MYLEGION.ORG

How to: membership processing and transmittals

As American Legion departments and posts continue to familiarize with the updated MyLegion.org platform, there are a few areas where questions continue to arise. Currently, that is with membership processing and transmittals. How-to videos and step-by-step instructions are available on the MyLegion.org website to help.

To access these instructions visit mylegion.org. Click View Online Help at the top of the page. This link will direct you to a web page where you will find the video training series and guided instructions in the My Groups link.

To process membership and transmittals, American Legion post and Sons of The American Legion squadron adjutants and commanders must be signed in to MyLegion.org to access My Groups. The following is a brief overview of how to process membership and transmittals through.

RENEW MEMBERS

1. Click Process Membership in the lefthand menu.
2. Click Add/Modify Transmittal to open the post transmittal window.
3. Search the member to renew, then check the box to the left of the member to renew and save. If no results are found, the member is already paid or is in a pending batch. Results in this search only provide members eligible for renewal. The member is added to the transmittal batch and the summary recalculates.
4. Repeat this process for each member to renew. Members who have let their membership expire for longer than one year do not display in the post transmittal listing.
5. Review the post transmittal summary, which will also update the amount due. If the dues are not correct in the summary, please contact your department headquarters.

ADD A NEW MEMBER

1. Click Process Membership in the lefthand menu.
2. Click Add/Modify Transmittal to open the post transmittal window.
3. Click Add/Transfer Member to view add/transfer scenario. A member information window will appear where you can add as much information as possible then save. Saving this will add the member to the batch.

TRANSFER A MEMBER

1. Click Process Membership in the lefthand menu.
2. Click Add/Modify Transmittal to open the post transmittal window.
3. Click Add/Transfer Member.
4. Enter member ID number and last name (required). Then click continue.
5. Verify member information, make any updates and save.

GUIDELINES FOR RENEWING, ADDING TRANSFERRING MEMBERS

- The save button allows the transmittal to be saved and finalized on a later date. Transmittals are to be finalized within 14 days from the date opened.
- To view members in the transmittal batch, click List Selected and click Finalize.
- Add payment information or select Saved Bank Account and Pay Now. You must check the Authorization checkbox. Then click Pay Now. A transmittal receipt will appear for you to print or save.
- To review your transmittal history from the Group profile, go to Transmittal History on the lefthand menu. A table displays with a summary of transmittals. Select the transmittal number to view the members in the batch.
- To remove members from the transmittal, uncheck the box next to the name. To delete the whole transmittal, select Delete Transmittal.

IMPORTANT INFORMATION ABOUT ONLINE MEMBERSHIP PROCESSING

- Payment information was not converted from the previous interface. After finalizing the first transmittal, a hold will prevent a second submission until the first transmittal completes. This hold is to ensure payment information is stored correctly and to prevent multiple declines in the event the first transmittal is declined. Finalizing a transmittal prior to the first one completing will result in an error message.
- A declined transmittal will require new bank information to be entered prior to submitting the next batch.
- Current processing time is three to nine days. The new MyLegion.org will update transmittals once approved by the financial institution.
- There is a $10,000 batch limit per transmittal. Amounts higher than that should be broken down into separate transmittals that meet the limit.
- Transmittals are to be finalized within 14 days. Members pay their dues with the expectation that they will be removed from future renewal notices, and that they will receive their membership card in a timely manner along with the monthly American Legion Magazine. Open transmittals not submitted in 14 days will receive a reminder to submit and are deleted if no action is taken. All members in the transmittal will have to be re-entered.

Photo by Ben Mikesell