

# HOW TO ADD A MEMBER

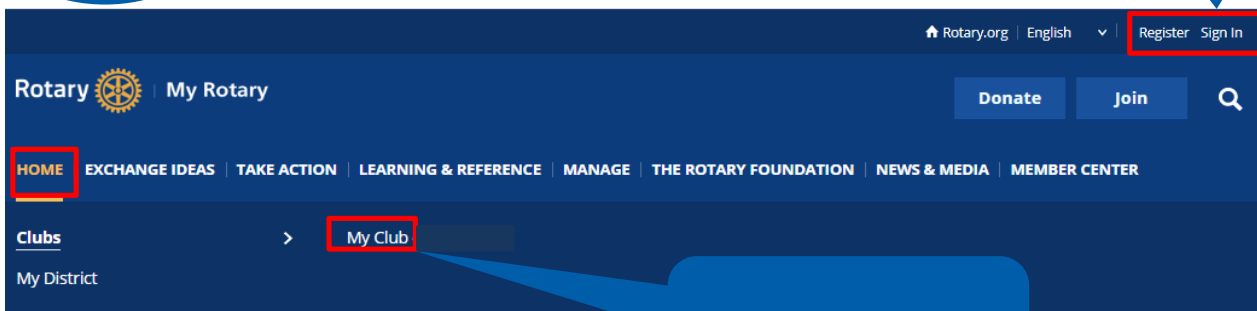


1

GO TO YOUR CLUB'S PAGE

Go to My Rotary and sign in.

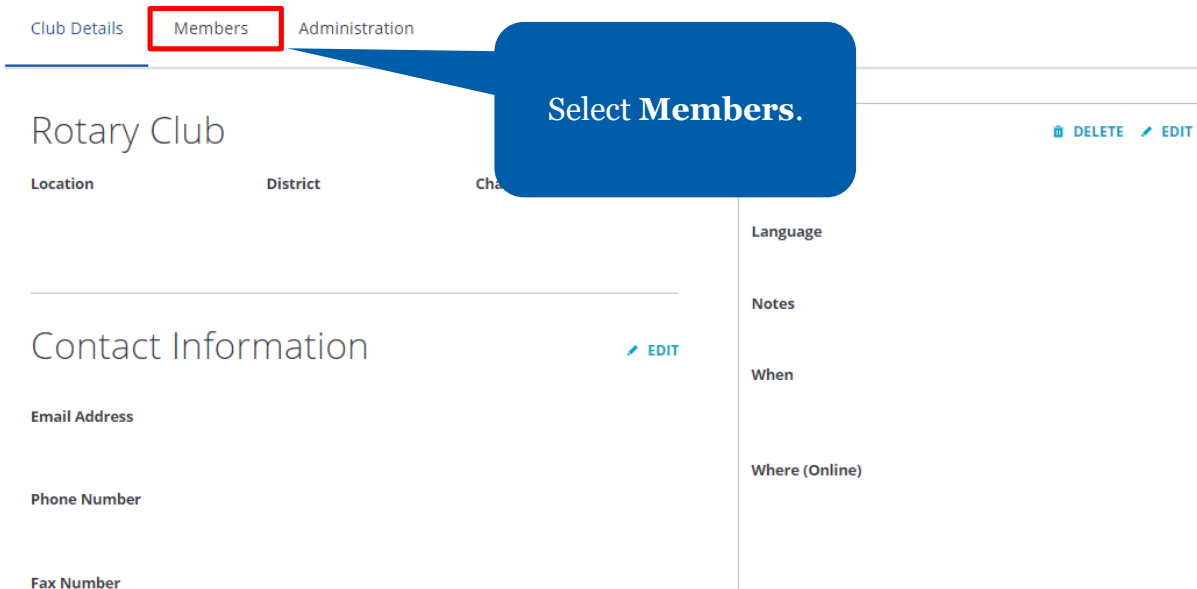
Or select **Register** to get a My Rotary account.



Select **HOME**, then **My Club**.

2

GO TO THE CLUB ROSTER



# 3 ADD A MEMBER

Club Details

Members

Administration

If you have questions about your club membership, please contact your Club and District Support Team.

**ADD A MEMBER**

MANAGE CLUB OFFICERS

Select **ADD A MEMBER**.

Search club members

Name

E-Mail

Name

E-mail

SEARCH

# 4

## SEARCH MEMBER DATABASE

Step 1 of 3

### Identify member

First, see if your new member is already in Rotary's database. You can check by searching with their name and email address or member ID.

**Full Name\***

This field accepts non-Latin characters

**Email\*** or  **Member ID\***

This field is required

**SEARCH FOR MEMBER**

CANCEL AND BACK TO CLUB ROSTER

Sorry, we couldn't find a result to your search. Check the spelling of your search and try again. Or you can add the person as a new member.

**ADD AS A NEW MEMBER**

CANCEL AND BACK TO CLUB ROSTER

Type the member's full name.

Type the member's email address.

Select **SEARCH FOR MEMBER**.

If there's no record of the member, select **ADD AS A NEW MEMBER**.

# 5

## ENTER MEMBER DETAILS

[Back](#) | Step 2 of 3

### Enter Member Details

Double-check to ensure this member's information is up-to-date. You can edit the member's information if needed.

#### PERSONAL DETAILS

Full Name\*

This field accepts non-Latin characters.

First Name\*

Middle Name

Last Name\*

Email\*

Phone

Address\*

City\*

Country/Region\*

State/Province/Territory

Postal Code\*

Language\*

Year of birth\*

Gender\*

#### Legal Disclaimer Title

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Complete the required fields in the **Enter Member Details** section.  
  
Then select **CONTINUE**.

CONTINUE

# 6

## ADD MEMBERSHIP INFORMATION

◀ Back | Step 3 of 3

### Add Membership Information

**Member type\***  
Active

For **Member type**, choose **Active** or **Honorary**.

**Admission date\***  
2020-06-15

Select the date the member was admitted to your club (must be within the past 30 days).

**Sponsored by**  
Select...

Add a sponsor if appropriate.

**Procedure certification\***  
 I certify that this individual was added in accordance with our club bylaws and understands and accepts the conditions of termination.

Check the **Procedure certification** box.

**CONTINUE**  
CANCEL AND BACK TO CLUB ROSTER

Select **CONTINUE**.

Congratulations! You have added a member to your club.

# HOW TO MANAGE CLUB MEMBERS

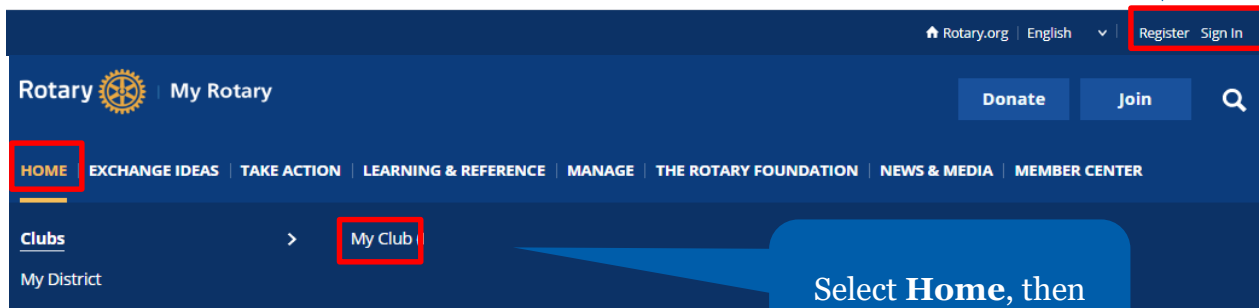


1

GO TO YOUR CLUB'S PAGE

Go to My Rotary and sign in.

Or select **Register** to get a My Rotary account.



Select **Home**, then **My Club**.

2

GO TO THE CLUB ROSTER

Select **Members**.

Club Details   **Members**   Administration

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Rotary Club NOT EDITABLE

<b>Location</b>	<b>District</b>	<b>Chartered</b>
null, Spain	2201	2002

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Contact Information EDIT

<b>Email Address</b>	None
<b>Phone Number</b>	.
<b>Fax Number</b>	

---

1 of 6 DELETE EDIT

NewOnlinemeetingname1

**Language**  
Chinese

**Notes**  
Meeting Comment

**When**  
Monday at 10:30  
once a week

**Where (Online)**  
online location  
To join the meeting remotely, access the website:  
www.rotary.org

If you have questions about your club membership, please contact your Club and District Support Team.

[ADD A MEMBER](#)

[MANAGE CLUB OFFICERS](#)

Search club members

<b>Name</b>	<b>E-Mail</b>
<input type="text" value="Name"/>	<input type="text" value="E-mail"/>

Scroll down to **CLUB MEMBERS** to see your club's current members.

**CLUB MEMBERS (17)**

Filter by Role ▾



**MX BNYfLxMYj gUjCIQY**  
Member  
Since 2014



**eSbQVA rbhTO hapjCPIF**  
Member  
Since 2002



**JN rxDi oID**  
Club Executive Secretary/Director  
2020-2021



# 3

## VIEW OPTIONS FOR EDITING MEMBERSHIP

Select the ... next to the member's record.

CLUB MEMBERS (37)

Filter by Role



nlnWrll vzUIGvlr de

**View Member Details** allows you to edit a member's contact information.



Since 2007

**Assign a Club Officer Role** allows you to report a member as a club officer. You can also do this in the Manage Club Officers section. See the How to Manage Club Officers guide for instructions.

**Edit Membership Type** allows you to switch membership type between honorary and active.

**Terminate Membership** allows you to remove a member from your club's member list.




- View Member Details
- Assign a Club Officer Role
- Edit Membership Type
- Terminate Membership



# 4

## EDIT MEMBER DETAILS

CLUB MEMBERS (37) Filter by Role

	<b>njnWrJj vzUIGvIr de</b> Member Since 1986	...
	<b>jk Sm Guumy</b> Member Since 2007	<b>View Member Details</b> Assign a Club Officer Role Edit Membership Type Terminate Membership
	<b>IZ CLFNKNxn</b> Member Since 2006	

Select **View Member Details** to go to the member's profile.

### Contact Information

Primary Email

n

Primary Phone

Alternate Phone

Primary Address (Home)

 EDIT

Select **EDIT** to make changes to the member's contact information.




Select **SAVE CHANGES** when done.

SAVE CHANGES

CANCEL

# 5 EDIT MEMBERSHIP TYPE

CLUB MEMBERS (37) Filter by Role | v

	njnWrJj vzUIGvIr de Member Since 1986	...
	jk Sm Guumy Member Since 2007	<a href="#">View Member Details</a>  <a href="#">Assign a Club Officer Role</a>  <span style="border: 2px solid red; padding: 2px;">Edit Membership Type</span>  <a href="#">Terminate Membership</a>
	IZ CLFNKNxn Member Since 2006	

Select Edit Membership Type.

## Edit Membership

**Membership Type**  
Member

CHANGE TO HONORARY

Type sponsor name | v

**Admission Date**  
1986-04-01

**SAVE CHANGES**

[CANCEL AND BACK TO CLUB ROSTER](#)

Select **CHANGE TO HONORARY** to switch the membership to honorary status. This automatically takes you to the next screen.

Type a sponsor's name if appropriate. If you add one, select the **SAVE CHANGES** when done.

# Change to Honorary Member

**i** This member can no longer hold office

Changing Member Type to Honorary will end this member's eligibility to hold office and will remove current position(s) and remove any future position(s). \*RI Bylaws, Article 4.050.2, Club Constitution Article 7, Section 6B.

Effective Date\*

2020-06-23 

**SAVE CHANGES**


[CANCEL AND BACK TO CLUB ROSTER](#)





The effective date is the current date.

Once updated, this member will not be eligible for Rotary roles.

Select **SAVE CHANGES** when done.

## 6 REMOVE A MEMBER

**CLUB MEMBERS (37)** Filter by Role 

 <b>njnWrJJ vzUIGvIr de</b> Member Since 1986	
 <b>jk Sm Guomy</b> Member Since 2007	<a href="#">View Member Details</a>
	<a href="#">Assign a Club Officer Role</a>
	<a href="#">Edit Membership Type</a>
	<a href="#">Terminate Membership</a>

Select **Terminate Membership**.

# Select Termination Details

Please provide a date and reason for termination and review how this data will be used by Rotary.

**Termination Date\***

  
**Termination Reason\***

Select...

- Terminated - Non-payment of club dues
- Terminated - Personal
- Terminated - Relocation
- Terminated - Family Obligations
- Terminated - Business Obligations
- Terminated - Joining New Club
- Terminated - By club for cause

Select the date the member left or will leave your club.

The date can be up to 30 days in the past or future.

Select the down arrow to see reasons for termination. Select a reason from the list.

## HOW THIS INFORMATION WILL BE USED

We are sorry to see members leave Rotary. The personal information provided to Rotary about members termination will not be shared and will be used to better understand why members leave Rotary. We may also use this information to contact former members about future memberships opportunities. Please contact [membershipdevelopment@rotary.org](mailto:membershipdevelopment@rotary.org) with any questions.

**CONTINUE**

**CANCEL AND BACK TO CLUB ROSTER**

Select **CONTINUE** when done.

# Confirm Termination Details

Please confirm the details of this member's termination

**Member Name**

IXVsGRTgrpcZCQOu

Review the termination details.

**Termination Date**

2020-06-09

**Termination Reason**

data ? (  
Terminated - Relocation

Check the Procedure Certification box.

); ( ' ... ' )

Procedure Certification\*

I certify that this individual was terminated in accordance with our club bylaws and understands and accepts the conditions of termination.

**CONFIRM TERMINATION**

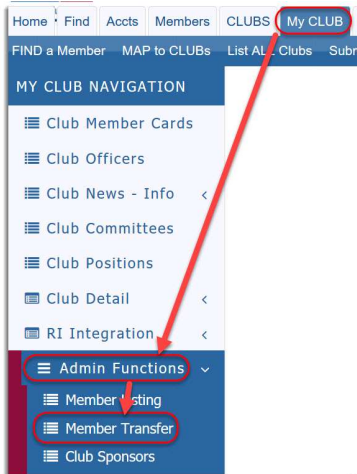
Select **CONFIRM TERMINATION**.

CANCEL AND BACK TO CLUB ROSTER

Use the "Search" field at the top right to search for a help topic.

Transferring a Member (this only works for members who are in the DACdb system and have been TERMINATED in their previous club).

1. Click the **My Club** tab, then click the "Member Transfer" link down on the left hand side under the "Admin Functions" section.



2. **Member Transfer Page.** Type in partial or complete Last name and click search.

Member Transfer - into Charlotte (2920)

**Add Member** Cancel

Use this function when a Member was previously terminated from another club and in joining club (**Charlotte**).

This function will allow you to search for the terminated member in the DACdb system, and ADD them into this club -- copying over the existing terminated member information. The selected member here will be added to this club (**Charlotte**) leaving the member terminated in the club where they were terminated and creating a new record with the same MemberID and member information in this club (**Charlotte**).

**Search Parameters**

Enter partial Member name:  Search

**Notes:**

- Enter a partial last name and (if necessary), the comma and partial first name, to find the terminated member in DACdb, you are looking to find.
- THERE IS NO SUCH THING AS A TRANSFER WITHIN RI. It is a **TERM** in one Club and an **ADD** in another Club.
- The MemberID of the terminated member selected will be used. This parallels what RI will attempt to do - find the Member's ID and reuse it.
- Please verify the member information. Most likely the member address or phone information has changed.
- Please correct the start date. By default -- today's date will be used as the start date in your club.
- RI ADD will be sent immediately following the member selection and ADD.

3. Find the correct member and click the "Add" link next to their name. They will be entered into your club and the information will be sent to RI. Because their RI number stays with them, you can then go in and make additions or corrections to their profile.

Member Transfer - into Charlotte (2920)

**Add Member** Cancel

Use this function when a Member was previously terminated from another club and in joining club (**Charlotte**).

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**Search Parameters**

Enter partial Member name:  Search

**Search Results**

Member Name	Prev District	Prev Club	Action
Arnold, Jr., William E.	6970	Jacksonville (2920)	<a href="#">Add</a> <a href="#">View</a>
Arnold, William	7620	Silver Spring-Kensington (2920)	<a href="#">Add</a> <a href="#">View</a>
Arnold, William D.	7360	Bedford (2920)	<a href="#">Add</a> <a href="#">View</a>
Arnold, William David Jr.	6900	LaGrange (2920)	<a href="#">Add</a> <a href="#">View</a>
Arnold, William Douglas	5160	Davis Sunset (2920)	<a href="#">Add</a> <a href="#">View</a>
Arnold, William H.	6360	Charlotte (2920)	<a href="#">Add</a> <a href="#">View</a>
Arnold, Jr., William E.	6970	Jacksonville (2920)	<a href="#">Add</a> <a href="#">View</a>
Williams, Arnold E.	5450	Rotary Club of Boulder (2920)	<a href="#">Add</a> <a href="#">View</a>
Williams, Arnold L.	6510	Metropolis (2920)	<a href="#">Add</a> <a href="#">View</a>

**Notes:**

- Enter a partial last name and (if necessary), the comma and partial first name, to find the terminated member in DACdb, you are looking to find.
- THERE IS NO SUCH THING AS A TRANSFER WITHIN RI. It is a **TERM** in one Club and an **ADD** in another Club.
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- Please verify the member information. Most likely the member address or phone information has changed.
- Please correct the start date. By default -- today's date will be used as the start date in your club.
- RI ADD will be sent immediately following the member selection and ADD.

**Note:** When a member transfers into another club, their Start Date is when they are *entered into the club they are transferring into*. You do have the ability to enter the Years in Rotary in the member's profile. That will keep track of the total years in Rotary for the member.