Membership Website – Branch Processing Guide

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Contents

Internet Service Recommendations

Basic Internet service is required and Internet browsers (Internet Explorer, Firefox, Chrome, etc.) browsers should be up to date with updates from their providers.

How to Login to your Branch

Go to www.Legion.ca

Click on For Members and Branches on the top navigation menu

Enter the username and password supplied to your branch.

If you have not received your username and password, contact Dominion Command.

Select Login

Accessing Your New Legion.ca Email

To access your new legion.ca email select the link below.

HTTPS://RCLMAIL.LEGION.CA/OWA

Enter your username and password supplied by Dominion Command and select sign in

All branches have a legion.ca email. This email is set up to receive; password reset requests, updates to membership profiles, online renewals and more. Please check your email regularly for updates.

Forgot Your Password?

Email received in your branch legion.ca inbox:

Forgot your password?

You sent a request to reset your password to ablack@legion.ca Please use the link provided in your email to reset the password for your account.

Dear AMANDA WHITE, we received a request for password change for username 20270554 at RCLDev. Go to this page to set your new password. The link will be active for one hour.

Regards,
The Legion Portal team

IN THIS SECTION

Registration
Join the Legion
Membership Eligibility
Login
Web Mail
Member Web Store
Supply Catalogue

New password

Confirm password

Submit

Enter your new password
Confirm Password
Submit

Navigating the Website:

Under "IN THIS SECTION" on the left side column, select "Home" for branch communications and incentives:

#1- HOME

IN THIS SECTION

▸ Home

Profile

Payment Information

Create/View Branch Members

Branch Rates

Previous Transactions

Membership Processing

Membership Since Date Calculator

Data Change Form

Reports

Help

Branch and Command Resources

Log out

Welcome to the Membership Processing Website.

Please select from the menu on the left to proceed.

Enter your branch rate to give your members the option to renew online. Each branch will receive a cheque from Dominion Command for any member who renews on line. Cheques are mailed once a month. Thank you!

NEW! **Your Branch can win $2,500 in VIA Rail tickets!**
Submit your Branch rate in the Member Services Website on or before June 29, 2018 to be entered into a draw for a voucher for up to $2,500 in VIA Rail travel. You can use the voucher in a raffle to raise funds for your Branch! The winning Branch will be selected and contacted by July 6.

Commands, branches and sections of The Royal Canadian Legion are invited to assemble their delegates in Winnipeg, MB for the 47th Dominion Convention. Click here: **2018 Convention Call**

Branch Transfer Report
Effective January 01, 2018 the Branch Transfer Report will only be available on line. We will no longer be mailing a hard copy to branches on a monthly basis. The Transfer Report can be found under the Reports menu.

Membership Website – Branch Processing Guide
Step by Step instructions on using the membership website!
Download the Guide

#2- PROFILE

Below "IN THIS SECTION" select "Profile" to update your branch contact details.

Dominion Command will provide all branch correspondence in your preferred language.

Select "Main Address" to update your branch address.

Select "Branch Photo" and upload a photo.

#3- PAYMENT INFORMATION

Branches have two payment options:

Option#1: Credit Card Payments (subject to Provincial Command regulations) see steps below. No paperwork is required if the branch pays by credit card.

Option #2: Cheque payment – mail the printed transmittal and the cheque to Dominion Command

Credit Card Payments: Enter the Credit Card information and Save.

Once saved, proceed to the Member Processing section to process the membership years.

#4- CREATE/VIEW BRANCH MEMBERS

Below "IN THIS SECTION" select "Create/View Branch Members" add new member enrollments and to search existing members. Create/View Branch Member section also includes; view a Branch Summary, view Branch Members and export a Branch membership list (branch register) in excel.

Create a "NEW" member profile

To avoid duplicate accounts, first verify that the member number does not exist within your branch records. See "search a member profile" or if the member is reinstating from another branch, verify with Dominion Command the member does not have an existing membership number.

Enrolling a new member is a two-step process. Step one: go to the Create/View Branch Members section to create the member profile. Step two: process the year(s) paid in the Membership Processing section.

IN THIS SECTION

Home
Profile
Payment Information
▸ Create/View Branch Members
Branch Rates
Previous Transactions
Membership Processing
Reports
Help
Branch and Command Resources
Log out

To start a new member:

1. Click the ADD NEW button in the grid below
2. Add the member information
3. Click Update
4. Now Record the new Membership ID assigned. Click Close
5. Now proceed to MEMBERSHIP PROCESSING to process the enrollment with the new membership number.

To find existing members, enter your search criteria in the box above the column in the grid below and click on the button next to it to select the method you would like to search by.

Active Members
1332

Last Year Members
1459

Branch Account Balance
1179.1

Members

Add New

Membership ID	Name	Type	Max Year Paid

Create 'New':

Select the ADD NEW button in the grid below

Add the member information

Select Update

"Record" the new Membership ID assigned, you will need it to process the membership in step two. Select Close

Proceed to MEMBERSHIP PROCESSING to process the membership year(s)

Branch Summary View:

Active Members
1293

Last Year Members
1459

Branch Account Balance
1129.11

'Search' a Member Profile:

Enter your search criteria in the box above the column to search, click on the button next to it to [▼] select the method you would like to search.

In the example below – select the "Name" field [Name ▼] the text entered is "Amanda W" and the drop down selected is "Contains".

'Edit' a Member Profile

Click on the pencil beside the membership number and a new window will open. This window has four tabs: Profile, Additional Information, Membership Information and Military Service.

Member Details:

This section includes Member Profile, Additional Information, Membership Information and Military service tabs

<u>Member Profile</u>

Update contact details and select "Update"

New –branches can now update deceased members in real time

Additional Information:

Gender, citizenship, birth year and consent to receive emails from Legion associated 3rd parties

Membership Information:

View a Member Transmittal and Transaction History
Sort by clicking on each header
Click on link to view transmittal
Note: To view and Print a Transmittal- See Previous Transactions

Military Service:

Enter the number of years served and the service number

Select Update

Select Close

Branch Register - Export Membership List in Excel:

Select the 'Export Branch Members' button and wait for the Excel sheet to load, once loaded, the excel sheet will populate on the bottom left of the screen, select open.

Note: Members paid for the current year and the last two previous years will be included on the list. Note: deceased members are not included.

Select Enable Editing

Select Export Branch Members and Save Worksheet

#5 – PRINT MEMBER LABELS

- Export members and save the excel file to your Desktop
- Open Word, choose file > New > Blank Document
- Start with the Mailings (tab)
- On the Mailings Tab, in the start mail merge group, choose Start Mail Merge
- Select - Step by Step Mail Merge Wizard
- Select Labels on the far right column of the page
- Step 1 of 6 - Select Next starting document
- Select label options
- Label Information – Label Vendors: Select Avery US Letter from the dropdown list
- Under Product Number: Scroll down to select 5162 Easy Peep Address Labels and select OK
- Step 2 of 6 – Select Next select recipients
- Click on Browse- Select your document from the desktop
- Step 3 of 6 – Select Next Arrange your labels
- Click on More Items
- Select the first field you would like to see on your label i.e. First Name select Insert and close click space and select last name on the same line
- Select the next line and click More Items select address 1
- Select the next line and select City
- Select More items on the same line as City and select State/Province and close
- On the next line item - More items and select ZIP
- Click on the button UPDATE ALL LABELS
- Step 4 of 6 – Next: Preview your labels
- Step 5 of 6 – Next: Complete the Merge
- Step 6 of 6 - Edit Individual Labels (double check that labels are formatted correctly)
- Select – ALL and OK
- Save file
- Enter labels into printer and Print.

#6- BRANCH RATES:

Below "IN THIS SECTION" select Branch Rates. For members to renew their membership on line, "Full" branch rates for both the current year (2018) and next year (2019) must be entered into this section.

The amount you enter for your Branch Rate is the amount your branch collects from the member and retains. It does not include the Dominion per capita tax portion. For example, if you remit $37 Per Capita tax to Dominion Command and your members pay a total of $50 to your branch, then your Branch Rate to enter in this field is $13.

When a member has processed online, an email notification is emailed to both the member and to the Branch @legion.ca email address provided by Dominion Command.

Dominion Command will remit the branch portion via cheque monthly to the local branch, and will include a paper transmittal report.

Branch Payables For 13-013

Data From: 9/1/2017 To: 9/30/2017

Date: 10/3/2017
2:30:02 PM

Member	Member ID	Renewal Year	# of Transactions	# Additional Years	Payable Amount
Amanda White	20270554	Next Year	1	0	$10.89
Total -->			1		$10.89

Add a Branch Rate

Select the Branch Rate Tab and Add New

–

Type - select "Branch"

Year - Enter 2018 (current year) and select the button beside the year and selecting "Contains" and Submit.

Rate: Enter your branch rate

Proration Type: select "Full"

Once the (current year 2018 and next year2019) rates are entered members can then renew on line once they have registered and logged into the portal.

If you need assistance to enter your branch rate, please contact Member Services 1-855-330-3344.

Edit a Branch Rate

Click on the pencil beside branch to edit the branch rate, branches are to update branch rates in the portal when changes occur.

#7- PREVIOUS TRANSACTIONS

Below "IN THIS SECTION" select Previous Transactions. Select various criteria in the boxes below by selecting the 'filter' button beside the column where you have entered text.

-Enter Process Date
-Select Contains
-View your branch transactions for the date entered

View and Print a Transmittal

To review the complete transmittal click on the pencil beside the transmittal number and Print transmittal

#8- Membership Processing

Below "IN THIS SECTION" select Membership Processing

Select the Continue button to begin the process.

The Processing Details window will open. Please take the time to review notes.

Note: Life Members are auto-renewed in the system and do not require annual processing.

Processing Examples:

See examples below for processing Enrollments, Renewals (current year and next year), Buy Back Years and multiple transactions for a member.

Note: Additional Years are processed as future years 2019 and above and Buyback years processed as previous years.

Example #1 – Enrollment:

In this Example: The Member is enrolling for the current year (2018) and next year (2019) and the membership number noted from the previous step.

Before processing an enrollment, please create the member in the "Create/ View Branch Members" section on the left column, Click on "Add New". Once you have created the new member profile, make note of the new Member ID so you can process the enrollment in this section.

Select the Process Type and the screen will automatically update to provide all the required fields. Please make a selection and enter the appropriate information in all the fields shown on the screen after you select your process type. Enter the **Membership Number** ,then select the **renewal year** or **enrollment year**. After you click **Save**, the Member's Name field will populate - letting you know that the record saved correctly.

Once you have saved the record, enter in any additional years or buy back years then click **Close**. If you do not have any additional years or buy back years, you can leave those fields blank and click **Close**.

The Renewal Year is based on the current calendar year date. If you are processing additional years you must first choose the Renewal Year.

Reinstatements are processed as Renewals.

Process Type

[▼]

Membership Number   **Member**

[   ]   [   ]

Buy Back Years?
○ Yes ● No

[Save]   [Close]

Process Type

| Enrollment | ▼ |

| Enrollment |
| Renewal |
| Buy Back Years |

Enter Membership number and Save

The current year was selected (2018) and additional years (2019) +1 Year is also selected.

Click on Save.

The members name will then appear in the Members Field

Select Close

Select "Add New" for each additional member you would like to process.

See page #22 Completing Transactions for further instructions on completing this process.

Example #2 - Renewal Current Year

Select Add New

Transactions

Add New					
Member	Process Type	Additional Years	Renewal Year	Start Enrollment On	Already Paid

Currently there are no records that match your criteria.

In this example: the member is renewing for the current year (2018)

Select the Process Type and the screen will automatically update to provide all the required fields. Please make a selection and enter the appropriate information in all the fields shown on the screen after you select your process type. Enter the **Membership Number** ,then select the **renewal year** or **enrollment year**. After you click **Save**, the Member's Name field will populate - letting you know that the record saved correctly.

Once you have saved the record, enter in any additional years or buy back years then click **Close**. If you do not have any additional years or buy back years, you can leave those fields blank and click **Close**.

The Renewal Year is based on the current calendar year date. If you are processing additional years you must first choose the Renewal Year.

Reinstatements are processed as Renewals.

Process Type

Renewal	▾

Membership Number

20270554

Member

Renewal Year

Current Year	▾

Buy Back Years?

○Yes ◉No

Additional Years

	▾

Save   Close

Click on Save and Close window.

Add members, one at a time by clicking on Add New.

See Completing Transactions for further instructions on completing this process.

Example #3 - Renewal Next Year

In this example: the member is renewing for the next year (2019

Click on Save and Close window.

Add members, one at a time by clicking on Add New.

See Completing Transactions for further instructions on completing this process.

Example #4 - Buy Back Years

Note: 2017 is processed as a buy back year as of Feb 1st, 2018

Add members, one at a time by clicking on Add New.

In this example: The member is buying back one year.

Enter the membership number and SAVE

The member name will auto-populate

Select Buyback Years – "yes"

Select Save and enter the year you would like to buy back and select Add New

Once you have saved the record, enter in any additional years or buy back years then click **Close**. If you do not have any additional years or buy back years, you can leave those fields blank and click **Close**.

The Renewal Year is based on the current calendar year date. If you are processing additional years you must first choose the Renewal Year.

Back Year

Back Year

Please indicate the year you are buying back. You can only process one buy back year at a time.

Year*

[   ]

Submit

Processing Details

Select the Process Type and the screen will automatically update to provide all the required fields. Please make a selection and enter the appropriate information in all the fields shown on the screen after you select your process type. Enter the **Membership Number**, then select the **renewal year** or **enrollment year**. After you click **Save**, the Member's Name field will populate - letting you know that the record saved correctly.

Once you have saved the record, enter in any additional years or buy back years then click **Close**. If you do not have any additional years or buy back years, you can leave those fields blank and click **Close**.

The Renewal Year is based on the current calendar year date. If you are processing additional years you must first choose the Renewal Year.

Back Year

Back Year

Please indicate the year you are buying back. You can only process one buy back year at a time.

Year*

[2016   ]

Submit

* Buy Back Years require you to click Submit. If processing multiple buy back years enter one year at a time by selecting Add New.

See [Completing Transactions](#) for further instructions on completing this process.
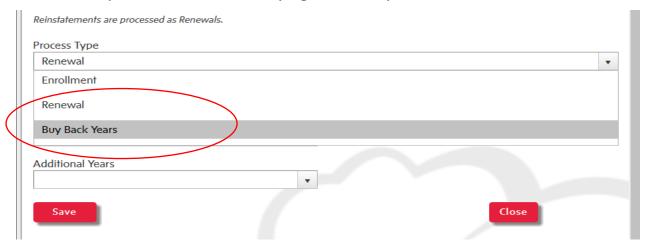
Example #5 - Multiple Processing for one member

Renewal- In this example the member is paying for the next year 2019 and 3 additional years 2020, 2021 and 2022

Note: If a member would like to prepay (2020 and above), but has already paid for the next year (2019). Call membership services to assist with processing. 1-855-330-3344 (the next year 2019 is has to be refunded by Dominion Command before additional years can be processed)

Select the Process Type and the screen will automatically update to provide all the required fields. Please make a selection and enter the appropriate information in all the fields shown on the screen after you select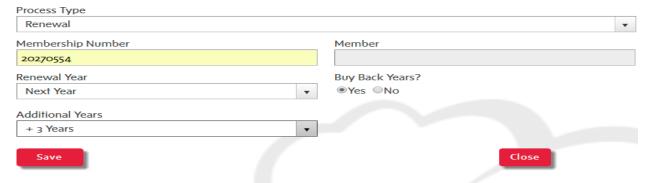 your process type. Enter the **Membership Number** ,then select the **renewal year** or **enrollment year**. After you click **Save**, the Member's Name field will populate - letting you know that the record saved correctly.

Once you have saved the record, enter in any additional years or buy back years then click **Close**. If you do not have any additional years or buy back years, you can leave those fields blank and click **Close**.

The Renewal Year is based on the current calendar year date. If you are processing additional years you must first choose the Renewal Year.

Reinstatements are processed as Renewals.

Process Type
| Renewal | ▼ |

Membership Number
| 20270554 |

Member
| |

Renewal Year
| Next Year | ▼ |

Buy Back Years?
◉Yes ○No

Additional Years
| + 3 Years | ▼ |

[Save]   [Close]

Click Save

Back Year

Back Year

Please indicate the year you are buying back. You can only process one buy back year at a time.

Year*
| 2016 |

[Submit]

Click on Submit.

Add members, one at a time that you would like to process by clicking on Add New.

See [Completing Transactions](#) for further instructions on completing this process.

Completing Transactions:

Once you have added all the member transactions, select a method of payment Check or Credit Card.

Note: If you choose to pay by credit card, you will need to set up your Payment Information, before processing any transactions. Once your method of payment has been selected click on Calculate Payment.

If you do not immediately see the Invoice Amount, please "refresh" your screen by clicking the "F5" button on your keyboard.

To change or add any transactions after selecting calculating payment, click on Edit Transactions before advancing to Process Payment.

If you choose to pay by cheque, please enter the Cheque Number and Cheque Amount in the fields provided.

** Select the method of payment on the bottom of each page.

If you choose to pay by cheque, please print the Transmittal, attach the cheque to it, and mail it to Dominion Command.

The processing is now complete and you may log out of the system if you have nothing further to do.

Dominion Command mails all membership cards to the branch. Please allow 4 weeks for shipping.
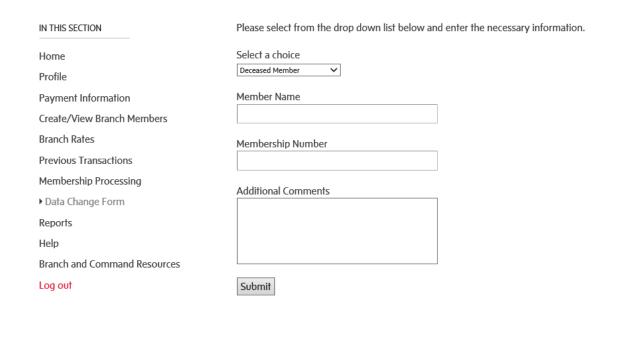
Refunds and Processing Errors:

Please contact Dominion Command to process all refunds and/or to correct processing errors.

#9- Data Change Form

The Data Change Form is a newly added option in our portal. Please enter changes to submit for Dominion Command Processing. Please note: Processing Data Changes may take up to five business days to update.

-Transfers

-Deceased Members- (Can be updated on a Member profile in real time, see pg. 12)

-Replacement Card Request

-Legion Magazine Delivery Updates

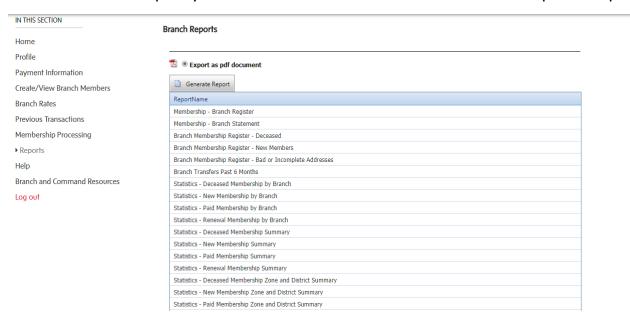| IN THIS SECTION	Please select from the drop down list below and enter the necessary information.
Home	Select a choice
Profile	[Deceased Member ⌄]
Payment Information	Member Name
Create/View Branch Members	[ ]
Branch Rates	Membership Number
Previous Transactions	[ ]
Membership Processing	
▸ Data Change Form	Additional Comments
Reports	[ ]
Help	
Branch and Command Resources	
Log out	[Submit]

Transfers

-A replacement card is processed, if the member is transferring and has paid for the current year.

-If the member has not paid for the current year and is transferred into your branch. Please submit per capita tax for 2018 and request a replacement card at the same time as transfers do not automatically print cards when transferred.

#10- Reports

Please select the report you would like to view and select Generate Report to open.

-Branch register in .pdf format

-Branch statement (suspense) as of July 22, 2016:

-Deceased Member Report

-New/Reinstated members

-Bad or Incomplete addresses

-Transfer Report (6 months)

-Monthly branch and zone reports

#11- Help

Below "IN THIS SECTION" select 'Help' this section includes training guides, training videos and FAQ's .

Training Guides

PDF Membership Website for Branches

Training Videos

Hover over a video to see the title and click on it to play. You can make the videos full screen by clicking on the icon on the bottom right of the video.

Frequently Asked Questions (FAQ)

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Frequently Asked Questions (FAQs)

- How do you enroll a new member?
  - First, go to Branch Members and click on Add New. Fill out the fields in the Member Profile and click Update. Write down the new Membership ID number. Go to Membership Processing and select Enrollment in the process type. Enter the new Membership ID and click Save. If you have any additional years or buy back years, add them now or click on Close to finish.

- How does the branch receive their money if a member renews on line?
  - Branches will receive their portion of the fees regularly from DC via cheque

- How will a branch know when a member has renewed on line?
  - An email notification will be sent to the branch immediately. A paper transmittal and membership card will be mailed to the branch per the standard procedures.

- When a member renews on line is the card still sent to the branch?
  - Yes

- Is paperwork still required if a branch uses the website?
  - Only if the Branch is paying by cheque, then the Transmittal will need to be printed and attached to the cheque and mailed to Dominion Command.

- How does the website help reduce mistakes?
  - By automatically calculating the totals for the processing records entered and by preventing duplicate payments for the same members.

- What kind of training will be available for branches?
  - On line Training videos and training guides will be available on this website.

- Can members still pay at the branch?
  - Yes

- What kind of Internet service is required.....dial up?
  - Basic Internet service is required and Internet browsers (Internet Explorer, Firefox, Chrome, etc.) should be kept up to date with updates from their providers.

#12- Branch and Command Resources

IN THIS SECTION

Membership
Bylaws and Branch Management
All Branch Emails
Marketing and Public Relations
Service Bureau
Poppy and Remembrance
Rituals, Awards and Protocol

Membership

The information and resources in this section assists Branches with membership administration. For questions or assistance, please contact Dominion Command Member Services. We will be happy to help!

Toll Free: 855-330-3344
Fax: 613-591-8462
Email: Membership@Legion.ca

Member Services Hours of Operation
Member Services is open Mon-Fri, 8:30 – 4:00 p.m. EST

Publications, Guides and manuals

- Membership Manual

- Membership Form Processing Guide

- Membership Website – Branch Processing Guide

Forms

- Application for Membership [800293]
- Application for Life Member Award [800282]
- Graduating Cadet Application
- Declaration of Legion Service
- Declaration of Ladies Auxiliary Service
- Transfer Application [800792]
- Member Master Card [800148]

Member Retention Resources

- Letter for New Members [800815]
- Member Renewal Letter [800395]
- Early Bird Poster [800684]
- Early Bird Letter [800711]
- Branch Hospitality Program

Per Capita Tax

1205.   Each branch shall: a. remit at least monthly to Dominion Command a per capita tax payment of all tax collected during the preceding month;

- Per Capita Tax Rate

Additional Resources

- Member benefit partners
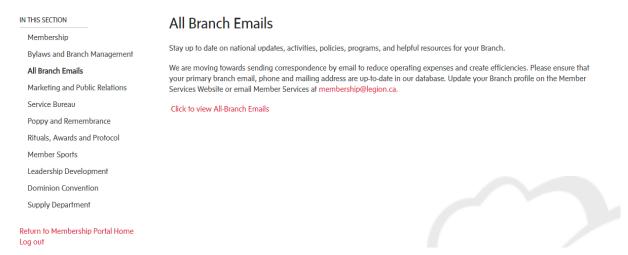- Membership Matters

Monthly Membership and Year End Reports

Monthly Membership Statistics / Year End Reports

Click here to view

Bylaws and Branch Managemnt

Bylaws and Branch Management

The information and resources in this section assists Branches and Members with Legion Bylaws and Branch management. For questions or additional assistance, please contact your Provincial Command.

Publications, Guides, and Manuals

- Act to Incorporate
- General By-laws (amended January 2018)
- Rules of Procedure (July 2017)
- Branch Leadership Manual (For historical reference)
- Real Property Development Handbook

Forms

- Complaint Form

Left menu:

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Leadership Development
Dominion Convention
Supply Department
Member Programs

Return to Membership Portal Home
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All Branch Emails

All Branch Emails

Stay up to date on national updates, activities, policies, programs, and helpful resources for your Branch.

We are moving towards sending correspondence by email to reduce operating expenses and create efficiencies. Please ensure that your primary branch email, phone and mailing address are up-to-date in our database. Update your Branch profile on the Member Services Website or email Member Services at membership@legion.ca.

Click to view All-Branch Emails

Left menu:

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** See the menu on the left for many other useful resources.

#13- Log Out

Questions: If you have questions regarding your account or technical, issues please call: 1-855-330-3344 or email memberhelpdesk@legion.ca