

Squadron Membership Record Manual

Produced By:

Sons of The American Legion

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<u>INTRODUCTIO</u>N

This manual is formatted for use by the Squadron Adjutant or the Squadron Membership Chairman. While the information contained is geared for the members who will be taking care of membership and membership related records, it can be used by any member of the Sons of The American Legion or The American Legion who might be in charge of handling the duties of record keeping.

Regardless of who is handling the duties of keeping membership records, whether you're an 'old hand at it or new to the job, we hope you'll read the material closely and keep it handy for any needed reference. It will make your job much easier, it will help stop unnecessary duplication of cards, and it might help to prevent some of the common mistakes we all seem to have during the year.

From time to time there might be situations that are not covered in this manual or you might just need further explanation. Therefore, please don't hesitate to contact those who might be able to assist you.

The Post Adjutant of your home Post should be able to answer most of your questions. If you have an organized District Organization, you can also contact either your District S.A.L. Officers or Legion Officers.

You also have your Detachment Headquarters to assist you or if needed, you can contact National Headquarters at: { 317 / 630-1200}.

You can also contact the National Membership Chairman. His address or phone number can be obtained by contacting your Detachment Commander or National Executive Committeeman.

The names, addresses, cities, states and member ID's on the sample cards printed in this manual are total works of fiction.

SECTION I

ADJUTANT / VICE- COMMANDER RESPONSIBILITLES

- The member in charge of dealing with your Squadron's membership cards/records can best be described as the personnel officer. He will be one of the first officers to have one on one contact with the individual members of the Squadron. He should have a very good working knowledge of who belongs to the Squadron, what dates are important, be aware of who has or has not renewed their membership, and know the proper steps in handling all S.A.L membership material and records.
- The only indispensable qualifications to complete these tasks are **honesty and willingness.** If your Adjutant handles the membership, he should obtain a set of Squadron Account Books from National Emblem Sales. This requires no special knowledge of bookkeeping. This also applies if the Vice-Commander or other Squadron Officers handle membership.
- In either case, a ledger should be kept showing who has paid, when they paid, and their current address and phone number. It will show when the Detachment / National dues were transmitted to your Detachment Headquarters and any other information that might be needed. Do this on top of keeping your computer printout updated. One copy of everything should always remain at your home Post with other Squadron records.

GUIDELIINES

- Listed below are various guidelines that will help you in your membership efforts. This list is not all-inclusive, but rather a guide to help you run a smooth operation for your Squadron during the year.

Membership is open to all male descendants, adopted sons (their male descendants),

Stepsons (their male descendants), grandsons, great-grandsons, etc.... of members of The

American Legion, a deceased member of The American Legion or a deceased Veteran who would be eligible for membership in The American Legion if alive.

If a current Legion member drops his / her membership with The American Legion, the S.A.L. member can continue his membership by keeping his dues updated each year. Should his dues lapse, he would become ineligible for membership until and if the Veteran once again joined The American Legion or passed away.

- Do not ask for special concessions to be made such as, uncles nephews good friends or others... this can only be done by amending the National Constitution.
- Make it a matter of your Squadron Constitution and By-Laws to require all new members to show and provide a copy of their eligibility for membership. Keep a copy on file. The suggested forms of proof are: DD214 -Service Discharge National Cemetery Burial Record A certified copy of a Death Certificate with service dates-VA Medical Center Records (make sure these show service dates).

Many Detachments require that Squadron Officers be certified by a set date. Some also require that all unused current membership cards be returned before they'll send the next years cards. Check and abide by the guidelines of your Detachment.

CONTINUED ON NEXT PAGE...

- All paid membership **must** be sent to your Detachment Headquarters. *Do not send paid membership cards or Member Data Forms to National Headquarters.* National HQ's will only return these items causing unneeded delays and increase the possibility of it being lost.
- When sending dues and / or membership cards, you should send them using *certified mail with the return receipt required*.
- Do Not Hold Onto Paid Membership Cards. Many S.A.L. members like to enter the different tournaments sponsored by The American Legion, but in most Departments they won't be able too if their current and paid-up dues are not recorded at Department by a specified deadline. Even more important is the fact that if a member of the S.A.L. needs assistance from the NEF (National Emergency Fund), his membership must be current and paid or he won't even be considered. If he has paid his dues in the past and is turned away due to either the Squadron or possibly Detachment / Department not transmitting his dues, this could result in a very upset member or other problems.
- If you run out of blank membership cards, contact your Detachment Headquarters for more.
- Squadrons are permitted too more than a single dues rate. You can charge one rate for adult members and another for minors and or Dual Members. Your Squadron with possible approval sets dues rates if required by your sponsoring Post. National does not set, recommend, or suggest any amounts or policy.
- An *Honorary Life* member patch is available from National Emblem Sales. The catalog number is: 56582. National *does not* have a guideline for awarding Life Membership status to any member. Only your Squadron determines this or Detachment headquarters if they choose to participate. The *Honorary Life Membership cannot be bought* it can only be awarded. A member designated as a "Life Member" is only a Life Member as long as his Squadron or Detachment pays his yearly membership dues. The S.A.L. Life Membership is *not transferable*. Refer any questions to your Detachment Adjutant or Department S.A.L. Liaison.
- Whenever it is necessary to make a change on a membership record card you must use a #2 pencil. This will ensure that any scanning equipment won't miss the change.
- Either type or neatly print all information when dealing with any item concerning membership. Typewritten information is the preferred method.
- If a member loses his membership card, you must provide a replacement card from your supply of surplus cards. Do not *request duplicates from National*.
- Your Squadron should be able to obtain all S.A.L. literature and forms from your Detachment or Department Headquarters *free* of charge. The Squadron Member Handbook is available from Emblem Sales at a low cost. If needed, you can request these items from National Headquarters. Your request must be written and marked to the attention of the National S.A.L. Liaison.
- -Always remember, that the Sons of The American Legion is in existence only because of The American Legion. At all levels of our organization, you must answer to and have obtained approval by its American Legion counterpart. Example: Squadron-Post / District-District, Detachment-Department / National S.A.L.-National Legion

SECTION II

THE S. A. L.

MEMBERSHIP RECORD CARD

National Headquarters with the name, address, member ID number, and continuous years of your previous year's membership preprints membership cards each year. This card is made up of three basic portions. The RIGHT portion goes to the new or renewing member once his dues are paid. The MIDDLE portion and the LEFT portion goes to Department Headquarters. Unless your Department policy states different <u>Do Not</u> separate the LEFT and MIDDLE portions from each other. Your Headquarters Staff who will then forward the LEFT portion to National. The Membership Record Card has several boxes that are to be used in filling out the cards for both new members and renewing members. Never mark on the membership record card to make a name, address, or continuous years change. Never mark out or change a member ID number on a preprinted card. The Member Data Form should always be used when making a change on names, addresses, continuous years, or spelling corrections.

MEMBER IDENTIFCATION NUMBER

The official Membership Identification Number is printed at four different locations on the preprinted membership card. Twice on the LEFT portion and once each on the MIDDLE and RIGHT portions. The Member ID number is the most important feature in identifying one member from all other members in our organization, and should be used whenever you call or write your Detachment or National Headquarters.

Every member having a preprinted card will have assigned to him a 9-Digit number that should remain with him as long as his dues are paid yearly without interruption.

Even if a member transfers from one Squadron to another within or outside the same Detachment this permanent member ID number will remain with him if all directions are followed. So for this reason, it is very important to complete an official transfer using the Member Data Form. This will prevent the creation of duplicate and unnecessary records on data files

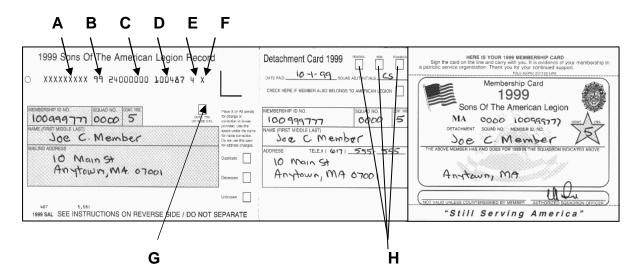
WHAT'S ON A MEMBERSHIP RECORD CARD?

The following pages will give you, the new or old hand, help in dealing with membership cards a step by step guide on handling membership cards. While we believe this manual will answer any questions you may have, please contact your Detachment Officers, Detachment Headquarters, or your National Membership Chairman if you have any questions.

THE SCAN LINE

- When the LEFT and MIDDLE portion of the Membership Record Card are processed through scanning equipment, the primary line that is scanned appears on the LEFT portion of the Record Card. The Bar Code is also a scanning method. Be aware that any marks or notations made to these preprinted characters or the Bar Code could cause errors when the card is processed.

NEVER CHANGE OR MARK OVER THESE AREAS



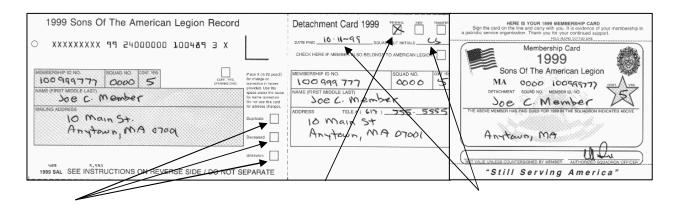
PREPRINTED CARD INFORMATION EXPLAINED

- A This is the permanent 9-digit member number.... It will remain the same as long as the member continues to pay his annual dues.
- B This 2-digit number represents the membership year.
- C This 8-digit number has many purposes, position I & 2 identify the Detachment positions 3,4,5 & 6 identify the Squadron position 7 & 8 are used if the Squadron is located in a foreign Country.
- D 6-Digit sequential number; every card will have a number to serve as a counter, for example: your Squadron has 175 cards with preprinted date for members last year and you receive 25 blank cards. The first card will have a sequence number of 100001 and the last card will carry a number of 100025.
- E This variable number has importance only to National Headquarters.
- F All S.A.L. cards will carry an S.
- G –Mark here if a name or continuous years change is required with a #2 pencil. Write the change above the space provided and/or use the Member Date Form.
- H Check the box which explains the reason for using the card.

HANDLING A RENEWAL MEMBERSHIP CARD

- When your membership cards arrive from your Detachment Headquarters they should be in alphabetical order. The FIRST thing you should do is to check for DUPLICATE cards. If any are found, return them to your Detachment / Department HQ's as soon as possible making sure to mark the box on the LEFT portion showing that it's a duplicate. Once you have received the dues from a member who is renewing his membership, locate his preprinted card then follow these steps:
- Place an "X" in the RENEWAL box located on the MIDDLE portion of the record card.
- Fill in the date he paid and place your initials on the line provided on the MIDDLE portion of the record card.
- Sign the member's portion on the line reserved for the Squadron Adjutant or other authorized Squadron Officer on the RIGHT portion of the record card.
- Separate the member's portion (RIGHT SIDE), from the MIDDLE and LEFT portions and give or mail it to him right away. Place the remainder of the record card aside to be transmitted to your Detachment / Department Headquarters.
- Finally, locate the member's name on the membership register which is also in alphabetical order, and mark the date paid and / or transmitted on the far left column.

Except for the very important job of transmitting the proper amount of Detachment / National dues and the Membership Record Card to your State Headquarters, this will complete your record keeping for a Renewing member. How to correct spelling, name & address changes, etc..., will be described later in this manual.

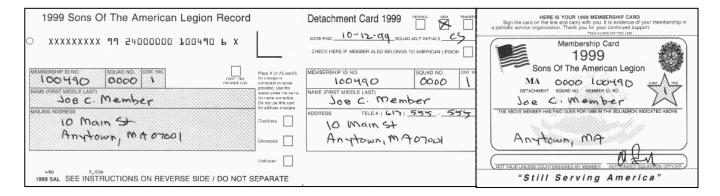


IF NOT CORRECT CHECK THIS BOX AND DRAW A LINE THROUGH THE ERROR AND WRITE IN THE SPACE ABOVE ITEM TO BE CORRECTED OR USE THE MEMBER DATA FORM PUT "X" HERE / COMPLETE THIS TO / SIGN HERE SHOW WHEN DUES WERE PAID

HANDLING NEW MEMBERS

IN ADDITION TO NEW MEMBERS THESE GUIDELINES ALSO APPLY TO ANY RENEWING MEMBERS THAT DIDN'T RECEIVE A PREPRINTED CARD FROM NATIONAL HEADQUARTERS

- When a NEW member is accepted into your Squadron, take the FIRST blank Record Card you received from your Detachment Headquarters. The 6-digit sequential number can serve as a temporary member ID number if you wish. (See page 4, item D)
- Type or neatly print the following information on the LEFT and MIDDLE portions of the Membership Record Card.
- Member ID number Complete name Complete mailing address including Zip Code Years of continues membership (1 for new members).
- Place an "X" in the proper box on the MIDDLE portion of the Record Card to show new or renewal. Enter the date and your initials on the line provided to validate the card.
- Place the member's name on the line provided on the member's portion (RIGHT SIDE) of the Membership Record Card. Complete the remainder of the card as shown in the sample using your Squadrons information.
- Remember to either very neatly print or type all information on the Membership Record Card. Keep n mind that first impressions count to the new member.



HELPFUL HINTS FOR HANDLING THE NEW MEMBER

- Make him feel welcome and important to your Squadrons future
- Remember what it was like when you were new? Introduce him to other members
- Let him know when and where your meetings are held, and what to wear
- Get him involved if he has an interest in a project
- Ask what his interests are, see if the Squadron might become involved in the future
- Don't push the formalities on him too soon, it could scare him off
- Include him on Squadron or group outings or Post visits

TRANSFERS

THE FOLLOWING INFORMATION PERTAINS TO TRANSFERS ONLY

- Transferring from one Squadron to another is a privilege granted to any paid-up member only with the approval of the Squadron to which the member desires to transfer into.

TRANSFERS MAY BE MADE UNDER THE REGULATIONS LISTED BELOW

- No transfer shall he made unless the member requesting the transfer has a membership card showing that he is a member in good standing at the time the transfer is requested. Members whose dues for the current calendar year that are not paid by February 1st of that year are suspended and not in good standing, therefore, they are not eligible for transfer.
- No charge shall be made to the member for the privilege of transferring, and no dues shall be transferred from one Squadron to another. The accepting Squadron may require payment of any difference in dues (if theirs is higher), on a prorated basis.
- An S. A. L. member desiring to transfer his membership must first secure approval from the Squadron to which transfer is desired. The Adjutant or a designated Officer of the new Squadron will complete the transferring process and route the copies of the Member Data Form as required. Remember to send the fourth copy of the Member Data Form to the Squadron <u>losing</u> the member to transfer so they can delete him from their records, or send with other copies going to your Department Headquarters.
- The new Squadron should inform the transferring member of what, if any items are needed to show his eligibility. Example... DD214 Past S.A.L. Membership Card etc,. Some Squadrons will accept transfers on face value, but other might still require proof of the transferring member's eligibility.
- A Member Data Form is ALWAYS required when processing transfers regardless of the circumstances.
- National Headquarters will follow through the necessary procedures to transfer the member's record to his new Squadron provided that his current record is on file and that the information contained on the Member Data Form is correct and complete.

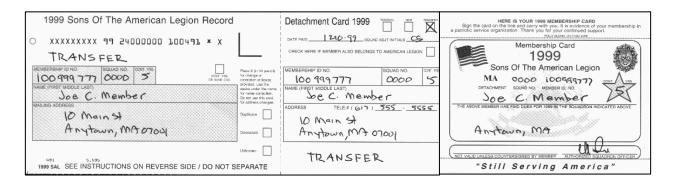
INSTRUCTIONS FOR COMPLETING MEMBER TRANSFERS

- The Squadron official must fill out the appropriate sections of the Member Data Form.
- The transferring member must surrender his membership card from his former Squadron. Being a member of more than one Squadron at one time is a violation of The American Legion's Constitution, therefore, is not permitted regarding the S.A.L.
- The Squadron Official should first issue a new card from the supply of blank cards and then he must enter the 9-digit membership number listed on the transferring member's former membership card. After doing this, the former Squadron's card is to be destroyed.

- After listing the 9-digit member ID number on the LEFT & MIDDLE portions of the Record Card, write in bold letters the word "TRANSFER" above the number on the LEFT portion and at the bottom of the MIDDLE portion. Also complete his name, address, and continuous years. Contact your Detachment Headquarters for any further directions when dealing with transferring members.
- Make sure to sign the member's portion of the Membership Record Card before giving it to him
- The Squadron Official and the transferring member must sign the Member Data Form when dealing with any form of transfer.

If a member has a membership card from the former calendar year, and wishes to transfer AND pay the current years dues to the new Squadron, what do I do? FOLLOW THESE INSTRUCTIONS AFTER COLLECTING THE CURRENT DUES FROM THE MEMBER:

- The Squadron Official must complete the appropriate sections of the Member Data Form.
- The 9-didgit number on his membership card must be entered on the LEFT portion of the new record card. Above the number, write in bold letters "TRANSFER". Then complete filling out the LEFT portion of the record card.
- In the MIDDLE portion you must again enter the 9-digit member ID number, complete the remainder of the card and place an "X" in the Transfer Box.
- On the RIGHT portion (members card), again enter his 9-digit member ID number, his name on the line provided as well as his continuous years and the Squadrons location. Be certain to sign the MEMBER portion before giving him the card.
- Depending upon your Detachment's policy, at this point you should transmit the intact LEFT and MIDDLE portions of the Membership Record Card along with any required per-capita payment to your Detachment Headquarters.



Remember to check with your Detachment to see if a policy is in place dealing with transmitting a transfer.

THE MEMBER DATA FORM

- This multiple purpose form is designed to keep track of your Squadron's members and is principally to be used to report the following.

Name Changes - Change of Address Change of Continuous Years - Transfers Reporting Deceased Members - Spelling Corrections

- The members Name Member ID Number Squadron Number and Detachment MUST be provided for <u>any changes</u> to be processed by National Headquarters.
- The information requested under "ADDITIONAL INFORMATION" is optional, however, it is urged that you try, to complete as much of it as possible, especially, their Date of Birth.
- You must route the four (4) parts of the Member Data Form as follows;
- . Parts 1, 2 & 3 (White-Yellow-Pink), Mail to Department or Detachment Headquarters. They should mail Part 3 to Squadron <u>losing</u> member if purpose is a transfer.
- . Part 4 (Green) Retain for your Squadron Records.

WHAT GOES WHERE

	SONS OF THE AM MEMBER D (Please	ATA FORM	Date		
Member ID Number	Dep	partment	Squadron		
Name THIS	SECTION M	UST BE	COMPLETED		
	(The above information is required for all changes)				
	NAME/ADDRESS	CORRECTION			
Name Correction	FIRST	INITIAL	LAST		
Former Address	COMPLET	E ALL QL	IESTIONS		
Former City	Former	State	Former Zip		
New Address	CORREC	IT SPELL	ING		
New City	New Sta	ate	New Zip		
	SQUADRON	TRANSFER			
MAKE SURE	TO COMP	LETE ALL	INFORMATION		
TRANSFERRING FI	ROM:	TRAN	SFERRING TO:		
Squadron No.:			ron No.:		
Detachment:			ment:		
Detacriment.	70	Detaci	iment.		
Evidence of eligibility m	eets SAL requirements:				
Applicant is:	Son Adopted Son	Stepson [Grandson		
of:		; who is (a) a	member in good standing of		
Post No D	epartment of	; or (b) a	deceased veteran who served		
honorably between		19 and19			
	SIGNATI	RES REC	WIRED		
SIGNATURE - POST/SQUAD	DRON ADJUTANT		SIGNATURE - MEMBER		
	ADDITIONAL INFO	RMATION (optional)			
	☐ DECE	EASED			
Telephone ()		D	ate of Birth		
Marital Status: Married	Single	Cont	inuous years for(paid year)		
Blood Donor (Y or N)_	No. in Household	Social Security	No		
PROVIDE .	AS MUCH I	VFORMAT	ION AS POSSIBLE		
	SEE INSTRUCTIONS	ON REVERSE SIDE			
FORM NO. 00-007 (11/95)	N	ATIONAL			

SECTIOIN III

MISCELLANEOUS INFORMATION

Replacement Membership Cards

- If a member of your Squadron loses his official membership card a replacement card must be provided from the supply of extra blank membership cards. While most Detachment's send their Squadrons an extra supply of these cards, some may not. If you don't have any, contact your State Headquarters and request blank cards
- If you find it necessary to provide a replacement, you should proceed in the following manner.
- On the LEFT and MIDDLE Portions, you must enter the member's 9-digit ID number in the proper spaces provided. Now complete the member's name, address and all other required information. At this point you should write using a #2 pencil in bold letters across the face of the LEFT and MIDDLE portions *REPLACEMENT*. These two portions should be returned to your Detachment Headquarters. Since this is a Replacement, you should not be required to attach any per-capita fees.
- On the RIGHT portion (member's card), you must enter his 9-dligit ID number along with his name and continuous years. Finally, enter the location of your Squadron and remember to sign the card on the line provided.

Extra Membership Cards

- In most Detachment's every Squadron is provided with a supply of Blank Membership Record Cards in addition to the preprinted cards. If you need more Blank Cards than those supplied you should be able to request them from your Detachment Headquarters.
- Extra (Blank) Cards are to be used for New Members -Renewals who don't have a preprinted card transfers and replacements.
- The extra cards will not have your Squadron Number printed on them. You will need to type or print your Squadron Number on <u>ALL THREE PORTIONS</u> when it's issued to a member.
- If you request additional Blank Cards, you'll also receive a new (blank), membership register sheet listing the sequential numbers of the Blank Cards that you receive. In all instances, write the member's name and address next to the matching sequential number on the register. This will enable you to keep track of these cards and members.

If Duplicate Cards Are Received

- If you happen to receive more than one preprinted card for the same member process only one of the cards as usual. On the duplicate card place an "x" with a #2 pencil in the box opposite the word DUPLICATE on the left portion. So it won't become lost, return the entire card including the member's portion. Strike the name off your Membership Register and note the remarks column that the card was returned as a Duplicate.

Deceased Members

- If you receive a preprinted card for a member who is deceased, place an "X" using a #2 pencil in the box opposite the word DECEASED on the LEFT portion of the Membership Record Card. Return the entire card to your States Headquarters. Remember to make the proper notation in the remarks column on your Membership Register.
- If a member passes away after his dues have been paid and transmitted use the Member Data form to report his death. Be sure to include all required information.

Membership Card Errors / Unknowns

- If you receive a preprinted card for someone who is not a member of your Squadron and is unknown to your Squadron put an "X" using a #2 pencil in the box opposite the word UNKNOWN on the LEFT portion of the Membership Record Card. Return the entire card to your Detachment Headquarters. Make the proper notation on your Membership Register in the Remarks column.
- It may happen that through an error in packaging you may receive cards intended for another Squadron. If this should ever happen return them as soon as possible to the place of origin attention to the person sending out the cards. **Do not mark these cards as "Unknown" since another Squadron will need to use them.**

What to do if A Members Name Is Misspelled.

If the member's name is misspelled or needs any corrections put an "X" using a #2 pencil in the correction box on the LEFT portion. Draw a line through the name on the MIDDLE and LEFT portions and type or neatly print the name correctly.

- If a name needs correcting after the member has paid his dues and the Detachment Membership Record has been transmitted you must use a Member Data Form.

Continuous Membership

- Although it is the responsibility of your Squadron to maintain continuous membership records for each of your members, your National and Detachment Headquarters offer its facilities to help compile and maintain accurate records.
- Years of continuous membership will be recorded once your Squadron has reported them, but you have to do your part. National and your Detachment cannot perform your duties. Most records are only kept for a limited amount of time.
- If a change is needed on a member's continuous years, you can make the correction by placing an "X" using a #2 pencil in the correction box on the LEFT Portion. Strike out the incorrect number printed on both boxes of the Membership Record Card. In the same box or immediately above it write or type in the correct number. Also correct the member's card (RIGHT-Portion) and the membership register sheet.
- Remember to use the Member Data Form if needed. It can be used to make any changes concerning members records.

S.A.L. MATERIAL GUIDE

The following is a list of materials that every Squadron should have on hand at all times. Most Detachments will provide these items to you FREE upon request.

MEMBERSHIP APPLICATIONS - MEMBER DATA FORMS
MEDICAL EMERGENCY CARDS - CHAPLAIN HANDBOOK - DUES REMINDER
5 STAR AWARD FORM - MEMBERSHIP PROMOTIONAL POSTERS
CHILD WELFARE FOUNDATION MATERIALS - VARIOUS S.A.L. PAMPHLETS

IMPORTANT MEMBERSHIP PHONE NUMBERS

Detachment Commander: Ph: 508-420-0761 FAX: State Membership Chairman: Ph: 781-740-8049 FAX:

Detachment Adjutant: Ph: 508-261-1629 FAX: 508-261-1629 Department Headquarters: Ph: 617-727-2966 FAX: 617-727-2969

National S.A.L. HQ's: John Kerestan Ph: 317-630-1200