

# TABLE OF CONTENTS

TOPIC	PAGE #
INTRODUCTION.....	3
<b>SECTION I</b>	
ADJUTANT'S RESPONSIBILITIES.....	4
POST GUIDELINES.....	4-6
BEFORE YOU BEGIN.....	7-8
<b>SECTION II</b>	
THE MEMBERSHIP CARD - GENERAL DESCRIPTION.....	9-10
PROCESSING MEMBERSHIP CARDS - <b>RENEWALS</b> .....	11
PROCESSING MEMBERSHIP CARDS - <b>NEW MEMBERS</b> .....	12-13
TRANSFERS.....	14-15
MEMBER DATA FORM.....	16
<b>SECTION III</b>	
REPLACEMENT MEMBERSHIP CARDS.....	17
OBTAINING EXTRA MEMBERSHIP CARDS.....	17
DUPLICATE MEMBERSHIP CARDS.....	18
DECEASED MEMBERS.....	18
MEMBERSHIP CARD ERRORS/UNKNOWN.....	18
MISSPELLED NAMES.....	18

CONTINUOUS YEARS MEMBERSHIP CARDS.....	19
TRANSMITTING MEMBERSHIP TO DEPARTMENT.....	20
SNOWBIRDS.....	21
DIRECT MEMBERSHIP SOLICITATION (DMS).....	21
HEADQUARTERS POST MEMBERS.....	21
MYLEGION.ORG.....	22
CORRECTIONS TO A MEMBER’S RECORD.....	22

**SECTION IV**

BONDING OFFICERS.....	23
CONSTITUTION & BY LAWS.....	23
THE AMERICAN LEGION EMBLEM.....	23
POLITICAL CANDIDATES.....	24
SOCIAL MEMBERSHIPS.....	24
DEPARTMENT SPEAKERS.....	24-25
CORRESPONDENCE/PHONE CALLS.....	25
ONLINE RENEWALS.....	26-31
LIFE MEMBERSHIP.....	32-35
SUPPLY ORDER FORM.....	36

# MEMBERSHIP MANUAL

## INTRODUCTION

The following is the Department of Ohio's Manual for Post Adjutants and Membership Chairmen. This manual is designed to improve the efficiency of handling the membership aspect of your Post. However, a section is also included regarding many matters that are important to ensure the smooth operation of your Post.

While this manual is geared toward Post Adjutants we also realize that another Post officer may be in charge of the day to day job of administering the Post. We therefore ask that this manual be given to the appropriate individual. Additional copies are available upon request.

Regardless of who is handling the job and whether you are an old pro or a rookie, it is our hope that you will read the material closely, keep it handy, and refer to it throughout the year. It will make your job a lot easier, alleviate unnecessary duplication, and perhaps avoid some of those common pitfalls we all seem to experience throughout the year.

We are sure there will be situations not covered or that a further explanation will be necessary. Therefore, please do not hesitate to contact our office anytime you are unsure of a proper procedure or if you just need a simple clarification. We work for you and will be happy to help!

Our office is located at 60 Big Run Road, Delaware, OH 43015, and our hours are 8:00 am to 4:15 pm Monday through Friday. If you wish to call, our telephone number is: (740) 362-7478. Our facsimile number is (740) 362-1429 and our e-mail address is [legion@ohiolegion.com](mailto:legion@ohiolegion.com).

## SECTION I

### ADJUTANT'S RESPONSIBILITIES

The job of Post Adjutant or the individual in charge of his job can best be described as the personnel officer. He has intimate contact with the individual members of the Post. He keeps the membership records and minutes of meetings, checks up and assists the work of other officers and committees, and publishes official orders, announcements, and instructions.

The only indispensable qualifications to complete this task are honesty and willingness. **Before starting, the Adjutant should go through all the Post's records and become familiar with the Constitution and By-laws, Robert's Rules of Order, minutes of meetings, and reports of officers and committees.** Communications from Department and National Headquarters will provide additional updates and instructions.

Most Posts find it wise to retain a good Adjutant in office over a period of years.

#### GUIDELINES

Listed below are various guidelines to help the Post Adjutant. This list is not all-inclusive but rather a guide to facilitate the smooth operation of the Post during the year.

1. Membership is open to all honorably discharged wartime veterans who served at least one day of active service during the eligibility periods spelled out in Article IV of the Constitution of The American Legion.
2. All new members should verify their eligibility by presenting a copy of their DD-214 discharge showing the dates of military service.
3. Every Post must certify their officers at Department Headquarters not later than June 1<sup>st</sup> of each year. If your Post attends the Department Convention, but does not have the new officers certified prior to the deadline stated in the Department of Ohio Constitution, your delegation will not be allowed to take part in any official business.
4. At the end of the membership year all unused membership cards (all 3 portions) must be accounted for and returned to Department Headquarters.
5. New membership cards will not be sent until guidelines 3 and 4 are met.
6. The Post may hold their unused cards as long as they think necessary, however, we prefer that they be returned before the end of May. **Remember, your Post will not receive new cards until the old cards have been returned.** If a member decides to pay after you have returned your cards, mail their per capita to the Department with a note and we will return the member portion of their card to you.

7. New membership cards will be sent to the Post Membership Chairman via UPS unless we are advised in writing to send them to someone else. Please give us a STREET ADDRESS since UPS will not deliver to a P.O. Box number. **PLEASE NOTE:** Only members, with few exceptions, who had their paid membership recorded at National Headquarters by April 1st will have a preprinted membership card.
8. The Department and National per capita payment (\$27.50 per card) must accompany all paid memberships sent to Department Headquarters. If payment is not made, the cards will not be processed.
9. Some District organizations within the Department have a per capita charge per membership. If you are unsure of the amount or if you have any questions, you should contact your District Commander. **Do NOT send District per capita to Department Headquarters!**
10. All paid membership **MUST** be sent to Department Headquarters. **DO NOT SEND PAID MEMBERSHIP CARDS, OR ANYTHING ELSE FOR THAT MATTER, TO NATIONAL HEADQUARTERS.** They will only return those items to us causing unnecessary delays and increase the chance of it being lost.
11. When sending money and/or membership cards we recommend that it be sent **CERTIFIED MAIL**, and please make all checks payable to: **THE AMERICAN LEGION.**
12. **Do not hold on to paid membership cards! Many members like to enter the American Legion's various tournaments but are often ineligible because their dues were not recorded by the specified deadlines.**
13. To obtain extra membership cards you must notify this office.
14. Early Bird Stickers will be enclosed with the new membership cards. They are only used for those who pay their dues before Veterans Day (November 11th.) Let us know if you need more.
15. All Department officers are available for speaking assignments. To obtain a speaker you must put your request in writing providing all the details (times, location, etc.) and send it to Department Headquarters at least 30 days in advance of the event.
16. We have a Department Newsletter but we rely on receiving articles from your Post reporting on its activities and programs. **Be proud of your Post and let the rest of the Department know what you are doing.**

17. Whenever it is necessary to make a change on a membership card you **MUST** use a #2 **pencil**. This will ensure that the change will not be missed by the scanning equipment at National Headquarters.
18. If a member loses his membership card you must provide a replacement from your supply of surplus cards. **DO NOT REQUEST DUPLICATES FROM OUR OFFICE.**
19. Membership cards not listing the member's complete mailing address will not be processed.
20. A Member Data Form still needs to be filled out and returned to our office if a member pays his current year dues to a new Post as part of transferring. The member retains his permanent 9 digit I.D. number regardless of a transfer.
21. Your Post may obtain all membership literature and forms from Department Headquarters **FREE** of charge with forms coming available via the Department website [ohiolegion.com](http://ohiolegion.com).
22. Every Post should have a constitution and by-laws with a copy on file at Department Headquarters. If your Post does not have one, we suggest one be written as soon as possible. Before it is adopted by your membership it should be sent to us for review by the Department Judge Advocate to ensure there are no conflicts.

## **THE MEMBERSHIP YEAR**

There is often confusion about The American Legion membership year. Does the year run from July to June or from January to December?

A member's membership card is valid from the time of issue until December 31<sup>st</sup> of the calendar year printed on the card. After December 31<sup>st</sup>, the member is delinquent. Posts begin collecting dues in July for the following calendar year.

A matter that confuses members even more is Article X, Section 4 (Finance) of the National American Legion Constitution which states "Annual dues shall be payable October 20 of each year, for the succeeding calendar year."

Think of the membership year as being similar to a magazine subscription. With a magazine subscription, you pay in advance so you do not miss an issue. With The American Legion, we attempt to collect all dues between July and December for the coming year so the member remains in good standing, does not become delinquent, and will not miss out on any benefits.

### **BEFORE YOU BEGIN**

The membership cards and roster are pre-printed at National Headquarters based on your previous year's paid members received at National Headquarters by April 1<sup>st</sup> each year. New members, late payments, deaths, and transfers received at National Headquarters after April 1<sup>st</sup> may not be reflected on the roster.

When you receive your Membership Roster for the new membership year, **PLEASE CHECK IT FOR ERRORS!** You will need to correct errors as you process membership. An explanation of the membership roster appears later in this manual. To make corrections to a member's record, see "Corrections to Member's Record" in this manual.

Check your pre-printed cards for errors.

Compare your pre-printed cards with the roster list. Compare the sequence numbers on the cards with those on your Membership Roster. Use the following procedures for any discrepancies.

- **Missing Cards:** If cards are missing you will use your stock of blank cards to process that member's payment.
- **Unknown Cards:** If you receive a pre-printed card for someone who is not a member of your Post, please return the entire card (all three sections) to Department with a note explaining why the card is being returned. Keep the card separate from those for which

you are transmitting dues payment. Cross the record off of your membership roster and make a note that the card was returned to the Department.

- Duplicate Cards: If you receive more than one pre-printed card for the same member, process one of the cards with the member's payment and return the duplicate card (all three sections) to the Department with the word "DUPLICATE" written prominently across the card.
- Membership Supplies: If you need anything contact the Department Headquarters. You should have the following supplies on hand at all times.
  - Member Data Forms
  - Membership Applications
  - Membership Brochures
  - Member Benefit Brochures
- Blank Cards: With your membership cards, you receive a supply of blank cards based on a percentage of your total post membership. If you exhaust your supply during the year, we can send you a resupply. The resupplied cards are provided in a set of 27 cards with a blank roster sheet to help you maintain accountability for those cards. The serial number on the cards will match the numbers on the roster sheet. If they do not, contact Department Headquarters immediately.
- Check your roster for Honorary Life Members. **Ensure that the Post pays their dues promptly or they might get overlooked!**



## SECTION II

### THE AMERICAN LEGION MEMBERSHIP CARD

Membership cards are preprinted each year at National Headquarters with the names and addresses of your previous year's members. The card is made up of three basic parts. The left portion ends up at National and the Department gets the middle portion. These are identified throughout this manual as "**The Department Record Card**" and should **NOT** be separated by the Post.

The right portion is given to the member when he pays his dues.

The Department Record Card has several boxes that are to be used in making out cards for new and renewing members, correcting continuous year's membership, and correcting a changed or misspelled name. **NOTE: THE BOXES SHOULD NOT BE USED TO CORRECT AN ADDRESS.** General instructions on the handling of the membership card are printed on the back of the Department Record Card.

- **Do NOT separate the National and Department portions of the Record Card.**
- **Do not staple or tape anything to the Record Card.**
- **To make corrections to a member's record – see "Corrections to Member's Record" in this manual.**
- **Only use card for the membership year for which you are transmitting dues.**

### MEMBERSHIP I.D. NUMBER

The Official Membership I.D. number is printed in four places on the preprinted membership card. Twice on the left section and once each on the middle and right sections of the three-part card. **This I.D. number is the most important feature in identifying this member from all other members in the Legion, and should be used whenever you call or write to Department Headquarters.**

Every member having a preprinted card will have assigned to him a 9-digit number that will stay with that person. Even if a person transfers from one Post to another, this permanent number will remain with the member. For this reason, it is most important to complete an official transfer using the Member Data Form. This will prevent the creation of duplicate and unnecessary records on our data file.

## THE AMERICAN LEGION MEMBERSHIP CARD (SAMPLE)

A-F: The characters that appear here make up the SCAN line. Do not change any information on this line. Do not mark in this area for any reason.

- A. This is the permanent 9-digit membership ID Number. It will stay the same.
- B. This number represents the membership year.
- C. These positions identify the Department, Post and sometimes the country membership is in.
- D. These numbers serve as a counter – for example, if your Post has 195 pre-printed cards from last year, and you get an extra 25 blank cards (for new members, missing/lost cards), the first card will have the **sequence number** of 000001 and the last card will have 000220 (195 pre-prints plus 25 blank cards). The sequence number for your Post begins with the first member alphabetically and the blank cards are at the end of the Membership Roster.
- E. This variable number has importance only to National’s scanning software.
- F. All Legion cards will have an “L”, and SAL cards will display an “S”.
- G. Only the first war era a member served is indicated on the left and middle sections of the card.
- H. Anytime a war era is to be updated or changed, this box must be marked on both sections **using a Number 2 pencil**.
- I. Anytime the Continuous Years or the Member’s Name is to be changed, this box must be marked. The correct information is to be entered in the same space provided for the name/continuous years. Correct both sections of the card. **Use only a Number 2 Pencil!**

## HANDLING A RENEWAL MEMBERSHIP

When your membership cards arrive from Department Headquarters they will be in alphabetical order. After you have received the dues from a member who is renewing his membership, first, pick out the card that has already been made for him by National Headquarters. Then,

1. Place an "X" in the Renewal Box on the middle section of the Department Record Card.
2. Fill in the date paid immediately below and to the left of the Renewal Box on the middle section of the Department Record Card.
3. Put your initials on the Department Record Card (next to "date paid" line).
4. Sign the member's portion on the line reserved for the Post Adjutant, or other authorized officer (right section).
5. Separate the member's portion from the Department Record Card. Give or mail the member's card to him promptly and put the Department Record Card aside to be sent to Department Headquarters.
6. Finally, find the member's name on the membership register, which is also in alphabetical order, and mark the date paid in the column set aside for this purpose (extreme left side).

Except for the important job of transmitting dues and the Department Record Card to Department Headquarters, this completes your record keeping for a renewal member. (How to change addresses, etc., will be described later.)

## HANDLING NEW MEMBERS

**In addition to new members these instructions also apply to any renewal that did not receive a preprinted card. (Except you will always use the permanent ID Number of a renewal.**

When a new member or renewal without a preprinted card pays his dues for the current year, take the first blank card from the supply you have received from Department Headquarters. The serial number printed on the card will be the 6-digit sequential number on the SCAN LINE (See pg. 8, item D). For the first year of membership, the sequential number is used for the member's temporary I.D. number.

Type or print on **both** sections of the Department Record Card the following.

Membership I.D. number - same as 6-digit sequential number.

First name, middle initial, last name of a new member.

Mailing address, including City, State, & Zip Code.

Years of continuous membership (one year for a new member).

Put an "X" in the proper box on the middle portion of the card to show new or renewal. Then enter the date and your initials on the line provided to validate the card. If membership records are handled by an officer other than the Post Adjutant, the initials of the designated officer are acceptable.

Type or print the member's name on the first line of the member's portion (right side), immediately above the words: "The above member has paid dues for 20XX in the Post indicated above." If the number of the Post has not been preprinted, enter the Post number and continuous years. On the sample card below, the information added by the Post Adjutant is hand printed so that it will stand out from the data preprinted on the card by National Headquarters, however, typing the name, address, etc., of your new members is preferred.

**Note: Always ask a prospective member if they currently belong to an American Legion Post or have EVER belonged to The American Legion, regardless of Department. If they do not know their membership number from another Post, contact Department Headquarters. This will prevent a duplicate record from being created.**

- **Keep the membership application on file – Do NOT send to the Department. Transmit only the Record Card and per capita payment.**
- **Do NOT send in a Member Data Form for new members.**

### **SAMPLE NEW MEMBER CARD**

## TRANSFERS

### **THE FOLLOWING INFORMATION PERTAINS TO TRANSFERS ONLY:**

Transferring from one Post to another is a privilege granted to any paid-up Post member, and ONLY with the approval of the Post to which the member desires to transfer.

### **A TRANSFER MAY BE MADE UNDER THE REGULATIONS LISTED BELOW:**

1. No transfer shall be made unless the member requesting transfer has a membership card showing that he is a member in good standing at the time transfer is requested. Members whose dues for the current calendar year are not paid by February 1 of that year are suspended, are not in good standing, and are not eligible for transfer.
2. No charge shall be made to the members for the privilege of transfer and no dues shall be transferred from one Post to another. The accepting Post may require payment of difference in dues on a pro-rate basis if dues are higher than the transferring member's former Post.
3. A member desiring transfer of membership must first secure approval from the Post to which transfer is desired. The Adjutant or designated individual of the new Post will then complete the transferring process.
4. A Member Data Form is always required when processing a transfer - regardless of the circumstances.
5. National Headquarters will carry through the necessary procedures to transfer the member's record to his new Post, provided his current record is on file and the information on the transfer certificate (Member Data Form) is complete.

### **MEMBER TRANSFER INSTRUCTIONS**

#### **If a member has a Current membership card and transfers.**

1. The Post Adjutant must first fill out the appropriate sections of the Member Data Form (see page 16). The transferring member must then surrender the membership card from his former Post. **PLEASE NOTE: THE POST ADJUTANT AND TRANSFERRING MEMBER MUST BOTH SIGN THE MEMBER DATA FORM.**
2. The Post Adjutant should destroy the former Post card and issue a new card from his supply of blank cards received from Department Headquarters.
3. On the left section you must enter the member's permanent 9-digit membership number listed on his previous Post card. Above the number write the word "**TRANSFER**". You must also fill in the member's complete name, address, and continuous years.

4. On the middle section of the three part card, place an "X" in the transfer box. Then enter the 9-digit member identification number. Again, fill in the member's complete name, address and continuous years.

**These two portions must be returned to Department Headquarters. If not, they will be treated as "unaccounted for cards" at the end of the year and the Post may be charged \$22.50 per missing card.**

5. On the right section (member's portion) enter the member's permanent 9-digit I.D. number, his name, Post number, continuous years, and Post location (city and state) Be sure to sign the member's portion before giving it to him.

**If a member has last year's membership card and wishes to transfer and pay his current dues to the new Post, follow these instructions after collecting the current dues from the member:**

1. The Post Adjutant must first fill out the appropriate sections of the Member Data Form (see page 16). **PLEASE NOTE: POST ADJUTANT AND TRANSFERRING MEMBER MUST BOTH SIGN THE MEMBER DATA FORM.**
2. The 9-digit number on last year's membership card must be entered on the left section. Above the number write the word "**TRANSFER**". Then fill in the member's complete name, address, and continuous years.
3. On the middle section, you must again enter the 9-digit membership number, complete name, address, and continuous years. Place an "X" in the **TRANSFER BOX**.
4. On the right section (member's portion), enter the 9-digit membership number, his name, new Post number, continuous years and Post location (city and state). Be sure to sign the member's portion before giving it to him.
5. Transmit the left and middle sections of the card, with the per capita payment to Department Headquarters.

## **MEMBER DATA FORM**

This multi-purpose form is designed to keep track of your members and is principally used to report name changes, address changes, continuous year changes, transfers and deceased members.

The member's name, I.D. Number, Post Number, and Department are required for changes to be processed by National Headquarters. It is requested that the telephone number and date of birth are provided - especially date of birth.

### **YOU MUST ROUTE THE THREE PARTS OF THE MEMBER DATE FORM AS FOLLOWS.**

Parts 1, 2, & 3 (White, Yellow and Pink copies): Mail to Department Headquarters, we will forward part 1 to National and retain parts 2 and 3.

Part 4 (Green copy): Keep in your Post files.



## SECTION III

### MISCELLANEOUS INFORMATION

#### REPLACEMENT MEMBERSHIP CARDS

If a member loses his Official Membership Card (**right section**), a replacement card must be provided from the Post's supply of blank membership cards that have been received from Department Headquarters.

When it is necessary to provide a replacement from your blank supply, you should proceed in the following manner:

1. On the left and middle sections you must enter the member's permanent 9-digit I.D. number in the I.D. number box. You must then fill in the member's complete name and address. Then write in bold letters across the face of the card **REPLACEMENT** or **DUPLICATE**. These two portions must then be returned to Department Headquarters. **YOU DO NOT PAY THE PER CAPITA FOR REPLACEMENT CARDS.**
2. On the right section (member's portion) you must enter the member's permanent 9-digit I.D. number along with his name and continuous years. Finally, enter the location of the Post (city and state) near the bottom of the card and sign it.
3. **PLEASE NOTE:** The left and middle sections must be returned to Department Headquarters. If not, they will be treated as "unaccounted for cards" at the end of the year and the Post may be charged \$22.50 per missing card.

#### EXTRA MEMBERSHIP CARDS

Every Post is provided with a supply of blank cards in addition to the preprinted cards. If this supply isn't enough, you may request additional cards from Department Headquarters. Extra cards come in packs of 27 only and are used for new members, renewals who do not have a preprinted membership cards, transfers and replacements.

Additional cards, will NOT have the number of your Post preprinted on them, therefore, you will have to type/print the Post number on all three sections of the card when it is issued to a member. You will also receive a new membership register sheet listing the sequential numbers of the blank cards that you receive. **In all instances, write the member's name and address next to the sequential number on the membership register in order to keep track of these members and the replacement stock of membership cards.**

## IF DUPLICATE CARDS ARE RECEIVED

Sometimes you may receive more than one preprinted card for the same member. If this happens, process one of the cards as usual. On the duplicate card, put an **"X" with a #2 pencil** in the box opposite the word **"DUPLICATE"** on the left section. Return the entire card, including the member's portion to Department Headquarters. Strike the name off your Membership Register and note in the **"REMARKS"** column that the card was returned to Department Headquarters as **"DUPLICATE"**.

## DECEASED MEMBERS

If you receive a card that has been preprinted for a member who is deceased, put an **"X" with a #2 pencil** in the box opposite the word **"DECEASED"** on the left section. Return the entire card including the member's portion to Department Headquarters. Write **"DECEASED"** in the **"REMARKS"** column on your Membership Register.

If a member dies after his dues have been paid and transmitted, that fact should be reported to Department Headquarters via the Member Data Form (See page 16). Be sure to include his name, I.D. number, and last known address.

## MEMBERSHIP CARD ERRORS / UNKNOWN

If you receive a preprinted card for someone who was not a member of your Post last year and who is not known to your Post, put an **"X" with a #2 pencil** in the box opposite the word **"UNKNOWN"** on the left section. Return the entire card including member's portion to Department Headquarters.

Strike the name off your Membership Register and note in the **"REMARKS"** column that the card was returned to Department Headquarters as **"UNKNOWN"**. It also might happen that, through an error in packaging, you would receive cards intended for another Post. If this should happen, please return them to Department Headquarters. **DO NOT MARK THESE CARDS "UNKNOWN" SINCE ANOTHER POST WILL NEED TO USE THEM.**

## IF A MEMBER'S NAME IS MISSPELLED

If the member's name is misspelled or needs to be corrected, put an **"X" with a #2 pencil** in the correction box on the left section. White out or draw a line through the name on the left and middle portions and type or print the name correctly.

If a name correction needs to be made after the member has paid his dues and the Department Record Card has already been transmitted to Department Headquarters you must use the Member Data Form (See Page 16).

## CONTINUOUS MEMBERSHIP

- Continuous Years reflect the number of continuous years that a member's dues have been received at National Headquarters.
- If the individual's dues are received after April 1<sup>st</sup>, the continuous year's information will appear blank on his next year's card.
- If a payment is missed, the member's continuous years will revert to one.
- To correct the number of continuous years, the Post Adjutant may submit a Member Data Form with the correction or edit the member's record online if the Post is enrolled at MyLegion.org.
- **The number of continuous years is not synonymous with the number of years since a member first joined the Legion!**

## TRANSMITTING MEMBERSHIP TO DEPARTMENT HEADQUARTERS

Membership should be transmitted on a weekly basis. Posts should also transmit before all Target Dates and Renewal Cut-Off Dates. (listed in the annual Awards Manual)

Check all cards to ensure they are completed properly.

Make sure you are using the correct year's membership cards.

If you are transmitting dues for a previous membership year, use the card from that year and keep it separate from current year cards. If you have already returned all of your membership cards from the previous year, just send the per capita and a note indicating which member you are paying. We will return the member's portion to the Post unless you ask for us to mail it directly to the member.

Count the cards you are transmitting and make sure the count is accurate.

**Do NOT separate the National and Department portions of the record card.**

**Do NOT staple or tape anything to the Membership Cards.**

Enclose a check for the proper per capita. (see chart on next page)

**Include a note if you are using credit accrued through online renewals or Journal Entries.**  
*\*Journal Entries are credits to the Post in the event of a member having over-paid or paid twice.*

The check for the transmittal should be for MEMBERSHIP DUES ONLY. Do NOT include any other payments with your transmittal. Make your check payable to The Ohio American Legion.

## SNOW BIRDS

National Headquarters no longer provides the “snowbird” service of automatically changing the address of members who move between two different addresses each year. Members are now required to report seasonal address changes to the US Postal Service (USPS) or directly to National Headquarters.

The USPS may not forward your magazines or newspapers. For this reason, members are encouraged to report changes directly to National Headquarters by calling **1-800-433-3318**.

Members may also report address changes to National Headquarters using the online service at [www.legion.org/membershipmanagement](http://www.legion.org/membershipmanagement).

## DIRECT MEMBERSHIP SOLICITATIONS (DMS)

The DMS program is a form of direct marketing used to solicit membership in The American Legion. While the DMS program has changed over the years, its purpose remains the same – to bring new members into our organization. For the DMS program to be truly effective, it is imperative these new members are personally contacted and invited to transfer to a local Post.

When National gets a member through DMS, the member is placed in a “holding Post” at national. The member remains in the national holding post until they transfer to a local Post or after the member has renewed their membership at national twice.

Posts can transfer DMS members, as well as Post 888 members at any time. **The member must consent to being transferred to your Post.**

## HEADQUARTERS POST 888 MEMBERS

The Department Headquarters “holding Post”, Post 888, is comprised primarily of members acquired through the DMS program. Many wish to transfer to a local Post. Your Post may receive a “Request to Transfer to a Local Post” from Department. Contact the member to see if they wish to transfer to your Post. If the member agrees, complete a Member Data Form and have the member sign the form.

Contact Department Headquarters and we will provide a list of all Post 888 members and expired members for the zip codes in your area. When you receive the list, contact the members and invite them to join your Post. **The member must consent to being transferred to your Post.**

## **MYLEGION.ORG**

MyLegion.org is a free website designed to assist Post officers with everyday membership duties and to connect members of The American Legion to their Post and Department leadership as well as other American Legion members. This site can be accessed from any computer with an internet browser and internet access.

Posts with access can view members who have renewed online, generate rosters, submit Consolidated Post Reports (CPR), perform Member Data Form changes online for Legion and SAL members, publish a Post newsletter, publish a Post calendar and general announcements online, find potential members by utilizing lists of expired members and DMS members in their area, access publications and manuals, and communicate with other officers through the *myLegion Officer's Forum*.

Members can create a profile and get connected with other members, keep up-to-date with news from the Post and Department, link to Post and Department calendars and websites, communicate with other members, and renew membership online.

Go to [www.mylegion.org](http://www.mylegion.org) to take a quick tour and print a Post authorization form.

## **CORRECTIONS TO A MEMBER'S RECORD**

Corrections can be made to a member's record in three ways:

1. Member Data Form
2. MyLegion.org (most preferred)
3. Membership Record Card (least preferred)

Do NOT make address changes on the Membership Record Card.

Do NOT write over the Member ID number on the Membership Record Card.

Do NOT write over the numbers in the scan line at the top of the Record Card.

## SECTION IV

### BONDING

BOND all Post officers who handle money. It is not a dishonor to have a bond. It protects your Post, it protects the individual, and it protects his family. The cost offsets the worry. All Post officers and others handling funds of any type **MUST** be bonded for double the average amount of money handled in a single year.

**REQUIRED BY DEPARTMENT BY-LAWS, ARTICLE V, SECTION 1.**

### POST CONSTITUTION & BY LAWS

It has been strongly recommended for many years that **EVERY** Post in Ohio furnish the Department Headquarters with a copy (up to date) of their Constitution and By-Laws, and yet the latest check of Post files in Department Headquarters reveals some that have not furnished an up-to-date copy since the Post was originally chartered.

To prevent arguments within your own membership and to have the benefit of the Department Judge Advocate's experience, kindly make sure your Post furnishes the Department with your latest Constitution and By-Laws without delay. All proposed amendments should be sent to Headquarters before your membership formally adopts them to be certain of no conflict.

### EMBLEM

The right to use, manufacture, or reproduce The American Legion official emblem, is controlled completely and explicitly by the National Headquarters. The only exception is the use of the Legion emblem on Post stationery, Post publications, notices or other routine items of legitimate Post business.

Posts or individuals may use the emblem on programs which carry advertising and are for sale or distribution outside the Legion ONLY UPON WRITTEN APPROVAL of the National Adjutant. The National Legion emblem is copyrighted by Congress, and to use it without written approval is a violation of Federal law, and violators are subject to prosecution.

Applications for use of the emblem other than on stationery and non-salable Post programs should be routed through the Department Adjutant of The American Legion, together with a copy, if possible, of the material on which it is to be used. In the event the copy is not available, the Post shall make a complete statement as to the type of material and its prospective use, when requesting permission to use the emblem. To send your request direct to

National Headquarters will only result in delay since the Department must give its approval before the National Headquarters will give its O.K.

### **POLITICAL CANDIDATES**

The Seattle National Convention of The American Legion in 1976 adopted a Constitutional Amendment concerning political restrictions in The American Legion. Article I, Section 2 of the American Legion National Constitution states, "The American Legion shall be absolutely nonpolitical and shall not be used for the dissemination of partisan principles nor for the promotion of the candidacy of any person seeking public office or preferment".

There are no restrictions prohibiting a political office holder or candidate for public office from holding a Legion office at the same time.

However, we should be extremely cautious to be certain that no candidate or public office holder uses the good name or prestige of The American Legion to seek election to or retention of his office. This does not prohibit a Post from urging "GET OUT THE VOTE" campaigns or from endorsing local issues related to levies, bond issues, local options, etc.

### **SOCIAL MEMBERSHIP**

**The National Constitution reads, "There shall be no form or class of membership except an ACTIVE membership, and dues shall be paid annually. The interpretation of this by The American Legion Department Executive Committee of the Department of Ohio is that no one is entitled to any type of a membership card that would permit one to be a regular entrant into a Legion Post clubroom, unless he or she, has paid dues to be a member.**

**A bona fide member is one who has a membership record ON FILE WITH DEPARTMENT HEADQUARTERS. Courtesy cards, key cards (without a Legion card) and social membership cards are NOT permitted, and upon the submission of proof to a District or Department Officer, violation of this section of the National Constitution is sufficient grounds for *revocation of the Post Charter under Uniform Code of Procedure for the Revocation, Cancellation, or Suspension of a Post Charter.***

### **DEPARTMENT SPEAKERS**

No Department speaker can be officially assigned to any Post, unless that Post makes such a request in **WRITING** to Department Headquarters, at least thirty (30) days in advance of the event. Emergency "fill-ins", of course, will be accepted.

Posts should remember that Department and District officers, like most everyone else, must earn their living. Therefore, it would be well to keep in mind when you ask Department



officers to travel 100 or more miles, one way, that the meeting should be something special. Keep in mind that the type of meeting must be taken into consideration, when Headquarters makes assignments. Too many times the Department Commander has traveled 150 miles, only to find that the meeting was cancelled, that the date had been changed, or that there were less than 25 people in attendance. If the Commander were to travel just once to each county, that would mean eighty-eight (88) nights on the road.

## **CORRESPONDENCE/TELEPHONE CALLS**

When you need supplies, a speaker, or just have a question or problem, a letter or email to Department Headquarters will bring a quick response. It is helpful if you will write separate letters if the requests are to be handled by different divisions (request for speaker and an emblem order, for instance) but regardless, we are here to help you. Address all correspondence to P.O. Box 8007, Delaware, OH 43015.

If you wish to call on an urgent matter, the office is open Monday through Friday, 8:00 am to 4:15 pm. Those wishing to visit the office are always welcome. We are located at 60 Big Run Road in Delaware, Ohio. To reach us, take I-71 to the Delaware Exit (131). We are located just off US 36 / SR 37 two miles west of the I-71 exit. The telephone number is (740) 362-7478.

If visiting the office, please be aware that not all staff officers will necessarily be present when you visit. If you want to visit a specific staff officer, please call ahead to make sure they will be present when you visit.

## ONLINE RENEWALS

Beginning July 1, 2011 all members of The American Legion now have the option to renew their membership and pay their dues online.

A. Beginning with the first renewal notice, members will see the online renewal option and the web address, [www.legion.org/renew](http://www.legion.org/renew), to process their renewal payment.

B. To begin the online renewal process, members are asked to enter their membership ID number and last name.

C. A page verifying the member's current information on file will appear. The member can provide any missing information and update any incorrect information to his/her membership record. i.e. address updates, telephone number correction, war era.

D. Using a MasterCard, Visa, or Discover credit card, the member can enter payment information. Once the payment is processed; the member will view a "Membership Renewal Confirmation" with a link to print an Electronic Fulfillment Form.

E. The Electronic Fulfillment Form opens to print. It has three sections – A thank you from the National Adjutant with instructions on how to obtain the official card from the Post, a temporary card and proof of payment for the member to carry until the official card is received and a payment slip to mail to the Post.

F. If the original Electronic Fulfillment Form is lost, the member can return to the renewal page on the website and enter their name and membership number and reprint the form.

### ONLINE RENEWAL – NOTIFICATION ON RENEWAL NOTICE

*Please inform your membership that if they wish to renew online that there will be a verification page/card they need to print and present in order to receive their card. Many times since instituting this policy, members renew and then either forget or skip the printing and then correspond with National Headquarters with complaints of not receiving their new cards. Each Post should develop a policy for those who do not visit the Post in order to receive their card, whether it be by the member mailing the verification page to the Post, MyLegion.org, or other means.*

**ONLINE RENEWAL – MEMBERSHIP RENEWAL CONFIRMATION  
(FOR MEMBER)**

**ONLINE RENEWAL – ELECTRONIC FULFILLMENT FORM**

## ONLINE RENEWAL – PROCEDURES FOR POSTS

- A. The Post must first verify which members have renewed online. The Post can obtain this information from several sources.
1. The member can provide the Electronic Fulfillment Form to the Post. The payment receipt on the bottom of the form will include the member's name, ID #, and the membership year.
  2. Posts using the free MyLegion.org website have the ability to generate reports listing all members who have renewed online as often as needed. The Post can enter a beginning date and ending date and a list of members of the Post who have renewed online will appear. The report can be printed by selecting "Generate PDF" button on the screen. *For more information on MyLegion.org see the section later in this manual or visit the website at [www.mylegion.org](http://www.mylegion.org).*
  3. The Department will mail a list monthly to those Posts who have had online renewals. The report will contain the transaction date, member ID #, member's name, and the dues allocation. Also included with the report will be a credit memo showing the accumulated credit balance of the Post. (The credit balance can be subtracted from future membership transmittals to the Department.)
- B. Once the Post has confirmed the online payment, the official membership card can be issued by the Post to the member.
- C. Sign the member's portion of the card as "Authorized Post Officer."
- D. Separate the member's card from the Record Card. Give or mail the card to the member promptly!
- E. **THE POST STILL NEEDS TO SEND IN THE NATIONAL AND DEPARTMENT PORTIONS OF THE CARD. HOWEVER, YOU SHOULD NOT SEND ANY DUES MONEY FOR THE ONLINE RENEWAL BECAUSE THEY HAVE ALREADY BEEN PAID. WRITE ONLINE RENEWAL ON THE CARD AND KEEP THEM SEPARATE FROM ANY OTHER CARDS IN YOUR TRANSMITTAL TO THE DEPARTMENT.**
- F. Find the member's name on the roster. In the Date Paid column, indicate the date the member renewed online. In the Date Transmitted column, write "Online."
- G. Post per capita (dues) is provided in the form of a credit on the Post's membership account.

H. Online renewals are reflected on the Department membership report every week.  
**ONLINE RENEWAL – MyLegion.org POST REPORT**

## **ONLINE RENEWALS – POST REPORTS**

## ONLINE RENEWALS – RECORD CARD

MARK RECORD CARD  
AS SHOWN ABOVE

GIVE OFFICAL MEMBERSHIP  
CARD TO MEMBER

**Don't forget to sign the member's card!**

## LIFE MEMBERSHIP

### There are three types of Life Memberships in the Department of Ohio

1. Ohio Life Members
2. Paid Up For Life (PUFL) Members
3. Honorary Life Members

#### A. Ohio Life Members

Prior to 1995 the Department of Ohio administered its own Life Membership program. Members who joined would have their dues paid for the rest of their life to the Post they belonged to when they joined or to another Post in Ohio should they transfer or if their original Post ceased to operate. One important caveat to the program is that the Ohio Life membership is not transferable to any Post outside the Department of Ohio. The Ohio Life Membership program was closed to new members by the Department Executive Committee in 1995. Members who joined prior to the closure remain Ohio Life members as long as they are members of a Post in Ohio and regardless of where they currently reside. Ohio Life Members are identified on your Post Roster with the designation ML.

#### B. Paid Up For Life Member (PUFL)

***\*This is a National Headquarters program and applications should no longer be sent to Department Headquarters.***

A member has the option of purchasing a lifetime membership in The American Legion. Applications are available online at [www.legion.org](http://www.legion.org). Members can purchase a PUFL membership in a lump sum or can make 12 equal monthly payments.

When the National Executive Committee met last October, the Internal Affairs and Finance Commissions approved a new marketing plan for the Paid-Up-For-Life program. In recent years, The American Legion's way of processing membership has been enhanced through the addition of on-line renewals and new member sign-up. A simpler way to purchase Paid-Up-For-Life memberships from National Headquarters was discussed and approved by the National Executive Committee.

Beginning January 1, 2014, the Paid-Up-For-Life program will expand into direct marketing and online venues with a revised price structure and promotional incentives. At [www.legion.org](http://www.legion.org), members can calculate the cost of a Paid-Up-For-Life membership.



Members can pay in full or by credit card with 12 monthly payments. The member will not be mailed a Paid-Up-For-Life card until paid in full. While the member is current on the 12 month payment plan, he or she is considered a member in good standing. As an incentive, the Legion will offer a discount for the purchase of a Paid-Up-For-Life membership if paid in full at time of purchase, or a merchandise premium.

After a member signs up for the Paid-Up-For-Life program, the department and post will be notified immediately, either electronically or by mail. If some action pending at the post level deems the member ineligible for a Paid-Up-For-Life membership, the post will be required to notify the department in writing with sufficient reason as soon as possible after notification to veto the application and the department will in turn send to National. This action must be completed within 30 days from date of notification.

**Question:** *What is a Paid Up For Life Membership?*

**Answer:** Paid Up For Life membership is a lifelong membership plan of The American Legion. It ensures you receive all the benefits of Legion membership for life. Lifetime membership is paid either in one payment giving you an immediate savings offer – or charged to your credit card in 12 equal monthly payments. Once you fulfill your membership dues, you'll never pay another dime in American Legion membership dues.

**Question:** *How is my cost calculated?*

**Answer:** Starting on Jan. 1, 2014, The American Legion rolled out a new, simplified procedure and cost calculation formula.

Previous PUFL forms (printed in 2009) are still accepted if submitted; however most will find the new cost structure and incentives to be a better value.

Age is the primary component used in the new pricing structure. In most cases, post dues are NOT a factor in the calculation.

The cost is specifically calculated for you. Go to [www.legion.org/join/PUFL](http://www.legion.org/join/PUFL) to get your personalized Paid Up For Life offer.

**Question:** *What if my post's dues increase?*

**Answer:** Being a Paid Up For Life member will protect you from any future dues increases at the post, department or national levels. That alone can save hundreds of dollars over the lifetime of your membership.

**Question:** *What about my subscription to The American Legion Magazine and other member benefits?*

**Answer:** As a Paid Up For Life member, you'll have a life-time subscription, plus, you'll receive all active benefits of American Legion membership for life. And once your lifetime membership dues are fulfilled, you'll receive a permanent plastic card identifying you as a lifetime member. You'll also receive an annual American Legion membership card each year.

**Question:** *Am I eligible?*

**Answer:** Anyone who is currently an American Legion member or who is eligible for membership may become a Paid Up For Life member.

**Question:** *Why does Paid Up For Life seem to cost more than other organizations' "life" memberships?*

**Answer:** National Headquarters maintains a special Paid Up For Life Membership trust. Money from this trust can only be used to pay annual dues to your post, department and national headquarters. Each year the trust pays annual dues amounts to your post, department and national organization.

Though we can't speak with authority on how other organizations set up their "life" memberships, they may not pay annual dues to the local, state and national organizations, resulting in a different cost structure.

**Question:** *What if I want to transfer to another post?*

**Answer:** You may transfer your Paid Up For Life membership to another participating post.

**Question:** *How do I become a Paid Up For Life member?*

**Answer:** It's easy. Just go to [www.legion.org/join/PUFL](http://www.legion.org/join/PUFL) and enter your name and member ID. You can either choose to pay by credit card or print out the personalized form and mail it in with your check.

**Question:** *What if I still have questions?*

**Answer:** Call our customer service phone number: **(800) 433-3318** (Monday – Friday).

National headquarters will issue the permanent (plastic) PUFL membership card only after the total PUFL fee is paid in full. If annual cards are issued before the fee is paid-in-full, the member will receive an annual card (from national) with the notation of "Time Pay."

The Post may purchase a PUFL membership for a member as a gift or award from their Post. This is similar to an Honorary Life membership, except by purchasing a PUFL membership; the Post has removed the responsibility of ensuring payment of annual dues for the member.

## **HONORARY LIFE MEMBERS**

Posts have recognized outstanding members for exceptional service or accomplishments by awarding what is known as Honorary Life Membership.

**For Honorary Life Memberships, the Post assumes the responsibility for seeing the yearly dues are paid annually for the remainder of the member's life. The member will no longer receive a dues renewal notice.**

Check your Post roster for those members who have been awarded Honorary Life Member Status. Honorary Life Members are marked on your Post Roster with the code "H" in the Type column.

Process Honorary Life members as you would a traditional renewal.

If your Post awards an Honorary Life membership, it must be reported to the Department and National on a Member Data Form.

Complete the following sections of the Member Data Form:

- a. Member ID number
- b. Department
- c. Post Number
- d. Name (First, MI, Last, Suffix]
- e. Put an X in the box for Honorary Life Member
- f. Signature of Post Adjutant (required)

*(This form also available on the Department website in pdf writable which can be emailed)*  
**LEGION SUPPLY ORDER FORM**

Listed below are pamphlets and forms that will greatly assist your post in retaining and building membership. Mark the quantity needed before each item and return the form to Headquarters. We need a street address to ship UPS. All items are free of charge.

Very truly yours,

Roger Hight

Department Adjutant

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QUANTITY

_____ EA	Benefit of \$1,000.00 (AGIA) Insurance Application (#16229, 2006)
_____ EA	Member Data Forms (#30-001 2008)
_____ PADS	Membership Application Pads (#30-009)
_____ EA	Ohio Legion Activities Pamphlets - Serving: The Veteran, Community. (#4-2001)
_____ EA	Recruiter Cards
_____ EA	Renewal Time Notices (#30-006)
_____ EA	2 <sup>nd</sup> Dues Notice (#30-007)
_____ EA	3 <sup>rd</sup> Dues Notice (#30-008)
_____ EA	Wallet Size Benefit Cards
_____ EA	Why You Should Belong to the American Legion pamphlets (#30-185 5/09)
_____ EA	Your American Legion and SAL Benefits pamphlets (#90-001 7/09)

**PLEASE PRINT LEGIBLY**

POST # \_\_\_\_\_

Supplies Ordered By: \_\_\_\_\_

STREET ADDRESS \_\_\_\_\_

CITY and ZIP \_\_\_\_\_