

District “F” Membership Seminar – 10 & 11 August 2024

Intro (1-855-330-3344)

Q. Do we have any “**new**” membership chairmen present?

Q. Are there any branches still using the paper system?

Q. Is there any branch represented here today that does not have a computer in their branch office or a branch computer that is really out of date? If there are, contact Provincial Cmd and Jen Leclair at (905) 841-7999.

2024 District Membership Stats

The total number of paid members for 2024 in District “F” as of 27 Jul 2024 is 15,617 and still increasing.

The total 2024 membership across the country as of 23 Jul 2024 stands at 250,156. This is 97% of the 2023 total and is up by 14,000 members and counting.

Reference Material (only accessible on the new portal system)

- If you are using the new portal system, there is a 38 page “**Branch Processing Guide**” (13 August 2018) available to assist you.

- If you are using the paper system, there is a “**Form Processing Guide**” to assist you on the portal system.

These two manuals are located under the heading “Membership” which can be found by selecting “Branch and Command Resources”, then “Membership”.

Renewal Stickers

The 2025 membership stickers will be mailed to all branches in the first weeks of September.

The New Digital Membership Card

The new Digital M’ship Card is still very popular with growing numbers every year. The application for this card is available in the member’s portal profile

Kings Portrait

The official Kings Portrait is now available and distribution to the branches will take place in late September.

New Report – “Branch Membership Register - Dormant”

A new “**Branch Membership Register – Dormant**” report is now available under “Reports”. This report provides contact information of Branch members who have lapsed up to 2 years. (Good source for renewal reminders).

Branch Transfer Report

The **Branch Transfer Report** can be found under the Branch logon and then under “**Reports**”.

If the member has not paid for the current year and transfers into your branch, submit per capita tax and also request a replacement card at the same time since a transfer does not automatically have a card printed on a transfer.

Improved Transfer Notifications

Dominion Command is working with the IT department to develop a new notification system for branch transfers both into and from a branch.

Soon, any transfer into or out of a branch will trigger an automatic email to the respective branches’ legion.ca email addresses alerting them to the change. Also, the report named “**Branch Transfers Past 6 months**” in the branch reports section of the portal already tracks all recent transfers.

<u>Per Capita Tax</u>	<u>2024</u>	<u>2025</u>
Dominion Command	\$13.15	\$13.15
Provincial Command	\$11.00	\$11.00
Legion Magazine	<u>\$10.72</u>	<u>\$10.72</u>
	\$34.87	\$34.87

Logging into the New Portal System

There are two levels of login with the new system - one as an individual and the other as a branch. The branch login has more functions since they will be updating the members file and processing membership information.

An Individual

The individual member has limited access to M’ship processing but does have access to all other information listed under “Branch and Command Resources” such as “All Branch Emails”, various manuals, membership forms, etc.

Individual access to many reports is not current but historic.

Branch or Command

The branch has full rights when it comes to M'ship processing, downloading the current Branch Register and a variety of current M'ship **reports**.

“Branch” access to these reports is accurate to the date opened. A popular report is the “Paid Membership Zone and District Detail” report.

How to Change the Logon Password in the Portal System

After logging on with the User Name and Password, select “Profile” from the menu on the left side of the page and at the bottom of that “Profile” page will be “Change Password” block.

Dominion Command Membership Targets

Dominion Command has set the targets for membership in 2024 and 2025 as follows:

	<u>Dominion Target</u>	<u>Branches</u>
Renewals	90%	Not available yet
Branch Rates	100%	
Member Emails	70%	
Portal Processing	85%	
Auto Renewals	20%	

Questions to the Dominion M'ship Office

It was brought up at a Provincial membership meeting that to go through the chain of chairmen to get an answer often takes too much time when you need the answer right away. All District Chairs agreed to this process.

If you have a question with regards to membership, a direct call to the Dominion Command M'ship Office will save you considerable time in finding out the answer. (1-855-330-3344)

Legion Dispatch & Legion Debrief

There is a “Legion Despatch” issued each month providing the latest activities and information from Dominion Command including updates on membership. These documents can be found under “**All Branch Emails**”. (“Branch & Command Resources” then “All Branch Emails”)

Dedicated Communication between Member Services and the Branch

Branch access to the “**Web Mail**” site is located on the left side of the “**Branch Login Page**”. The procedure to log into the Web Mail system is contained in the first pages of the “Branch Processing Guide”.

This is a dedicated email link using “Outlook” to communicate between the branch and the Dominion Membership Office.

Some branches have been notified to update their Membership Portal password and if their passwords have not been updated, their portal access will be restricted. They will need to contact “Member Services” to update their password.

It's very important to monitor this email link often.

“Branch Aged Balances” *“Outstanding Branch Per Capita”*

There is a report called the “Branch Aged Balances” Report and it is found on the Dominion and Provincial websites only. This report shows the amount of Per Capita Tax owed to Dominion Command for M’ship transmittals that have been submitted.

The amount owed (if any) is found on the Branch Home page and if it’s in brackets, that is the amount still outstanding.

This report will be monitored by Dominion and Provincial Command then, passed down to the District Membership Chairs who pass it on to the Zone Chairs to make sure Branches are paying the Per Capita Tax promptly.

The system was originally designed to use credit cards in which the payments are instantaneous but Ontario doesn’t do that. Ontario requires that a cheque be submitted with a copy of the transmittal and mailed to Dominion which takes time to be processed.

Any unpaid balance of over \$500.00 after 121 days will result in the branch being asked why the amount is so high. A high balance could indicate that the branch is having trouble with finances.

-The Branch should keep track of the date of transmittals submitted plus the number and date that the cheque for that submission was mailed.

The “**Branch Statement**” report shows the date and amount submitted to Dominion and when the payment is processed by Dominion, Dominion adds a “Payment Processed” column beside the transmittal submitted.

Veteran Welcome Program and Veteran Family Welcome Program

Parents, guardians, spouses and adult children of serving, retired or passed CAF and RCMP members who have not yet joined the Legion can now receive a free year of membership at the Legion.

Free one year Memberships for Retiring CAF Members and Graduating Cadets - (Forms available)

The Legion will provide Veterans who have retired from the CAF within the last year with a free one-year Legion membership including a subscription to the Legion Magazine and access to the Member Benefit programs.

The Legion is proud to support Canada's Cadets and recognize their service by offering all graduating Cadets a one-year free membership in the Legion including a subscription to the Legion magazine and access to the Members Benefit programs.

Online Applicants

New applicants are able to join the **Legion on-line** and become a member of Dominion Command (13-013) or to join **a Branch on-line** of their choosing.

*There is a lot of discussion about joining a branch on-line as a **veteran** which is now in the hands of Dominion Command*

It is the responsibility of the branch to confirm an **on-line Ordinary applicant** to confirm his/her military service.

It's the option of the branch to approve this member and hold an **"Initiation Ceremony"** or a **"Welcoming Ceremony"**.

Branches will be notified of new applicants via "Web Email" and a new **"Online Member Enrollment Report"** located under **"Reports"**.

Similar to the online member renewal process, the Branch portion of the fees collected online will be remitted directly to the Branches monthly. These members will be identified on the report you receive. The online applicant still has to be approved by the Branch.

New Member Joining a Branch Online

When a new member joins online either a Branch or the "Dominion Holding Pool", branches will immediately receive a notification via the "legion.ca email".

The **"Branch Online Member Enrollment"** report in the portal's reports section is continually updated and branches are mailed a physical card for the new member.

Should a digital card be issued, branches will also receive a copy at their legion.ca email.

Note: If an online applicant is not accepted by the Branch, the following process takes effect:

1) The Branch is to notify Dominion Command within 30 days of the member joining online that the member is not accepted.

2) Notification can be sent to Dominion Command via phone, email or by the using the “Data Change” form within the membership website. A reason for the membership refusal is required.

3) Upon notification, the Member will be transferred to the Dominion Command Branch 13-013 (after considering the Branch refusal reason provided).

4) Member Services will notify the member they were not accepted at the local Branch level and have been transferred to the Dominion Branch

5) If the member is not willing to transfer to the Dominion Branch, the member will be refunded their membership dues.

Membership Processing

Note: 30 minute time limit while renewing or enrolling members.

Membership processing is completed by two methods - by using the new Portal system or by using paper processing with existing forms.

At this time, you still have the choice of using the paper system or software system. The software system is the new kid on the block but needs only a short time to adapt to the new way of processing membership data.

When a current member has made a Branch dues payment **online**, an email notification is sent to both the member and to the Branch email address in “Outlook” or **Web Mail** that was provided by Dominion Command when the new system was introduced. Dominion Command will remit the Branch portion via cheque at the end of each month.

“Paper” Transmittal Form (*How many Branches are using the paper system?*)

The paper transmittal form only has the “Total” amount of Per Capita tax and the cheque number listed. There are no names of those members dues being submitted.

You would be wise to write down the names of those members being submitted in the event there is a dispute of dues payment with the transmittal returned by Dominion Command.

Software “Per Capita” Transmittal Form

When processing membership per capita tax submissions, these entries are entered on a software transmittal form.

When the software transmittal is complete, the total amount of per capita tax required is displayed. In Ontario, where a cheque is being used, a copy of the transmittal with the cheque attached is mailed to Dominion Command for processing.

*Remember when processing renewals or enrollments that there is a **30 minute time limit** before the transmittal is terminated and all entries to this point are lost.*

***** If you bring up the members profile and look under “Membership Information”, you will see the last transmittal number that was submitted on the members’ behalf. (pg14)*

*****Confirming that Dominion has processed a Branch Transmittal**

Because submitting a transmittal to Dominion is instantaneous but paying by cheque through the postal system takes some time, the amount of outstanding per capita increases as more transmittals are submitted.

Under the old system, Dominion sent a Dominion transmittal back to the branch listing the names submitted confirming that they had been processed.

One way to confirm that Dominion has processed a branch transmittal is to look up the report titled “**Branch Statements**” to see if the transmittal has been processed. (*Discuss this report*)

Pencil Icon (Edit)

With the new system, the branch can view “**Previous Transactions**” which lists all the transmittals submitted by the branch. Clicking on the “pencil icon” in the left-hand column of a particular transmittal number will bring up the transmittal itself listing the names submitted.

Data Change Form in the New System

The “**Data Change Form**” is found on the “Home” page of the Branch Level Log-on.

It can be used for Replacement Card Requests, Reprint Cards, Transfers and denying an on-line member application.

Deceased members and Legion Magazine Delivery can also be made on the member’s Profile page.

Branch Membership Register

The **Branch M’ship Register** can only be accessed by a Branch level login to the portal system. This register is kept current to the day the register is reviewed. This register is found under “Reports” listed on the “Home” page.

This register contains members who have been processed by the branch and registered by Dominion Command.

If a branch member has paid his dues but the Branch Register shows that he has not paid, a look at the members Profile under “Membership Information” which will show the transmittal number for any per capita tax paid.

Branch Member “Master Card” (*show copy of Master Card*)

How many chairmen present keep up a “Personal File” for each branch member which includes the “**Member Master Card**”?

If it’s too cumbersome to start with a card for everyone, begin by making up a card for each branch executive member and new executive members each year.

Each file should contain the complete history of the member. The “Member Master Card” lists the dues payments by year, the member's Legion computer number, the category of the member, the Offices held and the H&A received.

The “**Member Master Card**” form is found in the portal system under “Branch and Command Resources”, then “Membership”, then Forms.

The Members Application Form is held in the **members personal file folder** along with the members “Master Card”, any "Member Registration Forms" or "Member Data Change Forms".

If the Branch doesn't keep this information current, the info can be lost because Dominion Command does not keep any records for Branch members.

If a member transfers to another Branch, this personal file is forwarded to the new Branch when notified to do so by Dominion Command.

Early Bird Campaign:

The "Early Bird Campaign" is fast approaching beginning on the 1st of September and ending on the 30th of November.

Ontario Command is again awarding “Early Bird” certificates to its branches.

That’s all I have for you at this time so I’ll leave it open to any questions from the floor.