Post Online Transmittals

- Process Overview -

- Renew
- Add new members
- Transfer-in existing members from other Posts.
  
  NOTE: Posts can only transfer-in members that dues are being paid.
  MDF must still be submitted. Discussion?
- Utilizes electronic Echeck payments. Credit card transactions are only available for departments outside the United States.
- 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.
- 7 business day processing time.
How to Process Membership

Step 1 – Set up Payment Method.

Step 2: Click Edit to add renewals and/or new members to an “Open” batch.

Step 3 : Submit Batch for Processing

Open transmittals should be submitted within 14 days to decrease the likelihood of duplicate payments (online), and people complaining about getting renewal notices when they have paid.

If an open batch is not submitted within 14 days the batch will be deleted.

This process 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.
Step 1 – Click on Manage Payment Method.

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.

The Post account will be held until the 1st-Echeck completes processing in the banking network. This is only necessary for your 1st-transaction as we need to make sure all account information is setup correctly.
Enter the required information on the “Manage Account” screen and click “Save”
Step 2: Click Edit to “Open” transmittal batch.

Only one “Open” Membership batch is available for processing. The Open batch must be completed and submitted before a new batch becomes available.

A $10,000 maximum limit is in effect for each batch.
Transmittal Batch

# Cards: 0
Total Amount: $0.00
Status: Open

Add New Member / Transfer-In

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

No Member(s) in batch
ADD A NEW MEMBER

Transmittal Batch

# Cards: 0
Total Amount: $0.00
Status: Open

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

No Member(s) in batch
ADD A NEW MEMBER

Add New Member / Transfer-In

- Add New Member
- Transfer-In Existing Member and Renew
Possible Matches

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.

<table>
<thead>
<tr>
<th>Member ID</th>
<th>Department</th>
<th>Post</th>
<th>Name</th>
<th>Address</th>
<th>Zip</th>
<th>Date of Birth</th>
<th>War Era</th>
</tr>
</thead>
<tbody>
<tr>
<td>202805302</td>
<td>INDIANA</td>
<td>0777</td>
<td>ROBERT COLLINS</td>
<td>1638 NE 185TH ST</td>
<td>98155</td>
<td>06/05/1983</td>
<td>Aug 2, 1990 - Open</td>
</tr>
</tbody>
</table>

[Continue and Add Member]
# Transmittal Batch

- **# Cards:** 2  
- **Total Amount:** $79.00  
- **Status:** Open

## 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

<table>
<thead>
<tr>
<th>Member ID number</th>
<th>Name</th>
<th>Membership Year</th>
<th>Edit/Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>99996257</td>
<td>MICHAEL THOMAS</td>
<td>2018</td>
<td>Edit/Remove</td>
</tr>
<tr>
<td>99996258</td>
<td>THOMAS CARROL</td>
<td>2018</td>
<td>Edit/Remove</td>
</tr>
</tbody>
</table>
Only members that are paying dues can be transferred through myLegion. If the transferring member is paid for the current membership year, the transfer must be requested using the Member Data Change form mailed to Department.
RENEW MEMBERS

Transmittal Batch

# Cards: 1
Total Amount: $38.00
Status: Open

Add New Member / Transfer-In Click Here

Search for Members in My Post to Renew

Member ID: 103
Last Name:
First Name: Search by First Name

<table>
<thead>
<tr>
<th>Member ID</th>
<th>Name</th>
<th>Renew Year</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>103-------</td>
<td>THOMAS SAMONS</td>
<td>2018</td>
<td>Renew</td>
</tr>
<tr>
<td>103-------</td>
<td>KENNETH SCHRYVER</td>
<td>2018</td>
<td>Renew</td>
</tr>
<tr>
<td>103-------</td>
<td>HOWARD SEABORN</td>
<td>2018</td>
<td>Renew</td>
</tr>
</tbody>
</table>

Members in this Batch

Submit Batch

<table>
<thead>
<tr>
<th>Master ID number</th>
<th>Name</th>
<th>Membership Year</th>
<th>Edit/Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>103---------------</td>
<td>NAHUM DOSKOW</td>
<td>2018</td>
<td>Edit / Remove</td>
</tr>
</tbody>
</table>
**Renew Member**

Master ID number: 103

Last Name: SAMONS
First Name: THOMAS
Middle Initial: M

Address Line 1: 19TH AVE SW

City: PUYALLUP
State Code: WA
ZIP Code: 98371
ZIP Code Extension: 7303

Country Code

Telephone #1: 206-

Telephone #2

E-mail Address

<table>
<thead>
<tr>
<th>Eligible Renewal Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ 2018</td>
</tr>
<tr>
<td>□ 2017</td>
</tr>
</tbody>
</table>

[Buttons: Cancel, Renew]
STEP 3 : Submit Batch for Processing

If bank information is not entered, the Submit Batch option will not be available. To enter bank information, select the Back button for the link to Manage Payment Method.
Your account will be held until this 1st-Echeck completes processing in the banking network.

This is only necessary for the 1st transaction, as we need to make sure all account information is setup correctly.
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 “Processed”.

Once submitted, changes cannot be made to the batch. If needed, adjustments can be requested through your department once the transmittal processes.

Allow up to 7-business days for the transaction to clear through the ACH network.
To view members that have been processed, click on Review in the transmittal grid.

---

**Process Membership**

<table>
<thead>
<tr>
<th>Date Opened</th>
<th>Number of Cards</th>
<th>Amount</th>
<th>Date Submitted</th>
<th>Processed Date</th>
<th>Transmittal Status</th>
<th>Edit/Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/05/2018</td>
<td>0</td>
<td>.00</td>
<td></td>
<td></td>
<td>Open</td>
<td>Edit</td>
</tr>
<tr>
<td>11/02/2017</td>
<td>2</td>
<td>50.00</td>
<td>11/02/2017</td>
<td>11/08/2017</td>
<td>Processed</td>
<td>Review</td>
</tr>
</tbody>
</table>

**Transmittal Batch**

- Cards: 9
- Total Amount: $200.00
- Status: Processed
- Date Submitted: 11/17/2017
- Invoice #: PSR20171117BAGR08001

**Members in this Batch**

<table>
<thead>
<tr>
<th>Master ID number</th>
<th>Name</th>
<th>Membership Year</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>200</td>
<td>TIMOTHY HILL</td>
<td>2018</td>
<td>Applied</td>
</tr>
<tr>
<td>201</td>
<td>LEEDS BERRIDGE</td>
<td>2018</td>
<td>Applied</td>
</tr>
<tr>
<td>202</td>
<td>DANIEL JACOBSON</td>
<td>2018</td>
<td>Applied</td>
</tr>
<tr>
<td>203</td>
<td>MIKE SILVER</td>
<td>2018</td>
<td>Applied</td>
</tr>
<tr>
<td>204</td>
<td>JANUSZ KACZMAREK</td>
<td>2018</td>
<td>Applied</td>
</tr>
<tr>
<td>205</td>
<td>JUAN OOTIA-DIAZ</td>
<td>2018</td>
<td>Applied</td>
</tr>
<tr>
<td>206</td>
<td>DARRELL ROBERTSON</td>
<td>2018</td>
<td>Applied</td>
</tr>
<tr>
<td>207</td>
<td>KEITH FREEMAN</td>
<td>2018</td>
<td>Applied</td>
</tr>
</tbody>
</table>
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 send payment of the Department Per Capita back to the Department Headquarters office.
ELECTRONIC CHECK (Echeck) PROCESSING GUIDELINES

The processing time for Echecks is up to 7-business days.

During the 7-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 7-business day period. After a successful transfer of funds to the bank at National Headquarters, the transmittal status of the batch will change to “Processed”, and the member information will be applied to the National Database.
If a Post submits payment for a batch of transactions and the Echeck is declined:

1. The transmittal status of the batch in myLegion will be set to “Declined”.
2. The Post Officer will be notified via email, and the batch will NOT be applied to the National database.
3. New bank account information must be entered before you can re-submit the rejected batch.
4. Declined batches can be re-submitted within 14-days. If not re-submitted within the 14-day period, the batch will be deleted.
**Declined Echecks**

<table>
<thead>
<tr>
<th>Common reasons for declined Echecks are:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.) Insufficient funds</td>
</tr>
<tr>
<td>2.) Bank Account has been closed</td>
</tr>
<tr>
<td>3.) Invalid Bank Information</td>
</tr>
</tbody>
</table>

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.
Impact on Membership Reports

- When a Post submits a batch for processing, National Membership Reports and myLegion “Post wi District...etc” reports are updated immediately.
How and when does the Department per capita get paid?

- Payment to the Department will be monthly along with the member-online renewals.
- A line-item will be shown on the “Membership Statement” published in myLegion.
- Supporting documentation that lists each Post and Paid-Member will also be published in myLegion on a report labeled “Mem Stmt – Post ONL Renew”
MEMBERSHIP STATEMENT EXAMPLE: MYLEGION DOWNLOADS

THE AMERICAN LEGION
NATIONAL FINANCE DIVISION
P.O. BOX 1055
INDIANAPOLIS, INDIANA 46206

DEPT OF OHIO
PO BOX 8007
DELTAH, OH 43015-8007

Enclosed is a check for the following amount: $30,052.50

Complete

<table>
<thead>
<tr>
<th>Number of Members</th>
<th>Dollars Recvd.</th>
<th>Actual Members</th>
<th>Total Owed</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Online Renewals</strong></td>
<td>701</td>
<td>24,320.00</td>
<td>701</td>
<td>12,968.50</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Post Online Renewals</strong></td>
<td>2017</td>
<td>165.00</td>
<td>6</td>
<td>111.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Post Online Renewals</strong></td>
<td>2018</td>
<td>32,615.00</td>
<td>1,100</td>
<td>31,830.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Dues Direct Renewals</strong></td>
<td>2018</td>
<td>13,065.00</td>
<td>308</td>
<td>7,170.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Traditional Membership</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OH - 2017 - 0052 - LGN</td>
<td>48</td>
<td>888.00</td>
<td>48</td>
<td>795.50</td>
</tr>
<tr>
<td>OH - 2018 - 0011 - LGN</td>
<td>2,904</td>
<td>55,574.00</td>
<td>2,970</td>
<td>55,111.50</td>
</tr>
<tr>
<td>OH - 2018 - 0012 - LGN</td>
<td>2,846</td>
<td>52,651.00</td>
<td>2,798</td>
<td>51,762.00</td>
</tr>
<tr>
<td><strong>LGN Transaction Totals</strong></td>
<td></td>
<td>5,558</td>
<td>109,113.00</td>
<td>5,820</td>
</tr>
</tbody>
</table>

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**NOTE:** IF A DEPARTMENT ISSUES CREDITS FOR MEMBER ONLINE RENEWALS, POSTS WILL HAVE TO REDEEM THOSE CREDITS BY PERIODICALLY SUBMITTING A PAPER-TRANSMITTAL THROUGH THE DEPARTMENT. SMOOTHEST RECORD-KEEPING PROCESS IS FOR THE DEPARTMENT TO ISSUE CHECKS TO POSTS FOR ONLINE MEMBER RENEWALS.
How can the Department keep track of what Posts are submitting Online Transmittals? How can the Department keep it’s AIM membership report updated?

A new folder has been created on the myLegion Report Server in the Department “MEMBERSHIP FOLDER” labeled “POST ONLINE TRANSMITTALS”.

The American Legion

POST ONLINE TRANSMITTALS

- Completed Transmittals
- Open Transmittals
Online Post Transmittals can be in 3 different statuses:
1 – Submitted – Pending clearance through the banking network.
2 – Open – A transmittal has been opened, but NOT submitted for processing through the banking network.
3 – Completed: Money has been transferred and all membership adds/renewals have been applied to the database.

The “Open Transmittals” report retrieves information for “Submitted” and “Open” transmittals.
The **“Closed Transmittals”** report is displayed below, and should be used for Departments Using AIM Membership Reports. Note that a date-range can be selected.

Recommendation: Use this report on a bi-weekly basis to keep your AIM Membership Report updated...

**EXAMPLE:** select data from 1/1 to 1/15 and 1/16 to month-end.

<table>
<thead>
<tr>
<th>Post</th>
<th>Adjudant</th>
<th>Adj-Phone</th>
<th>Email</th>
<th>Invoice#</th>
<th>Type</th>
<th>Complete</th>
<th>New</th>
<th>Renew</th>
<th>Total</th>
<th>Dupes</th>
<th>Dept$</th>
</tr>
</thead>
<tbody>
<tr>
<td>OH POST 0061</td>
<td>Glenn H</td>
<td>814-308-8796 C</td>
<td>gle</td>
<td>PSR2017026380001001</td>
<td>Echeck</td>
<td>11/1/2017</td>
<td>0</td>
<td>14</td>
<td>14</td>
<td>0</td>
<td>128.00</td>
</tr>
<tr>
<td>OH POST 0061</td>
<td></td>
<td></td>
<td></td>
<td>PSR2017026380001002</td>
<td>Echeck</td>
<td>11/1/2017</td>
<td>0</td>
<td>4</td>
<td>4</td>
<td>0</td>
<td>38.00</td>
</tr>
<tr>
<td>OH POST 0061</td>
<td></td>
<td></td>
<td></td>
<td>PSR2017026380001001</td>
<td>Echeck</td>
<td>10/31/2017</td>
<td>0</td>
<td>53</td>
<td>53</td>
<td>0</td>
<td>477.00</td>
</tr>
<tr>
<td>OH POST 0067</td>
<td>Gary Mii</td>
<td>440-340-8194 C</td>
<td>ha</td>
<td>PSR2017022380007001</td>
<td>Echeck</td>
<td>11/2/2017</td>
<td>0</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>18.00</td>
</tr>
<tr>
<td>OH POST 0067</td>
<td></td>
<td></td>
<td></td>
<td>PSR2017026380007001</td>
<td>Echeck</td>
<td>11/1/2017</td>
<td>1</td>
<td>3</td>
<td>4</td>
<td>0</td>
<td>30.20</td>
</tr>
<tr>
<td>OH POST 0067</td>
<td></td>
<td></td>
<td></td>
<td>TOTAL</td>
<td></td>
<td></td>
<td>0</td>
<td>71</td>
<td>71</td>
<td>0</td>
<td>639.00</td>
</tr>
<tr>
<td>OH POST 0017</td>
<td>Jonathor</td>
<td>419-307-0025</td>
<td>NC</td>
<td>PSR20170203800017001</td>
<td>Echeck</td>
<td>11/4/2017</td>
<td>0</td>
<td>42</td>
<td>42</td>
<td>0</td>
<td>378.00</td>
</tr>
<tr>
<td>OH POST 0017</td>
<td></td>
<td></td>
<td></td>
<td>PSR20170203800017002</td>
<td>Echeck</td>
<td>11/4/2017</td>
<td>1</td>
<td>14</td>
<td>15</td>
<td>0</td>
<td>135.00</td>
</tr>
<tr>
<td>OH POST 0017</td>
<td></td>
<td></td>
<td></td>
<td>TOTAL</td>
<td></td>
<td></td>
<td>1</td>
<td>56</td>
<td>57</td>
<td>0</td>
<td>513.00</td>
</tr>
</tbody>
</table>
Summary Benefits

- When Post Officer submits the batch (click “Submit”) –

1 - Counts are added to the National Target Date membership reports.
2 - Counts are immediately added to the myLegion Post/District Membership reports as-well-as available for Departments to add to their membership reports.
3 - Members are immediately suppressed from any renewal notices (Direct Mail and Email).
4 - Once the Post submits the payment, it prevents members from renewing online (duplicate payments).
5 - Average turnaround time for paper transmittals sent to Department (up to National) are 3-6 weeks.
6 - Post saves money by not having to pay shipping cost for a paper transmittal to Department.
7 - Department does not have to process the Post transmittal (Open package, out sort and count documents, deposit checks etc.)