SQUADRON MEMBERSHIP PROCESSING

A Guide to Electronic Membership Transmittals via MySAL.org (MyLegion.org)

Introduction

The "Process Membership" feature (MyLegion.org and MySAL.org) allows post and squadron officers to renew, add new, and transfer paying members online. (Note: Posts/Squadrons can only transfer-in members who are paying dues for the current membership year.) This feature uses electronic payment methods (eCheck) and eliminates the need for post and squadron officers to send the National and Department* portion of the (3-part) membership cards and paper checks to the Department Headquarters office. *Please confirm with your Department/Detachment as to whether they require their portion of the membership cards.

Electronic Check (eCheck) is the only payment method available. The account must be a valid checking, business checking, or savings account held with a US Bank. Credit card payments are only accepted for foreign posts that do not have a US bank account.

Each dues payment charged for a member is the sum of the National Per Capita amount plus Department/Detachment Per Capita in effect at the time of the transaction (District/County dues included when applicable). National Headquarters will send Department/Detachment portion to Department on a regular basis.

Declined eChecks:

If a post/squadron submits payment for a batch of transactions and the eCheck is declined, the transmittal status of the batch will be set to "Declined". Common causes for declined eChecks: 1) Insufficient funds. 2) Bank account has been closed. 3) Invalid bank information.

If a batch is declined, the post/squadron officer will be notified via email and the batch will NOT be applied to National HQ database. Declined batches can be re-submitted within 14 days. If not re-submitted within 14 days, the batch may be deleted. The post/squadron will be charged all penalty fees levied by the Automated Clearing House (ACH) processor for declined eChecks.

Signing Up for MySAL:

Go to www.mysal.org and sign-up by completing the "Authorization Form" located at the bottom of the web page.

Note Regarding Legion Post Officers:

Post officers can process SAL membership by clicking "SAL" in the top menu (blue ribbon) prior to clicking "Process Membership". The entire process is practically identical for Legion and SAL. On the SAL side, bank account information will need to be entered in order to process SAL membership (even if the account is the same as the Legion membership account). Note: Once bank account information is entered, only the last four digits of the bank account number are visible to anyone. Post officers may process both Legion and Sons membership, Squadron officers may process Sons membership only.

Getting Started: Add Bank Account (Checking)

1. Click "**Process Membership**" in the left-menu to access Process Squadron Membership feature.

2. Click "**Manage Payment Method**" to enter bank account information for squadron membership processing.

- 2.1. Ensure correct account type is selected under **Account Type** and fill out the form.
- 2.2. **Name on Account** must be name bank has on file for the account and can be abbreviated.
- 2.3. **Email Address** is for receiving automated receipts for payments submitted.
- 2.4. After filling form, click "**Save"** button.
- 2.5. Note: Bank account information does not need to be entered prior to each transaction.

Creating a Transmittal: Adding Renewals and/or New Members to a batch

3. Click "**Edit**" to begin adding members to the membership transmittal batch.

Process Squadron Membership

Manage Payment Method

Date Opened	Number of Cards	Amount	Date Submitted	Processed Date	Transmittal Status	Edit/Review
10/08/2019	0	.00			Open	Edit

  3.1. Note: One transmittal batch is always open for editing/adding members.

  3.2. Note: When an open batch is submitted, a new batch becomes available.

  3.3. Note: A $10,000 maximum limit is in effect for each batch.

Squadron Transmittal Batch Screen Detail:

Squadron Transmittal Batch

B. Back

Cards: 0
Total Amount: $0.00
Status: Open
Charge per member: $7.00

A.

Add New Member / Transfer-In   Click Here   **C.**

Search for Members in My Squadron to Renew

Member ID: [Search by Member ID]
Last Name: [Search by Last Name]
First Name: [Search by First Name]

D.

No Search Results Found
E.

Members in this Batch   **F.**
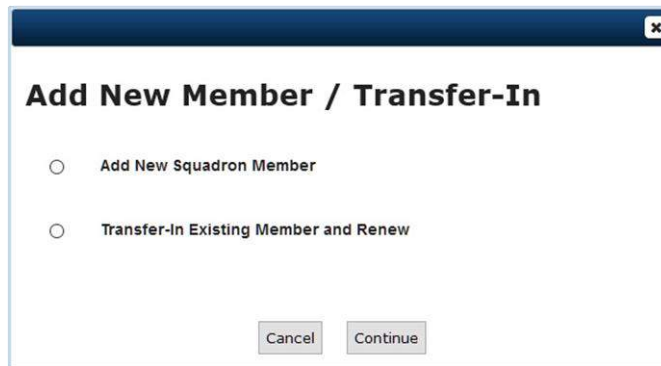
No Member(s) in batch

A. **Transmittal Batch Summary** - lists total members in current batch and total dollar amount to be submitted.
B. **Back button** - returns user to previous screen and saves current work.
C. Opens "**Add New Member / Transfer-In**" window.
D. **Search for Members in My Squadron to Renew -** search by member ID or name to add to batch.
E. Search **results** listed here.
F. **Members in this Batch** - lists members already in the current batch.

4. Adding a NEW Member

4.1. From the "Squadron Transmittal Batch" screen, click the button next to "Add New Member / Transfer-In".
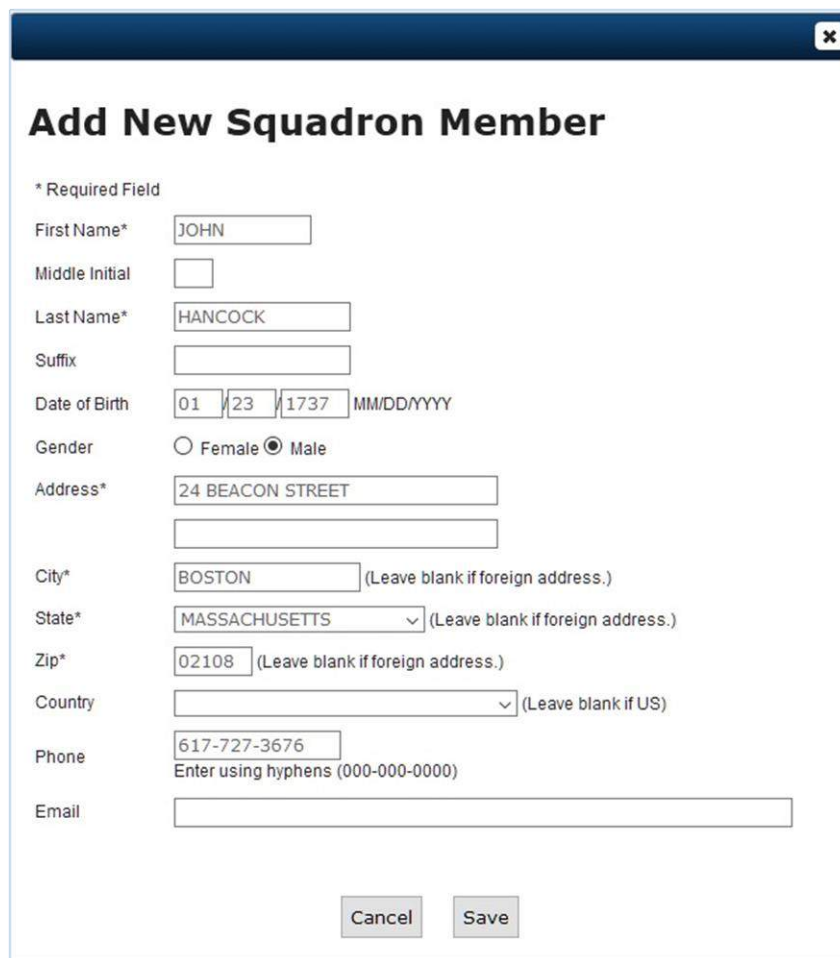
4.2. **"Add New Member / Transfer-In"** window appears:

4.3. Choose "Add New Squadron Member" and click "Continue", a member data form will appear:

4.4. Complete the form and click the Save button.

Squadron Transmittal Batch

Back

Cards: 2
Total Amount: $14.00
Status: Open
Charge per member: $7.00

Add New Member / Transfer-In Click Here

Search for Members in My Squadron 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

Account information must be entered before you can submit batch.

Master ID number	Name	Membership Year	Edit/Remove
999948416	JOHN HANCOCK	2020	Edit / Remove

4.5.　After "Save", member is listed under "Members in this Batch" – Click "Edit" to change demographic information, or "Remove" to delete member from current batch.

5. Transferring Existing Members

5.1. From the "Squadron Transmittal Batch" screen, click the button next to "Add New Member / Transfer-In".

5.2. **"Add New Member / Transfer-In"** window appears:

5.3. Choose "Transfer-In Existing Member and Renew", two text boxes will appear:

Add New Member / Transfer-In

○　Add New Squadron Member

◉　Transfer-In Existing Member and Renew

Member ID: 260869492

Last Name: JEFFERSON

Cancel　Continue

5.4. Note: Member ID and Last Name are required to transfer existing members.

5.5. Enter member's ID and last name, click "Continue".

5.6. "Edit Member" data form will open in new window:

Edit Member

* Required Field

First Name*   THOMAS

Middle Initial

Last Name*   JEFFERSON

Suffix

Date of Birth   04 / 13 / 2019   MM/DD/YYYY

Gender   ○ Female ⦿ Male

Address*   931 THOMAS JEFFERSON PARKWAY

City*   CHARLOTTESVILLE   (Leave blank if foreign address.)

State*   VIRGINIA   ⌄   (Leave blank if foreign address.)

Zip*   22902   (Leave blank if foreign address.)

Country   ⌄   (Leave blank if US)

Phone   434-984-9880
Enter using hyphens (000-000-0000)

Email

[Cancel] [Save]

5.7. Verify member's data is correct and click "Save".

5.8. Member will be added to "Members in Batch" section.

Members in this Batch

Account information must be entered before you can submit batch.

Master ID number	Name	Membership Year	Edit/Remove
999948416	JOHN HANCOCK	2020	Edit / Remove
260869492	THOMAS JEFFERSON	2020	Edit / Remove

6. Search for Members in My Squadron to Renew

6.1. Enter partial or full Member ID, Last Name, and/or First Name to search members in current squadron.

Search for Members in My Squadron to Renew

Member ID: 200

Last Name: b

First Name: Search by First Name

Member ID	Name	Renew Year	
200454987	BRAD BAKER	2020	Renew
200188394	JAMES BALDING	2020	Renew
200166474	SAM BENNETT	2020	Renew
200454988	HAROLD BREECE	2020	Renew
200431709	WILLIAM BURKHART	2020	Renew

Members in this Batch

Account information must be entered before you can submit batch.

Master ID number	Name	Membership Year	Edit/Remove
999948416	JOHN HANCOCK	2020	Edit / Remove
260869492	THOMAS JEFFERSON	2020	Edit / Remove

6.2. Select the member to be renewed by clicking "Renew" next to their name.

6.3. Select the Renewal Year(s) and click "Renew".

6.4. Note: This system currently accepts payments for current and previous membership year only. Any additional payments (catching-up on continuous years) must be submitted to the Detachment.

7. Submit Batch

7.1. When your batch is complete click "Submit Batch" to initiate payment, a confirmation window will appear.

Submit Batch Confirmation

By clicking the Submit button below, I authorize The American Legion to make a one-time charge to my checking account ending with
(xxxx)--> on 10/09/2019 for the amount of 21.00.

Email receipt will be sent to: ●●●●●●●●●.@gmail.com
(Enter new email address for confirmation receipt.)

New Email [   ]

Confirm New Email [   ]

Cancel   Submit

7.2. By default, receipts will be sent to email address entered with bank account information. To send receipt to a different address, you may do so here.

7.3. Click "Submit" to confirm and finalize payment initiation.

7.4. After submitting the batch, the status will display as "Pending".

Process Squadron Membership

Manage Payment Method

⚠ Your account will be held until this 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.

Date Opened	Number of Cards	Amount	Date Submitted	Processed Date	Transmittal Status	Edit/Review
10/09/2019	0	.00			Open	Edit
10/02/2019	12	84.00	10/02/2019		Pending	Review

7.5. You can review Pending or Processed transmittal batches by clicking on "Review".

7.6. You are prevented from submitting a second batch until the first has completed. This is a one-time hold to ensure the bank account information is correct. Once the first batch has completed, you are not limited on frequency of submissions.

7.7. Please allow 7-9 business days for the transaction to finish processing (typically 10 calendar days from the date of submission). You may see a "pending" charge on your squadron's bank account within 24-36 hours. The payment is moved from your bank account, to a third-party payment processor, to National HQ. Once we receive payment, and all data passes review, the individual members' records will be updated to reflect this dues payment.

7.8. Please submit batches within 14 days. Any member records existing in open batches for 14 or more days may be removed/deleted from the batch.

The American Legion National Headquarters reserves the right to suspend the "Process Membership" feature at any time due to a high volume of declined transactions, or malicious use of MyLegion.org website.