



My Legion Quick Sheet

Renew a Members (Post Officer)

1. Sign In —→My Groups Post
2. Open Roster; search/filter for the member
3. Open the record —→RENEW choose term
4. Confirm payment workflow per Dept/Post
5. Save: verify expiration updates on roster
6. If undeliverable flag shows, update address.

Officer Changes

1. Leadership/Officers section in My Groups
2. Add/edit officer role → name, email, term dates
3. Confirm access roles align with duties
4. Save; export leadership report to verify

CPR Draft

1. Reports —→ CPR
2. Create/continue draft; enter activity by category
3. Attach notes/links; save frequently
4. Set a target completion date; brief monthly until submitted

Tips & Pitfalls

1. Update officer permissions before changes
2. Run undeliverable report monthly
3. Coordinate with Finance on payment reconciliation
4. Export Rosters/Leadership quarterly for records

Membership

- Renewals Target (#): _____
- New Members Target (#): _____
- Events/Activities Target (#): _____

Top Prospects/Renewal to Contact

Notes:



Questions?