored for your next transmittal.

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Receipt

MyLEGION.ORG Member Name MY ACCOUNT

MEMBERSHIP SUBSCRIPTIONS RESOURCES SHOP CONTACT

Home > Membership > ThankYou

THANK YOU! | RECEIPTS PROCESSED ARE- 4406098

Detailed Secondary Message needs to be updated by Legion
[Print Transmittal Summary](#)

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The American Legion was chartered and incorporated by Congress in 1919 as a patriotic veterans organization devoted to mutual helpfulness.

Programs	Services	Members	Media
BASEBALL	BENEFITS CENTER	JOIN THE AMERICAN LEGION	THE AMERICAN LEGION MAGAZINE
BOYS STATE / NATION	CAREER CENTER	RENEW MEMBERSHIP	BASIC TRAINING
LEGION RIDERS	EDUCATION CENTER	PAID UP FOR LIFE	DIGITAL ARCHIVES
NATIONAL CONVENTION	HEALTH CENTER	MEMBER DISCOUNTS	DIGITAL DISPATCH
NATIONAL EMERGENCY FUND	TROOP AND FAMILY SUPPORT	MYLEGION.ORG	E-NEWSLETTERS
OPERATION COMFORT WARRIORS	USAA FINANCIAL CENTER		LEGIONTV / VIDEOS
ORATORICAL CONTEST	WOMEN VETERANS		PRESS CENTER
SCHOLARSHIPS			PUBLICATIONS

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A receipt number is displayed providing notification the transmittal has been received and has begun to process.

To view the transmittal summary, and print the receipt, click **Print Transmittal Summary.**



Print Transmittal Summary

INSERT LOGO HERE	Page: 1 of 1	
0500 Speedway		
# Cards: 3 Total Amount: \$135.00 Status: Marked For Posting Charge per member: \$35.00 Date Submitted: 01/20/2021 Invoice #: 2101200091		
Members in this Batch		
Member ID#	Name	Membership Year
Lists members in transmittal.		

Print or Save this document for your records. This information is also available anytime in your transmittal history.



Transmittal History

Home > Membership > Transmittal History

[My Account](#) [My Groups](#) [In Post 0510](#)

Year Type Range

[Search](#) [Clear](#)

Transmittal Number	Membership Year	Transmittal Date	Transmittal Type	Processed Date	Stated # of Members	Stated Dollar Amount	Actual # of Members	Actual Dollar Amount
2010050001	2020	10/5/2020		10/5/2020	0	\$0.00	6	\$210.00

Transmittal History displays advanced search options to view. Click on the transmittal number to view members in that batch.



Updates to myLegion are currently in the development and testing phase.

Your national staff is in the process of creating user help documentation that will be available with the new release of myLegion.



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