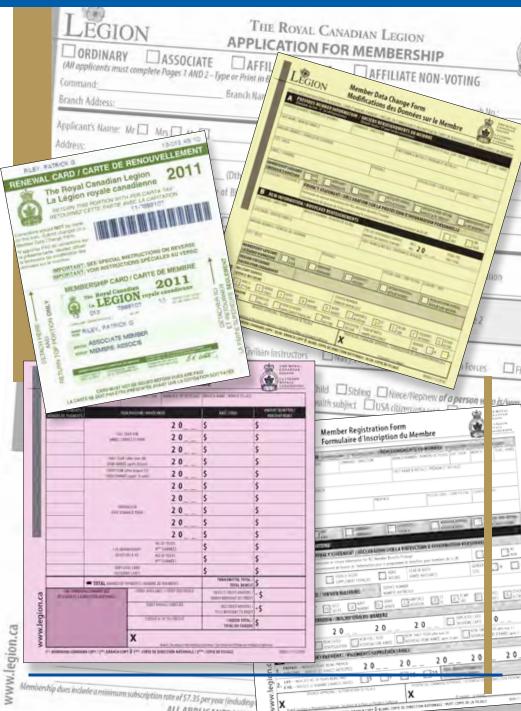


## MEMBERSHIP FORM PROCESSING GUIDE



#### The Royal Canadian Legion



## MEMBERSHIP FORM PROCESSING GUIDE

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# **PROCESSING GUIDE**

This Guide is intended for the Branch Secretary, the Branch Membership Chairman and other Branch or Provincial Command personnel who are involved in administrative duties dealing with membership. It illustrates sample forms that are used in the Legion's membership processing system, explains how they should be completed and submitted and contains many helpful hints on ways to make the system better for you and the member.

It is important to ensure that the appropriate forms are completed and submitted to Dominion Command in order to ensure that memberships are processed in a timely fashion. The various forms required to process membership are supplied by Dominion Command and can be ordered free of charge from the Supply Department. Items available for order can be found on the Supply Requisition Form.

The Branch Membership Chairman should review the General-By-Laws and the Eligibility Guide to ensure that the correct procedures are followed when completing application forms for new and reinstated members. The membership processing forms are designed specifically for providing information from the branch to Dominion Command computer system. They are the communication link required to ensure that the information required by Dominion Command is stated and processed in the most efficient way possible. Thousands of transactions are handled daily by the membership staff and it is important that the information be stated clearly and fully. The appropriate form must accompany every transaction submitted to Dominion Command.

This Guide is by far the most useful tool when processing membership transactions and anyone dealing with membership at the branch should make constant use of it. Most processing errors could be avoided by referring to this guide.

# FORMS

The following figures illustrate the Membership forms available from the Legion Supply Department.

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FIGURE 1-2 — MEMBER DATA CHANGE FORM

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FIGURE 1-5 — MEMBERSHIP APPLICATION FORM

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### FIGURE 1-6 — APPLICATION FOR TRANSFER FORM



FIGURE 1-7 — MEMBERSHIP RENEWAL CARD

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FIGURE 1-8 — LAST POST DEATH NOTICE

## HOW TO COMPLETE A MEMBERSHIP APPLICATION FORM

### DESCRIPTION

Anyone applying for membership must complete a Membership Application Form which must be processed in accordance with the procedures set out in the General By-Laws.

Ensure that all eligibility documentation is attached, proof of citizenship has been established and the Privacy Statement has been completed.

The application must be proposed and seconded by voting members of the branch.

Once the application has been approved by all the appropriate parties, this and any other required eligibility documentation is to be maintained by the branch in the member's file; do not send to Dominion Command.

Branches must use a Member Registration Form to register a new/ reinstated member at Dominion Command.

### FORMS TO USE

201. MEMBERSHIP APPLICATION FORM (See Figure 1-5) (White two sided form) (Stock # 800293)

## PROCESS

- 202. ORDINARY MEMBERSHIP—MEMBERSHIP APPLICATION FORM (See Figures 2-1 and 2-2) In order to apply for Ordinary membership the applicant must be a Canadian Citizen or Commonwealth subject.
  - a. Select the box at the top of the form to indicate membership category;
  - b. Complete the branch information section;
  - c. Complete the member information section for the person applying for membership;
  - d. Select the activities in which the member has indicated an interest;

- e. Complete Section D & E and Page 2 of application form;
  - i. Section "D" tick the appropriate box to indicate the documentation that was provided as proof of eligibility;
  - ii. Section "E"- Provide service information indicate the applicable area; and
  - iii. Proceed to page 2 of the application form.
- f. Complete the Privacy Statement This is a mandatory requirement. Applicant must complete and sign this section. Members cannot be processed without this information;
- g. If Legion Magazine is not required, tick box;
- h. Signatures;
  - i. Application form must be signed and dated by the applicant;
  - ii. Provide proposer's name Proposer must sign and date the application form; and
  - iii. Provide seconder's name Seconder must sign and date the application form.
- i. Record of Legion Service complete this section for members who are reinstating;
- j. Have you been expelled from any Legion Branch or other Veteran's organization – you must answer "yes or no". If "yes" provide the branch/organization information; and
- k. Complete the Section "For Branch Use".

The application and eligibility documents must be reviewed by the Branch Membership Committee and presented at a Branch General Meeting for approval or otherwise.

All new members must be initiated in accordance with The General By-Laws and the Ritual and Insignia Manual.

When membership dues are received a receipt must be issued which will serve as proof of membership until a membership card is received.

- i. Application form must be signed by the Branch Membership Committee;
- ii. The application must be presented at a General Meeting of the Branch for approval or otherwise;

- iii. Record the date the member was initiated;
- iv. Record the amount of the membership dues paid; and
- v. Indicate the date that the Registration Form and Per Capita Tax was submitted to Dominion Command.

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FIGURE 2-1 — MEMBERSHIP APPLICATION FORM (FRONT) FOR ORDINARY MEMBERSHIP

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### FIGURE 2-2 — MEMBERSHIP APPLICATION FORM (BACK) FOR ORDINARY MEMBERSHIP

- 203. ASSOCIATE MEMBERSHIP—MEMBERSHIP APPLICATION FORM (See Figures 2-3 and 2-4) In order to apply for Associate membership the applicant must be a Canadian Citizen or Commonwealth subject.
  - a. Select the box at the top of the form to indicate membership category;
  - b. Complete the branch information section;
  - c. Complete the member information section for the person applying for membership;
  - d. Select the activities in which the member has indicated an interest;
  - e. Complete Sections "A" or "B" or "C" and Page 2 of application for;
    - i. Section "A" tick the appropriate box to indicate the type of service. If you complete this section then you must also complete Sections "D & E";
    - Section "B" Provide member information by ticking the appropriate box. If you complete this section then you must also complete Sections "D & E";
    - iii. Section "C" tick the appropriate box as it pertains to the applicant. If you complete this section, you must also complete Section "D";
    - iv. Section "D" tick the appropriate box to indicate the documentation that was provided as proof of eligibility;
    - v. Section "E" Provide service information indicate the applicable area; and
    - vi. Proceed to page 2 of the application form.
  - f. Complete the Privacy Statement This is a mandatory requirement. Applicant must complete and sign this section. Members cannot be processed without this information;
  - g. If Legion Magazine is not required, tick box;
  - h. Signatures Required;
    - i. Application form must be signed and dated by the applicant;

- ii. Provide proposer's name Proposer must sign and date the application form; and
- iii. Provide seconder's name Seconder must sign and date the application form.
- i. Record of Legion Service Complete this section for members who are reinstating;
- j. Have you been expelled from any Legion Branch or other Veteran's organization – you must answer "yes or no". If "yes" provide the branch/organization information; and
- k. Complete the Section "For Branch Use".

The application and eligibility documents must be reviewed by the Branch Membership Committee and presented at a Branch General Meeting for approval or otherwise.

All new members must be initiated in accordance with The General By-Laws and the Ritual and Insignia Manual.

When membership dues are received a receipt must be issued which will serve as proof of membership until a membership card is received.

- i. Application form must be signed by the Branch Membership Committee;
- ii. The application must be presented at a General Meeting of the Branch for approval or otherwise;
- iii. Record the date the member was initiated;
- iv. Record the amount of the membership dues paid; and
- v. Indicate the date that the Registration Form and Per Capita Tax was submitted to Dominion Command.

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FIGURE 2-3 — MEMBERSHIP APPLICATION FORM (FRONT) FOR ASSOCIATE MEMBERSHIP

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### FIGURE 2-4 — MEMBERSHIP APPLICATION FORM (BACK) FOR ASSOCIATE MEMBERSHIP

- 204. AFFILIATE VOTING MEMBERSHIP—MEMBERSHIP APPLICATION FORM (See Figures 2-5 and 2-6). In order to apply for Affiliate Voting membership the applicant must be a Canadian Citizen or Commonwealth subject.
  - a. Select the box at the top of the form to indicate membership category;
  - b. Complete the branch information section;

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FIGURE 2-5 — MEMBERSHIP APPLICATION FORM (FRONT) FOR AFFILIATE VOTING MEMBERSHIP

- c. Complete the member information section for the person applying for membership;
- d. Select the activities in which the member has indicated an interest;
- e. Do not complete Sections A, B, C, D or E. Go to Page 2;

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#### FIGURE 2-6 — MEMBERSHIP APPLICATION FORM (BACK) FOR AFFILIATE VOTING MEMBERSHIP

- f. Complete the Privacy Statement This is a mandatory requirement. Applicant must complete and sign this section. Members cannot be processed without this information;
- g. If applicant is not eligible for Ordinary / Associate membership, tick box;
- h. If Legion Magazine is not required, tick box;
- i. Signatures Required;
  - i. Application form must be signed and dated by the applicant;
  - ii. Provide proposer's name Proposer must sign and date the application form; and
  - iii. Provide seconder's name Seconder must sign and date the application form.
- j. Record of Legion Service complete this section for members who are reinstating;
- k. Have you been expelled from any Legion Branch or other Veteran's organization – you must answer "yes or no". If "yes" provide the branch/organization information; and
- I. Complete the Section "For Branch Use".

The application and eligibility documents must be reviewed by the Branch Membership Committee and presented at a Branch General Meeting for approval or otherwise.

All new members must be initiated in accordance with The General By-Laws and the Ritual and Insignia Manual.

When membership dues are received a receipt must be issued which will serve as proof of membership until a membership card is received.

- i. Application form must be signed by the Branch Membership Committee;
- ii. The application must be presented at a General Meeting of the Branch for approval or otherwise;
- iii. Record the date the member was initiated;
- iv. Record the amount of the membership dues paid; and
- v. Indicate the date that the Registration Form and Per Capita Tax was submitted to Dominion Command.

#### The Royal Canadian Legion

- 205. AFFILIATE NON-VOTING MEMBERSHIP—MEMBERSHIP APPLICA-TION FORM (See Figures 2-7 and 2-8). This category of membership is for non-Canadian Citizens or non-Commonwealth subjects who are citizens of an Allied Nation. Please refer to pages 36 and 42 in the Eligibility Guide for applicants that qualify under NATO Allied Member Countries or Canadian Wartime Allied Countries.
  - a. Select the box at the top of the form to indicate membership category;
  - b. Complete the branch information section;
  - c. Complete the member information section for the person applying for membership;
  - d. Select the activities in which the member has indicated an interest;
  - e. Do not complete Sections A, B, C, D or E. Go to Page 2;
  - f. Complete the Privacy Statement This is a mandatory requirement. Applicant must complete and sign this section. Members cannot be processed without this information;
  - g. If applicant is not eligible for Ordinary / Associate membership, tick box;
  - h. If Legion Magazine is not required, tick box;
  - i. Signatures Required;
    - i. Application form must be signed and dated by the applicant;
    - ii. Provide proposer's name Proposer must sign and date the application form; and
    - iii. Provide seconder's name Seconder must sign and date the application form.
  - j. Record of Legion Service complete this section for members who are reinstating;
  - k. Veteran's organization you must answer "yes or no". If "yes" provide the branch/organization information ; and
  - I. Complete the Section "For Branch Use".

The application and eligibility documents must be reviewed by the Branch Membership Committee and presented at a Branch General Meeting for approval or otherwise. All new members must be initiated in accordance with The General By-Laws and the Ritual and Insignia Manual.

When membership dues are received a receipt must be issued which will serve as proof of membership until a membership card is received.

i. Application form must be signed by the Branch Membership Committee;

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### FIGURE 2-7 — MEMBERSHIP APPLICATION FORM (FRONT) FOR AFFILIATE NON-VOTING MEMBERSHIP

- ii. The application must be presented at a General Meeting of the Branch for approval or otherwise;
- iii. Record the date the member was initiated;
- iv. Record the amount of the membership dues paid; and
- v. Indicate the date that the Registration Form and Per Capita Tax was submitted to Dominion Command.

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#### FIGURE 2-8 — MEMBERSHIP APPLICATION FORM (BACK) FOR AFFILIATE NON-VOTING MEMBERSHIP

# HOW TO REMIT PER CAPITA TAX

### DESCRIPTION

A Branch Transmittal Form must accompany all membership payments sent to Dominion Command. This includes new member, renewals (includes renewal cards and Member Registration Forms), reinstatements, Life, supplementary and duplicate card payments. The form is used to summarize payments contained in the submission, record any debits or credits being considered, and record the cheque number and the amount being submitted.

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FIGURE 3-1 — BRANCH TRANSMITTAL FORM

## FORMS TO USE

- 301. BRANCH TRANSMITTAL FORM (See Figure 1-3) (Pink two part form) (Stock # 800611)
  - a. 1<sup>st</sup> copy is the Dominion Command copy
  - b. 2<sup>nd</sup> copy is the Branch copy

## PROCESS

302. BRANCH TRANSMITTAL FORM (See Figure 3-1)

Complete this form when submitting renewal cards and Member Registration Forms to Dominion Command. It must accompany all cheques being submitted to Dominion Command.

- a. Complete all applicable sections which include date and command and branch.
- b. Indicate the number of payments being submitted for corresponding year. To calculate the total, multiply the number of payments by the per capita tax rate for that year. Note: If submitting half year or one third year payments calculate using ½ or 1/3 of the full year's per capita tax rate.
- c. Indicate the number of duplicate cards being requested. Cost for a duplicate card is \$3.00. To calculate the total, multiply the number of duplicate cards requested by \$3.00.
- d. Indicate the number of life memberships being submitted and the no. of years being paid. Indicate the rate (current year's per capita tax rate). To calculate the total, multiply the rate by the number of years being paid (this is determined by the member's age according to schedule in Section 205.a. of the General By-Laws).
- e. Complete the total number of payments being submitted and the total of the transmittal.
- f. If using suspense account credits or paying debits enter the amount on the appropriate line. Add or subtract this amount from the "Transmittal Total" to determine the amount to be submitted. Enter this figure on the "Cheque Total" line. Your cheque must agree with this figure.

- g. Complete cheque information by providing the cheque number and the total amount of the cheque being submitted.
- h. Ensure your cheque is made payable to Dominion Command, correctly dated, that the written amount agrees with the numerical figure, and that the cheque has two signatures when required.
- i. Double check the number of items, the rate and your calculations to ensure that the correct per capita tax is remitted. This will help minimize errors and reduce extra work for both the branch and Dominion Command.
- j. Staple any Member Data Change Forms to the front of the member's renewal card or Member Registration Form and place these at the front of your submission.
- k. Submit no more than 200 items per transmittal. Dominion Command uses a batch system to process submissions and it is difficult to process those with more than 200 items. Wrap the transmittal around the submission and place the cheque on top. The package should be properly secured before putting it in the envelope.
- Submit per capita tax to Dominion Command using the preaddressed membership envelopes. Ensure correct postage is affixed. The size of the envelopes comply with Canada Post guidelines; however, additional postage may be required dependent on weight and thickness.
- m. Remember each transmittal form must be accompanied by a separate cheque. Per capita tax submissions should be sent to Dominion Command at least weekly.

# HOW TO PROCESS A NEW MEMBER

## DESCRIPTION

Anyone applying for membership must complete a Membership Application Form which must be processed in accordance with the procedures set out in the General By-Laws. Once the application has been approved by all the appropriate parties, this and any other required eligibility documentation is to be maintained by the branch in the member's file. Do not send to Dominion Command. Branches must use a Member Registration Form to register a new member at Dominion Command.

### FORMS TO USE

- 401. MEMBERSHIP APPLICATION FORM (See Figure 1-5) (White two sided form) (Stock # 800293)
- 402. MEMBER REGISTRATION FORM (See Figure 1-1) (MRF - White two part form) (Stock # 800613)
  - a. White is the Dominion Command copy
  - b. Green is the Branch copy
- 403. TRANSMITTAL FORM (See Figure 1-3) (Pink two part form) (Stock # 800611)
  - a. 1<sup>st</sup> copy is the Dominion Command copy
  - b. 2<sup>nd</sup> copy is the Branch copy

## PROCESS

- 404. MEMBERSHIP APPLICATION FORM
  - a. When a person applies for membership, ensure the appropriate areas of the application form are completed (see Chapter 2) and all eligibility documentation is attached. You must ensure that proof of citizenship has been established and the Privacy Statement has been completed. The application must be proposed and seconded by voting members of the branch.

- b. The application and eligibility documents must be reviewed by the Branch Membership Committee and presented at a Branch General Meeting for approval or otherwise.
- c. When membership dues are received a receipt must be issued which will serve as proof of membership until a membership card is received.
- d. Add the member's name to the branch register and create a file for the member. Fill out a Master Card for the member's file and record the date of payment. When the membership card is received record the membership number that has been issued on the member's file.
- e. All new members must be initiated in accordance with The General By-Laws and the Ritual and Insignia Manual.
- f. To submit a new membership to Dominion Command complete a Member Registration Form.
- 405. MEMBER REGISTRATION FORM (See Figure 4-1)
  - a. The member must be given a receipt for the dues paid.
  - b. Record payment on the member's master card file and any other applicable branch records.
  - c. Complete the Member Information Section of the Member Registration Form. Ensure that the citizenship and Privacy Statement are completed and the complete mailing address and postal code is included. The Date field should reflect the date the member completed the application form. Please record the date of application on the Member Registration Form.
  - d. Complete Section D by marking the year being paid and "New– Full Year". After July 1<sup>st</sup> new members may pay half year per capita tax. To indicate mark "New – Half Year". After September 1<sup>st</sup> new members may pay one third per capita tax. To indicate mark "New – Third Year".

**Note:** If the applicant does not pay dues for the current year but pre-pays for the following year only, the applicant does not become a member until January 1<sup>st</sup> of the year paid. These memberships must not be submitted to Dominion Command prior to November 1<sup>st</sup>.

#### The Royal Canadian Legion

e. When submitting per capita tax, a cheque must be accompanied by the above forms as well as a Branch Transmittal Form. Cheque must be made payable to Dominion Command.

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- 406. BRANCH TRANSMITTAL FORM (See Figure 4-2). Must accompany all cheques being submitted to Dominion Command.
  - a. Complete all applicable sections which include date and command and branch.

b. Indicate the number of payments being submitted for corresponding year. To calculate the total, multiply the number of payments by the current year's per capita tax rate. If submitting per capita tax for arrear year, use the rate applicable for the year submitted.

**Note:** If submitting half year or one third year payments calculate using 1/2 or 1/3 of the full year's per capita tax rate.

- c. Complete the total number of payments being submitted and the total of the transmittal.
- d. Complete cheque information by providing the cheque number and the total amount of the cheque being submitted.

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FIGURE 4-2 — BRANCH TRANSMITTAL FORM

# **HOW TO PROCESS A RENEWAL**

## DESCRIPTION

Two-Part Renewal/Membership Cards for the coming year are produced by Dominion Command each July for all members in the branch who have paid membership dues for the current year at that time. These cards are produced once a year and cannot be reissued or replaced. The renewal cards for the new processing year must not be submitted to Dominion Command prior to September 1<sup>st</sup>. You will not receive a two-part card for new or renewing members submitted after these cards are produced. When renewing these members for the new processing year a Member Registration Form must be used and a membership card will be produced and sent to the branch once the payment is processed in our office.

## FORMS TO USE

501. RENEWAL CARD (See Figure 1-7) (bar code portion)

**Note:** If the renewal card is not available then you must complete a MRF – do not submit both.

502. MEMBER REGISTRATION FORM (See Figure 1-1) (MRF - White two part form) (Stock # 800613)

a. White - is the Dominion Command copy

b. Green - is the Branch copy

- 503. TRANSMITTAL FORM (See Figure 1-3) (Pink two part form) (Stock # 800611)
  - a. 1<sup>st</sup> copy is the Dominion Command copy
  - b. 2<sup>nd</sup> copy is the Branch copy

## PROCESS

- 504. RENEWAL CARD (See Figure 5-1)
  - a. When membership dues are paid a receipt must be issued to the member.

- b. The two part cards are issued in alphabetical sequence for easy reference. Remove the membership card portion, sign and give the card to the member. Membership cards must not be given to members before dues are paid.
- c. Record the date of payment on the member's Master Card and other branch records.
- d. The renewal card portion (Figure 5-1) is to be sent with the per capita tax to Dominion Command

When submitting per capita tax a cheque must be accompanied by the above renewal membership card (Figure 5-1) as well as a Branch Transmittal Form. Cheque must be made payable to Dominion Command.

**Note:** If the two-part renewal/membership card is not available then you must complete a Member Registration Form



FIGURE 5-1 — RENEWAL CARD (BAR CODE PORTION)

#### 505. MEMBER REGISTRATION FORM (See Figure 5-2)

- a. The member must be given a receipt for the dues paid.
- b. Record payment on the member's master card file and any other applicable branch records.

- c. Complete the Member Information Section of the Member Registration Form. Ensure that the citizenship and Privacy Statement are completed and the complete mailing address and postal code is included.
- d. Complete Section D by marking the year being paid and "New– Full Year". After July 1<sup>st</sup> new members may pay half year per capita tax. To indicate mark "New – Half Year". After September 1<sup>st</sup> new members may pay one third per capita tax. To indicate mark "New – Third Year".
- e. When submitting per capita tax, a cheque must be accompanied by the above forms as well as a Branch Transmittal Form. Cheque must be made payable to Dominion Command.

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FIGURE 5-2 — MEMBER REGISTRATION FORM

- 506. BRANCH TRANSMITTAL FORM (See Figure 5-3) Must accompany all cheques being submitted to Dominion Command.
  - a. Complete all applicable sections which include date and command and branch.
  - b. Indicate the number of payments being submitted for corresponding year. To calculate the total, multiply the number of payments by the current year's per capita tax rate.

**Note:** If submitting half year or one third year payments calculate using 1/2 or 1/3 of the full year's per capita tax rate.

- c. Complete the total number of payments being submitted and the total of the transmittal.
- d. Complete cheque information by providing the cheque number and the total amount of the cheque being submitted.

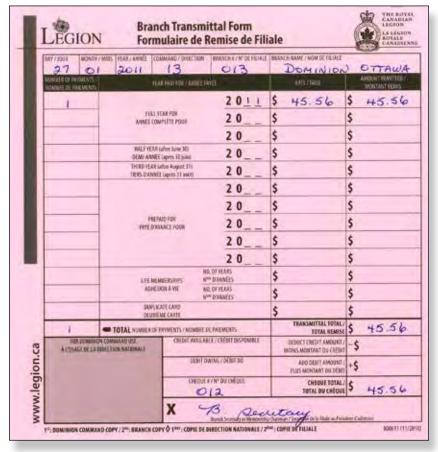


FIGURE 5-3 — BRANCH TRANSMITTAL FORM

# HOW TO PROCESS A REINSTATEMENT

#### DESCRIPTION

Any payment of per capita tax that results in a break in service is considered a reinstatement. For example: If a member paid for 2009, did not pay for 2010 and paid for 2011, this is considered a reinstatement. (Note: A member may still renew their membership for the current and previous two years). A member may apply to any branch for reinstatement regardless of the length of time the membership has lapsed. Reinstatements are not retroactive and all previous years of service are disqualified. All reinstating members must complete a Membership Application Form which must be processed in accordance with the procedures set out in the General By-Laws. Once the application has been approved by all appropriate parties, this and any other eligibility documentation is to be maintained by the branch in the member's file. A Member Registration Form must be used to submit a reinstating member to Dominion Command.

### FORMS TO USE

- 601. MEMBERSHIP APPLICATION FORM (See Figure 1-5) (White two sided form) (Stock # 800293)
- 602. MEMBER REGISTRATION FORM (See Figure 1-1) (MRF - White two part form) (Stock # 800613)
  - a. White is the Dominion Command copy

b. Green - is the Branch copy

- 603. TRANSMITTAL FORM (See Figure 1-3) (Pink two part form) (Stock # 800611)
  - a. 1<sup>st</sup> copy is the Dominion Command copy
  - b. 2<sup>nd</sup> copy is the Branch copy

#### PROCESS

- 604. MEMBERSHIP APPLICATION FORM
  - a. When a person applies for reinstatement, ensure the appropriate areas of the application form are completed and all eligibility documentation is attached. You must ensure

that proof of citizenship has been established and the Privacy Statement has been completed. The application must be proposed and seconded by the voting members of the branch.

- b. The application and eligibility documents must be reviewed by the Branch Membership Committee and presented at a Branch General Meeting for approval or otherwise.
- c. When membership dues are received a receipt must be issued which will serve as proof of membership until a membership card is received.
- d. Fill out a Master Card for the member's file and record the date of payment. Add the member's name to the branch register and create a file for the member if he his new to the branch or if a file does not already exist. If the member's number is known or when the membership card is received add this information to the records.
- e. Reinstating members do not have to be re-initiated.
- f. To submit a new membership to Dominion Command complete a Member Registration Form.
- 605. MEMBER REGISTRATION FORM (See Figure 6-1)
  - a. The member must be given a receipt for the dues paid.
  - b. Record payment on the member's master card file and any other applicable branch records.
  - c. A Member Registration Form must be used to submit a reinstatement to Dominion Command
  - d. Complete the Member Information Section of the Member Registration Form. Ensure that the citizenship and Privacy Statement are completed and the complete mailing address and postal code is included. Include existing membership number if available. The date on the Member Registration Form should reflect the date that the member completed the application form.
  - e. Complete Section D by marking the year being paid and the box indicating "REINSTATED". Note: Reinstated members are not entitled to pay 1/2 year or 1/3 year per capita tax.

- f. Retain the Membership Application Form and all eligibility documentation in the member's file. Submit the Member Registration Form (white copy) with a Branch Transmittal Form (pink) and the appropriate per capita tax. If reinstating member of the current year and renewing for the upcoming year, this should be done on the same Member Registration Form do not submit more than one form.
- g. When submitting per capita tax, a cheque must be accompanied by the above forms as well as a Branch Transmittal Form. Cheque must be made payable to Dominion Command.

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FIGURE 6-1 — MEMBER REGISTRATION FORM

- 606. BRANCH TRANSMITTAL FORM (See Figure 6-2). Must accompany all cheques being submitted to Dominion Command.
  - a. Complete all applicable sections which include date and command and branch.
  - b. Indicate the number of payments being submitted for corresponding year. To calculate the total, multiply the number of payments by the current year's per capita tax rate.

**Note:** If submitting half year or one third year payments calculate using 1/2 or 1/3 of the full year's per capita tax rate.

- c. Complete the total number of payments being submitted and the total of the transmittal.
- d. Complete cheque information by providing the cheque number and the total amount of the cheque being submitted.

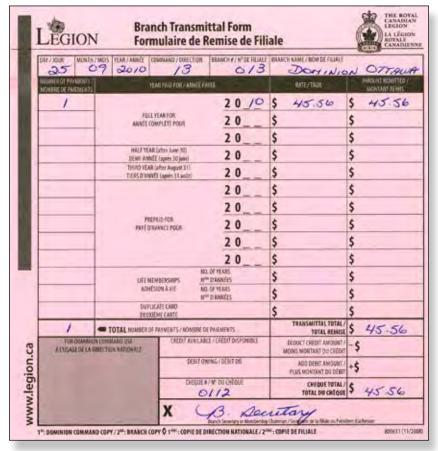


FIGURE 6-2 — BRANCH TRANSMITTAL FORM

# HOW TO PROCESS A LIFE MEMBERSHIP

### DESCRIPTION

A branch may nominate any Ordinary, Associate or Affiliate Voting member for a Life Membership Award for outstanding service in accordance with the General By-Laws and the Honours and Awards Manual. The membership period required is ten (10) consecutive years immediately prior to the date of nomination.

## FORMS TO USE

- 701. APPLICATION FOR LIFE MEMBERSHIP FORM (See Figure 1-4) (White single sided form) (Stock # 800282)
- 702. MEMBER REGISTRATION FORM (See Figure 1-1) (MRF - White two part form) (Stock # 800613)
  - a. White is the Dominion Command copy
  - b. Green is the Branch copy
- 703. TRANSMITTAL FORM (See Figure 1-3) (Pink two part form) (Stock # 800611)
  - a. 1<sup>st</sup> copy is the Dominion Command copy
  - b. 2<sup>nd</sup> copy is the Branch copy

## PROCESS

- 704. LIFE APPLICATION FORM (See Figure 7-1)
  - a. Complete the appropriate application form and citation following the procedures set out in the Honours and Awards Manual. These must be approved by your Provincial Honours and Awards Committee prior to submission to Dominion Command.
  - b. The Life Application form must be presented and approved at a branch general meeting.

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FIGURE 7-1 — APPLICATION FOR LIFE MEMBERSHIP

#### 705. MEMBER REGISTRATION FORM (See Figure 7-2)

- a. After the Life Application Form had been approved by the general meeting of the branch, complete the Member Information Section of the Member Registration Form.
- b. Complete Section E indicating the number of years being paid according to the member's age and as indicated on the Life Application Form and Section 205.a. of the General By-Laws.

This is calculated by multiplying the number of years being paid by the current year's rate.

- c. Provincial Command approval is required for all Life applications prior to submission to Dominion Command. Approval must be shown on the document forwarded to Dominion Command with the per capita tax.
- d. The approved Member Registration Form or copy of original Application Form is to be sent to Dominion Command. Do not send original application form – this should be kept on the member's file at the branch.
- e. Cheque must be accompanied by the above forms as well as a Branch Transmittal Form. Cheque must be made payable to Dominion Command.

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FIGURE 7-2 — MEMBER REGISTRATION FORM

- 706. BRANCH TRANSMITTAL FORM (See Figure 7-3) Must accompany all cheques being submitted to Dominion Command.
  - a. Complete all applicable sections which include date and command and branch.
  - b. Indicate the number of payments being submitted for corresponding year. To calculate the total, multiply the number of years by the current year's per capita tax rate.
  - c. Complete the total number of payments being submitted and the total of the transmittal.
  - d. Complete cheque information by providing the cheque number and the total amount of the cheque being submitted.

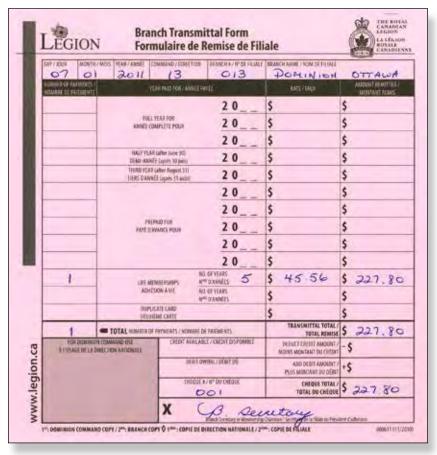


FIGURE 7-3 — BRANCH TRANSMITTAL FORM

# HOW TO PROCESS A PREPAYMENT

### DESCRIPTION

A member may prepay up to five years per capita tax which should be calculated at the current year's rate.

## FORMS TO USE

- 801. MEMBER REGISTRATION FORM (See Figure 1-1) (MRF - White two part form) (Stock # 800613)
  - a. White is the Dominion Command copy
  - b. Green is the Branch copy
- 802. TRANSMITTAL FORM (See Figure 1-3) (Pink two part form) (Stock # 800611)
  - a. 1<sup>st</sup> copy is the Dominion Command copy
  - b. 2<sup>nd</sup> copy is the Branch copy

### PROCESS

- 803. MEMBER REGISTRATION FORM (See Figure 8-1)
  - a. The member must be given a receipt for the dues paid.
  - b. Record payment on the member's master card file and any other applicable branch records.
  - c. Complete the Member Information Section of the Member Registration Form.
  - d. Complete Section D indicating if member is renewing for the current year.
  - e. Complete Section E indicating the years being pre-paid.

**Note:** per capita tax for the current year must be paid before a pre-payment of future years can be processed.

f. When submitting per capita tax a cheque must be accompanied by the above forms as well as a Branch Transmittal Form. Cheque must be made payable to Dominion Command.

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FIGURE 8-1 — MEMBER REGISTRATION FORM

- 804. BRANCH TRANSMITTAL FORM (See Figure 8-2). Must accompany all cheques being submitted to Dominion Command.
  - a. Complete all applicable sections which include date and command and branch.
  - b. Indicate the number of payments being submitted for corresponding year. To calculate the total, multiply the number of payments by the current year's per capita tax rate.
  - c. Complete the total number of payments being submitted and the total of the transmittal.
  - d. Complete cheque information by providing the cheque number and the total amount of the cheque being submitted.

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FIGURE 8-2 — BRANCH TRANSMITTAL FORM

# HOW TO REQUEST A DUPLICATE CARD

#### DESCRIPTION

If a member's card has been lost, stolen or destroyed a duplicate card can be ordered at a cost of \$3.00. A duplicate card cannot be issued unless per capita tax for the year requested has been paid.

### FORMS TO USE

- 901. MEMBER REGISTRATION FORM (See Figure 1-1) (MRF - White two part form) (Stock # 800613)
  - a. White is the Dominion Command copy
  - b. Green is the Branch copy
- 902. TRANSMITTAL FORM (See Figure 1-3) (Pink two part form) (Stock # 800611)
  - a. 1<sup>st</sup> copy is the Dominion Command copy
  - b. 2<sup>nd</sup> copy is the Branch copy

### PROCESS

- 903. MEMBER REGISTRATION FORM (See Figure 9-1)
  - a. Complete the Member Information Section of the Member Registration Form.
  - b. Complete Section D by checking the box for a duplicate card. Indicate the year that is required.
  - c. Cheque must be accompanied by the above forms as well as a Branch Transmittal Form. Cheque must be made payable to Dominion Command.

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FIGURE 9-1 — MEMBER REGISTRATION FORM

- 904. BRANCH TRANSMITTAL FORM (See Figure 9-2). Must accompany all cheques being submitted to Dominion Command.
  - a. Complete all applicable sections which include date and command and branch.
  - b. Indicate the number of duplicate cards being requested. Cost for a duplicate card is \$3.00. To calculate the total, multiply the number of duplicate cards requested by \$3.00.
  - c. Complete the total number of payments being submitted and the total of the transmittal.
  - d. Complete cheque information by providing the cheque number and the total amount of the cheque being submitted.

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FIGURE 9-2 — BRANCH TRANSMITTAL FORM

# **HOW TO PROCESS A TRANSFER**

#### DESCRIPTION

Members may apply to any branch to transfer their membership. The branch that the member wishes to transfer to must initiate the transfer. A transfer cannot be initiated by the old branch. Transfers must be approved at a branch general meeting before submitting to Dominion Command for processing.

### FORMS TO USE

- 1001. TRANSFER APPLICATION FORM (See Figure 1-6) (White two sided form) (Stock # 800792)
- 1002. MEMBER DATA CHANGE FORM (See Figure 1-2) (Yellow two part form) (Stock # 800669)
  - a. Yellow is the Dominion Command copy
  - b. Blue is the Branch copy
- 1003. MEMBER REGISTRATION FORM (See Figure 1-1) ( MRF - White two part form) (Stock # 800613)
  - a. White is the Dominion Command copy
  - b. Green is the Branch copy
- 1004.TRANSMITTAL FORM (See Figure 1-3) (Pink two part form) (Stock # 800611)
  - a. 1<sup>st</sup> copy is the Dominion Command copy
  - b. 2<sup>nd</sup> copy is the Branch copy

## PROCESS

1005. TRANSFER APPLICATION FORM (See Figures 10-1 and 10-2).

- a. Members who wish to transfer must complete a Transfer Application Form at the branch they wish to transfer to. They may only apply to transfer if they are in good standing or if lapsed for not more than the current or immediate preceding two years and the arrear years are paid at the time of transfer.
- b. If the member does not have a Membership Card to prove current status, the branch should contact the previous branch or Dominion Command for confirmation.

- c. The branch membership committee should review the application form and contact the previous branch to ensure that the member is in good standing and obtain any information that may be pertinent.
- d. The application must be presented to a general meeting of the branch for approval or otherwise.

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#### FIGURE 10-1 — APPLICATION FOR TRANSFER FORM (FRONT)

- e. If paying dues at the time of the transfer, a receipt should be given as proof of membership until a membership card is received.
- f. The member's file will not be forwarded from the old branch until the transfer has been processed by Dominion Command; therefore, you should record the receipt number and date of payment in a temporary file until the member's file is received. At this time the payment should be recorded on the member's master card.

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FIGURE 10-2 — APPLICATION FOR TRANSFER FORM (BACK)

#### 1006.MEMBER DATA CHANGE FORM (See Figure 10-3)

- a. Complete the Member Information Section "A" including member number, command/branch number, name and address, etc;
- b. Complete Section "B" indicating new command and new branch;
- c. Complete any other applicable areas in Section "B" such as the address if the member's address has also changed;
- d. A transfer cannot be processed if the current year's per capita tax has not been or is not being submitted to Dominion Command at the time of the transfer – see Member Registration Form (below) if submitting per capita tax.

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FIGURE 10-3 — MEMBER DATA CHANGE FORM

#### 1007. MEMBER REGISTRATION FORM (See Figure 10-4)

- a. If the current year's per capita tax is not paid then you must include per capita tax when submitting the Member Data Change Form.
- b. Complete the Member Information Section of the Member Registration Form and attach it to the Membership Data Change Form.
- c. Complete Section D indicating the year for which the member is renewing. If in arrears for more than the current year indicate all years being paid. Note: that a member can renew for only the current and/or two immediate preceding years.
- d. When submitting per capita tax, a cheque made payable to Dominion Command must accompany the above forms as well as a Branch Transmittal Form.

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FIGURE 10-4 — MEMBER REGISTRATION FORM

- 1008.BRANCH TRANSMITTAL FORM (See Figure 10-5) Must accompany all cheques being submitted to Dominion Command.
  - a. Complete all applicable sections which include date and command and branch.
  - b. Indicate the number of payment being submitted. To calculate the total, multiply the per capita tax rate by the number of payments.
  - c. Complete the total number of payments being submitted and the total of the transmittal.
  - d. Complete cheque information by providing the cheque number and the total amount of the cheque being submitted.

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FIGURE 10-5 — BRANCH TRANSMITTAL FORM

# HOW TO PROCESS A DECEASED MEMBER

### DESCRIPTION

Dominion Command must be advised of the death of any member regardless of membership category. Legion Magazine publishes a removable Last Post Section in the magazine twice a year in the spring and fall and posts the entries in a searchable database on their website <u>www.legionmagazine.com</u>. The Last Post is reserved for Ordinary members of The RCL at the time of death; RCL Life members who were previously Ordinary members and Canadian War Veterans. The branch should complete and submit a Last Post Death Notice for members who have had military service in order to publish an announcement in Legion Magazine. Only those received within a year of the date of death are published in the magazine.

## FORMS TO USE

1101. MEMBER DATA CHANGE FORM (See Figure 1-2) (Yellow two part form) (Stock # 800669)

- a. Yellow is the Dominion Command copy
- b. Blue is the Branch copy
- 1102. LAST POST DEATH NOTICE (See Figure 1-8) (Blue single sided form) (Stock # 800430)

### PROCESS

1103. MEMBER DATA CHANGE FORM (See Figure 11-1)

- a. Complete a Member Data Change Form for all categories of membership;
- b. Complete the Member Information Section "A", including member #, command/branch, name and address;
- c. Complete Section "B" NEW INFORMATION Under the section for Legion Magazine at the bottom of the form, mark the box DECEASED to identify any deceased member.

LEGION Member Data Change Form Modifications des Données sur le Membre
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FIGURE 11-1 — MEMBER DATA CHANGE FORM

#### 1104. LAST POST DEATH NOTICE (if applicable) (See Figure 11-2)

- a. An announcement will be published in the Legion Magazine for any member who has had military service and notification for the death has reached Legion Magazine within one year of the date of death. The onus is on the branches to submit these notices promptly. Late notices will only be entered in the Last Post database on the Legion Magazine website. Notices without a date of death will not be published.
- b. Complete appropriate section on the form providing all known information regarding the deceased.
- c. Provide membership information including Command/ Branch, membership number and the last year membership dues were paid.
- d. If the deceased was a Legion member and the widow(er) is not and wishes to receive Legion magazine for the duration of the calendar year, please complete the section "WIDOW(ER) INFORMATION"; otherwise the deceased's subscription will be cancelled.

If the deceased was a Legion member and the widow(er) is also a Legion member but is currently not receiving the magazine, please complete all areas under this section in order to reactivate the widow(er)'s subscription.

e. The Last Post Notice must be mailed to:

#### Last Post, Legion Magazine

86 Aird Place Kanata, ON K2L 0A1

	e Web site www.legionmagazine.com. y members of The Royal Canadian Legion at time of death:
	y members; and 3) Canadian war veterans (WW I, WW II,
ve only publish in the print magazine those notic	Type or print to ensure legiblity, Be thorough and accurate tes received at our Otawa office within one year of death, fabase on our Web site, where they will have historical value.
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FIGURE 11-2 — LAST POST DEATH NOTICE

## HOW TO PROCESS MEMBER INFORMATION CHANGES

#### DESCRIPTION

Any changes to a member's information must be submitted to Dominion Command by completing the appropriate sections on a Member Data Change Form. This form is used to provide Dominion Command with new or changed information pertaining to an existing member. A new Membership Card will be issued if the change affects the information reflected on the Membership Card, (ie. transfers, name changes, category changes) providing per capita tax has been paid for the current year. If not paid, a new card will be issued at the time the per capita tax is processed.

## FORMS TO USE

1201. MEMBER DATA CHANGE FORM (See Figure 1-2). (Yellow two part form) (Stock # 800669)

a. Yellow - is the Dominion Command copy

b. Blue - is the Branch copy

## PROCESS

1103. MEMBER DATA CHANGE FORM Complete the Member Information Section providing all applicable information including member number, command/branch number, address, category, citizenship and privacy information. For any changes, complete the appropriate area under the section "New Information." a. **Privacy Statement:** (See Figure 12-1) in order to change the privacy information complete the Privacy Statement.

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#### FIGURE 12-1 — MEMBER DATA CHANGE FORM—PRIVACY STATEMENT

# b. **Transfer:** (See Figure 12-2) please refer to "How to Process a Transfer".

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FIGURE 12-2 — MEMBER DATA CHANGE FORM—TRANSFER

c. **Category Change:** (See Figure 12-3) When a membership category changes, the current membership category should appear in the information section and the new category should be entered under the section titled "NEW INFORMATION". You must also complete the section "REASON FOR CHANGE", providing a reason for the category change. For appropriate reason please refer to the eligibility requirements for the new category indicated.

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FIGURE 12-3 — MEMBER DATA CHANGE FORM—CATEGORY CHANGE

d. Name Change: (See Figure 12-4) When a change to a member's name is required, the old name should be shown in the Member Information Section and the new name should appear under the section titled "NEW INFORMATION". Member numbers can be easily confused for members with similar names; therefore, the reason for the name change is required and you must also complete the section "REASON FOR CHANGE", providing a reason for the name change. The operator can then more easily verify if the name and number are consistent. If a reason is not given and there appears to be no logical reason for the name change, the Member Data Change Form will be returned to the branch. Please ensure that you provide the full first name for the individual.

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FIGURE 12-4 — MEMBER DATA CHANGE FORM—NAME CHANGE

e. **Legion Magazine:** (See Figure 12-5) Check the appropriate box to advise if the magazine is required and the language of choice or if the magazine is no longer required.

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FIGURE 12-5 — MEMBER DATA CHANGE FORM—LEGION MAGAZINE

f. **Deceased Member:** (See Figure 12-6) Dominion Command must be advised of the death of any member regardless of membership category. If the member has had military service and an announcement is to be published in the Legion Magazine, the branch should also submit a Last Post Death Notice to Legion Magazine.

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FIGURE 12-6 — MEMBER DATA CHANGE FORM—DECEASED MEMBER

g. Year of Birth & Gender: (See Figure 12-7) Dominion Command maintains membership statistics based on age and gender. Although this information should be provided when a new member is submitted, this is not always done; therefore, Dominion Command may periodically ask branches to provide this information. It is recommended that whenever a Member Data Change Form or a Member Registration Form is being submitted to Dominion Command that this information be included.

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FIGURE 12-7 — MEMBER DATA CHANGE FORM—YEAR OF BIRTH AND GENDER

h. Years of Continuous Service: (See Figure 12-8) Dominion Command does not maintain individual member files and did not always maintain years of continuous service on their records. Prior to 1987 branches were requested to submit this information; however, not all branches did. Therefore, some records may be inaccurate. If this information is incorrect in our records the branch must advise us accordingly. Branches must ensure that if a change to years of service is submitted that their branch records indicate that the member has had continuous service without interruption. We do know that any per capita tax payments processed since 1987 have been recorded correctly to the member's records.

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FIGURE 12-8 — MEMBER DATA CHANGE FORM—YEARS OF CONTINUOUS SERVICE

i. **Military Service:** (See Figure 12-9) Military service information is used by Dominion Command for statistical purposes and applied only to members who have served in the military, (ie Ordinary members and Life members who were formerly Ordinary members). Under the military service section indicate the member's service number and the theatre of war and type of service by marking the appropriate box.

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FIGURE 12-9 — MEMBER DATA CHANGE FORM—MILITARY SERVICE

j. **Change of Address:** (See Figure 12-10) It is important that Dominion Command has the correct mailing address for all members. Enter the member's previous address under Part "A" (PRE-VIOUS MEMBER INFORMATION) and the member's new address in Part "B" (NEW INFORMATION). The address provided must be the mailing address which is not always the same as the civic address. If a member has a street address but has mail delivered to a PO Box #, then it is the PO Box # that we require. If the member lives on a rural route and also has a street address, we need both the RR# and the street address. It is the mailing address that we require and you must always include the postal code.

**Note:** Labels for the magazine are produced 6-8 weeks in advance of the delivery date of each issue; therefore, address changes may not become effective immediately.

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FIGURE 12-10 — MEMBER DATA CHANGE FORM—CHANGE OF ADDRESS

# CHAPTER 13 REPORTS

# **BRANCH TRANSMITTAL REPORT**

### 1301. DESCRIPTION

a. Each per capita tax submission processed at Dominion Command is assigned a Transmittal Number. This number is indicated on the header (top) of the Branch Transmittal Report which is sent to the branch for each per capita tax submission processed. The report is a summary of the items processed and shows the details of the cheque the branch sent with the submission and any debits or credits that may have resulted. The body of the report lists the member numbers and names and other details of the items processed.

- a. Header—The top section shows the date the submission was processed, the Command and Branch numbers and the transmittal number assigned by Dominion Command. It also shows your cheque number and amount, the amount of the items processed and any suspense amount (shortage or overage). Check the "Suspense" amount which will be zero if the transmittal balanced. If this is other than zero, it means that the payment did not correspond with the items processed and you should refer to the Transmittal Summary. A Per Capita Tax Suspense Statement showing the balance in the suspense account, will be attached to any "out of balance" Transmittal Report.
- b. Body—The main section of the Transmittal Report lists all items processed. Check this section carefully to ensure that all the items submitted were processed. The member numbers and names are listed as well as the year processed. The type of transaction is indicated with an "R" for renewals, "S" for reinstatements and "N" for new registrations. The membership year being paid is also shown with an "F", "H" or "T", which indicates whether the payment was processed at the full year ("F"), half year ("H") or 1/3 year ("T") per capita tax rate. The membership category is indicated under "Mbr Type" and the code under the "Card Code" column indicates if a Membership Card is included or the reason why one is not, as detailed in the "Card Summary" section.

- c. Card Summary—This section summarizes the number of items processed, the reason and number of Membership Cards not issued and the number of Membership Cards issued with the Transmittal Report.
- d. Check the cards and report carefully and advise Dominion Command of any discrepancies immediately. File the report in your branch records for future reference.

BC15056		BRANCH TRANSMITTAL REPORT THE ROYAL CANADIAN LEGION				
BR/ TRA	MMAND         01           ANCH         01-094           ANSMITTAL#         BC15056           DCESSED ON         01-Oct-2010		CHECK# CHECK AMOUNT TOTAL SUSPENSE AMT <sup>4</sup>		2692 529.31 449.84 79.47	
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10112010	CLEMENTS, STEPHEN P	2011	R	F	AN	1
7335298	EASY, MAURINE	2009	R	F	AV	4
7335298	EASY, MAURINE	2010	R	F	AV	5
7335298	EASY, MAURINE	2011	R	F	AV	5
4606801	EVANS, W D	2011	R	F	OR	1
4635259	GIEGERICH, MICHAEL E	2011	R	F	OR	1
7530166	GOODMAN, ARTHUR E	2011	R	F	AS	1
4534431	GREGG, PAT G	2011	R	F	AS	1
3702454	HOPKINS, ROY M	2011	R	F	OR	1
7897269	HORN, DARCEY C	2010	R	F	AV	5
7902320	HORN, MARGARET A	2010	R	F	AV	5
4534397	INSCHO, DOROTHY	2011	R	F	AS	3
10083168	IVES, EMILY E	2010	R	F	AS	1
10083168	IVES, EMILY E	2011	R	F	AS	5
10058419	JAWANDA, BALDEV SINGH	2010	R	F	AS	1
3742165	MILLS, CAROL E	2010	R	F	AS	1
4861035	PUMPHREY, WES E	2011	R	F	OR	1
7820040	WINTER, MARY D	2011	R	F	AS	1
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ards issued						_

**Note:** Per capita tax is not processed unless a Member Registration Form or Renewal Card is included with the submission. Membership Cards for the previous year are not issued after January 31<sup>st</sup>.

# TRANSMITTAL SUMMARY / SUSPENSE STATEMENT

### 1303. DESCRIPTION

a. If a transmittal is out of balance, the computer printed Branch Transmittal Report will show a (-)debit or credit amount in the suspense area. The out-of-balance amount goes into your branch suspense account and a Transmittal Summary will be forwarded with the Branch Transmittal Report. The summary lists any out-of-balance amount on the specific transmittal and identifies items which may have caused the debit or credit amount. A Suspense Statement is attached to the Transmittal Summary indicating the current balance in the suspense account.

- a. Header—The top section shows the transmittal number assigned by Dominion Command, the date the submission was processed and the branch number. It also shows the suspense amount created on this particular transmittal. If the Suspense Amount has a (-) before the total this indicates a debit (shortage). If the Suspense Total does not indicate (-) before the total – then this indicates a credit (overage).
- b. Body—The main section of the Transmittal Summary identifies the reason for the suspense amount. There could be one or more reasons why the submission did not balance. For example:
  - i. Returned items If items could not be processed and were returned to the branch, it will indicate the number of items and the rate of per capita tax paid. Any returned items will be included with a letter giving details why the items were returned.
  - ii. Number of members paid for If the number of items processed is different from the number of items paid for, the transmittal will be out of balance. Check the Branch Transmittal Report carefully to ensure that all the members

you intended to pay for are listed. A missing name would indicate that we did not receive the transaction with your submission and you would end up with a credit. Conversely, if you included more items in the submission than you paid for you would end up with a debit.

BC15056			BRANCH TRANSMITTAL REPORT THE ROYAL CANADIAN LEGION				March 04, 2011		
CARIBO	00			TRANS	IITTAL SUM	MARY			
Transmittal: BC15056 Branch: 01-094			Members Processed; Members Paid For;				Cheque Amount Fransmittal Amt	529.31 449.84	
Date: 05-October-2010		Members +/- :			Suspense Amount	79.47			
Year	Breakdown o Processed	of Members Type	s Processe Rate	d Extended	Paid For		lanation of Tr Return Amt	ansactions Submitte Amt Paid	ed Suspense
2009	1000-000-000-000-000-00 1	Full	26.00	26.00	1	0	0.00	26.00	0.00
2010	6	Full	26.49	158.94	6	0	0.00	158.94	0.00
2011	11	Full	26.49	291.39	13	2	52.98	344.37 1 ALREADY PR	79.47 OCESSED
								Subtotal	79.47
								Adjustments	0.00
								Suspense Total (-) Debit	79.4
				SUSPE	NSE STATI	EMENT			
						Bala	ince as of: (	01-October-2010	\$48.41
		BC15	056		06-Oc	t-2010			79.47
								Subtotal	79.47
								IspenseTotal	127.88

- iii. Applied to Suspense Account If you included a debit note or credit note from a previous transaction, it would create an out of balance situation on the current submission. The debit or credit amount will be applied to the suspense account and will appear in the "adjustments" area.
- iv. Adjustments This section identifies other reasons why the submission may be out of balance.

- v. Suspense Total—this identifies the amount owing to Dominion Command (-) Debit or the Credit due to the branch on this particular transmittal.
- vi. Check the Suspense Statement—You should refer to the Suspense Statement that is attached to any "out of balance" Transmittal Report for the current balance of the account. The Statement lists the balance at the beginning of the current month and details of any suspense amounts incurred during the month. Payment for any amount owing (debit) should be forwarded by a separate cheque, or if you will be sending in another submission shortly you may include this amount. If you have a credit, you may apply it to your next submission.

**Note:** Each Transmittal Summary pertains only to the transmittal report in question. Please refer to the Suspense Statement for the balance in your suspense account.

# TRANSFER/REINSTATEMENT REPORTS

# 1305. DESCRIPTION

a. Transfer/Reinstatement Reports are produced at the end of each month and sent to all branches who have had members transferring in or out that month, including members who have reinstated in a new branch. The date on the top of the page indicates when the report was produced and any transfers processed after that date will be included on the next report. Members are listed by member number and name and shows the other branch number and address. As indicated on the report, branches with members transferring out, must forward their files to the new branches immediately.

- a. Header—The top section indicates if the report is for members transferred to or from the branch, the branch name and the date.
- b. Body—The main section of the report lists all members who have transferred in or out of the branch. Check the name and

member numbers carefully to ensure that all members listed are correct.

c. For members transferring out of your branch, forward the members' files, including Master Cards, to the new branch at the address provided. It is very important that this be done promptly.

# **BRANCH MEMBERSHIP REGISTER**

# 1307. DESCRIPTION

a. The Branch Membership Register indicates how Dominion Command records stand for your members. Listed will be all members whose per capita tax has been paid for the current year and all members paid for the previous year, but whose per capita tax has not been received for the current year. These members are not in good standing and will not receive the Legion Magazine. The date on the top of the pages indicate the date the register was produced. Any transactions received after this date would not be reflected. Members are listed in alphabetical order, with each category listed separately in the following sequence: Life, Ordinary, Associate, Affiliate Voting, Affiliate Non-Voting and Meritorious Life. The Branch Membership Register is for information only and cannot be used for statistical purposes. It has no bearing on the final year-end statistics. Statistical information should be obtained from your Zone, District or Provincial Command. A Branch Membership Register is sent to each branch in February and July of each year. Additional requests for a Branch Membership Register will result in a processing charge.

- a. Member Number and Name—Check each membership category to ensure all members are listed correctly. Deceased members are not included on the register so if the name of a deceased member is shown you must notify Dominion Command immediately.
- b. Address—Dominion Command must have a complete and accurate mailing address for every member in order to send out the Legion Magazine. If an address is incorrect or the member

has moved, the magazine will be returned by Canada Post, or if an incomplete address has been submitted the magazine cannot be mailed. Suspension of the magazine is indicated by a "P" or an "I" in the mail status (MS) column and an "M" and date of suspension in the street address column. The magazine will be suspended until new or correct addresses are received. Check members' addresses carefully and submit new addresses immediately by completing a Member Data Change Form.

- c. Language Code—An "F" in the language code (LC) column indicates the member wishes to receive the French insert in the Legion Magazine.
- d. Mail Status—This column will advise you as to the status regarding the delivery of the Legion Magazine. The following codes can be found in the mail status column. Note: Codes N, P, I or C in this column indicates that delivery of the magazine has been suspended. See below for detailed explanation.
  - i. **A** this code indicates that the member will receive the magazine as long as PCT for the current year is paid.
  - ii. N this code will suspend delivery of the magazine. It indicates that the member does not wish to receive the Legion Magazine. This is usually because there are two members in the household. If this situation changes and the member wishes to receive the magazine you must notify Dominion Command by completing a Member Data Change Form.
  - iii. P this code will suspend delivery of the magazine. This indicates that the magazine was returned to our office by Canada Post as undeliverable. A new address is required to reinstate delivery; therefore, complete a Member Data Change Form and forward to Dominion Command.
  - iv. I this code will suspend delivery of the magazine. This indicates that the address is missing a key piece of information such as an apartment number. As delivery of the magazine cannot be completed without the information please verify that all elements of the address have been provided by completing a Member Data Change Form and forwarding to Dominion Command.

- v. C this code will suspend delivery of the magazine. This code would indicate that the magazine was previously suspended for non-payment of dues. This code is also used if a former member indicates that he does not wish to receive any further correspondence (such as a renewal notice) from Dominion Command. Please notify us immediately if this code appears in the column and member has paid for the current year.
- e. Years of Continuous Service—The years of service (YR SV) column indicates the total years of continuous service the member has as of the last year paid. Dominion Command does not maintain individual records; therefore, we cannot confirm years of service prior to 1987. This information should be obtained from branch records.
- f. Last Year Paid—Check the year paid (Years Paid) column which indicates the last five years payment history for each member. Check that the per capita tax has been submitted for all members who have paid dues to the branch for the current year. If Dominion Command has not received the per capita tax, the last year paid will be the previous year. Payment must be submitted immediately for all members who have paid dues to the branch, but whose per capita tax has not been submitted to Dominion Command.
- g. Cancel Date—This indicates the date the magazine was returned to our office by Canada Post as undeliverable. Se Mail Status (MS) column. This should have a "P" or "I" indicating the magazine was canceled pending receipt of a new address.
- h. Category Totals—the totals indicate the number of members paid for the current year and the number of members paid for the previous year.
- i. February Branch Membership Register—This lists all members whose per capita tax for the current year was received by February 6<sup>th</sup>. It also lists those members whose per capita tax was not received by February 6<sup>th</sup>; these members are no longer in good standing and will not receive the Legion Magazine. The name of a member appears in the branch register that is deceased, then he has not been recorded as deceased in the membership database at Dominion Command and you should

notify our office immediately. This applies to all categories of membership.

**Note:** Check the February Branch Membership Register carefully. If the information indicates that per capita tax or a notification of death has not be submitted, you must do so immediately.

j. July Branch Membership Register—Two-part Renewal/ Membership Cards for the following year are only produced for members whose per capita tax has been paid for the current year. Production of the two-part cards begins in July; therefore, any per capita tax payment received for the current year after June will mean that you will not receive a two-part card for these members. You must, therefore, submit the following year's payment on a Member Registration Form.

**Note:** Check the July Branch Membership Register carefully to determine who you have and have not received two-part Renewal/Membership Cards for.

**Note:** Deceased members are not shown on the Branch Membership Register; therefore, if you know someone is deceased and the name is listed you must notify Dominion Command immediately.

# **BRANCH NON-RENEWAL LIST**

1309. DESCRIPTION

a. Non-Renewal Lists are produced on a request basis only. The report indicates all members who have not renewed their membership for the current year. It also indicates members who are in arrears for the previous year. Branches are encouraged to contact these members and remind them to bring their membership dues up to date. Production of these lists will result in a processing charge.

- a. If there are any members listed for whom you have received branch dues for the current year, you must submit the per capita tax to Dominion Command immediately. Please see section "Important Dates" to ensure that you do not miss a deadline date. Remember, these members no longer receive the Legion Magazine. Please see Section 1403 for important dates.
- b. If there are any deceased members listed, you must forward a Member Data Change Form to Dominion Command immediately so we can update our records. Please see section "Important Dates" to ensure that you do not miss a deadline date.
- c. Check for any "M" and date codes in the Street Address column and the Cancel Date column. The branch must follow-up with these members regarding their renewal. A change of address should be forwarded to Dominion Command.
- d. The members listed can still pay the current and immediate preceding two (2) years and retain their years of continuous service. The information is provided so that branches can contact the members in an effort to retain their membership.

# **CHAPTER 14**

# SUMMARY

# **IMPORTANT POINTS TO REMEMBER**

- 1401. When making inquiries to Dominion Command regarding any transmittal or per capita tax submission always include: member name and number, date of the submission, amount and number of the cheque and transmittal number, if already processed.
- 1402. Always indicate your Command and branch number on all processing forms and correspondence, as well as members' names and membership numbers.

### 1403. Important Dates:

September 1 to November 30—Early Bird Campaign.

**November 1**—Submission for pre-paid NEW members.

- **December 15**—Deadline for Early Bird submissions to reach Dominion Command. If received after this date, submissions will not to be included in campaign figures.
- **December 31**—Membership Renewals Membership year runs to December 31<sup>st</sup>. Members should renew before this date.
- **January 31**—Deadline for members to renew for the current year and remain in good standing.
- **February 6**—Deadline for renewal submissions, for the current year, to reach Dominion Command in order to avoid suspension of the Legion Magazine.
- **March 31**—Deadline for per capita tax to reach Dominion Command to avoid member being included on Non-Renewal Lists.
- **June 30**—Deadline for per capita tax to reach Dominion Command in order to receive a Two-Part Renewal/Membership Card for the following year.

## Remember, Transactions Must Reach Dominion Command By The Above Dates

# LEGION MAGAZINE PRODUCTION SCHEDULE

1404. Labels for Legion Magazine are produced two months in advance of the issue date; therefore, new and reinstating members and members renewing after their subscription has been cancelled, may not receive the next immediate issue. To assist you in determining the next issue a member will receive, the following list is the estimated label production dates and the applicable issue:

<u>Date</u>	<u>lssue</u>
February 6	March/April
April 6	May/June
June 3	July/August
August 5	September/October
October 4	November/December
December 2	January/February

**Note:** While every effort has been made to detail fully all procedures to be used in every case by the branch, a problem or situation might arise which has not been covered in this GUIDE. If this happens, check with Dominion Command for the proper procedure.

# ANNEX A

# **PROVINCIAL COMMAND CODES**

A space is provided on the Membership Processing Forms indicating "Provincial Command Code". These are two-digit numerical codes which must be used on all forms to designate the Provincial Command in conjunction with the branch number.

They are as follows:

- 01 BC/Yukon
- 02 Alberta/Northwest Territories
- 03 Saskatchewan
- 04 Manitoba/Northwestern Ontario
- 05 Ontario
- 06 Quebec
- 07 New Brunswick
- 08 Nova Scotia/Nunavut
- 09 Prince Edward Island
- 10 Newfoundland/Labrador
- 13 Dominion Ottawa Branch
- 15 Military Member at Large Branch
- 16 Retired Military Member at Large Branch
- 17 Eastern US Zone
- 18 Western US Zone
- 19 Europe Zone

# ANNEX B

# **PROVINCIAL COMMAND INSTRUCTIONS**

## 1. Life Application Forms

- a. Provincial Command Approval is required.
- b. Dominion Command approval is required for US and Europe Zones.

**NOTE:** All applications for Life must be submitted to Provincial Command for approval before submitting to Dominion Command for processing. Applications must be accompanied by a Member Registration Form and Member Data Change Form. Provincial Command approval must be shown on processing forms forwarded to Dominion Command. If approval is not shown on the documentation, the transaction cannot be processed and will be returned to the branch.

# 2. New Member Application Forms

Applies to Saskatchewan Command only—a photocopy of all new member application forms should be forwarded to Saskatchewan Provincial Command.