

How to Document the Results of an RLI-HOA Event

During the RLI Event:

Record who is present (for all sessions), verify their correct RLI Part, verify/update their RLI Fee and Fee Payment status, and if they had registered as a “Guest”, record what club they are in. Most districts use a paper Check-In Roster to record this data during the event. There is an electronic Check-In tool and a printable Check-In report available in the DACdb RLI Module.

After the RLI Event, there are three main tasks to accomplish to “Close Out” the event:

1. Update the Registration information in DACdb which among other essential actions includes:
 - a. Cancelling the registration for those who did not complete their Part.
 - b. For those who did complete their RLI Part, verifying/correcting their registration details, then “Checking-In” and “Posting the Class” to update their RLI History in their DACdb member profile.
2. Verify/update the RLI Fee and Payment information for everyone registered.
3. Submit the RLI-HOA Expense Report to the RLI-HOA Treasurer, whether any reimbursement for the event’s local expenses is needed or not.

The outcome of doing these three tasks in a timely manner ensures the following:

1. Everyone who completed their RLI Part is credited with that accomplishment. This is recorded in the RLI Tab of their member profile in DACdb.
2. The registration for everyone who did not complete their Part is “Cancelled” and they do not receive RLI credit.
3. Everyone’s registration Payment Status in DACdb is updated with no remaining “Amounts Due”. All RLI Fees are collected and recorded. Any refunds and other payment issues are resolved.
4. The Income portion of the RLI-HOA Expense Report matches the total net payments as listed in the event’s registrations. The Income portion of this Report also matches the total of all Fee Income received (prepaid online and checks minus refunds).

RLI Coordinators may do the Event Close Out Tasks by any of the following methods:

1. Do all the tasks yourself and send the Registrar an email letting us know these Close Out tasks are done.
2. Do the tasks yourself that you feel comfortable doing and send the Registrar the necessary event information to finish updating the Registration and Payment entries in DACdb.
3. Submit the necessary event information to update all the Registration and Payment entries in DACdb to the Registrar and we will update DACdb for you. Once DACdb is updated, the Registrar and the District Coordinator will review the results together to confirm the event is accurately closed out. The district will still need to submit the Expense Report to the RLI-HOA Treasurer (whether reimbursement is needed or not).

Details for Documenting the Results of an RLI-HOA Event

Registration Close Out Steps and Things to Know:

- Please remember that after the RLI event's start date, the event no longer shows up on the RLI Dashboard page. You will find all RLI events, past and future, in the DACdb Calendar, "List Year" view. Hit the "Manage Event" button to get into the event administratively so you can continue to manage and close out your event.
 - Registration and Payment Status updates are done in the RLI event's "Backroom".
1. Ensure every RLI participant is registered in their own DACdb member profile. For anyone registered as a Guest, edit their registration, and use the "Change Member" link to tie their registration to their own member profile. If someone's DACdb member profile cannot be found, ask for help. If someone does not have a DACdb member profile yet, ask their club to add them as a member in DACdb. It is best for several reasons for the Club Secretary or an officer in their club to be the one to add them as a member in DACdb. There should not be anyone left who is registered as a Guest, whether they completed their RLI Part or not.
 2. Change the registration status to "Cancelled" for anyone who did not complete their RLI Part (for any reason). Do not use the "No Show" registration status choice.
 3. For everyone who completed their RLI Part:
 - a. Ensure they are registered for the correct RLI Part.
 - b. "Check them in" by entering a check mark in the Check-In column. While the Check-In column is very important, know that it only serves as a visual indicator of who was marked present and deserves credit for completing their RLI Part. A check mark in this column has no other effect and by itself causes no action in the RLI Module.
 4. "Post the Class" – After confirming the three steps listed above are completed, hit the "Post Classes" button (only once). A "pop up" window should appear listing everyone whose RLI History was just updated. Save a screen shot or print of this "pop up" window's information for your records. Ensure this list includes everyone deserving RLI completion credit and that it does not include anyone whose registration is cancelled. RLI participants need their RLI History updated in their member profile to be eligible to register for their next RLI Part. This completes the registration portion of Closing Out an RLI event.
- Only hit the "Post Classes" button one time. Every time the Post Classes button is hit, another RLI class completion is added for the members with active registrations.
 - Do not change the check marks in the Check-In column after you hit the Post Classes button.
 - If anyone's RLI History needs to be updated or corrected later, make that correction manually in the RLI Tab of the person's DACdb member profile.
 - Do not delete (Red X) anyone's registration unless the Registrar agrees with that action.

RLI Fee and Payment Status Update Steps and Things to Know:

1. As necessary, edit each registration to update the RLI Fee charged and the Payment Status. Everyone's registration should end up showing a "Zero \$\$ Amount Due" unless they have a refund pending or other special payment situation (to resolve later but soon).
 2. Here are two common scenarios for those who registered and paid online but did not complete their RLI Part; therefore, their registration was cancelled:
 - a. Their RLI Fee Amount should be zeroed out if they want and are due a refund. Edit their registration and hit the "Reset Questions" button to zero out the RLI Fee Amount. This will result in a negative \$\$ amount in the "Amount Due" field which represents a refund is due.
 - b. Their RLI Fee and Payment can be retained if they plan to participate in a future RLI event. Their registration (with its payment information) can be moved to a future RLI event, and their registration set back to an active status.
 3. Update the registrations for payments by check. Include Check # and an appropriate Note.
 4. Record a refund by entering a negative amount for the refund and an appropriate note, thus leaving an audit trail. This should zero out the "Amount Due" (except for the "Handling Fee").
- Eligibility to receive a refund will depend on the RLI-HOA or District level Cancellation & Refund Policy (once those policies are published).
 - Normally, cancelled registrations are not deleted, especially for registrations containing online payments. Online payments must be preserved along with any refund information and notes.
 - Submit the RLI Expense Report with copies of reimbursable expense receipts and any fee payment checks (all in one package) to the RLI-HOA Treasurer, PDG Frank Bradshaw, within 30 days after the event, whether any reimbursement is needed or not.

Special situations and Other Things to Know

- **Cancelling or Postponing an entire Event.** If, for any reason, a district needs to cancel or postpone an event, contact the Registrar to discuss options and plans. Options may include:
 - The event's date may be changed to a future date thereby moving the entire event with its registrations and payments to the new date.
 - If not changing the event's date yet, all registrations should normally be cancelled (at least temporarily), and the event set to an "Inactive " status.
 - RLI Fee Amounts and Payments may be updated, as needed, for each participant as previously described depending on whether the payment will be retained for a future event or refunded.
- **RLI History Records and Manual Updates.** The official RLI History for a member resides in the RLI Tab of the member's profile in DACdb. District RLI Coordinators are responsible for keeping this RLI History in DACdb current and accurate for all the Rotarians in their district. Only District and higher RLI Coordinators have the authority and access to update someone's RLI History in DACdb. When making manual additions, deletions, and corrections to a member's RLI History, it is the best practice is to use the RLI Event's Name as listed in DACdb for the location field.
- **RLI Participants from Other Rotary Zones.** If anyone registered is from a club outside of Zones 30 and 31, then Posting the Class will not update their RLI History since our DACdb RLI system is only connected to districts and clubs in Zones 30 and 31 (Heart of America). District RLI Coordinators will likely be unable to manually update the RLI History for those participants. Districts will need to inform those participants' district or club leadership of their RLI accomplishment so the "home" district or club can record their member's RLI accomplishment in their system.

Deadlines for Closing Out an RLI-HOA Event

Within 10 days after the RLI event - If the District Coordinator is asking for help with updating the registration data and “Posting the Class” in DACdb, please submit the event’s registration related data to the Registrar.

Within 15 days after the RLI event, if the District Coordinator is closing the event out themselves:

1. Update the registration information in DACdb which includes Cancelling those who did not complete; and Checking-In and “Posting the Class” for those who did complete.
2. Send the Registrar an email reporting that the registration related Close Out tasks are done.

Within 30 days after the RLI event, if the District Coordinator is closing the event out themselves:

1. Finish updating the RLI Fee and Payment information in DACdb.
2. Send the Registrar an email reporting that the payment related Close Out tasks are done.

Within 30 days after the RLI event, whether you closed the event out yourself or received assistance:

1. Submit the Expense Report to the RLI-HOA Treasurer, PDG Frank Bradshaw, with copies of reimbursable expense receipts and any fee payment checks (all in one package), even if reimbursement is not needed.
2. Email the Registrar a copy of the RLI-HOA Expense Report (the completed form only).
3. Email your Regional RLI Coordinator a brief summary of the outcome of your RLI event along with a copy of the RLI-HOA Expense Report (the completed form only).

The RLI Event Close Out steps must be done in a timely manner for three reasons:

1. To ensure our Rotarians are properly credited with their RLI accomplishments.
2. Keep our RLI History database current so we can all manage our RLI Program properly.
3. To avoid unnecessary DACdb registration fee charges.

How to Submit an RLI Event's Results to the Registrar for update in DACdb

We understand there is a wide range of DACdb familiarity and experience across our RLI Districts in the Heart of America. Doing “advanced registration” tasks in DACdb only occasionally can be challenging. Therefore, we are happy to assist you in any way and to even enter your RLI event's results into DACdb to “close out” your event for you.

District Coordinators may submit their RLI event's results to the Registrar via email in any reasonable file, format, or method. Using the attached RLI Event Close Out Worksheets or something similar may be a good way to share the information with the Registrar. When reading the Close Out Worksheets:

- The items with a **GREEN** column heading are for the District Coordinator to provide.
- The items with a **BLUE** column heading are for the Registrar to complete if the district asks for that assistance. These Worksheets are available as pdf and as an Excel file.

Please submit your questions, suggestions and your RLI Event Results to J.D. Rottero, RLI-HOA Registrar, at jdr56@comcast.net