



**MYLEGION.ORG**

**BASIC COURSE**

**LESSON PLAN**

## The American Legion, Department of Texas Lesson Plan

### MYLEGION.ORG

Facility:	Post Home or Meeting Room
Format:	Class Room / Theater seating
Length of Class:	45 minutes
Classroom Style:	Classroom / Theater seating
Number of Instructors:	One
AV Needs:	Laptop computer, laptop projector, screen, power cables
Logistical Needs:	None
Prerequisites	Internet connection
Required Reading(s):	None
Materials/Handouts:	None
Subject Overview:	Basic class on MyLegion.org

**SLIDE 1 – Introduction**

- Welcome to today's training on MyLegion.org we will be covering the basics of MyLegion.org, for some of you this may be repetitive but there are several new changes to cover.

**SLIDE 2 –MyLegion.org**

- This is a secure internet site that provides access to member information to assist Post Commanders and Adjutants in their day to day membership processing duties.
- MyLegion is a secure site that requires a user name and password to access.
- Site is registered using Post Adjutant's information on file at National.
- The major change is that all online features are now available to the Post at **no charge**.
- There is also now a section for the District Commanders to review information about the posts and their members.
- It's the Post Adjutant's responsibility to control the access to this site.

**SLIDE 3 – Membership features**

- View member's information for Post & Squadron.
- Track members who have renewed online.
- Perform Member Data Form changes for Legion/SAL.
- Generate rosters for current, expired, deceased and undeliverable members.
- Search for HQ posts and Expired members in a specific area.
- Submit Consolidated Post Report.

**SLIDE 4 – Other features**

- Get Connected with your members by publishing post announcements, images, calendar of events and newsletters.
- Posts can provide up to date information to their members on upcoming events.
- Download Post Officers manuals and other publications that are vital to your day to day operations
- Download Suggested speeches
- Access the Dispatch

**SLIDE 5 – Accessing MyLegion.org National Page**

- MyLegion.org can be accessed through
  - National's website at [www.legion.org](http://www.legion.org)
  - Click on the MyLegion tab at the top of the page.

**SLIDE 6 – Accessing MyLegion.org Department Page**

- MyLegion.org can be accessed through
  - Department's website at [www.txlegion.org](http://www.txlegion.org)
  - Click on the MyLegion.org emblem to get connected

**SLIDE 7 – MyLegion.org Landing & Login Page**

- This is the new landing and login page for Members, Departments, Posts, Districts and Counties to log into their account.
- Members Click Here button

**SLIDE 8 – Members Area**

- Stay Connected with your Post and Department.
  - View Announcements, Newsletters, and Calendars.
  - Renew on-line.
  - Support Legion Programs through Donations.
  - Find out how to get VA Assistance and direct Access to Department Service Officer information.
  - Post Locator.
  - Network with other members.
  - Participate in members-only chat forums.

**SLIDE 9 – Members Login Page**

- Enter your email address and Password to login
- Or click the register button to create an account.

**SLIDE 10 – Members Page**

- The Member's page includes information about your Post, The Department and National Headquarters.
- Members can access their profile from this page and also update their information i.e. name, address, email address and phone number
- The member section can also be used as our form of Facebook and chat with other Legion members.
- Members can find other Posts
- Members can get information about VA Assistance
- Members can get information about Legion programs

**SLIDE 11 - MyLegion.org Landing & Login Page**

- This is the new landing and login page for Members, Departments, Posts, Districts and Counties to log into their account.
- For Posts and District not already signed up for MyLegion.org the authorization form is located at the bottom of the page.
- You can also take a tour of the feature of MyLegion.org here

**SLIDE 12 – Post Registration Process**

- The Post completes the authorization form and returns it to National
- National will verify the Officer requesting access
- National will contact the Dept Adjutant to request permission to provide access to the database.
- Post will receive an email from National with login instructions
- Post will create their password for login
- Only one user name and password per Post or District.

**SLIDE 13 – Post Login Page**

- This is where the Post would login to their account.
- Enter Username and password
- Click Login button

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## SLIDE 14 – Post Officers Page

- For those Posts that have been using MyLegion.org you will notice a change right here, there is now a Bulletin Board feature where information from national will be posted.
- Notice the toolbar at the top
  - Legion database tab
  - SAL database tab
  - Downloads tab
  - Contact Us tab
  - My Account tab
  - Log Out tab
- Click the Legion Tab

## SLIDE 15 – Legion Tab

- This is primarily the Membership section
  - View members information
  - Can update members information online
  - Features:
    - list of members
    - Search for member by ID or Name
    - review changes made to members
    - *Get a listing of Member that renewed online*
    - Information about your Post inquiry,
    - *Prepare the Post's Consolidated Post Report*
    - See your Post Members that are signed up for MyLegion.org.

## SLIDE 16 – Members Search Section

- List of the members of the Post
- Click on Member ID # to look at members record
- UN column notes members that are undeliverable

## SLIDE 17 – Member Information Page

- This page shows the members information as it appears in the national database.
  - Name
  - Address, city, state, zip
  - Telephone
  - Email
  - War Era
  - Branch of Service
  - Membership type
  - Status
  - Date Section shows when the joined, change record, Last paid dues
  - Current dues show the membership year member is paid through, Post paid, Dept Transmittal #, Continuous years and current post.
- If information is incorrect or missing you can update here.
- Click in Edit Data button – Top left or bottom

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## SLIDE 18 – Member Data Form Page

- Here you can change and update the members information
  - Name spelling
  - Address, City, ST & Zip
  - Telephone
  - DOB
  - Email Address
  - Continuous years
  - Dates of Service
  - Branch of Service
  - Change status for deceased members.

## SLIDE 19 – Members Renewed Online

- Post Adjutants should go here each week and check to see who have renew online.
- Simply clicking on the tab.

## SLIDE 20 – Online Renewals – How does it work?

### Members

- Since the 2011 membership year members can renew their dues online on the national website.
- Members renew online through [www.legion.org/renew](http://www.legion.org/renew) or link through [www.legion.org](http://www.legion.org)
- Members' Dues can be charged to MasterCard, Visa or Discover Card
- Print Electronic Fulfillment form (PDF)
  - Thank you and instruction
  - Temporary card and payment receipt for their record
  - Payment slip to mail or bring to Post.
- Mail or bring in the Receipt to the Post

## SLIDE 21 – Electronic Fulfillment Form

- This is the three sections Electronic Fulfillment form that the member will receive once his/her credit card payment has cleared.
  - Top Section is the Thank You from the Nat Adj and instructions.
  - Temporary Membership Card and members receipt.
  - Receipt to give to Post.

## SLIDE 22 – Online Renewals – How does it work?

### Post

- Posts mail members signed membership card
  - Post receives notice from Department
  - Members receipts / temporary card
  - MyLegion.org Online renewal reports
- Post Adjutant updates Post records, if they have already done so,
- Post Adjutant then destroys portion 1 & 2 of the membership card
- **Do not send the membership card Department – Destroy it.**

## SLIDE 23 – Online Renewals – How does it work?

### Department

- We receive list of members who renewed online on the 16<sup>th</sup> and 1<sup>st</sup> of each month for the previous two weeks.
- We update the Post's membership count based upon this reports
- Post receives a credit for the Post's portion of the per capita, credit can then be used on the next transmittal.
- Department receives a check form national once a month for the online renewals.
- Post will receive a check for balance on account during the year and at the close of the current membership year.

## SLIDE 24 – Members Renewed Online

- Enter the start and end dates and clicks on the search results button
- A list is generated for all members that have paid their dues online during the period selected.
- The Adjutant can then choose to print the list in either PDF or Excel format for the Posts records.
- Update Post Membership records
- Mail the Member their membership card
- Destroy portions 1 & 2 of the membership card. **DO NOT SEND TO DEPARTMENT.**

## SLIDE 25 – Consolidated Post Report

- Posts have three options for doing the Consolidated Post Report, they can use the 3 page paper copy that Department sends to them, they can download a PDF fill in version off the National/Department Website or the can use electronic version on MyLegion.org
- Click on the CPR tab to get started.
- This feature is available from January to June of each year.
- There are a total of 10 sections that can be updated, if they apply to your Post.
- **Please remember whether you use the paper or electronic version it extremely important to complete and return this form. National and Department use this information to tell our Federal, State and Local Legislators what we do for our communities as an organization. Post should be providing a copy to the city officials to help educate them on what the benefits of having an active American Legion in their town means.**

## SLIDE 26 – Consolidated Post Report

- Each section of the CPR can be update by clicking on the Edit button.

## SLIDE 27 –Consolidated Post Report

- This is what the various sections of the form look like when completed.
- Once you have finished entering the information and have reviewed everything, you simple click on the **Submit and Generate PDF** button.
- It then submits it to national for you and sends the Department a copy too, you can then print a copy for the Post records. It will also post a copy of the CRP Report on the member's page so every member of the Post can see what the Post accomplished

**SLIDE 28 – Tools**

- Post Communication tool / website for Posts
- Publish the Post information to the Members pages of MyLegion.org.
  - Publish your Post message
  - Publish Post Image
  - Publish Post Newsletter
  - Publish Post calendar
  - *Find Members in my area*

**SLIDE 29 – Find Members in My Area**

- We are going to cover a great tool the Post can use to help grow your Post membership.
- We are taking about Find Members in my Area, start by clicking on that tab
- This is the basic Post information
- Enter the number of miles and click on search tab

**SLIDE 30 – Find Members in My Area**

- A list of members is generated
- You have two options to generate either PDF report or CSV file.

**SLIDE 31 – Find Members in My Area**

- This is what a CSV report looks like.
- This report can be opened as an Excel Spreadsheet and used in various ways.

**SLIDE 32 – Materials**

- Posts can download the various publications, brochures, and suggested speeches.
- The Dispatch is now only available online.

**SLIDE 33 – Suggested Speeches**

- Suggested speeches for various patriotic holidays and events can be found here.

**SLIDE 34 – Officer's Forum**

- Posts can view and participate in various chats and any topic here.

**SLIDE 35 – SAL**

- Posts can access the information on their SAL Members here
- Offers same things as the Legion tab

**SLIDE 36 – Download Page**

- This feature has been changed, previously you would have had to sign up and use AIM's.
- There are two tabs to choose from
  - Membership Reports and Files
  - Accounting and Financial Reports and Downloads



**SLIDE 37 – Download Page**

- Membership Reports and Files Tab
  - Current Membership Listing – PDF file
  - Expired Membership Listing – PDF file
  - Deceased Membership Listing – PDF file
  - Undeliverable Membership Listing – PDF file
  - Current Members LGN & SAL Files – CSV file for Excel format

**Accounting and Financial Reports and Downloads**

- Monthly Online Renewals Reports – issued on the 16<sup>th</sup> and 1<sup>st</sup> of each month for the previous two weeks. PDF file

**SLIDE 38 – District Features**

- Find Members by Post, ID# or Name
- Post Inquiry – Post information:
- Address, Dues Remittance Address, Dues amount, Adjutant, Commander, Post Home etc.
- CPR reports - keep track of Posts that have submitted their CPR, retrieve Post CPR data in a PDF.
- Browser listing of Posts and Members in their District that are using myLegion.
- Find members in my area – Post Development and Revitalization.
- Retrieve lists of Expired and DMS Members in the District area.
- Post and District Manuals.
- Access to Read/Comment in Officer’s Forum.

**SLIDE 39 – Post Inquiry**

- Find basic information on any Post within the District

**SLIDE 40 – District CPR List**

- Find a listing of Post that have submitted their CPR

**SLIDE 41 – Find Members in My Area**

- Now the District Commander can pull lists to help Posts grow their membership.
- We are taking about Find Members in my Area, start by clicking on that tab
- Select the Post
- Enter the number of miles and click on search tab

**SLIDE 42 – District Downloads**

- These are the reports that the District Commander has access too.

**SLIDE 43 – National**

- Sign up information
- National Contact information