

## **CLUB SECRETARIES – LIST OF THINGS YOU SHOULD AND SHOULD NOT BE DOING!**

### **I. When entering a new member:**

- A. DO NOT enter even one day before their start date. RI doesn't allow it. You may enter them any time after their start date.
- B. Put in their birth year, not just the day and month. This is important both for the District and RI in order to accurately get the age demographic for your club and the District. Remember, only level-4s can see this information.
- C. Please put in their classifications. This is not a required field. One of the big advantages is you can search the entire District or system using the classification.
- D. After you have entered a new member, DO NOT go in and make changes until their RI ID number has been assigned. I go in and get these and it usually takes 3 to 6 days, but occasionally up to 10 days. If it takes longer than that I will resend them to RI and you will get email notification that this has been done.
- E. DO NOT use just a P. O. Box number for the address. You do have two lines when entering the address and RI prefers a street number.
- F. When adding a new member in December or June, try to do so by the second day of the month or it won't show up on your Semi-Annual Report (SAR).
- G. Be sure and enter their preferred email address, as that is one of the most important components of the database system.

### **II. When transferring a former Rotarian:**

- A. Be sure you have their RI ID number before entering them as a new member. Otherwise they end up with two ID numbers.
- B. If they are already in the DaCdb system, there is an easy transfer method. On the "My Club" tab on the top left is a way to "Transfer Member." Click on that and type in even a partial last name and select the proper person. Then click on "add" that member and they are now in your club. Be careful you have the correct person. You may need to go in and make changes in their profile. I would wait at least a week to give it time to get into the RI database system.
- C. If you terminate or add a member after June 1<sup>st</sup> or December 1<sup>st</sup>, make sure they appear on your SAR. If they don't, you must add the new member on the new member page of the SAR and check the box that says they have been entered and sent to RI. DO NOT cross off or terminate a member on the SAR without also terminating them in the DaCdb first. If that should happen, let me know so we can go terminate them without the information going to RI. RI does not communicate with DaCdb, but DaCdb does communicate with RI.

### **III. Dates you need to know about:**

- A. November – your club needs to be nominating your club officers and directors.
- B. All club officers need to be in place no later than December 31<sup>st</sup> in order to be included in the Official RI Directory.
- C. You need to let you club PE know they need to attend one of the PETS 1 sessions on either February 8, 2014 or February 22, 2014. Location to be announced.
- D. Also, you need to let your PE know they **MUST** attend PETS in Kalamazoo, at the Radisson Plaza Hotel. This will be held on March 13, 14 & 15, 2014. Registration should be available January 1, 2014. All PEs must attend or they cannot serve as club president on July 1, 2014. Your club already has been billed for their attendance so all they need to do is register. The clubs are only billed for the food portion of the registration. If they want to stay in the hotel, there is an additional charge for the two night stay.
- E. Please keep April 29, 2014, from 5:30 p.m. to 8:30 p.m. on your calendar for the District Training assembly. This will be held at the Battle Creek Lakeview Middle School. If another member is taking over your position as club secretary, please encourage them to attend. Of course, we want you there if you are continuing as club secretary. I promise you will go home with something that will make your job as club secretary easier.