HOW TO USE THE POST ADMINISTRATIVE MANUAL

This is the 25th edition of the Post Administrative Manual.

All forms can be located on the Department Website at
www.txlegion.org/forms

The use of the manual provides for two-way communication regarding administrative matters pertaining to reports and programs.

The manual is divided into 3 sections:
  1) a Monthly section
  2) a Membership Section
  3) a General Information Section

The table of contents can assist with quickly locating information pertaining to reports, forms and deadlines. Additional copies of this manual can be obtained on the Department Website or upon request to the Department Headquarters.

This version supersedes all previous versions and the dates published in this document supersede any and all dates published any form.

William West
State Adjutant
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SECTION I

Month to Month
JULY

POST CERTIFICATION

All Posts are reminded that the deadline for submission of Post Certification is July 31st. Posts that certify after this deadline will not qualify for any membership award. The Post Certification Form can be found on the Department Website.

SEPTEMBER

The 50% Target Date is September 9, 2020

RONALD P. McCLUSKEY SCHOLARSHIP

The Ronald P. McCluskey Veterans Scholarship Program award is a $500 scholarship to a deserving American Legion member. One scholarship is awarded each year at the Fall D.E.C. This is a merit-based scholarship.

RULES FOR APPLICATION

1. In addition to this form Applicants must submit the following:
   A. An up to date copy of his/her transcript records (if applicable)
   B. Evidence of acceptance or enrollment in school of choice
   C. A typed letter pertaining to why you feel you should qualify for assistance and information on your school, community, church and leadership activities.
   D. A recent photograph (non-returnable)
   E. A Copy of DD214 or other discharge paperwork

2. Applicants must be a member of The American Legion, Department of Texas. The applicant must be a paid-up member for the year in which applying.

3. All applications are to be sent to The American Legion, Department of Texas; P.O. Box 140527, Austin, TX 78714-0257; and must be received no later than September 1st of the year in which application is being made.

4. A recipient of the fund must maintain a 2.5 grade average for the semester, with a minimum of nine (9) semester hours.

5. A winning applicant may not re-apply.
(Failure to meet any of the above requirements may result in disqualification of eligibility for this scholarship program)

**OCTOBER**

The 55% Target Date is **October 14, 2020**

**NOVEMBER**

The 65% Target Date is **November 11, 2020**

**ORATORICAL CONTEST REMINDER**

All Posts are reminded that the Department Oratorical Contest is fast approaching. Local competition for the Oratorical Contest will begin after **November 1st**.

District and Division contests will be held throughout January. The Department Contest will be held in February.

**NATIONAL EMPLOYER AWARDS**

The Department Deadline for this year’s entry for all employer awards is **November 15th**. Entries received after this date will not be included. The American Legion National Economic Commission Awards recognize individuals across the country who had established outstanding records in the employment and retention of workers with disabilities. There are currently nine awards.

1. EMPLOYER OF THE YEAR AWARD - *(SMALL)*
2. EMPLOYER OF THE YEAR AWARD - *(MEDIUM)*
3. EMPLOYER OF THE YEAR AWARD - *(LARGE)*
4. EMPLOYMENT SERVICE AWARD - *(DVOP)*
5. EMPLOYMENT SERVICE AWARD - *(LVER)*
6. EMPLOYMENT SERVICE AWARD - *(LOCAL OFFICE)*
7. EMPLOYER OF OLDER WORKERS AWARD
8. ENHANCE THE LIVES OF DISABLED PERSONS AWARD
9. HOMELESS VETERAN OUTREACH AWARD
To be considered for the National Award, the Departments deadline for submittals to the National Economic Commission in Washington, DC is **January 15, of the following year**.

All entries must be accompanied by an official nomination form and must not be longer than two pages of narrative. Supporting documents, which may also be submitted with the nomination, must not exceed ten pages.

**DECEMBER**

The 75% Target Date is **December 9, 2020**

**VA VOLUNTEER AWARD**

The American Legion VA Volunteer Award program is designed to recognize those Legionnaires providing exceptional VA Volunteer Service. The Department will present an award to the most outstanding candidate from each Division based upon the information submitted. The entry forms can be found on the Department Website and it must be postmarked by **December 31st**.

**“JIMMY D. LEMLEY MEMORIAL AWARD”**

**(FOR THE OUTSTANDING POST ADJUTANT)**

In 1996 the Department Executive Committee created an award to honor the outstanding Post Adjutant each year, to be named for the late Jimmy D. Lemley, who served as Department Adjutant from 1985-1992. The Department Executive Committee approved the recommendation that the award criteria be judged from narrative nominations submitted by Posts.

If you wish to recommend your Post Adjutant for this award, please submit your nomination to Department Headquarters, it must be postmarked by **December 31st**. Since the individual posts participate in various programs in their local community, the narrative reporting system will be the most beneficial. Please consider some of the following areas for your recommendation:

1. Prompt transmittal of membership on a bi-weekly basis.
2. Concise Post meeting minutes.
3. Prompt reporting of Post activities to the membership.
4. Maintaining good communications between officers and Committee Chairmen.
5. Trains other members of the Post to fill in should he/she not be able to
fulfill their responsibilities.
6. Initiating membership programs to maintain the Post membership. (Transfer forms, supply forms, records)
7. Ensuring that the Post Administration is maintained properly. (i.e., taxes, insurance, incorporated, bonds on officers, current paid bills)
8. Promoting community activities with other civic groups.
9. Coordination of Legion programs during the year.

NOTE: If the post has a paid full-time or part-time Adjutant, this must be stated in your report. If only expenses are given, this does not need to be added. All Post Adjutants are eligible for this award. Please forward your recommendation to the Department Headquarters, it must be postmarked by December 31st.

A Copy of your Consolidated Post Report, Post Data Form and Certification of Post Officers must be on file in order to be eligible for this award.

MEMBERSHIP AWARDS

There are several National and Department Membership Awards this month, please review Section II for more information.

JANUARY

The 80% Target Date is January 13, 2021

AMERICAN LEGION BASEBALL REMINDER

American Legion Baseball registration begins on January 1st; you must register online at www.legion.org/baseball.

JUNIOR SHOOTING CONTEST REMINDER

All Posts are reminded that the Junior Shooting Contest is fast approaching. Target sets must be ordered by January 31st. All preliminary round target sets must be returned to the National Headquarters by February 28th.

MEMBERSHIP AWARDS

There are several National and Department Membership Awards this month, please review Section II for more information.
EAGLE SCOUT AWARD

All Posts are reminded that the Eagle Scout of the Year Award deadline is fast approaching. All entries must be received at the Department Headquarters by close of business on March 1st. All Post that are planning on participating in this program can download the Eagle Scout of the Year entry form directly from the National Website.

FEBRUARY

The 85% Target Date is February 10, 2021

MARCH

The 90% Target Date is March 10, 2021

EAGLE SCOUT AWARD

All Posts are reminded that the Eagle Scout of the Year Award deadline is March 1st, all entries must be received at the Department Headquarters by close of business.

CUT-OFF DATE FOR PRE-PRINTED CARDS

All renewal and new membership cards, member date forms for deaths, change of address, change of name or transfer must be at the Department Headquarters by March 15th in order to be processed and sent to National Headquarters by the April 1st deadline for getting pre-printed cards for the next membership year.

POST CERTIFICATION FORM

Post Certification Forms are located on the form section of the Department Website. All Post Adjutants should complete the form and return it to the Department Headquarters within 15 days of the Post Elections. Posts will not receive membership cards, administrative manual or other brochures until they are received.

APRIL

The 95% Target Date is April 14, 2021
BOYS STATE

April 15th is the deadline for registration of Primary Delegates to Boys State. Slots for additional Delegates cannot be guaranteed after this time. Alternate Delegate registration is open until April 30th.

MAY

The 100% Target Date is May 12, 2021

JUNE

BOY SCOUT REPORT

All Posts that sponsor Scout Troops are encouraged to complete the Boys Scout End of Year report and return it to the Department Headquarters by June 1st.

CONSOLIDATED POST REPORTS

The Consolidated Post Report Form must be submitted by June 1st for Posts to be eligible for Membership Awards.

The Consolidated Post Report is one of the most essential reports that we completed. Once completed the reports are sent to National to be complied with all Posts and is given to Congress to show what The American Legion does and to show why we need to be able to continue to operate as a non-profit organization. Posts should share this with the local community leaders to help show what you contribute to their individual community and a yearly basis.

DEPARTMENT AWARD DEADLINE

All Posts are reminded that there are several award entries and forms due to Department Headquarters by the June 1st deadline. Several of the awards are judged and winners selected at the Department Convention.

These entries and reports must be in the Department Headquarters no later than June 1st in order to be considered. The forms and rules for all awards can be found in the Administration Manual or Department Website.

- Gusman Cup (Consolidated Post Report)
DEPARTMENT COLOR GUARD CONTEST

The Department Color Guard Contest will be held at the Department Convention. Entry forms must be submitted to the Department Headquarters 30 days prior to the Department Convention.

The Department Color Guard Contest Winning Team will be required to attend the National Convention and represent the Department in the National Color Guard Contest and lead the Department Delegation during the National Convention Parade. The winning team is responsible for all expenses related to the National Convention.

CHAPLAIN OF THE YEAR AWARD

Every Post is encouraged to complete the Chaplain of the Year entry form and submit it to the Department Headquarters by the June 1st deadline. Entry forms can be found on the Department Website on the forms page.

HISTORY AND YEARBOOK CONTEST

All Post and District Historians are encouraged to participate in the Department and National History and Yearbook contests. Entries are due no later than 10:00 AM on Friday, in the History Room at the Department Convention site. DO NOT SEND TO THE DEPARTMENT HEADQUARTERS. POST HISTORIAN ARE RESPONSIBLE TO GET IT TO THE DEPARTMENT CONVENTION SITE

Review the Post Officers Guide, section 4 for the national standards by which the books will be judged. First place winners at the Department level will be submitted to National Headquarters for judging in the National Contest

LAW & ORDER AWARDS

Every year, Posts around the state select local Police, Fire and EMT Officials as award recipients. The Department also recognizes these individuals through the Department Law & Order Awards. Deadline for nomination forms from the Districts is June 1st. All entries must be submitted through the District Convention for review and action, prior to being submitted to Department Headquarters, each District may only submit one entry per category.

Entry forms can be found on the forms section of Department website.
Department award recipients are selected at the Department Convention by the National Security Commission.

**MEDIA AWARDS**

Posts are encouraged to submit local media outlets for consideration in the Department Media Awards Program. The program is designed to recognize those local media outlets (Television, Radio and Newspaper) that support The American Legion by providing positive news coverage of the various activities of our local American Legion Posts.

The entries should cover activities and reporting for the period June 1st to May 31st. Plaques are presented in four categories: Daily Newspaper, Weekly Newspaper, Television and Radio.

Entry information, forms and deadlines can be found on the Department website. Awards will be presented to the award winners at the next Mid-Winter.

**MEMBERSHIP DEADLINE**

**June 1st** will be the deadline date for all membership awards. All membership must be into the Department Headquarters by this date in order to count for awards.

**30 days before the Department Convention** will be the final close out date for the membership year. All membership must be into the Department Headquarters by this date in order to count towards voting strength.

**MEMBERSHIP AWARDS**

There are several National and Department Membership Awards this month, please review Section II for more information.
SECTION II

MEMBERSHIP
INTRODUCTION
Processing your Posts membership can be both time consuming and complex. This manual has been developed to explain the proper procedures for processing membership. Please read the manual in its entirety before you begin to process membership. Even experienced officers can benefit from reviewing procedures.

Additional information can be found in the Post Adjutant’s Manual. If you have any questions that are not covered regarding the processing of membership then contact the Department Headquarters, Membership Secretary at (512) 472-4138 or at membership@txlegion.org.

MEMBERSHIP ELIGIBILITY
Post Adjutants are responsible for checking and verifying membership eligibility on all applications. If there is doubt about eligibility, Adjutants should ask the applicant for a copy of his/her Honorable Discharge. If still in doubt after reviewing the discharge papers, write Department for a ruling. A membership card should never be issued until eligibility is established and the member is accepted by vote of the Post.

As provided in the National Constitution and By-Laws, Article IV,
Section 1. An individual is eligible for membership in THE AMERICAN LEGION only if the individual –
1) Has served in the Armed Force of
   A) The United States at any time during –
      i. The period of April 6, 1917, through November 11, 1918: or
      ii. Any time after December 7, 1941; or
   B) A government associated with the United States Government during a period or time referred to in subsection (A) of this section and was a citizen of the United States when the individual entered that service; and
2) Was honorably discharged or separated from that service or continues to serve honorably during or after that period or time; provided, however, that such service shall have been terminated by honorable discharge or honorable separation, or continued honorably during or after any said periods; provided, further, that no person shall be entitled to membership who, being in such service during any of said periods, refused on conscientious, political or other grounds to subject themselves to military discipline or unqualified service.

Section 2. There shall be no form or class of membership except an active membership, and dues shall be paid annually or for life.

Section 3. No person may be a member at any one time of more than one post.

Section 4. No person, who has been expelled by a post, shall be admitted to membership in another post without the consent of the expelling post, except that where such consent has been asked for and denied by such post, he may then appeal to the executive committee of the department of the expelling post for permission to be admitted to membership in another post, and shall be ineligible for membership until such permission is granted.
**RESERVE/NATIONAL GUARD ELIGIBILITY**

The National Guard and Reserves are required to meet the same eligibility requirements as the full time federal active veterans.

To be eligible, the National Guardsman/Reservist **must have served at least one day on federal active duty during any of the eligibility periods** as set forth in Article IV, Section 1 of The American Legion National Constitution. The person must either have an honorable discharge or currently be serving either in the Guard/Reserve on federal active duty.

The key to determining if a Guardsman/Reservist has been on or is currently serving on federal active duty is the “AUTHORITY LINE” on the activation orders of the Guardsman/Reservist. In both cases “Title 10, Subsection 672 or 12301” are orders from the Secretary of Defense and are federal orders.

The authority the Governor uses to activate the National Guard as an individual or unit is “Title 32” orders, i.e. weekend drills and annual training. **These are NOT federal orders.** The Reserves have similar reserve orders which are “Title 10, Subsection 270” this authority code gives the reserve component the authority to activate the reserves for weekend drill and annual training.

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**NOTE:** A DD214 **will be issued for the time on federal active duty or a DA1059 for a completion of a school will be issued with a character type of discharge. All Reserve components send their service members to basic training using Title 10, Subsection 672 or 12301.**

The following examples are provided to help answer most membership eligibility questions regarding National Guard and Reserve (Reserve component) veteran.

**National Guard Example** - If a traditional National Guard soldier/airman (i.e., one who never was stationed with an active duty unit) performed basic training during one of our eligibility dates, that soldier/airman would qualify for membership because that time on active duty was federal, Title 10 duty.

If the above soldier/airman performed basic training outside the dates, that soldier/airman may still qualify for membership if they were ever activated for federal service. Two week Annual Training (AT) does not normally qualify one for membership, but if AT was under federal control, going out of country for two weeks to drill, then those orders were federal orders. If that time was during the dates, they qualify for membership in TAL. This gets to the DD214 issue. The soldier/airman described above would not receive a DD214, but they do receive a copy of their orders and that copy would serve as basis to qualify a potential member. **(see chart above)**
Reserves Example - If a traditional Reservist soldier (i.e., one who never was stationed with an active duty unit) performed basic training during one of our eligibility dates, that soldier/sailor/airman/Marine would qualify for membership because that time on active duty was federal, Title 10 duty.

This gets to the DD214 issue or proof of eligibility. The soldier/sailor/airman/Marine described above would not receive a DD214, but they would receive a copy of their orders and that copy would serve as basis to qualify a potential member. All reservists are under federal control so all their orders are Title 10, Subsection 270. Those orders do not qualify a reservist for membership, but if they receive Title 10, Subsection 672 orders, then that would be active duty service that qualifies them for membership in TAL.

As with all membership eligibility, if further clarification is needed, contact your department headquarters. Reserve component service members are an excellent source of young talent and a very large and growing pool of eligible, potential members.

Direct Membership Solicitation (DMS)
The DMS program is a form of direct marketing used to solicit membership into The American Legion. Mailing lists are rented from commercial list brokers and compared to our membership files to remove the names of members from the rented lists.

If the contacted prospect wishes to join, he or she completes the application form, certifying dates of service in the U.S. armed forces, character of discharge, branch of service and birth date. Then the applicant submits the form with payment. National headquarters sends a membership card signed electronically with the signature of the National Adjutant, a welcome letter and other information. These new members are placed into the Department Headquarters Post of their state in accordance with the current policies of the National Executive Committee.

Lists of the DMS or headquarters post member in your area are available through your post MyLegion.org portal. Utilizing these lists is an excellent way to increase post membership, boosting American Legion engagement in your community and giving veterans a louder voice in Congress.

For the DMS program to be truly effective, it is imperative these new members are personally contacted and invited to transfer into your local Post. Ultimately, it is the responsibility of every post receiving a transfer to verify the member’s eligibility, using a DD214 or other official proof of honorable service with the U.S. Armed Forces.

Direct Renewal Notices
Every year, National Headquarters mails to almost all Legionnaires one or more notice that their annual dues for the coming year are payable. This is made possible by printing on every renewal notice the amount of each Post’s dues and the address to which dues are to be mailed.
Every year in early spring National sends to the Department a Post Data Form for every Post. The Post Data Form is sent to the Posts to verify and update any changes to their Post information. Posts need to verify the address and dues amount. Please make sure the information provided has no errors.

A mistake in either the Post address or dues amount will cause endless trouble. Any time, the annual dues or your Post remittances address changes, contact the department headquarters immediately.

RENEWAL SCHEDULE
During each membership year, National Headquarters sends renewal notices in July, October, January, March and May.

Each year, the renewal schedule for transmitting dues to arrive at National Headquarters by the established dates is printed in the Post Adjutant Manual. This schedule will be followed to remove the names of paid members prior to a specific mailing. Using the renewal schedule, National Headquarters extracts unpaid members records, then prints and mails the renewal notice. Post Adjutants should review the renewal schedule each year to get the correct dates.

Cutoff Dates are the dates they have to be at national for processing so the member can be removed from the next renewal notice.

NOTE: This is the date the renewals notice was printed at National, the individual’s dues must have been processed at National prior to this date to be removed from the mailing.

HEADQUARTERS POST 345 MEMBERS
The Department Headquarters “holding post”, Post 345, is comprised primarily of members acquired through the DMS Program. Your Post may receive a “Request to Transfer to a Local Post” from Department.
National sends the forms to all Post 345 members with each renewal notice. Completed forms are sent to Department by either the Member or National Headquarters and we in turn send them to the local Post nearest the member’s address.

Contact the member to see if he/she wishes to transfer into your local Post, if the member agrees, complete a Member Data Form to transfer the member to your Post. You can use the “Request to Transfer to a Local Post” in place of getting the member to sign the Member Data Form for transfer, provide he/she signed the “Request to Transfer to a Local Post” form.

The local Post is responsible for contacting the member, verifying membership eligibility and processing the transfer.

![REQUEST TO TRANSFER TO LOCAL POST](image)

**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 of the calendar year printed on the card. After December 31st the member is considered delinquent. Posts begin collecting dues in July for the following calendar year.

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

**BEFORE YOU BEGIN**

1. The membership card and roster are pre-printed at National Headquarters with your previous year’s members received at National Headquarters before April 1st. Membership received after April 1st may not be reflected on the roster. Continuous years of membership are increased by one year at this time, if the dues for the current year are paid at National, if not the member is return to 1 year.

2. When you receive your Membership Roster for the new membership year, PLEASE CHECK IT FOR ANY ERRORS. You will need to correct errors as you process membership. An
explanation of the Membership Roster appears later in this manual and can also be found in the Post Adjutants Manual. To make corrections to a member’s record, see “corrections to Member’s Record” in this manual.

3. Check your pre-printed cards for errors. You will need to correct errors as you process membership. To make corrections to a member’s record – see “Corrections to Member’s Record” in this manual.

4. Compare your pre-printed cards with the membership roster. Compare the sequence numbers on the membership card to those on your membership roster. Follow procedures below for any discrepancies.

5. **Missing Cards** – If cards are missing, follow procedures outlined in this manual for “Renewals for which you do not have a pre-printed card”.

6. **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 the Department Headquarters with a note explaining why the card is being returned. Keep the card separate from those for which you are transmitting dues. Do not include the card in the count on the Membership Transmittal Form.

7. **Duplicate Cards** – If you receive more than one pre-printed card for the same member, process only one of the cards (the most accurate one) as usual. Return the duplicate cards to the Department Headquarters with a note explaining why the card is being returned. Keep the card separate from those for which you are transmitting dues. Do not include the card in the count on the Membership Transmittal Form.

8. Check your membership supplies, if you need anything submit a Supply Request Form to the Department Headquarters. You should have the following supplies on hand:
   a. Member Data Forms
   b. Blank Membership cards (25 come with your roster, extra can be ordered from Dept)
   c. PUFL Applications
   d. Membership Transmittal Forms
   e. Membership Applications
   f. Recruiting brochures

9. Check roster for Honorary Life Members that are paid by the Post each year.

**MEMBERSHIP RECORD CARDS**
Each year membership cards are pre-printed at National Headquarters with the names and address of your previous year’s members received at National Headquarters before April 1st each year.
The card has three parts; the extreme right is the “Official Membership Card” to be given to the member after dues have been paid. The National and Department portions of the card are known as the “Record Card”, the Record Card is transmitted to Department.

- Do **NOT** separate the National and Department Portions of the Record Card.
- Do **NOT** staple, tape or whiteout anything to the Record Card.
- Use **only** a #2 pencil to make corrections.
- To make corrections to a member’s record – see “Corrections to Member’s Record in this manual.
- Use **only** membership cards for the year for which you are transmitting dues.
- **DO NOT ALTER THE SCAN LINE ON THE NATIONAL OR DEPARTMENT CARD.**

**Membership Record Card**

**Guide to the pre-printed card information**

**A/B/C/D/E/F** – These characters that appear here make up the SCAN LINE. **DO NOT CHANGE ANY OF THE INFORMATION ON THIS LINE. DO NOT MARK IN THIS AREA FOR ANY REASON**

**A** – This is the permanent 9-digit member ID Number; it will stay with the member as long as the member continues to pay dues annually or for life.

**B** – This number represents the membership year.

**C** – These positions identify the Department, Post (and country when applicable).

**D** – These numbers serve as a counter – for example, if your Post has 195 pre-printed cards for the members last year and you get an extra 25 blank cards (use for new members), the first card will have a 6-digit sequence number of 000001 and the last card will have 000220. These numbers should match up with your Membership Roster.

**E** – This variable number has importance only to National’s scanning equipment.

**F** – All Legion cards have an “L” and the SAL cards carry an “S”.

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G – Only the first war era and one branch of service in which a member served is indicated. Update if blank on the pre-printed card.

H – Current phone number, date of birth and member’s email address. Update if blank on the pre-printed card.

I – Update as appropriate

J – City in which the Post is located.

**MEMBERSHIP ROSTER**
The membership roster will list in exact alphabetical order all your previous year’s members whose cards were received at National before April 1st. Columns on the Membership Roster are explained below.

**To make corrections to a member’s record** – see “Corrections to Member’s Record” in this manual.

- **DATE PAID** – Record the date member pays dues to Post.
- **DATE TRANSMITTED** – Record the date Post transmits dues to Department.
- **LAST PAID YEAR** – Indicates last year member paid dues (as of April 1st)
- **MEMBERSHIP ID NUMBER**
- **CONT. YEARS** – Number of continuous year’s membership (as of April 1st)
- **NAME** – Members name as it appears in membership records
- **ADDRESS/CITY/STATE/ZIP** – Members address as it appears in membership records
- **CER FLAG** – (Certificate Flag) a number code will indicate a member has had 60, 60, 70, 75 or 80-year continuous membership certificate printed. Only the most recent certificate code will be reflected.
- **EX FLAG** – (Exclusion Flag) A “C” code means the member will not receive a dues renewal notice. If a “D” code appears, the will not receive a renewal notice or The American Legion Magazine. Call Department Headquarters for any corrections.
- **ERA** – Identifies the war era on file with National for the member, showing the first war era the member served. Code descriptions are located at the end of the roster.
- **TY** – The “Type” code identifies one of three types of life membership:
  - “H” indicates Honorary Life Membership – **the Post is responsible for payment of the member’s annual dues for life.**
  - “P” indicates Paid Up For Life Member
  - “*” (asterisk) indicates Honorary PUFL member
• UN – A “U” identifies those individuals, reported by the U. S. Postal Service as having an address that is not correct. The mail is undeliverable. Any member with a “U” code on their record will not receive any mail from National or the Department. Post are asked to verify address and must submit a Member Data Form to correct address.

• SEQUENCE NO. – This 6 digit number, which is also printed on the membership card, can help the Post find the card or members on the roster.

**FILING YOUR MEMBERSHIP REGISTER FOR HISTORIC REFERENCE**

Keep all previous membership registers is a good practice. They are your historical record of past membership and your Post’s history. Past membership registers should be stored in a loose-leaf binder.
## Membership Roster

<table>
<thead>
<tr>
<th>Date Paid / Date Transmitted Columns</th>
<th>Last Year Paid</th>
<th>Continuous membership years</th>
<th>Membership ID</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Date roster was prepared</strong></td>
<td><strong>Date roster was prepared</strong></td>
<td><strong>Date roster was prepared</strong></td>
<td><strong>Date roster was prepared</strong></td>
</tr>
</tbody>
</table>

### Membership ID

- **06 900000001 59 PUBLIC, JOHN A**
- **06 900000002 9 PUBLIC, JOHN B**
- **06 900000003 14 PUBLIC, JOHN C**
- **06 900000004 57 PUBLIC, JOHN D**
- **06 900000005 0 PUBLIC, JOHN E**
- **06 900000006 13 PUBLIC, JOHN F**
- **06 900000007 38 PUBLIC, JOHN G**
- **06 900000008 16 PUBLIC, JOHN H**
- **06 900000009 55 PUBLIC, JOHN I SR**
- **06 900000010 26 PUBLIC, JOHN J**
- **06 900000011 40 PUBLIC, JOHN K**
- **05 900000012 0 PUBLIC, JOHN L**
- **05 900000013 20 PUBLIC, JOHN M**
- **05 900000014 29 PUBLIC, JOHN N JR**
- **05 900000015 28 PUBLIC, JOHN O**
- **05 900000016 56 PUBLIC, JOHN P**
- **05 900000017 50 PUBLIC, JOHN Q**
- **05 900000018 0 PUBLIC, JOHN R**
- **05 900000019 15 PUBLIC, JOHN S**
- **05 900000020 34 PUBLIC, JOHN T**
- **05 900000021 54 PUBLIC, JOHN U**
- **05 900000022 21 PUBLIC, JOHN V**
- **05 900000023 48 PUBLIC, JOHN W**
- **05 900000024 29 PUBLIC, JOHN X**
- **05 900000025 26 PUBLIC, JOHN Y**
- **05 900000026 14 PUBLIC, JOHN Z**

### ERA Column – War Era

- **1 – WWI**
- **2 – WWII**
- **4 – Korea**
- **8 – Vietnam**
- **G – Lebanon/Grenada**
- **H – Panama**
- **S – Persian Gulf**
- **T – WWII Merchant Marines**

### TY Column

- **“H” – Honorary Life (paid by post)**
- **“P” – Paid Up For Life**
- **“*” – Honorary PUFL**

### UN Column – Undeliverable

- **“U” Code – mail is undeliverable, check member’s address**

### EX Flag Column

- **“C” Code – Member will not receive dues renewal notice**
- **“D” Code – Member will not receive notice or magazine**

### Sequence Number

- Matches sequence number on record card
PROCESSING RENEWALS
Renewals will be processed in one of two ways:

A. Renewals for which you have a preprinted card, or
B. Renewals for which you do NOT have a preprinted card

A. Renewals for which you have a preprinted card:
1. Have member review information on membership record card to insure it’s accurate.
2. Fill in “Date Paid” on center card.
3. Initial “Post Adj Initials” on the center card.
4. Place an “X” in the “Renewal” box on the center card.
5. Sign the member’s portion of the card as “Authorized Post Officer.”
6. Do NOT separate the National and Department portions of the record card.
7. Find the member’s name on the Membership Roster and enter the date paid in the appropriate column.
8. To make corrections to a member’s record, see the section titled “Corrections to Member’s Record.”
9. Transmit the card following procedure outlined in this manual.

B. Renewals for which you do NOT have a preprinted card:
1. Take the next available blank card from those supplied. The serial number on the membership record card will be the same as the 6 digit sequence number printed on the membership roster.
2. Type or print legibly on the left and center sections of the membership record card the following information exactly the way it was previously reported.
3. Put an “X” in the “Renewal” box at the top of the center card.
4. Fill in “Date Paid” on the center card.
5. Initial “Post Adj Initials” on the center card.
6. Type or Print the member’s ID number on the member’s card.
7. Type or print the member’s name on the first line of the member’s card.
8. Enter the continuous years of membership on the member’s card in the star.
9. Sign the member’s card as “Authorized Post Officer.”
10. Separate the member’s card from the Record Card. Give or mail the member’s card to the member promptly.
11. Do NOT separate the National and Department portions of the record card.
12. Find the sequence number of the Membership Record Card on the Membership Roster and enter the member’s information and the date paid in the appropriate column.
13. Transmit the card following procedure outlined in this manual.

NEW MEMBERS
Note: Always ask a prospective member if he/she currently belongs or has recently been a member. If the answer is yes, obtain the member’s Membership ID Number from the member or by contacting the Department Headquarters. If the member has a Membership ID Number established, it should be used to prevent a duplicate record being created;

- If the member has a current membership card, follow the procedures for a transfer as outlined in this manual.
• **If the membership is not current (expired), process as a new member in the procedures outlined below using the member’s established Membership ID Number.**

1. Take the next available blank card from those supplied. The serial number on the membership record card will be the same as the 6 digit sequence number printed on the membership roster. This will be the member’s Temporary Membership Number until the Permanent Membership Number is established by National.
2. Type or print legibly on the left and center sections of the membership record card the following information.
   a. Membership ID Number or the 6 digit sequence number if member does not have an established ID Number.
   b. First name, middle initial, last name of member
   c. Mailing address
   d. City, State & Zip code
   e. Years of continuous membership – (one year for a new member)
   f. War era (first war era served)
3. Put an “X” in the “New” box at the top of the center card.
4. Fill in “Date Paid” on the center card.
5. Initial “Post Adj Initials” on the center card.
6. Type or Print the member’s ID number or sequence number on the member’s card.
7. Type or print the member’s name on the first line of the member’s card.
8. Enter the continuous years of membership on the member’s card (1 for a new member) in the star.
9. Sign the member’s card as “Authorized Post Officer.”
10. Separate the member’s card from the Record Card. Give or mail the member’s card to the member promptly.
11. Do NOT separate the National and Department portions of the record card.
12. Find the sequence number of the Membership Record Card on the Membership Roster and enter the member’s information and the date paid in the appropriate column.
13. Transmit the card following procedure outlined in this manual.
   • **Keep Membership Application on file at the Post – DO NOT send to Department.**
   • **Do NOT send in a Member Data Form for new members.**

**ONLINE RENEWALS**

Beginning in July 1, 2011 members of The American Legion have had the option to renew their membership and pay their dues online for the current membership year at www.legion.org/renew.

**A. Procedures for Members**

1. Beginning with the first renewal notice, members will see the online renewal option and the web address, www.legion.org/renew, to process their renewal payment.
2. To begin the online renewal process, members will be asked to enter their membership ID # and last name.
3. 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.

4. 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 the Electronic Fulfillment Form.

5. 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.

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

Renewal Notice – Online Renewal Information

Membership Renewal Confirmation
THANKS! YOUR 2012 MEMBERSHIP DUES ARE PAID!

Print this form so that you have verification of online payment of your 2012 membership renewal. Your department and post will be notified that your dues have been paid. Your post has your 2012 Official Membership Card and should mail it to you shortly. Or to expedite receipt of your card, you can remove the bottom section of this form and mail or take it to your post to verify your renewal payment and receive your new card. You should also detach your receipt below, by cutting on the dotted line, and carry it with you until you receive your 2012 card from your post.

A message from the National Adjutant:

Thanks for renewing your membership in The American Legion, the world’s largest organization of veterans. I extend my heartfelt gratitude for your service to our great nation.

Whether you choose to get actively involved in The American Legion at the local level, or simply show your support through your membership, there is tremendous value in being an American Legion member. Together, we are accomplishing great things for veterans and their families — and for a better America.

DANIEL S. WHEELER
National Adjutant

Please keep the receipt shown below for your records:

The member noted below has paid dues in the post indicated:

DAVID A KING - ID # 212345678
FL Post 0025 Contact Information:
Adjutant: ROBERT MOORE
Commander: JOHN W PLUNKETT
2012 Post Dues Paid: $50.00
Post Address:
1400 US HWY 27 N
LAKE PLACID FL 33852
Post Phone: 863-465-0975
Post Email: flpost25@embarqmail.com

Mail or tear this bottom portion to your post to expedite receipt of your new Official Membership Card:

ATTENTION: POST ADJUTANT/COMMANDER

The member noted below has paid his/her 2012 membership dues renewal online. The dues will be reimbursed through your Department. Please issue his/her Official Membership Card as soon as possible. Thank you.

ID #212345678 - DAVID A KING has renewed for 2012
B. Procedures for Posts
1. The Post must first verify which member have renewed online. The Post can attain information on which Post members have renewed online by three different methods
   a. 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. (See example on previous page)
   b. Posts using the free MyLegion.org website will 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. A report can be printed by selecting the “Generate PDF” button on the screen. This report is in the same format as the report which will be mailed monthly by the Department.
   c. Department will mail a list bi-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.
2. Once the Post has confirmed the online payment, the official membership card can be issued by the Post to the member.
3. Sign the member’s portion card of the card as “Authorized Post Officer.”
4. Separate the member’s card from the Membership Record Card. Give or mail the member’s card to the member promptly.
5. The Post can then discard the National and Department portion of the card. DO NOT include members who have renewed online in your transmittal to Department.
6. Find the member’s name on the Post Membership Roster and in the “Date Paid” column, indicate the date the member renewed online. In the “Date Transmitted” column write “Online.”
7. Post per capita (dues) will be provided in the form of a credit on the Post’s membership account at the Department Headquarters. Credits can be used for membership only. See section on “Account Balances” in this manual for details.
8. Online renewals will be reflected on the Department Membership Reports every two weeks
PROCESSING TRANSFERS

Transfers will be processed in one of two ways:

A. Transfers for which you are transmitting dues (member needs to pay dues for current membership year)

B. Transfers for which you are **NOT** transmitting dues (member has already paid dues for current membership year)

A. Transfers for which you are transmitting dues:

1. Complete the following sections of the Member Data Form:
   a. Member ID number
   b. Department Alpha Code (TX)
   c. Post #
d. Name (First, MI, Last, Suffix)
  e. Member transferring from: Department & Post
  f. Member transferring To: Department & Post
  g. Signature of Post Adjutant (REQUIRED)
  h. Signature of Member (REQUIRED)
2. Mail in parts 1 – 3 of the Member Date Form to Department Headquarters with Post Transmittal.
3. Retain part 4 for the Post’s records
4. Take the next available blank card from those supplied. The serial number on the membership record card will be the same as the 6-digit sequence number printed on the membership roster.
5. Type or print legibly on the left and center sections of the membership record card the following information.
   a. Membership ID Number
   b. First name, middle initial, last name of member exactly the way it was previously reported
   c. Mailing address
   d. City, State & Zip code
   e. Years of continuous membership
   f. War ear (first war era served)
6. Put an “X” in the “Transfer” box at the top of the center card.
7. Fill in “Date Paid” on the center card.
8. Initial “Post Adj Initials” on the center card.
9. Type or Print the member’s ID number on the member’s card.
10. Type or print the member’s name on the first line of the member’s card.
11. Enter the continuous years of membership on the member’s card in the star.
12. Sign the member’s card as “Authorized Post Officer.”
13. Separate the member’s card from the Record Card. Give or mail the member’s card to the member promptly.
14. Do NOT separate the National and Department portions of the record card.
15. Find the sequence number of the Membership Record Card on the Membership Roster and enter the member’s information and the date paid in the appropriate column.
16. Transmit the card following procedure outlined in this manual.

Transfer for which you are transmitting dues

B. Transfers for which you are NOT transmitting dues:
   1. Complete the following sections of the Member Data Form:
      a. Member ID number
      b. Department Alpha Code (TX)
      c. Post #
      d. Name (First, MI, Last, Suffix)
      e. Member transferring from: Department & Post
      f. Member transferring To: Department & Post
      g. Signature of Post Adjutant (REQUIRED)
h. Signature of Member **(REQUIRED)**
2. Mail in parts 1 – 3 of the Member Date Form to Department Headquarters with Post Transmittal.
3. Retain part 4 for the Post’s records
4. Take the next available blank card from those supplied and prepare a blank membership card for the member and discard the left and center sections of the membership record card. Give the prepared card to the member.
5. Record member information on the Membership Roster
THE AMERICAN LEGION
MEMBER DATA FORM
(Please use ink and print clearly using UPPERCASE letters) Date: 4/2/12

Member ID # (9-digit) 123456789 Dept. TX Post # 0345

Name James Smith

MEMBERSHIP RECORD CHANGE

☐ Deceased ☐ Honorary Life Membership Awarded by Post
☐ Paid-Up-For-Life Member (Purchased - for post use only)

Name Correction

New Address

Line 1 

Line 2 

City State Zip Code

Telephone # - - E-Mail Address:

Date of Birth: - - Cont. Years Mbsp: for 

War Era: (Mark the appropriate box with an "X." If more than one applies, please mark only the earliest War Era served.)

☐ 4/6/17 - 11/11/18 (WWI) ☐ 12/7/41 - 12/31/46 (WWII) ☐ 6/25/50 - 1/31/55 (Korea)

☐ 2/28/61 - 5/7/75 (Vietnam) ☐ 8/24/82 - 7/31/84 (Grenada/Lebanon) ☐ 12/20/89 - 1/31/90 (Panama)

☐ 8/2/90 - Cessation of hostilities as determined by U.S. Govt. (Persian Gulf)

Branch of Service: ☐ Air Force ☐ Army ☐ Coast Guard ☐ Marines ☐ Navy

Member Transferring from: Department (Alpha Code) AZ Former Post # 0102

Member Transferring to: Department (Alpha Code) TX New Post # 0345

Signature - Post Adjunct (Required for Transfers, Deceased, Hon. Life and Cont. Years changes)
Signature - Member (Required for Transfer)

SEE INSTRUCTIONS ON REVERSE SIDE

Form No. 30-001 (2002)
LIFE MEMBERSHIPS
There are three types of Life Memberships
A. Honorary Life Members
B. Paid Up For Life Members
C. Honorary PUFL Members

A. Honorary Life Members
1. Posts have recognized outstanding members for exceptional service or accomplishments by awarding what is known as Honorary Life Membership.
2. For Honorary Life Membership, the Post assumes the responsibility of seeing that the yearly dues are paid annually for the remainder of the member’s life. Check your Post Membership Roster for those members who have been awarded Honorary Life Member status.
3. If your Post awards an Honorary Life Membership, it should be reported to Department and National using a Member Data Form.
4. Complete the following sections of the Member Data Form:
   a. Member ID number
   b. Department Alpha Code (TX)
   c. Post #
   d. Name (First, MI, Last, Suffix)
   e. Put an “X” in the box for Honorary Life Member
   f. Signature of Post Adjutant (REQUIRED)

B. Paid Up For Life Member (PUFL)
Anyone who is currently an American Legion member or who is eligible for membership may become a PUFL member.

Legionnaires can apply for membership online at www.legion.org/pufl. After providing a name and member ID number, the member will receive a price quote, then he/she can pay by credit card, or print out a personalized form and mail it in with a check, money order or credit card information. Those without a member ID number can contact Customer Service at 1-800-433-3318.

Life membership can be paid either in one single or lump sum payment over 12 equal, monthly payments. If member chooses the Time Pay Plan, payment must be made by credit card only. Once a member fulfills the PUFL membership dues, he/she will be protected from any future dues increases at the post, department or national levels.

All PUFL applications must be submitted to National by one of the following methods:

1. Online Application: The member obtains a rate quote and/or submit an electronic application at www.legion.org/pufl. Once the rate quote is received, the member can opt to apply online, causing their record information to appear for confirmation purposes. Once confirmed and the payment information is completed, the member selects the Submit button to complete the application process. NOTE: For those without internet access, the Post or the Department can
perform the process. A link to the PUFL application page has been added to *myLegion* for Posts and Departments.

2. **Printable Application.** The member obtains a rate quote and/or prints an application at www.legion.org/pufl. Once the quote is received, the member can opt to print an application to complete and mail to National Headquarters. The application will be pre-filled with the member’s name, address, birth date, ID number and total cost of PUFL membership. (Any updates can be noted on the application.) The member simply mails the application and payment to National Headquarters at the address on the form. Note: For those without internet access, the application should be printed by the Post or the Department and forwarded to the member for completion. A link to the PUFL application page has been added to *myLegion* for Posts and Departments.

3. **Call a Customer Service Specialist:** Members can speak to a Customer Service Specialists by calling our toll-free number at 800-433-3318. They can answer questions regarding cost, process or a particular member, as well as print and mail a PUFL application or take them over the phone. Note: This should not be considered the primary procedure since all members, Posts, and Departments have the same ability.

C. **Honorary PUFL**

Honorary PUFL Life Members are member who have received a PUFL membership as recognition or award from the Post. This is the same as an Honorary Life Membership, except that the Post is paying the dues one time by purchasing a PUFL membership for the member. Contact National Headquarters using the procedures list in section B.

**CORRECTIONS TO MEMBER’S RECORD**

There are three ways to make corrections to a Member’s record.

1. **MYLEGION.ORG**
2. **Member Data Form**
3. **Membership Record Card**

Changes can be made by anyone of these methods, but MYLEGION.ORG is the *preferred* method for making changes. Changes are made within 24 – 48 hours to the members’ record and to the National membership database. Posts Adjutant can log in and sign up at www.mylegion.org, for more information see the MyLegion.org section in the manual.

A. **MyLegion.org**

All changes which can be done with a Member Data Form can also be performed online by Posts with MyLegion.org access. MyLegion.org is a free website designed to assist posts Post officers with everyday membership duties. For more information on features of MyLegion.org and to learn how to sign up your Post, visit www.mylegion.org or see the section later in this manual.

For Post that already has access to MyLegion.org here is the procedures for making changes.

1. Log into MyLegion.org and search for the member by either name or membership ID number.
2. Click on the “edit button” and the Member Data Form screen will appear.
3. Make any necessary changes to the following areas:
   a. Name
   b. Address
   c. City, State & Zip
   d. Telephone
   e. Email address
   f. War Era
   g. Branch of Service
   h. Continuous membership years
   i. Dates of Service

4. Update deceased member’s records.

5. When all changes are made to member’s records, click the “Submit Change” button.

6. The changes will occur in the National membership database with 24 hours.

MyLegion.org – Correcting Members Record
B. Member Data Form
1. The top section must be completed on all Member Data Forms and must include:
   a. Member ID Number
   b. Department Alpha Code (TX)
   c. Post Number
   d. Name of Member – as it currently appears on the member’s record
2. The following corrections to a member’s record can be made with a Member Data Form:
   a. Name
   b. Address
   c. City, State & Zip
   d. Telephone
   e. Email address
   f. War Era
   g. Branch of Service
   h. Continuous membership years
   i. Dates of Service
   j. Update deceased members record
   k. Transfer members to your Post
   l. Update Honorary Life membership status
   m. Update PUFL membership status
3. All Deceased, Honorary Life, Continuous Years change require the signature of the Post Adjutant.
4. **All Transfers require the signature of the Member and the Post Adjutant.**
5. Record all changes on Post Membership Roster.
6. Mail parts 1-3 to Department.
7. Retain part 4 for the Post’s records.

C. Membership Record Card
The following corrections can be made on the Membership Record Card:
1. Name
   a. Place an “X” in the box “Cont Yrs or Name Change” with a #2 pencil on the left card.
   b. Put a line through the misspelled information and print or type the corrected name below or right of the pre-printed name on the left and center cards.
   c. Record correction on Membership Roster.
   d. Transmit card with following procedures outlined on “Transmitting Post Membership.”
2. Continuous Membership Years
   a. Place an “X” in the box “Cont Yrs or Name Change” with a #2 pencil on the left card.
   b. Strike out the incorrect number on all three cards.
   c. Print or type the correct continuous years on all three cards.
   d. Record correction on Membership Roster.
   e. Transmit card with following procedures outlined on “Transmitting Post Membership.”
3. War Era
   a. Place an “X” in the box “Correct War Era” with a #2 pencil on the left card.
b. Place an “X” in the box of the correct war era on the left and center cards.
c. Record correction on Membership Roster.
d. Transmit card with following procedures outlined on “Transmitting Post Membership.”

4. Deceased
a. Place an “X” in the box “Deceased” with a #2 pencil on the left card.
b. Return the entire card (all three sections) to the Department – keep the card separate from those for which you are transmitting dues. Do NOT include in the count on the Membership Transmittal Form.
c. Make a note on the Membership Roster that the member is deceased and the card has been returned to Department.

5. Duplicate Membership Record
a. If you receive more than one pre-printed card for the same member, process on the cards (the most accurate one) as usual.
b. On the other card, put an “X” in the box “Duplicate” with a #2 pencil on the left card.
c. Return the entire card (all three sections) to the Department – keep the card separate from those for which you are transmitting dues. Do NOT include in the count on the Membership Transmittal Form.
d. Cross the duplicate record off the Membership Roster.

TRANSMITTING MEMBERSHIP TO DEPARTMENT HEADQUARTERS
Membership is transmitted to the Department Headquarters using the Membership Transmittal Form, follow the steps below when transmitting membership.

Membership should be transmitted on a weekly basis, pay special attention to Target Dates and Renewal Cut-off Dates.

1. Membership Record Cards
a. Check all cards to ensure they are filled out properly using the procedures covered earlier in this manual.
b. Make sure you are using the correct year’s membership card.
c. If you are transmitting dues for a previous membership year, use the card from that year and do a separate transmittal and check for each year.
d. Count the cards you are transmitting and make sure the count is accurate.
e. Make sure the member’s portion of the card has been removed and given to the member.
f. Do NOT separate the National and Department portions of the Membership Record Card.
g. Do NOT staple or tape anything to the Membership Record Cards or the Membership Transmittal Form.
h. **DO NOT** include payment(s) for Paid Up For Life (PUFL) in the transmittal amount. Each PUFL Applicant must be submitted separately for each individual and must have separate payment for each application.
2. **Membership Transmittal Form**
   a. Fill in Post Name, Number and District Number.
   b. Enter the Membership Year transmitting cards and dues (i.e. 2012)
   c. Enter Check or Money Order number and amount – **Send $31.00 per card**
   d. Enter Transmittal Number – start with one, this make it easier to track should a problem arise later with the transmittal.
   e. Enter Total Cards This Transmittal – Enter the total count of cards you are submitting dues on.
   f. Enter Total Cards Prior Transmittals – Enter the number of cards previously transmitted.
   g. Enter Total Cards Transmitted to Date – Add the Card This Transmittal line to Cards Prior Transmittal Line to get a total.
   h. Enter Name and contact information of the individual preparing transmittal - in case there is a problem with the transmittal we can contact the individual to get it corrected.
   i. Enter date transmittal is prepared.
   j. Enter Name(s) and Membership ID Number(s) of individuals being transmitted on this transmittal.
   k. Mail to the Department Headquarters in the Membership Envelopes provided by Department.
**Department Transmittal Form**

**TRANSMITTAL OF DEPARTMENT MEMBERSHIP CARDS**

<table>
<thead>
<tr>
<th>Membership Number (9 digits)</th>
<th>Member Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>123456789</td>
<td>Joe Smith</td>
</tr>
<tr>
<td>987654321</td>
<td>Bob Smith</td>
</tr>
<tr>
<td>234567891</td>
<td>Johnny Smith</td>
</tr>
<tr>
<td>345678912</td>
<td>Robert Johns</td>
</tr>
<tr>
<td>456789123</td>
<td>John Doe</td>
</tr>
</tbody>
</table>

**THIS TRANSMITTAL PREPARED BY:**
- **Name:** Joe Smith
- **Date:** 1/1/16
- **Address:** PO Box 1234
- **City / Zip:** Austin, TX. 78714
- **Daytime Phone:** 512-472-4138
- **Email:** Txlegion@txlegion.org

**TRANSMITTAL NO** 2  
**TOTAL CARD THIS TRANSMITTAL** 5  
**TOTAL CARDS PRIOR TRANSMITALS** 7  
**TOTAL CARDS TRANSMITTED TO DATE** 12

---

**DO NOT REQUEST SUPPLIES ON THIS FORM**

**DEPARTMENT USE ONLY – DO NOT WRITE IN THIS SPACE**
- # Cards Received:  
- Post Credit:  
- Post Members to Date:  
- Amount Due:  

---

38
MYLEGION.ORG
The American Legion National Headquarters has designed a secure internet site to assist Post Officers in their day-to-day membership processing duties. All features included with MyLegion are below and are available to the Post at NO CHARGE.

MyLegion.org is a secure site that requires a username and password to access. The site is registered using the Post Adjutant’s information we have on file at National Headquarters. If the username or password is lost or forgotten that information will only be provided to the Post Adjutant. It is the adjutant’s responsibility to provide username and password information to only trusted sources.

Features
• View member information for Post and Squadron data.
• Track members who have renewed online.
• Process membership online – renewals and new members
• Submit Member Data Form changes electronically with the exception of transferring members. All member data changes submitted electronically through the MyLegion site are updated within 24 to 48 hours of submission.
• Generate rosters for current, expired, deceased and undeliverable members. Data is also available in CSV file format allowing users to work with the data in other applications.
• Submit Consolidated Post Report electronically.
• Search for Headquarters Post and Expired members in a specified area to help you grow your Post membership.
• Perform Member Data Form changes online for Legion and SAL members

PROCESSING MEMBERSHIP ON MYLEGION.ORG

INTRODUCTION
The “Process Membership” feature in myLegion allows American Legion Post Officers to renew, add new members and transfer-in existing members from other Posts. (NOTE: Posts can only transfer-in members that dues are being paid for.) This feature utilizes electronic payment methods via myLegion, and eliminates the need for Post Officers to send the National/Department portion of the (3-part) membership cards and paper-checks to the Department Headquarters office.

Electronic check (Echeck) is the only payment method available when using this feature. The account must be a valid business checking or savings account held with a US Bank. Credit card payments are only accepted for foreign Posts outside of the US that do not have a checking/savings account with a US Bank.

Each dues payment charged for a member is the sum of the National Per Capita plus Department Per Capita in effect at the time of the transaction. National Headquarters will handle payment of the Department Per Capita back to the Department Headquarters office.
ELECTRONIC CHECK (Echeck) PROCESSING GUIDELINES

The processing time for Echecks is 5-8 business days. During the 5-8 business day period, a “Pending” charge will be placed on the funds in the checking/savings account designated by the American Legion Post. In addition, the batch status in myLegion will also show a “Pending” status for the 5-8 business day period. After a successful transfer of funds to the bank at National Headquarters, the transmittal status of the batch will change to “Closed”, and the member information will be applied to the National Database. Credit card transactions should clear within 24-hours.

Declined Echecks

If a Post submits payment for a batch of transactions and the Echeck is declined, the transmittal status of the batch in myLegion will be set to “Declined”. Common reasons for declined Echecks are:

1.) Insufficient funds
2.) Bank Account has been closed
3.) Invalid Bank Information

In the event a membership batch is declined, the Post Officer will be notified via email, and the batch will NOT be applied to the National database. Declined batches can be re-submitted within 14-days. **If not re-submitted within the 14-day period, the batch will be deleted.**

The Post will be charged all penalty fees levied by the ACH (Automated Clearing House) processor for declined Echecks. The American Legion National Headquarters reserves the right to suspend the “Process Membership” feature for a Post at any time due to a high volume of declined transactions, or malicious use of the myLegion site.

From the left-menu, choose “Process Membership”
STEP 1: Click “Manage Payment Method” to enter your Post’s Bank Information. Click “Switch to Credit Card” to enter credit card information.

Enter the required information on the “Manage Account” screen and click “Save”
STEP 2: ADD RENEWALS AND/OR NEW MEMBERS TO AN “Open” BATCH. - Only one “Open” Membership batch is available for processing. The Open batch must be completed and submitted before a new batch becomes available. In addition, a 10,000 maximum limit is in effect for each batch.

Click “Edit” to begin adding members to the batch.

The “Transmittal Batch” form allows you to Add New Members, Transfer-in and pay for a member from a different Post, as-well-as select from a list of members that currently reside in your Post.
ADD NEW MEMBER/Transfer-in

Choose whether you are adding a new member (never-before-Legionnaire), or transferring-in an existing member from a different Post.

Add New Member / Transfer-In

- Add New Member
- Transfer-In Existing Member and Renew

Member ID# and name are required to transfer-in a member from another Post.
Complete the “ADD NEW MEMBER” form and click “Save”

After “Save”, notice the member shows up under “Members in this Batch”. Click “Edit” to change demographic information, or “Remove” to delete this member from the batch.
Search for Members in My Post to Renew

Use the Search feature to find the member in your Post that you want to renew. Notice that the search feature follows along with you as you type. The example above shows “100” entered for “Member ID:”, and “b” for last name. The form then finds all members in your Post where Member ID begins with “100” and Last Name starts with “b”. Select the member by clicking Renew.

Select the Renewal Year(s) and click “Renew”
STEP 3: SUBMIT BATCH FOR PROCESSING

When your batch is complete, click “Submit Batch” to initiate payment.

A confirmation screen will appear with the email address where the transaction receipt will be sent. This screen also allows you to change where the email receipt will be sent. Click “Submit” to initiate payment for the batch.
After submitting the batch for processing, the “Process Membership” form will show the batch in a pending status. Once the transaction has completed processing in the ACH network, the Transmittal Status will change to “Closed”. Allow up to 5-business days for the transaction to clear through the ACH network.
MEMBERSHIP REPORTS
Membership Reports showing District and Post standings can be found at www.txlegion.org, under membership tab and clicking on current reports. If you discover a discrepancy between the membership report and your Post records, please report it immediately to the National Customer service at 1-800-433-3318.

TARGET DATES
Target Dates are set up as measurable goals for both the Post and Department to achieve. Every member the Posts transmit in time for a Target Date helps the Post to earn potential awards and it helps the Department to attain our goal.

Many of the Target Dates are also Cut-off Dates for Renewal Notice, if the membership is transmitted in time for the cut-off date, it will prevent the member from getting an unnecessary renewal notice.

Department transmits daily to national using the Department Online Membership feature in MyLegion.org.

The 2020 Department & National Target Dates are set to fall on the Second Wednesday of each month

<table>
<thead>
<tr>
<th>Date</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 9, 2020</td>
<td>50%</td>
</tr>
<tr>
<td>October 14, 2020</td>
<td>55%</td>
</tr>
<tr>
<td>November 11, 2020</td>
<td>65%</td>
</tr>
<tr>
<td>December 9, 2020</td>
<td>75%</td>
</tr>
<tr>
<td>January 13, 2021</td>
<td>80%</td>
</tr>
<tr>
<td>February 10, 2021</td>
<td>85%</td>
</tr>
<tr>
<td>March 10, 2021</td>
<td>90%</td>
</tr>
<tr>
<td>April 14, 2021</td>
<td>95%</td>
</tr>
<tr>
<td>May 12, 2021</td>
<td>100%</td>
</tr>
</tbody>
</table>

POST MEMBERSHIP GOAL
The 2020 membership goals for each Post shall remain the same as the 2020 membership goal. Those Posts achieving 100% or larger will have their goal set at the final membership number as stated on the June 1, 2020 Final Membership Report. The minimum Post goal will be 15 members.

MEMBERSHIP AWARDS

Individual Awards
Texas Lone Star Individual Membership Recruiter Pin – This award is for Legionnaires that recruit new member(s) or members that were expired for the previous year into The American Legion. This award is based upon the total accumulative number of new/expired members the recruiter signs up into The American Legion starting with the 2013 Membership year through their Legion career. The pin will be awarded starting with the #1 for the first new/expired member and then increase in increments of 5 (5, 10, 15, 20, etc.) based upon the accumulative total of new/expired members recruited. Once the recruiter is awarded a pin level, he/she will work for the next higher pin level and once a pin level has been achieved a duplicate pin level will not be
awarded. The Post Adjutant must submit the Texas Lone Star Individual Membership Recruiter Pin Certification Form to the Department Headquarters for members to receive the proper level award.

**Gold Brigade Award** – A Legionnaire who recruits 50 or more NEW MEMBERS into The American Legion by May 1st of the current membership year and are certified by the Post Adjutant identifying all 50 members, will qualify for enrollment in the elite GOLD BRIGADE of The American Legion. These very special Legionnaires will be awarded unique gifts that designate affiliation with the Gold Brigade of The American Legion. The gifts awarded to a Gold Brigadier will depend on the number of times he/she has qualified for this award. The first time qualifier for the Gold Brigade will receive a choice of jacket or sweater with the Gold Brigade logo on the left breast or polo shirt; a cap pin, a Gold Brigade patch, and Gold Brigade certificate. A second, third or fourth time winner will receive a Gold Brigade Patch and certificate, a “hash mark” for the jacket sleeve, and the choice of either another jacket or a sweater with the Gold Brigade logo on the left breast or a polo shirt. (National Award)

**Silver Brigade Award** – A Legionnaire who recruits 25 to 49 NEW MEMBERS into The American Legion by May 1st of the current membership year and are certified by the Post Adjutant identifying all 25 members, will qualify for this award. A silver pin and certificate will be awarded. (National Award)

**Recruiter of the Year Award** – The individual certified with the highest number of New Members recruited from all the Post with the Department will be declared the “Department Membership Recruiter of the Year”. That individual’s name will be submitted to National Headquarters, by May 1st of the current membership year, as the Department Recruiter of the Year for the National Recruiter of the Year Competition.

**Continuous Year Membership Certificates** – The National Executive Committee has directed the issuance of certificates to members of The American Legion credited with 50, 60, 70, 75, 80, 85 & 90 years of continuous membership. An eligible member receives only one of each of these special awards. January 15th of each year has been determined to be the cutoff for getting membership transmitted or submitting continuous membership year changes to National to ensure a certificate will be printed for members. The certificates are sent directly to the Posts for presentation to the member.

**Post Awards**

**POSTS WHICH HAVE NOT SUBMITTED TO DEPARTMENT HEADQUARTERS A POST CERTIFICATION FORM BY JULY 31ST OF EACH YEAR, A CONSOLIDATED POST REPORT BY JUNE 1ST OR EACH YEAR AND DO NOT HAVE AN UP TO DATE POST CONSTITUTION AND BYLAWS BY JUNE 1ST EACH YEAR WILL NOT BE ELIGIBLE FOR ANY POST AWARDS. A POST CONSTITUTION AND BYLAWS IS CONSIDERED TO BE UPDATED IF IT’S DATED AFTER JULY 31, 2015.**

**Post Cash Award** – Posts attaining 105% of their membership goal for 2021 by December 31, 2020 shall receive a check for $10.00, and additionally for each member over the 100% the post shall receive a rebate of $1.00 for each member. The membership must be at the Department
Headquarters or post marked by December 31st or at National to count. DMS and HQ Post 345 Transfers do not count.

Post 100% Award – Posts attaining 100% of Goal by May Target Date for the current membership year will be awarded an American Legion Post Certificate, a Post Commander, Post Adjutant 100% membership pin and one (1) White 100% Goal Post Streamer. Any Post attaining 120% of goal by the May Target Date will also be awarded a cash prize of $100.00 for the Post.

Texas Post Excellence Award – Posts that achieve this award will be recognized at the Department Convention and will be presented with a distinctive plaque by the Division and District Commander at a local community event to recognize the Posts efforts. The Department Headquarters will provide a press release to local media outlets. Posts must meet the following qualification by June 1st.

Award Qualification requirements:
1. Minimum 90% Retention of previous year’s members
2. Minimum 10% Increase in recruiting new members
3. Participate in a National Security Award Program.
   a. Law Officer of the Year
   b. Firefighter of the Year
   c. EMT of the Year
   d. Outstanding Enlisted National Guard / Reservist of the Year
4. Participate in 3 American Legion youth programs.

Legion Programs:
Boys State School awards
High School Oratorical Contest Junior Shooting Sports Program
Flag Education Week Education & Scholarship Program
American Legion Baseball Scouting
Junior ROTC Program

American Legion Retention Award – Posts that attains 90% retention of previous year’s members by May Target Date will receive a certificate. New members, DMS and HQ Post 345 transfers do not count.

Post Recruiting Award – Posts that recruit new members equal to or greater than 10% of their current goal by June 1st will receive a certificate. For each new member in excess of 10% of their current membership goal a post will receive $10.00. A new member is defined as an individual that has never been a member of The American Legion or was not a member the previous year. DMS and HQ Post 345 Transfers do not count.

Post New Member Award – A Post in the following membership goal categories that recruits the highest percentage of new members by June 1st of the current membership year will earn $250 for their Post: (In the event of a tie the award will be divided equally by all Posts achieving the award in their category). A new member is defined as an individual that has never been a member of The
American Legion or was not a member the previous year. **DMS and HQ Post 345 Transfers do not count. New Posts are not eligible for this award.**

- 15 - 50
- 51 - 150
- 151 - 300
- 301 - 700
- 701 and above

**New Post Cash Award** – Each new Post organized within the Department during the current membership year will receive $10 per new member on first year’s membership, current years membership must be at National Headquarters by the **May Target Date** to qualify. **DMS and HQ Post 345 transfers will count.**

**Department All-Time High Award** – Posts that surpass their All-Time High membership by **June 1st** of the current membership year will be presented an All-Time High Membership Citation. (Note: All-Time High Membership for each Post will be the highest year since 1976. New Posts are not eligible.)

**National Post Honor Ribbon** – Post Honor Ribbons will be awarded to all Posts whose membership for the current membership year (as of **December 31st**), achieves an advance membership (for the year about to begin) equal to or greater than the final membership for the year just ending. (National Award)

**Certificate of Meritorious Service All-Time High Award** – This certificate will be awarded to all Posts who have, by **December 31st**, enrolled an advance membership for the membership year equaling or surpassing the Post’s previous All-Time High membership. (National Award)

**District Awards**

**District 100% Post Award** – All District Commanders attaining 100% of goal and 100% Consolidated Post Reports by **June 1st** of the current membership year will receive $100.00.

**District Commanders Cap Award** – All District Commander’s earning 100% both years in office will qualify for a Past District Commander’s Service/Uniform Cap.

**Top District Commander** – The Top District Commander who has attained GOAL by **June 1st** for the current membership year and who has achieved 100% Consolidated Post Reports by **June 1st** will receive three (3) nights paid hotel accommodations at the National Convention during the official business session of the National Convention and will include two (2) tickets to the National Commander’s banquet for the current membership year. Other District Commanders with 100% or more of their goal by **June 1st** of the current membership year and who has achieved 100% Consolidated Post Reports by **June 1st** will have their names placed in a drawing for two (2) night’s paid hotel accommodations at the National Convention during the official business session of the National Convention, for the current membership year. **This award is non-transferrable.**
The #1 Gold Pin Award – Beginning each year with the Fall DEC a 10k gold #1 pin with a .10K diamond will be awarded to one District Commander who has the highest membership percentage of goal on the below award dates. This pin will travel with the winner, until the next award date. The final recipient will be presented the #1 Gold Pin at the Department Convention and will keep the Gold Pin. Membership must at the Department Headquarters or at National by close of business of the award date to count, postage marks will not be counted for any award date.

<table>
<thead>
<tr>
<th>Award</th>
<th>Cutoff Date</th>
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<tbody>
<tr>
<td>1. Fall DEC</td>
<td>September Target Date</td>
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<tr>
<td>2. Midwinter</td>
<td>January Target Date</td>
</tr>
<tr>
<td>3. Dept Convention</td>
<td>June 1st</td>
</tr>
</tbody>
</table>

The “Top 10” District Commanders Pins - The District Commanders of the Districts with membership placing them in the “Top 10” places at June 1st will be awarded a “Top 10” award pins. This Award will signify the District Commanders who put forth the additional time and effort needed in Membership to put their Districts on Top.

District 100% Award – The District Commanders with the highest number of Posts attaining goal by December 31st of the current membership year will be awarded $100.00. Any District Commander with all Posts attaining goal by June 1st will receive an award of $500.00.

District Improvement Award – The District Commander with the highest number of new Post Temporary Charters by May 1st will receive $250.00. In the event of a tie, the tie will be broken by the District having the earliest dated temporary charter.

Division Awards

The Harold L. Gregory Trophy – The Division Commander reporting the highest percentage of Goal in Department by January Target Date will be recognized on the Harold L. Gregory Membership Trophy to be displayed in Department Headquarters. In addition, a replica will be presented to the Division Commander.

The #1 Gold Pin Award – Beginning with the Fall DEC a 10k gold #1 pin with a .10K diamond will be awarded to one Division Commander who has the highest membership percentage of goal on the below award dates. This pin will travel with the winner, until the next award date. The final recipient will be presented the #1 Gold Pin at the Department Convention and will keep the Gold Pin. Membership must at the Department Headquarters or National by close of business of the award date to count, postage marks will not be counted for any award date.

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</table>
Top Division Commander – Top Division Commander who attains the highest percentage of Goal by **June 1st** will receive a plaque and an American Legion Blue Service Cap with the wording “(Year) Top Division Commander”.

**Department Vice Commander Award**

**Goal Award** – The Department Vice Commander will be awarded a Legion Blazer, name badge and plaque at the Department Convention if Department Membership equals or exceeds 100% of goal by **June 1st** of the current membership year.
Consolidated Post Reports (CPR) Form

Each post is required to file an annual report with department headquarters. A convenient report form, called the Consolidated Post Report (CPR), is sent to each post from the department headquarters providing the requested data on programs and activities.

Your completed report is compiled into a final report and presented to Congress each year by the national commander as justification for our non-profit status and to brag about what we do as an organization in our communities.

The required turn in time to department headquarters is June 1st of each year. The CPR form may also be completed on MyLegion.org or downloaded from the Department website www.txlegion.org.

Annual Post Data Report

Throughout the year it is necessary for national and department staff to contact posts regarding membership renewals, awards, Dispatch subscriptions, veterans’ issues or other important information.

Maintaining current post information on national’s files has become more important than ever. Each February the Annual Post Data Report is mailed from national headquarters to department headquarters for distribution to their respective posts.

Each form is preprinted with current contact information from national’s data system. This preprinted form for your post is sent for annual springtime reporting. If there is a change at other times, send those changes to your department headquarters and your department will forward changes to national. Any and all changes must first go through your department headquarters for processing. Any changes received at national directly from a post will be returned with no action.

Post Officer Certification

It is critical for the post adjutant to report post officers to the department headquarters immediately after their election. The department may furnish a special reporting form for this purpose or you may receive reporting forms provided by national to your department. All national mailings are addressed to post officers. It is imperative that all contact information for post officers are up to date and correct.

CHARTERS

Naming A Post after an Individual and/or Name Changes - The individual must be deceased and the post must have the family’s written permission to name a post after their family member. If naming the post after an individual when establishing a charter, attach the letter with the application. If changing the name when applying for a permanent charter or after the permanent charter has already been established, send a copy of the minutes or the resolution, or both, to the department headquarters and the department will request the name change.
If a post has a Sons of The American Legion squadron, it will always be changed to reflect the Legion post information. A new replacement charter and SAL charter, if applicable, will be issued. For further information contact the department headquarters.

**Location Change Procedure** - If a post requests a location change, a letter from the post adjutant, commander or other authorized representative needs to be sent to your department headquarters and your department will request the location change. The letter needs to include a copy of the minutes or resolution, or both, the old location and the new location. The department will then forward the location change request to national. A new replacement permanent charter and SAL charter, if applicable, will not be issued. For further information contact your department headquarters.

**Temporary Charter** - Any group of eligible veterans may apply for a post charter in The American Legion from the national organization through the department headquarters after meeting all department requirements. The executive committee of the department in whose area the post lies shall determine the minimum membership and starting make up of a post.

A temporary charter application is to be filled out in triplicate and is to be typewritten. The instructions are included on the application, which is available from the department. National no longer requires signatures from new members. The name of the new post that appears on the temporary charter may only be changed at such time as an application for a permanent charter is submitted.

The organizer of the post must sign all three copies and list their address. The organizer’s address is used for the post’s mailing address until the post finds a permanent address. An Annual Post Data Report is sent with the temporary charter to the post, thus enabling the post to list the dues, permanent address and dues mailing address, if different than the permanent address.

After a Post has functioned with a temporary charter for a minimum of ninety (90) days, it can apply for a permanent charter. This form, available from your department, is filled out in triplicate and sent to your department headquarters to be signed and forwarded to National Headquarters for the issuance of the charter instructions for this form are on the back of the application. For further information contact your department headquarters.

**Permanent Charter** - After a post has functioned with a temporary charter for a minimum of ninety (90) days, it can apply for a permanent charter. This form, available from your department, is filled out in triplicate and sent to your department headquarters to be signed and forwarded to national headquarters for the issuance of the charter. Instructions for this form are on the back of the application. For further information contact your department headquarters.

**Supplemental Charter** - When a post becomes incorporated, it is necessary to apply for a supplemental charter. When a post incorporates and changes its name, the change is usually enough for it to be considered by the government as a new entity, thereby requiring another Employer Identification Number (EIN). The old one is normally invalid; play it safe, get a new one. This number is obtained through the IRS by submitting an SS-4 Form.

The incorporation of a post modifies the information sent in on the earlier inclusion letter reporting your EIN with the national organization. The legal name of the post will appear on the
incorporation papers or corporate charter with the state in which it is located. A change in the name, even just adding -INC. to the name, will be reported to the IRS in September.

We need to maintain your correct, legal and accurate post name on this report for IRS exactly as it appears on the corporate charter from the state. Any changes are to be sent to the national office so the IRS records will remain up-to-date and the post can avoid any IRS issues.

When requesting a supplemental charter, please fill the form out in triplicate. A copy of your Articles of Incorporation, issued by the state, is a required attachment to the supplemental charter application, which is available from your department office.

If the name of the Legion charter changes while a supplemental charter is in place, the supplemental charter will be null and void. A new supplemental charter application and Articles of Incorporation will need to be submitted to reflect the new name of the Legion charter. For further information contact your department headquarters.

Incorporation – When a post becomes incorporated and makes the appropriate application to national headquarters as evidence of this action they will be issued a supplemental charter, properly attested by the duly authorized officers of your department and national headquarters.

Tax Exempt Status - Federal Tax Regulations require every subordinate American Legion post that is obligated to file an Annual Information Return (Form 990), or if they maintain a bank account, must have an Employer Identification Number (EIN).

The American Legion is tax exempt under Section 501 (c)(19) of the Internal Revenue Code of 1954, as amended. Every post needs to obtain an EIN from the government. All newly chartered posts receive an SS-4 form in their new post kit, prepared and sent by national. The instructions should be closely followed in completing and submitting the SS-4 form.

When you receive the post EIN, send a copy of the number and the Inclusion Letter (also in the packet) to national headquarters so the post may be listed as a tax-exempt charter of The American Legion. A listing of all new posts, plus updates, is sent to the IRS each September 30th. Your bank and various vendors will also need this number – protect it.
Recommendations for Protocol for Department Commander or Other Department Officers Visits

It is recommended that:

1. The Commander should be given the privilege of selecting the time of his appearance.

2. That no other Department Officer appear on the program before the Commander with the exception that at a District Conference, the Department Adjutant and/or the Department Service Officer may give his/her short report before the Commander.

   (Reason: The Department Commander, as titular head of the organization, outlines the program which should be followed by the Division, District, or Post and by the various commission and committee chairmen. Under such circumstances, he/she is the keynote speaker and as such, he/she sets the tone for the program.)

3. The Commander should be met by a person charged with the responsibility of looking after the needs and comfort of the Commander. He/she should be conversant with the details of the function and not leave the Commander to shift for himself/herself.

4. Meals and hotel accommodations for the Commander and his/her spouse, if it is necessary to stay overnight, will be paid for by the host or at time of request notify the Department if this is not possible.

5. Those courtesies which are usually extended to a visitor in your home must be accorded the Commander, and the host organization must make every effort to see that these amenities are extended.

6. A “Request for a Visit by the Department Commander or Department Officer” form must be filled out and submitted to Department Headquarters as a proper invitation and a letter of acceptance and authorization to travel will be issued to the individual when approved. The forms can be found on the Department Website or by contacting the Department Headquarters.
WEARING OF DISTRICT CAPS

The Department Executive Committee in meeting, February 2, 1997, approved the recommendations of the M & O Commission pertaining to the wearing of District Caps.

National has defined Legion Officers as follows: “That officers of the National Organization, departments, districts and counties of The American Legion be authorized to wear caps designating their office be extended to mean all constitutional officers of such organizations whether elected or appointed.”

Department Officers and Division Commanders are permitted to wear the Department WHITE CAP.

District Officers: The following District Officers, while serving in office, consisting: Shall wear a Legion Blue cap with a white center with gold lettering designating their particular office.

- District Commander
- District Vice-Commander
- District Adjutant
- District Chaplain
- District Treasurer or Finance Officer
- District Sergeant at Arms
- District Assistant Sergeant at Arms
- District Judge Advocate
- District Historian
- District Service Officer
- District Zone Commander(s)

The above EXCLUDES Assistant and/or Second Vice Commanders, Assistant Adjutants, etc., as well all other Assistant Officers and District Committeemen.

Your DEC action instructed the Department NOT to issue approval for the purchase of District Caps for others than those specifically listed above. You can readily see the importance of having duly constituted officers within your District to conform to the above.

If you presently have Legionnaires in your District wearing District Caps who are not listed above, they should be informed of the DEC action and asked not to wear their District Caps in the future.

The DEC took action to have the LONGHORN STEER AND STAR INSIGNIA placed on all Caps, including SAL. The extra price of the insignia will need to be added to your order for all Caps, Shipping and Insurance are also extra on all orders. See current National Emblem Sales Catalog for current rates.
**CAP ORDERING INSTRUCTIONS**

All orders for District, Division and Department Officer Caps MUST be sent through Department Headquarters for approval or National will not honor your order.

Department will pay for the first cap for new Department officers, Division and District Commanders. Extra caps are at each officer’s own expense. All other District Officer Cap Orders must be accompanied by payment for the order - or the order will be held until payment is received. You may, of course, charge your purchase against your personal credit card.

All Post Cap Orders should be placed directly with National Emblem Sales using stock numbers and prices indicated in the current National Emblem Sales Catalog.

All Caps must have the Texas Star & Steer Emblem which is an additional change as is additional lettering which is a per letter charge.

**District Caps** - Blue with white crown, District in full and state name abbreviated and Post number in gold letters are included.

**Division Caps** - All white gabardine. Name of state and Post number in gold lettering.

**Department Caps** - All white gabardine. Name of state and Post number in gold lettering.

**All Caps will be ordered in the Fort Know style unless otherwise requested. All orders are shipped direct to the customer and all 8 – 12 weeks for delivery.**

**PROPER WEARING OF THE LEGION CAP**

The Legion Cap should be worn by its members, only when in attendance at official Legion meetings or ceremonies, or as official guests at patriotic or other civil functions, or by individuals when officially representing The American Legion on public occasions.

A Legionnaire is considered to be in uniform when wearing the Legion Cap. Therefore, it is not proper to wear the Legion cap when eating a meal at any function.

Legionnaires not in formation will uncover when entering a church and shall remain uncovered during the entire service and will re-cover after leaving the church.

**Restrictions on wearing the cap: The left side (emblem side) of any Legion cap CANNOT contain anything other than the Official American Legion emblem, and lettering as set forth as designated by The American Legion. NO DECORATIONS.**

Consecutive membership insignia, membership stars, life emblem, leadership emblems, extension course insignia and/or decorations (authorized American Legion or military service), past or present officer insignia or badges must be worn on the right side of the cap in an orderly manner. Fraternal or civic organizational insignia, names or nicknames of individuals cannot be used on the American Legion cap.
REQUEST FOR USE OF AMERICAN LEGION NAME OR EMBLEM ON MERCHANDISE

The name and emblem of The American Legion are registered service marks in the U.S. Trademark Office and are protected by criminal and civil enforcement provisions of federal law (18 U.S.C.S 705 and 36 U.S.C.S 44 and 48). By authority of May 1947 Resolution Number 71, the National Adjutant or his designated representative) Director, National Emblem Sales), may grant limited permission to use the name and emblem in accordance with Resolution Number 71, other Resolutions and U.S. Trademark Law.

In order to gain permission for limited use of the name or emblem, complete enclosed form and forward to the Department Adjutant. The Department Adjutant will forward the completed form to National Emblem Sales. Please note that permission must be requested by the member or Post purchasing the merchandise and permission is granted directly to U.S. Manufacturers only.

Any permission given will be granted on a one-time basis for a given quantity. Additional orders will require new authority and the manufacturer may not produce more items than had been ordered. Permission will be given with the caveat that all material used will specifically identify the Post.

If the merchandise requested is available through National Emblem Sales, you will receive a quote for the merchandise or a one-time limited permission. If the merchandise is not available through National Emblem Sales, you will receive a one-time limited permission or denial of permission.

If you are ordering an outdoor sign for your Post, the only licensed manufacturer of American Legion Post outdoor signs is the J.M. Stewart Co., 2201 Cantu Court, Suites 217-218, Sarasota, FL 34232 and they can be reached at (800) 237-392

Fill out form completely and email, fax or mail to Department Headquarters.
GUIDELINES FOR POST JUDGE ADVOCATE

Because of his wide involvement in Post legal matters, the Post Judge Advocate should be, whenever possible, an attorney. If the Post does not have an attorney as a member, efforts should be made to recruit one or more. If an attorney is not available, then select a member with a broad Legion background and perhaps with some legal training.

Charge from Installation Ceremony, Officers Guide: Post Judge Advocate - “To you, my comrade, is assigned a most important duty for which your legal training and/or past Legion experience so aptly prepare you. You are the interpreter of the Constitution and by-laws of your Post, and may at any time be called upon by the Commander and other officers and members of the Post to rule on the legality of their actions and decisions insofar as they affect the good of The American Legion. You are also charged with protecting the integrity of our organization and keeping alight the torch of truth and fidelity that symbolizes the high ennobling ideals under which our great American Legion was founded. Protect wisely that heritage.”

The primary duty of the Post Judge Advocate is to supply professional advise in the conduct of the Post business or to procure proper counsel. He is the guardian of constitutional form of Post government.

The Post Judge Advocate can supply valuable assistance to other Post Committees and officers. He should be available to the Post Service Officer for legal advice and to the Americanism Committee on matters relating to education and naturalization laws. Any Post Committee can benefit from the Post Judge Advocate’s contacts with the office holders of local government.

The Prescribed Post Constitution and By-laws charge the Post Judge Advocate and his legal committee with the duty of auditing Post financial accounts. This should be done annually, usually at the end of the Post fiscal year, and just prior to the installation of new Post Officers.

The value of a Post Judge Advocate increases year by year as our country rapidly evolves into a more “Legalistic Society”. Today the question of legality of Legion/Post actions comes into play far more often than fifteen or twenty years ago. Citizens are more prone to sue each other and Post Members and in the process bring our Posts, their officers as well as the Department and National Organization, plus their officers into the suit as a part of a “broad brush swipe”. More and more, legal documents need reviewing, briefs written or forms completed and filed with proper Agencies and the Courts. Example: Post Constitution and By-laws need periodic review and updating to comply with and coincide with both Department and National Constitution and By-laws. On occasion changes need to be made based on changing circumstances at the Post level.

GUIDELINES FOR ASSISTING POSTS

1. He should offer assistance with legal documents every step of the way. Posts build homes, land must be purchased, architects and contractors must be hired and the finished structure must be accepted.

2. He should review prior to filing all applications for Bingo Permits or Liquor Permits.
3. He should be consulted by the Executive Committee and the House Committee to insure compliance with State Liquor laws and regulations as well as Bingo laws and regulations.

4. He should file necessary papers to incorporate the Post, or review the Post Corporation Charter to insure it is up to date and that all laws of the Corporation Division of the Secretary of State are being complied with.

5. At the proper time, he should file Restated Corporation Charter papers with the Secretary of State (through the Department Adjutant).

6. He should assist the Post Executive Committee with any trial. Should charges be filed against a member for misconduct, and to insure that proper procedures are followed as required by the Department and National Constitution and By-laws and the Uniform Code of Procedure as well as Club Rules and Procedure for Club Rule violations.

7. Annually, he should review that the Posts insurance policy to ensure the Post has adequate coverage in all areas such as Fire and Casualty; Liability: Officers & Directors Liability; Theft or Burglary coverage.

8. Ensures that Post Officers or officials handling moneys of the Post are properly bonded. This includes cashiers at Bingo games as well as bartenders, club managers or business managers.

9. He should review tax assessments on Post properties to insure the Post is not unduly assessed and to see that all taxes are paid.

10. He is the Parliamentarian for the Post Commander and/or presiding officer and is the official interpreter of the Post Constitution and By-laws. An officer or a member of the Post, except during a Post meeting, may request an interpretation as to any actions of the Post to insure that the Constitution and By-laws are fully complied with in all actions of the Post. Such requests should be submitted to him in writing and the ruling should likewise be in writing to the person making the request with a copy to the Commander and the Adjutant. He, of course, should make rulings for the Chair, as requested, during Post meetings.
POST FINANCE OFFICERS GUIDELINES

1. Post Finance Officer:
   A. Makes all deposits
   B. Pays all bills - when properly authorized
   C. Keeps the books
   D. Makes financial reports – Monthly and Quarterly
   E. Recommends financial policy
   F. Usually serves as chairman of the Budget Committee

2. Membership dues:
   A. $12.50 Department dues plus $18.50 for National dues for $31.00 total
   B. Forward promptly, do not spend for bills
   C. Posts set their own dues, however $31.00 must be transmitted to Department

3. Bonding:
   A. National requirement - bond for at the amount of gross income plus expenses
   B. Bond the positions rather than the individuals

4. Post Budget:
   A. Reasons for budget - includes all programs and prevents emotional spending
   B. Method of operating - any method the Post has for authorizing the payment of bills that is agreeable to the membership

5. Post Audit:
   A. Annual requirement
   B. Post Judge Advocate and the Post audit committee or an outside auditor.

6. Post Operations Manual:
   A. One copy per Post www.legion.org
   B. Good accounting procedures

7. Federal Requirements:
   A. Employer identification number - every Post must have one to use on bank accounts and tax returns.
   B. W-2 annually to each employee and 1099 forms to each contract laborer by January 31st.
   C. 990 tax return and 990-T return for unrelated income
   D. Group tax exemption number is 0925.

8. Tax Exemptions:
   A. Income tax on related income
   B. Sales tax (state) on all purchases made by or in behalf of the Post except alcoholic beverages.
   C. Ad Valorem tax on the Post home - request annually before May 1
9. Taxable Items - Not Exempt:
   A. Sales tax on sales made by the Post
   B. Tax on alcoholic beverage purchases
   C. Bingo gross receipts tax
   D. Cigarette tax
   E. Tax on pool tables
   F. Gambling tax
   G. Matching social security tax on employees wages
   H. Matching Medicare tax on employee wages
   I. Withholdings of income tax, social security tax and Medicare tax for employees
   J. State and Federal unemployment taxes
   K. Minimum wages for employees
   L. Excise taxes
   M. Royalty (ASCAP) tax - when the performance is open to public

10. Keep Records on all Post Financial Accounts:
    A. Lack of knowledge of the tax laws will not excuse the taxes or penalties and interest due
    B. Seek professional help if you need it

11. Recommended Charitable Donations:
    A. The Texas American Legion Development Foundation
       a. F. C. McConnell Boys State Scholarship
       b. Ronald McCluskey Veterans Scholarship
       c. Department Oratorical Scholarship
       d. Eagle Scout of the Year Scholarship
       e. American Legion Baseball Scholarship
       f. Junior Shooting Scholarship
    B. Children & Youth Fund
    C. National Disaster Relief Fund

INFORMATION ON UNRELATED BUSINESS INCOME

The American Legion is exempt from payment of Federal Income Tax under the provisions of Section 501 (c) (19) of the Internal Revenue Code of 1954, as amended. Each Post must apply with the IRS for an Employer Identification Number (EIN) this number is different for every Post. The American Legion Group Exemption number (GEN) is 0925. Both the EIN and GEN numbers are used your Form 990, 990EZ, and 990-T.

However, the provisions of the 1969 Tax Reform Act have reinforced a liability for taxes to be paid on “unrelated business income” earned by the Posts of The American Legion. The effect of these provisions on the normal fund-raising activities of the Legion Posts may be summarized, generally as follows:

Unrelated business income is defined in the Code as the “gross income derived by any organization from any unrelated trade or business regularly carried on by it, less the deductions
which are directly connected with the carrying on of such trade or business.” Therefore:

1. It is income from a trade or business
2. Such trade or business is regularly carried on by the Post
3. The conduct of such trade or business is not substantially related (other than through the production of funds) to the organization’s performance of its primary function to promote the purposes of The American Legion.

Unrelated Business Income Normally Does Not Include:

1. Income from dividends, interest, annuities or royalties.
2. Income from rental of real property under a lease of less than five years: e.g., land, buildings, offices, the Post Hall, etc.
3. Income from rental of personal property if incidental to the amount of the total rents under a lease.
4. Income from a trade or business in which substantially all of the work done is without pay, volunteer help.
5. Income from a trade or business, which sells merchandise, substantially all of which is donated.
6. Income from a trade or business which is not “regularly carried on.”
7. Gains or losses on sale or exchange of property.
8. Bingo income provided the games are conducted in accordance with local law.

NOTE: If your game is not conducted in accordance with the laws, the Texas Lottery Commission will take your license then the IRS may charge you taxes on the past three years of bingo income as unrelated income.

The ordinary fund-raising activities of a Legion Post may be considered a trade or business within these provisions. The question then is whether it falls within one of the exemptions. If it is not “regularly carried on” or is run by volunteer help or consists of the sale of donated merchandise, then the income realized from there will not be subject to the “unrelated business income” tax.

Thus, the income realized in the normal fund-raising activity of a Legion Post (a Bar-B-Q, sale of candy, raffle tickets, turkey shoots, etc.) is not unrelated business income.

However, if a Post carries on an income producing activity, other than rental of real property, which operates on a regular basis through the year in a manner similar to a comparable trade or business of a commercial enterprise (such as a parking lot one day each week, monthly dances open to the public, a restaurant or bar lounge open to the public or even to members and guests on a regular basis throughout the year) then the Post will have “unrelated business income” with respect to such activity and may be liable for the tax imposed thereon.

The profits of an exempt organization from advertising and other activities carried on for the production of income through sale of goods or services, e.g., sale of advertising in a periodical, journal, magazine, newspaper or newsletter it publishes, are taxable unrelated business income. Such income is subject to special computations in the allocation of space and costs. Special consideration also is given to leasing a mortgaged building in that the income may be taxable. If income is partially taxable, a proportionate part of the deductions will be allowed as an offset against the income. Posts having unrelated business income are required to file form 990-T. Be
sure to keep a copy of your returns.

In summary, IRS says that each Legion Post must continue to file Form 990 or 990T each year on or before the 15th day of the fifth month following the close of the accounting period.

Employee VS Contract Laborer

The Internal Revenue Service defines an employee as follows:

1. If you provide the material to do the job, and
2. If you tell the individual when to work, and
3. If you tell the individual how to do the work, then He/She is an employee and not a contract laborer.

If any one of the three provisions above is not true then the individual could be considered a contract laborer. It is advisable to have the individual sign a written statement that they are aware that they are working as a contract laborer and are being paid accordingly.

The above information is designed to alert you to the tax situations that may affect your Post and yourself. If any doubt exists as to your particular situation, it is in your best interest to resolve it by seeking more detailed information through the Internal Revenue Service.

GUIDELINES FOR THE SELLING OF POST PROPERTY

The Department Constitution and Bylaws requires Posts to inform the Department of their intent to sell the building.

Here are the steps that need to be taken to ensure that everything is done correctly:

1) A Post General Membership meeting needs to pass a motion to investigate the possible sell of Post Property.

2) The Post needs to get a current copy of the Post Deed on file with the city or county to show that it has a clear title on the property.

3) The Post needs to get an appraisal done on the property to show the fair market value.

4) At the next Post General Membership meeting a motion to proceed with the possible sell of Post Property, also at this meeting it needs to be approved to what Post program(s) or building fund the monies from the sale will be placed in.

5) Once that motion is approved a certified letter needs to be sent to ALL Post Members and the District Commander that at the Post General Membership meeting held on (date) the Post voted and approved to sell the Post Property and at the Next Post General Membership Meeting to be held on (date) the final vote will be taken to processed with the sale of Post Property.
6) In that letter there should be placed a ballot for members that cannot attend the meeting can provide their name, address, if they are for or against the sale of Post Property, a signature block for them to sign and a spot for a notary to verify their signature and return to the Post.

7) At the Post General Membership Meeting where the vote is to be taken the District Commander must be present to verify the members present, the ballots received, the number of certified letters returned and the number of letter signed for and not returned; 2/3 majority of the Post General members must have responded before any further action can be taken.

8) Once the 2/3 majority of Post members responding or present is verified then the Post General Membership must vote to approve to sell the property; and should include in the motion and minutes, the name of the retailer it will be listed with, the amount that will be listed, the fair market value it is worth.

9) Once the sale of the property is approved a letter must be sent to the Department of Texas requesting permission to sell the Post Property.

10) In the letter to the Department everything listed above must be enclosed, including the minutes of the Post General Membership meeting, an explanation of why the Post is selling the Post Property.

11) A letter from your District Commander must also be sent stating that he has attend all of the meeting and that he concurs with the sale of Post Property.

12) If a Post is incapable of funding actions required here in should ask for financial assistance from their respective District with a caveat that the funds will be repaid upon the sale of the Post property.