Welcome to this training presentation of MyLegion.org. This presentation is a comprehensive training session on the new MyLegion platform released April 2021.

Topics of discussion include how to:

• Register an account. All MyLegion accounts are registered with the email on your member record.

• Manage your account. As a member of The American Legion Sons of The American Legion or a dual member, you can manage your membership account online. Become familiar with navigating your MyLegion account to view updated contact information and demographic information, manage
subscriptions, view discounts, set up auto-renew, print your membership card, and other member-only tools.

• This presentation will also include how to access MyLegion leadership tools. You will learn how to navigate the administrative side of MyLegion to manage post and squadron membership information, view reports, access materials and process memberships, along with how to assign others permission to use administrative tools.
To get started with myLegion, the first step is to register an account.
MyLegion is a secure website and requires registration. On any device that provides internet access, from your web browser, go to www.myLegion.org. A link to this page is also available on The American Legion’s national site, legion.org.
Why Register a MyLegion Account

- Membership details and management
- Renew online
- View and manage subscriptions
- Member discount codes
- Online giving opportunities
- Officer Management Resources for Posts and Squadrons

1. MyLegion is the web application for American Legion and Sons of the American Legion that provides membership details, dues status and membership management.

2. Members can renew online and set up for auto renewal

3. access subscriptions online including The American Legion Magazine

4. view member-only discount codes

5. have giving opportunities

6. and resources for post and squadron administrators

Officers seeking Post and squadron membership for member management resources and online membership processing will create an individual member account and transition to the administrative side of MyLegion through their individual MyAccount log in.
All MyLegion accounts are to be registered with the email address on your membership record.

<1> One MyLegion account provides access to all your membership. All accounts are individual registered with the primary email address on the member record. Membership details for both The American Legion and Sons of the American Legion are included along with any administrative access provided to adjutants and commanders.

<2> Post and Squadron membership is accessed through your individual MyLegion account. Registering with a post or squadron email stores that email on your member record. It is not necessary to use a group email to access post and squadron membership. Administrative access is through the individual and not the group.

<3> The Email used during registration must be on your membership record on file at National HQs. Registering with an email not listed as your primary email will not provide access to membership details or leadership resources.
Leadership

Why do I have to register with my own email address if I only want to use MyLegion for leadership responsibilities?

Enhanced Security

Members with leadership roles will register with their individual email.

Why do you have to register as an individual if all you are seeking are leadership tools such as online membership processing, access to rosters, reports, and membership management.

<1> Registering individual accounts provides enhanced security. The previous version of MyLegion only provided one account for administrative duties. If others needed access, log in credentials were shared. Now that access to leadership tools is through individual accounts, those needing access can be assigned by an administrative officer.
Leadership

Why do I have to register with my own email address if I only want to use MyLegion for leadership responsibilities?

One Account Includes All Access

MyLegion.org

Member Legion & SAL

Post

District

County

Squadron

Detachment

The previous version of MyLegion had separate accounts for the resources needed to manage membership. Now MyLegion is one account for all. MyLegion provides one login for all your needs.

<1> The first function of MyLegion is serves as a member account. It provides members access to their personal account to renew, donate, print a membership card, view discounts and other member only benefits. After your leadership term expires you will still have access to your membership without having to re-register.

<2> Administrative tools are provided automatically to American Legion and Sons of The American Legion Adjutants and Commanders. These positions are also referred to as “Administrative Officers” of MyLegion. Access is provided and removed in real time as reporting of officers from the Officer’s Certification form is entered. Now that administrative tools are through your individual account, there is no need to contact previous officers or contact MyLegion support to provide temporary usernames or passwords.

Please note that registering with your own email as an officer DOES NOT display your personal email on post directories and publications.
To register an account, go to www.mylegion.org. On the home page select Register. If you are not sure if you have already registered an account, go ahead and click register. You will receive a message that User is registered and sent a one-time password to verify your email address and complete the registration.
Enter the email address on your membership record.

An email is required to register.

<1> If you do not have an email address, free sites are available such as outlook.live.com.

<2> Create an email and contact your department or national headquarters prior to registering an account.
Registering with an email address not on your member record will not provide correct member details or permissions.

<1> Mobile number can be entered and used in future enhancements to allow verification via your mobile phone. 2-Factor Authentication is an optional security log in option.
Two-factor authentication is an extra layer of security to ensure that you're the only person who can access your account, even if someone knows your password. This extra security measure requires you to verify your identity using a randomized code we'll send you each time you attempt to log in. Applying this feature is available when you first create your account.

Every Log-in Requires
Username and Password
2nd Log-in with code sent via Email

It can be added or removed later through your account.

Click “Next” once the email is entered.
Enter your last name and first name. Address is optional. Selecting an address type opens an address widow.

<1> MyLegion is a secure web application that stores membership information on your member record. Updates to contact information through MyLegion will be stored in The American Legion’s National membership database. This application allows users, in your MY ACCOUNT, to store credit card information to pay membership dues and online giving.

<2> For more information on how data is stored and used, please review our Privacy Policy (https://www.legion.org/privacy)
<3> Click “Next”. This action will email you a One Time Password to finish the registration.
Create Username, Password, and complete Registration

The welcome window appears.

The username defaults to your email address. You can update the username in this window or keep it as displayed. When creating a username, try to use something unique and not generic.

<1> Create the password by entering it 2 times. Password requirements include 1 Uppercase letter, 1 Lowercase letter, 1 number and 1 symbol.

<2> Before you finish the registration, return to your email to retrieve the one time password sent from The American Legion Identity Provider and enter in the OTP field. Have you email open to retrieve the code and then Finish Registration.
Registered users will receive a notification.

User Registered. A One Time Password has been sent to your email xxxxx@xxx.com to verify account.

- Retrieve the One Time Password from your email and enter.
- Do not close this window.
- 5-minute expiration to verify email.
- Why do you have to verify?

Emails already registered will receive a message.

<1> User Registered. A one-time password has been sent to your email to verify account.

<2> Retrieve the one-time password from the email included in the message.

<3> Do not close this window. Have your email already open if you have trouble with this step.

<4> The password expires in 5 minutes. If you are not able to retrieve the password and enter in that time frame, return to the registration window and begin again.

<5> Why are you required to take this verification step? Now that myLegion is registered with an email address, verification links are required, to ensure you have access to that email and we have a clear communication with you as a member.
I didn’t receive OTP

If you do not receive an email to complete your registration, check your junk mail or spam.
During registration, log in credentials are created. Let’s review how to manage your username and password.
The login page offers links for forgotten usernames or passwords. Selecting either of the options will send a link to the registered email.

To update the password, the username is required. If you have forgotten both, begin with forgot username.

Requesting a one-time password also sends an email with a onetime password to log into your account.
Update Username and Password

While logged into MyLegion, update account login credentials by going to Username/Password. This link opens a self-service window that shows your current username and main email associated with your account.
Let’s review the MyLegion home page.
The myLegion Home page identifies the name entered during registration, located above the MY ACCOUNT button.
Your account provides links to Legion.org and pulldown menus to navigate from Legion.org and MyLegion.org. Legion.org is the public website for The American Legion National Headquarters.

Registering with the email on your membership record will associate your MyLegion account with membership details. People that are not members can also create a MyLegion account, however any member-only options such as subscriptions and discounts codes will not be available.

<1> Membership links include Join options, Renewal for members of The American Legion, Paid Up for Life information and links to purchase a paid up for life membership, along with Frequently asked questions about membership eligibility.
Membership in The American Legion includes The American Legion Magazine. View TALM from subscriptions, set up online E-Newsletter options, and sign up for The American Legion Dispatch.
Online giving opportunities can be set up through a MyLegion account. The give menu provides information for planned giving, vehicle donations and corporate sponsorships. Questions about giving to American Legion charities are answered in frequent questions.
Resources helps you find a post or accredited service officers with step-by-step help documentation to assist with MyLegion tools for members and leadership.
The Shop link navigates to National Emblem Sales, and <1> Contact re-directs to legion.org’s National HQ directory.
Member only discount codes are located in MyLegion.org.
To view membership details and manage your account click on My Account. <1>

Leadership seeking post and squadron membership will access that information through My Account.
Manage Your Account

My Account provides information on file at Department and National Headquarters. This first page provides the registered individual membership details, subscriptions and resources.

<1> Member type is located in membership summary. Member post describes your payment type. 1 year renewal means your membership is based on annual renewal. Paid Up For Life and Honorary Life is included in the Member Post description with the paid through date above.

<2> My Contact information displays the main address, phone and email on record and is used as the primary contact for membership subscriptions, renewal notices, and all correspondence.

<3> Some SAL members will notice their membership ID has changed and wonder why. Previously Legion and Sons of the American Legion membership was stored on two separate databases. During the conversion, they were combined to one, therefore, creating duplicate records with the same ID#. As a result, all Sons members with an ID# equal to an existing Legion member, was assigned a new number.
Adjutants and Commanders have an additional My Groups menu. This transitions to the administrative side of MyLegion.
The My Account page allows you to add, update and delete demographic information on your record.
Manage Your Account

NAME AND DEMOGRAPHICS

Edit Name

Name “edit” updates your name, including nickname, suffix, prefix and credentials such as DDS, ESQ, MD or PHD. After making updates in this section click Save.
Demographics include date of birth, gender, job function, job title, preferred currency and displays deceased status. With every section you update, always Save.
Military service provides branch of service, conflict and retirement information. More than one branch of service or conflict can be listed on your membership record. Using the Add, Edit or Delete links you can manage this information.

Are you retired military? Record that on your record. Let your leadership know your retired.
Contact information allows you to add, update and delete phone and email information.

The email set as “main email” is associated with your profile. The main email displays in MY CONTACT INFORMATION and Username/Password profile. It is also the email used for account username and password reset links.
Addresses allows you to add an alternate address and set address preferences. Information set as Main is the primary contact information. National HQs, Department HQs and other American Legion and Sons of the American Legion leadership use main contact information for mail, phone and email correspondence.

Only one main contact can be on file. Adding an address with the Main Address preference will replace the existing main address.
Emergency Contacts is a new feature. Add an emergency contact to your account. This information is available to your leadership and can be useful if participating at an American Legion event, conference or convention.
To update account login credentials, go to Username/Password. This link opens a self-service window that shows your current username and main email associated with your account.
To update your login credentials, enter the new information and Save.

The username does not have to be an email address.

The email address listed in the self-service window is the main email on record and updates your contact information. Updating the email in Username/Password will direct all future forgot username and passwords to this email.

When creating usernames and passwords, always use unique credentials.
To update your password in the self-service window you must know your current password. If you have logged in with a saved password and do not know it, you can log out and request a one-time password. This will email you a password reset link.

If you have your current password, enter it with the new password and click ‘Update Password’.
Like many other web applications, myLegion users can log in using other online identities as a single sign on process. Allowing fewer passwords to remember.
Two-factor authentication is an extra layer of security to ensure that you're the only person who can access your account, even if someone knows your password. This extra security measure requires you to verify your identity using a randomized code we'll send you each time you attempt to log in.

If you set up 2 factor authentication, you can disable through self service.
The membership area lets members print their membership cards.
If a member is a dual member, both Legion and SAL cards can be printed. Only current membership cards are available. If you do not have a link to print your card, you first need to pay current dues. Once dues are paid, the card is available to print.
In membership details members can view current memberships and future memberships. The member detail includes your post or squadron state and number, membership end date, and current status.
Membership details has a checkbox to add auto renew the beginning of each membership year.

Members set up for auto renewal will have their credit cards charged by the 2\textsuperscript{nd} week of July annually. The American Legion’s membership campaign runs from July 1 – June 30.
Checking the box gives you a link to set up your credit card information if you do not already have one saved.
Enter your credit card information and “Add New Card”
Checking the box describes the credit card number that will be charged with your next renewal. Select “Save” to save your future renewal.

To add or edit credit card information click on “Manage My Saved Credit Cards”. <1>
Enter the credit card information, check the box to save credit card information and Pay Now.
Membership Details

To update credit card information click Manage My Saved Credit Cards or use “Saved Credit Cards” from the left menu. <1>

To cancel auto renew, uncheck the box and “Save”. <2>
The American Legion offers exclusive discount programs for members of The American Legion and Sons of the American Legion. Discount provider information and codes are only available in myLegion.org member accounts.
Discount codes are found only when logged into myLegion. Select the area of interest to view provider contact information and exclusive discount codes.
Through MyLegion you will find discount codes only available to members.
Any officers maintained by Department and National HQs are located in Committees. The page lists any past, future and current positions on file. The positions displayed in this area are post, county, district, state, and national leadership positions reported to National HQ. All leadership positions are reported through your department headquarters. If you have held a position that is not listed, contact your department headquarters. Only department and national staff can update officer and committee positions.

This member is a post commander. Post adjutants and commanders have a My Groups menu. My Groups is the administrative side of myLegion.
Dispatch is an American Legion National Headquarters monthly print newsletter that provides post, district and department leaders with news relevant to membership, post activities and national American Legion news. Complimentary copies of Dispatch are provided to department leadership, district commanders and post adjutants, and committee/commission chairpersons.

There is a monthly Digital Dispatch e-newsletter sent directly to subscribers’ email inboxes. The e-newsletter features headlines with clickable links to the full stories on the Digital Dispatch web page, www.legion.org/dispatch.
E-newsletters allows you to opt in or out of online subscriptions. To add or modify online subscriptions go to Edit.
Check the box to select individual subscriptions or check the box next to E-newsletters to select all. Unless specified these subscriptions will be emailed to the main email address on file.

<1> You can request online newsletters to be sent to a different email. Set up a 2nd email address through Contact Information. Return to opt in and out from E-newsletters. Check the subscription and assign the alternate email address. Save changes and return to home page.
Members receive a 12-month free subscription to The American Legion Magazine. This publication has gone digital. Current and past issues are located in your My Account subscriptions menu.

Expired members will receive an Access Denied message. Access to online magazine requires active American Legion, Sons of the American Legion membership, or paid subscription.
The purchase history shows history of payments made for renewals and donations.
Pay Open Orders is the same as what displays in MY ORDER BALANCE. The amount due includes post dues for your renewal. Online renewal for SAL members will be available in 2022. National is in the process of collecting data to activate this feature in the future.
Donation history records all online and mailed in giving. A date range search assists as you review your giving to American Legion programs and charities.
Saved credit cards allows you to store payment information for future renewals and donations.

Credit card information can be maintained through myLegion in the Saved Cred Card area. Add, update or remove the credit card when needed.
Both the myLegion home page and the My Account page, at the top of the page, have areas for Membership, Subscriptions, Giving, Resources, Shop National Emblem Sales and Contact information.

Legion.org is a public page and selecting options from this menu exits your myLegion account.
When your membership becomes eligible for renewal, a Renew Now button appears. The amount due displays in My Order Balance. Select either Pay Now or Renew Now to proceed.

Legion members can renew online with a credit card and is only available for Legion members. Future enhancements will include online renewal for members of the Sons of the American Legion.
Check the box for your renewal order to open Payment Information if not already saved. Pay Now to finish your renewal.
Subscription Details

My Subscriptions displays subscription details including title, start, expiration dates, and delivery.
The next part of this presentation will focus on the administrative side of MyLegion. This area is called MyGroups and is accessed through the individual account of adjutants and commanders.
**What is My Groups?**

- Administrative area of MyLegion
- Administrative Offices: Adjutants and Commanders
- Membership Management
- Rosters
- Reports and Labels
- Membership Processing
- Group Attributes and contact information

My Groups is the administrative side of myLegion.

<1> Adjutants and Commanders will have a MyGroups menu. These positions are Administrative Officers for MyLegion and by default provided post and squadron membership.

<2> My Groups includes membership details and management tools for Legion and Sons of the American Legion members.

<3> Rosters
<4> Reports and labels
<5> Online Membership Processing
<6> Group Attributes and contact information.
Groups are defined as Post, Squadron, County, District and Detachment. Adjutants and Commanders and have My Groups by default and it is accessed their member account.

Administrative officers have authority to assign permission to others. Group administrators are members that do not hold an administrative officer position but have been provided permission to a group.
<table>
<thead>
<tr>
<th>GROUP</th>
<th>ADMINISTRATIVE OFFICER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post</td>
<td>Post Adjutant</td>
</tr>
<tr>
<td>Post Leadership</td>
<td>Post Commander</td>
</tr>
<tr>
<td>Squadron</td>
<td>Squadron Adjutant</td>
</tr>
<tr>
<td>Squadron Leadership</td>
<td>Squadron Commander</td>
</tr>
<tr>
<td>County</td>
<td>County Adjutant</td>
</tr>
<tr>
<td>County Leadership</td>
<td>County Commander</td>
</tr>
<tr>
<td>District</td>
<td>District Adjutant</td>
</tr>
<tr>
<td>District Leadership</td>
<td>District Commander</td>
</tr>
<tr>
<td>Detachment</td>
<td>Detachment Adjutant</td>
</tr>
<tr>
<td>Detachment Leadership</td>
<td>Detachment Commander</td>
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</tbody>
</table>

With each group, Adjutants and Commanders will also have a Leadership group. Leadership groups provides a listing of the officers reported. It is not the group to select to manage membership, view reports and process membership.

Reporting of officer’s continue to go through your department headquarters using the Officer Certification form. Officer updates cannot be made through MyLegion.
Permissions will vary per group and can even differ per officer.

Post and Squadron administrative officers have full online group manager access to post and squadron group profile, member management, online membership processing, reports, and labels. At this time, only post adjutants have access to consolidated reports. This is only for the 2021-2021 reporting year.

Administrative officers can assign permission to other individuals with full or partial access.
permissions allows access viewing the membership roster.
## District and County Permissions

<table>
<thead>
<tr>
<th>ADMINISTRATOR</th>
<th>PERMISSIONS</th>
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</thead>
<tbody>
<tr>
<td>District Adjutant</td>
<td>Group Profile: Posts in District</td>
</tr>
<tr>
<td>District Commander</td>
<td>View Member Current Listings</td>
</tr>
<tr>
<td></td>
<td>Member Management</td>
</tr>
<tr>
<td></td>
<td>Reports and Labels (in development)</td>
</tr>
<tr>
<td></td>
<td>Consolidated Reports*</td>
</tr>
<tr>
<td>County Adjutant</td>
<td>Group Profile: Posts in County</td>
</tr>
<tr>
<td>County Commander</td>
<td>View Member Current Listings</td>
</tr>
<tr>
<td></td>
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<td>Consolidated Reports*</td>
</tr>
<tr>
<td>Group Administrator</td>
<td>Permissions assigned by Administrative officer.</td>
</tr>
<tr>
<td></td>
<td>Minimum: View Members, print/export roster.</td>
</tr>
</tbody>
</table>

*2020-2021 Consolidated reports are only available for Adjutants.

District and County includes access to all posts assigned to the group. These group administrative officers can generate membership listings and manage membership. Reports and labels are currently in development.

Administrative officers can assign permission to other individuals with full or partial access. Minimum permissions allows access to view membership roster.
### Detachment Permissions

<table>
<thead>
<tr>
<th>ADMINISTRATOR</th>
<th>PERMISONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Detachment Adjutant</td>
<td>Group Profile: All Squadrons in Detachment</td>
</tr>
<tr>
<td>Detachment Commander</td>
<td>View Member Current Listings</td>
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<tr>
<td></td>
<td>Membership Management</td>
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<td></td>
<td>Online Membership Processing</td>
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<tr>
<td></td>
<td>Minimum: View Members, print/export roster.</td>
</tr>
</tbody>
</table>

Detachment adjutants and commanders have full online group manager access to all squadrons in their detachment. Group profile and member management, online membership processing, reports, and labels.
This member is a post adjutant. While in his MyLegion account, he has a MyGroups menu. Post Adjutant have access to both post and squadron membership. Therefore, he will have the following groups menu. <1>

<2> Post
<3> Post Leadership
<4> Squadron
<5> Squadron Leadership
Clicking on the group will navigate you to the administrative side of MyLegion. You may have to click twice. Please watch for the spinner indicating the page is loading.

Post Administrative Officers are the only leadership with both Post and Squadron Membership.
Leadership group displays the officers on file with contact information.

<1> The actions menu allow to print a listing, send emails, or export. Reappointment is restricted. All officers are reported through the department headquarters.
Administrative tools are located in Group Profile and entered through My Groups. Navigation back to this dashboard is done by clicking on My Groups, or select Group Profile.

If you have access to more than one group, always note the group name indicated on the My Group menu.

The left hand “My Views” menu provides membership processing tools, member profiles, reports and labels, group information and officer materials.

Group profile is contact information on file for your post, squadron, county, district or detachment.

The group profile dashboard allows updates to contact information and publication uploads through Group information.
Group contact information allows administrators to update contact information including phone, email and fax. Information set up as Main is listed on directories and used for correspondence to group leadership.

Additional phone numbers, email addresses, and fax numbers can be entered and can be viewed by department and national leadership.

Use the Add, Edit or Delete options to update group contact information.

Officer certification and post data forms are not available online and are sent to the department headquarters.
Group attributes can assist others interested in The American Legion and Son of the American Legion by providing contact information about your group in American Legion’s find a post tool, or in printed directories published by your department.
To record these attributes, go to Group Attributes / Services. To add or remove click “Edit”. <1>

Check the attributes and “save”
Group message includes adding, editing and deleting an image and message for your group.
Add a photo of your post building, commander, or other image identifying your post. Post a brief message about meetings, special events or programs your post supports. It is important that if posting a message to keep it current. Images and messages published in this area are seen by your members and others that are using Legion.org’s Find a Post.

Supported files are gif, jpeg, jpg and png.
To add an image, choose the file and upload. Once an image is added you can delete or replace by uploading a new image to replace it.
Group message allows you to publish additional information about your group. This information is seen by your members and people using the American Legion post locator.

Click Edit to add, update or delete text.
Type the message and “save”.
Published newsletter allows administrators to publish a flyer, or newsletter for members of your group.
Attachments uploaded in this area display as the group profile dashboard and multiple attachments can be uploaded.

After creating the document go to Add New Attachment. In the add window choose the file to attach. The document type options include Charter and Miscellaneous.

A brief comment box allows you to make a note about the attachment. Attachment information is displayed on your Group Profile dashboard. You can use this comment to view date or as a reminder when to update or delete. Once all information is entered, click Save. <1>
After saving, attachment information and details can be seen on the group dashboard. When uploading documents online it is important to maintain and keep information current. Delete outdated publications routinely.
Contact information and attributes are published on The American Legions’ public website under Resources Find A Post. This resource now includes Squadron lookup with squadron group information.
Officer materials include post, squadron and district manuals and guides.
Select the title to link to publications on Legion.org to download.
Brochures are national publications related to Americanism and Children & Youth services.
Every year The American Legion provides speeches to use as a guideline during events and observances. These speeches can be downloaded in the myLegion Group Profile only.

Navigating in myLegion is a new experience for users familiar with the old myLegion site. Breadcrumbs on the page will display to help you understand what section of myLegion you are located. Clicking on the page you would like to do redirects the page. To return to your group membership (post, squadron, county and district), click on Group Profile. Another option is to click on My Groups.

Return to the Group Profile by clicking the Group Profile breadcrumb. Return to your account using the MY ACCOUNT button.
MyLegion offers online membership processing for posts and squadrons.
Transitioning to the administrative side of MyLegion provides a left menu option for Process Membership. You can also access membership processing through View Members. Both options open the member listing.
The member list includes all members with a last paid years for current year, minus 2. <1> Notice in this listing we are viewing the roster that displays the Paid Through Year and not the renewal year.

The member list allows you to search members, export roster, or send emails. Do not check names in view members to renew. The checkboxes in view members is for export purposes only and does not add members to a transmittal batch.

Proceed to post transmittal. Click Add/Modify Transmittal. <2>
MEMBERSHIP PROCESSING
MEMBERSHIP -> POST TRANSMITTAL

The transmittal will display a summary that includes transmittal status, number of cards, and per capita allocations. The total amount will include national and department only. These amounts do not display until a member is added to the batch.

<1> The listing in post transmittal only displays names of members eligible for current renewal and one previous year. The renewal year column is the year of eligible renewal. Paid members will not display in this listing.
Let’s begin with a renewal.
To renew a member, search the member and click in the box to the left of their renewal year. <1> The member is added to the batch and summary re-calculates. <2>

The total amount due equals the department and national per capita only. <3>

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.
An error message will occur if searching a current paid member. This search only provides results for members with an eligible renewal year.
Members who have let their membership expire for longer than one year do not display in the post transmittal listing. To renew those members, begin with Add/Transfer Member. <1> The eligible renewal year for these members is current year only.

Members that would like to pay past dues to reinstate continuous years, may pay those dues, but they cannot be processed online. Contact department headquarters to submit past dues.
Select current or former member and “Continue” <1>
The database conversion resulted in member ID# changes. Most affected are SAL members whose IDs were reassigned. If an error occurs, contact department or national headquarters to verify the correct member ID#.

Attempting to add members, will also provide a member exists message with the correct member number.

Enter the member ID#, Last Name <1> and Continue.
This action adds the expired member to your transmittal.
Searching this expired member in Post Transmittal displays one year renewal only.

Return to the full list by clearing the search. <1>
Add a new member or transfer a member using the Add/Transfer Member button. <1>
<1> Select “new member – never been an American Legion or Sons of the American Legion member.
Address Error?


Saves member to transmittal.

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 option.

If you receive an error message about invalid city, state or zip please use zip code verification from the United States Postal Service to verify the correct address, city, state and zip. Entries that do not meet USPS standardization will receive an error.

After all the information is entered, click Save <1> to add the member to the transmittal batch.
Individual create an account prior to joining and was assigned this ID. No membership details are attached.

Individual’s details match an existing record. Previous expired or member of another post or squadron.

An error message may occur “A Customer exists with matching details with the member ID#” When adding a member, this message appears for the following reasons:

<1> The individual created a MyLegion account prior to joining. MyLegion does allow individuals to create an account prior to becoming a member. It assigns them an ID# however their account has no membership details or access to discount codes and member only resources. This ID# will not change and become the individual’s permanent membership ID#.

<2> The message will also appear if the individual is an expired member not included in the post transmittal list, or the member is a member of another post.

Make note of the member ID#. Return to post transmittal and process as current or former member. Cancel to return to the post transmittal page.
Return to Add/Transfer Member <1>
Add this member as a current or former member.
Enter the ID# and last name.  <1> This information is required.
Demographics entered during MyLegion registration will populate. Update any information needed and Save to add the member to the transmittal.
To transfer a member, payment must be processed with the transaction. Members that are current and request a transfer are submitted to department headquarters. Online membership processing requires a payment with each record processed.

To transfer a renewing member, select Add/Transfer Member. <1>
Transfer Member
Member must renew in same transaction

Select current or former member and continue.
Enter the member ID# and last name.

Update any information needed and Save. This saves the member to the batch.
The Summary recalculates with the amount due.

To remove members from the transmittal, uncheck the box next to the name. To delete the whole transmittal, select “Delete Transmittal”.

View the members in the transmittal using the List Selected icon. <1>
After reviewing the transmittal finalize or go back to add more members.
Payment information was not transferred to the new interface and must be entered when finalizing the transmittal. Enter the routing and bank account information.

How do you identify a Routing and Account Number on a Check? <1>

The easiest place to find your bank’s routing number is to look at your paper checks. The check will typically have the 9-digit routing number down on the bottom left of the check. It will be in a sequence of three numbers printed in MICR (magnetic ink character recognition) form. All routing numbers are 9 digits.
The most common length for bank account numbers is 9, 12, or 10 digits. Although they range from 4 to 17 digits long. The account number works in conjunction with the routing number. While the routing number identifies the name of the financial institution, the account number identifies your individual account.

Foreign posts and squadrons can process membership with a credit card. Online membership processing is designed for payment to be processed with a post or squadron account and not with individual credit cards.

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 future transmittals. Entering new payment information holds future transmittal from finalizing until the first transmittal completes. This is to ensure all subsequent transmittals have valid bank information.

If you receive an error when entering payment information, contact your financial institution to verify ACH payment account information.
The next time a transmittal is finalized, the information is stored.

Stored bank information can be updated. <1> Click the link to Update Account Information to re-enter.
<1> Add the new eCheck information, check the authorization box and Pay Now.

If you receive an error when entering payment information, contact your financial institution to verify ACH payment account information.
Finalization of a transmittal produces a receipt number. This is notification the transmittal has been received and is in process. While in pending status, counts are added to the National Target Date membership reports and are immediately available for Departments to add to their membership reports. Legion members do not receive renewal notices and it prevents them from renewing online that creates duplicate payments.

To view the transmittal summary, and print the receipt, click Print Transmittal Summary.
### Members in this Batch

<table>
<thead>
<tr>
<th>Member ID#</th>
<th>Name</th>
<th>Membership Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>123456789</td>
<td>B. Sample (Renewal)</td>
<td>2022</td>
</tr>
<tr>
<td>123456789</td>
<td>New Member Name</td>
<td>2022</td>
</tr>
<tr>
<td>123456789</td>
<td>Transfer Member Name</td>
<td>2022</td>
</tr>
</tbody>
</table>

Print or Save this document for your records. This information is also available anytime in your transmittal history.
Transmittal history currently includes all transmittal submitted or in process since April 1, 2021.
Transmittal History is located in the left menu of your group profile.
Online transmittal history prior to April 1, 2021 will be available for review.

It includes reference number, membership year, status, members submitted and amount.

Set date ranges to search for previous history.
Clicking on the transmittal number opens details including members in the batch, amount and status.
Important information to know about online membership processing.

<1> Payment information was not converted from the previous interface. After finalizing the first transmittal, a hold will prevent a 2nd 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.

<2> Declined transmittal will require new bank information to be entered prior to submitting the next batch.

<3> Current processing time is 3-9 days. Unlike the previous version, the new MyLegion will update transmittals once approved by the financial institution.
<4> There is a $10,000 batch limit per transmittal. Amounts higher than that should be broken down to separate transmittals that meet the limit.

<5> 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. 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.
MyLegion.org

Group Administrative Tools
Member Management, Rosters, Reports and Labels

MyLegion provides other administrative tools such as, member management, rosters, reports, and labels.
Rosters and reports are generated in My Groups. The My Groups menu identifies the membership group to be managed. <1>

The left menu option has a link for Reports and Labels. <2> Consolidated reports <3> are also located on the left menu.

<4> View Members provides the current membership listing. This is also the location to view and manage membership records.
The member list includes all members with a last paid years for current year, minus 2. <1> Notice in this listing we are viewing, the roster displays Paid Through Year and not the renewal year.

The member list allows you to search members, export roster, or send emails.

To view additional member information, update or delete, click on the member’s name. <2>
Viewing a member displays the members name and ID# along with main contact information. <1>

Address, email, and phone can be updated using edit links to the right. To update a member’s name, use the left menu Name and Demographics.

Contact information will also display a photo image if uploaded by the member. You can also upload a picture for a member using the Add link where the photo will be located.
Membership summaries appear below contact information. Status is Active for members paid and Expired for unpaid members. <1>

All membership are annual and paid through the end of December. The paid through date provides the membership year the member is paid.
Member Post shows the post paid and type of payment. This member renews annually. If the member is paid up for life, or honorary life, the details are in the description. <1>

<2>A member transferred to a new post reads Post Transfer.
MyLegion combined The American Legion and Sons of the American Legion databases into 1. As a result, Sons members may notice a member ID change for the following reasons.

Members that belong to both The American Legion and Sons of The American Legion are known as Dual members. Their exiting SAL number is now their Legion number, providing 1 ID for both memberships.

If a squadron member possessed an ID# that was reassigned by a Legion member, the SAL member was assigned a new number starting with 35.
Name and Demographics has two sections. The first is name. Names can only be updated in this area. Update and Save. Scroll down to review demographics.
Demographics displays date of birth, gender, job information, currency preference and is where you go to mark a member deceased. To flag a member deceased, check the box next to deceased.

Click Save to store changes.
Add an address to the member’s record. <1> Enter address and Save. To replace the primary mailing address, check “Make this my Main Address”. The primary email address listed on a member record determines the address communications are sent to members from all Leadership levels, including renewal notices, campaigns and membership information.
When 2 addresses are on file, the delete option is enabled. One main address is required.
Military Service includes branch of service, conflict and retirement information.

This information can be corrected using Edit, deleted, or add another. Many of our members served in multiple conflicts and branches of service. MyLegion now allows multiple selections to be stored on the member record.

Through MyLegion members can add if they are retired with a date of retirement. <1>

This provides the date the member retired from the military.
Contact information includes phone number and email address.

<1> Phone information can be updated using, edit, delete or add.

<2> Email addresses can be added or edited. If one email is on file, no delete option will be available. If a member replaces their email, select edit. Member’s that would like to have a secondary email on their record can add up to 2 additional emails.

<3> When adding an email, the location options are Alternate, Home and Work. An email for each of these locations can be stored. When setting preferences, confirm with the member what address should be listed as the main email. Main email addresses are associated with the member’s MyLegion account. All password and username communications are sent to the main address. Check preferences and Save.
<1> 2 emails are now on file with the one added listed as main. The delete option is now available to delete the previous email, or it can remain as a secondary email address if valid. It is required to have one main email on record.
Emergency contact information is a new feature allowing members to provide who to contact in case an emergency arises.

<1> Members can store on their member record emergency contact name, relationship, phone number with comments. This information can be seen by department and national staff in case of an emergency if the member attends events and conventions or local activity of The American Legion or Sons of The American Legion.
Paid up for life link allows you to assist your member with the online application.

<1> Generating through the review of the members account provides amount due for PUFL membership. Selecting Pay Now navigates to a payment page.
Enter credit card information and submit.
Group access by default is provided to adjutants and commanders. Other officers, may also need access. Group permission can be assigned full or restrictive access to group membership information and management.
To assign an individual permission to access group profile begin in the group and go to View Members.
Assign Group Permission

Click on their name to open member profile.
Assign Group Permission

After searching the member, in member profile go to Assign Group Permissions <1>
The recommended settings to provide the same access to view and edit membership information, reports, membership processing and other resources available to the Administrative Officer are as follows:

Online Group Manager. <1> This is the minimum permission requirement. It provides access to export and print electronic membership roster <2> 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.

Edit Individual Profile <3> grants authority to view and edit additional member information not on the roster.

Edit Group Profile <4> provides access to online membership tools in View Members — Global Member Search — Group Attributes - Reports/Labels — Process Membership. and Officer Materials.

After the desired management settings are assigned, Save them and the permission will be assigned to the members myLegion account.
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 payment information 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 Leadership or Squadron.

To return to Post membership select My Groups.

The My Account button will return you to your personal membership and exits Group Profile.
Assign Group Permission

What if the person is not a member of my group?

Permissions can be provided to individuals not part of the group. As an example, an auxiliary or sons member assists the post and needs access to reports and resources.

You must first add them to your group listing. Go to Add/Modify transmittal and add the member. Do not submit the member and select delete transmittal after adding. That clears out the individual in the batch but it adds them to your listing to assign permissions.

The individual will not have membership details.
Reports play a vital role when tracking membership. The next part of this presentation will review reports available.
Roster Reports

Rosters and reports are generated through View Members.
The Detail listing in view members includes data for current membership year, minus 2. Using the search and filter tools, this listing allows you to create a current roster, expired, undeliverable, and deceased listing from one location. Deceased membership is for the last 2 paid years.
To print a full roster <1> check all members. Click on box to check on the top title row.

<2> Select the Action and click Go. The next step is determined by the action selected. Export options allow you to send the listing to an Excel, Word or CSV document. The action to “print” creates a PDF document.

Print, export or save the roster, using the Actions pulldown. Records must be selected prior to prompting an Action.
Search fields allows you to search a group of members and create a modified report. Reports generated in this area can include; Current, Expired, Deceased and Undeliverable.

After you set the report parameters, <2> check the members and <3> Actions menu to print or save.
Search the member, group of members or you can select all. Names checked will be included in the email. Records with no emails can remain checked and do not have to be filtered out.

In this example, a check mark in the title row will select all records. <1>
Using the Actions menu select “Send Email” and “GO”. <2>
Send Emails

Email browsers may need set up to allow this feature to send emails through Outlook. <1>

Microsoft help will provide instructions to set your account up to email members. You can add a gmail account to Microsoft Outlook, and manage it in Outlook, to view and manage all of your email in one place.
Additional reports are available in Reports/Labels. <1>
Reports available prior to the new MyLegion interface are in progress. The current report area includes the most used reports for managing members, revitalization, and communications.

Mailing labels can be produced 30 per sheet labels in standard 3 column, 10 row format. <1>

Filtering options display to define who you want included in your labels. <2> Select the last paid year or multiple years. That action activates the sort option. <3> Designate if you want your labels sorted by last name or
zip code.

View Report to continue. <4>
The label display is not in 30/sheet format. Send the data to a PDF document selecting the export icon. <1> PDF is the only selection that applies for labels. After you select PDF look for a tab to open the PDF generally located at the lower left of your window. <2>
The PDF opens in the format to print labels. Labels are currently sorted by zip code.
To create a listing of HQs post member information, begin in Reports and Labels – Find Members in My Area. <1>

This report provides contact information for members in your headquarters post only within a designated area defined by zip code.
When using this report, the zip code must be entered first. <1> Only zip codes within your group’s state is included. This report is not to be used to locate members in other departments. You can select a few zip codes or all. It may take a few minutes to generate the zip code list. After the zip codes have been selected you can select last paid year and “View Report”. <2>
The report generates and is sorted alphabetically. It includes contact information on file at national headquarters. This listing can be exported to save or print using the export icon. <1>

This report can be used for revitalization. Contact these members and ask them to transfer.
Members that renew online can be identified using the Member Online Renewals Report. <1>
This report provides date range parameters.  <1> Using the small calendar icons, select the date range and View Report.  <2>
The report generates. The current report includes all online transmittals. The Amount paid defines if the member paid online or if the post submitted through MyLegion’s online membership processing.

In this example, 2 paid amounts appear. <1> The paid amount reflects what was paid to National. Those with a paid amount of $43 paid full dues using online renewal that includes post + department + national. Posts will receive their amount per member from their department. The members with amount paid of $35 were submitted by the post in an online transmittal where the amounts withdrawn are department and national per capita. This listing can be exported to save or print using the export icon. <2>
In addition to view members, a roster can be generated from reports and labels. <1>
When creating a roster, the membership included will be members of your group. District and county rosters will members of all posts assigned to their area.

Membership rosters include current year minus 2. Using filtering menus allow flexibility to the data included in the roster.

Last paid year <1>
Status <2>
And Mailing Status <3>
Using the filter options allows you to create a deceased listing.  <1>
and a undeliverable listing using mailing Status <1>

Create the report by clicking “View Report” <2>
The roster includes status, paid year, contact information, conflict, continuous years, branch of service and membership type. Save or print the roster using the export icon.
Consolidated reports are also located on the left menu. CPRs and CSRs are restricted to Adjutants only. Commanders and assigned administrators do not have access to consolidated reports. Phase 2 of MyLegion will extend access to future reporting to all group administrators.

CPRs are closed for the current reporting year. To view submitted reports go to View / Edit reports. <1>
Closed includes reports submitted for the last 2 years. Completed reports will remain in closed status for reference to view, save or print. Historical data will build with each submission year.
Online help is available from the Resources Menu. <click>

Step by step instructions for both member management and officer tools are located this area.
Online Help

Using the new MyLegion (Videos & Step-by-Step instructions):  
https://mylegion.org/PersonifyEbusiness/Resources/Help

Setting up Outlook for use with Gmail:  
https://support.microsoft.com/en-us/office/set-up-gmail-accounts-46274497-95ea-4a7d-9651-d246aa63eb5e

How to clear cache:  
https://www.pcmag.com/how-to/how-to-clear-your-cache-on-any-browser

<1> Online resources includes a MyLegion Training video series to help users navigate and get the most out of the features and tools available at MyLegion.

<2> Other online help resources can help you set up your email client when sending an email to your group.

<3> Clearing cache maximizes speed and performance. If you spend a lot of time online or have been visiting websites for a long period, then you may build up a sizeable cache.
Your National support staff is available Monday through Friday, 8-4:30pm Eastern.