# 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.