



Rotary International District 7090

United States - Canada "Best of Friends" District

Frank Adamson, District Governor 2020-2021

Office: 800 Lakeview Avenue, Jamestown, NY 14701; 716.484.8814

To: Incoming Presidents, District 7090, 2021 – 2022

From: Penelope Hutton, District 7090 Executive Secretary

At the request of the Training Team, I have compiled some documents to assist you with preparing for and serving in your new role as President-elect and President.

Thank you for stepping up to *Service Above Self*. The District Training Team and other District leaders are available to help you as you endeavor to lead your club to new achievements in *2021 – 2022*.

Attached are the following:

- ***Important Contact Information 2021-2022***
- ***How to User Guides for Rotary International website*** www.rotary.org
 - Covers the basics of logging in and administrative duties like adding and removing members, finding the club invoice.
- ***How to Use the District's ClubRunner website*** to update your club and membership information at www.rotary7090.org
- ***For help on using ClubRunner (club and district sites)***, go to <https://www.clubrunnersupport.com/>

2021 – 2022 IMPORTANT CONTACT & OTHER INFORMATION

Anne Bermingham, District Governor
20 Ravenscliffe Avenue, Hamilton, ON L8P 3M4
Bus/Cell: 905-719-1225 E-mail: anne@d7090.org

Penelope Hutton, District Executive Secretary/Webmaster/Newsletter Editor
800 Lakeview Avenue, Jamestown, NY 14071
Office: 716-484-8814 Cell: 716-499-2989 E-mail: office@d7090.org

John Bartlett, District Treasurer
561 Gorham Road, Ridgeway, ON L0S 1N0
Cell: 289-407-7045 Res: 289-876-8819 E-mail: johnbartlett77@gmail.com

Insurance Claims and Queries: www.rotary7090.org – click on Insurances (under Club Tools)

CA: Norwich Insurance Brokers, Attn: Kelsey Schaafsma, 13 Stover St. N, Norwich, ON, N0J 1P0
Phone: 519-863-2014; Fax: 519-863-2015; 800-280-0937; E-Mail: kelsey@norwichinsurance.com

USA: Arthur J. Gallagher/Gallagher Insight
Phone: 833-3ROTARY E-Mail: rotary@ajg.com
Certificate of Insurance/Claim Report Forms for USA Clubs on website at <https://insight.ajg.com>
Username: rotary@ajg.com Password: rotarian1

Web Sites:

RI District 7090: www.rotary7090.org; **Rotary International:** www.rotary.org
ClubRunner: For assistance, call toll free 1-877-469-2582, option 2

ANNUAL DUES:

- 1. R I Dues – CLUB Invoice (formerly known as SAR).** Due in July and January to Rotary International. The invoice will be sent via email to the club officers twice annually.
NOTE: Invoice will be based on # members in databases as of 1st of month July and January. No adjustments after this date.
- 2. District Dues.** Payable annually as of July 1, based on official numbers at RI. Club executives (president/secretary/treasurer) will receive e-mail with attached invoice to submit District dues.

Rotary World Headquarters:

One Rotary Center
1560 Sherman Avenue
Evanston, Illinois, USA 60201-3698

Phone: 847-866-3000 Toll Free: 866-976-8279
Fax: 847-328-8554
E-Mail: contactcenter@rotary.org

Club and District Administration Department (CDS):

Associate Officer: Sarah Steacy
Associate Officer: Sophie Dangerfield

Phone: 847-866-3036 E-Mail: sarah.steacy@rotary.org
Phone: 847-424-5220 E-Mail: sophie.dangerfield@rotary.org

Accounts Receivable Department:

A/R Coordinator: Laura Ovalle

Phone: 847-866-4497 E-Mail: laura.ovalle@rotary.org
Fax: 847-556-2166

The Rotary Foundation Donor Services (Paul Harris Fellow Recognition & Contributions to TRF):
Be sure to include Member no., Club no., and/or District number 7090 on check and submit appropriate form as noted below*)

USA: The Rotary Foundation, 14280 Collections Center Drive, Chicago, IL, 60693
Questions: Phone: 866-976-8279 Email: contact.center@rotary.org

CANADA: The Rotary Foundation, c/o 911600 PO Box 4090, STN A, Toronto, ON, M5W 0E9
www.clubrunner.ca/trfc TRF Canada Coordinator: Susan Hicks Phone: 905-533-5100 E-Mail: Susan.Hicks@rotary.org

Note: the following forms are available online at RI:

Recognition Contribution Form	123EN*
Recognition Transfer Form	102EN*
Multiple Donor Form	094EN*

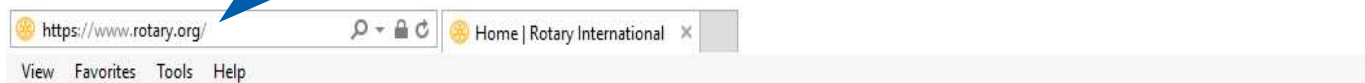
Other Assistance

Data Services (changes to membership/officers): data@rotary.org

HOW TO CREATE A MY ROTARY ACCOUNT



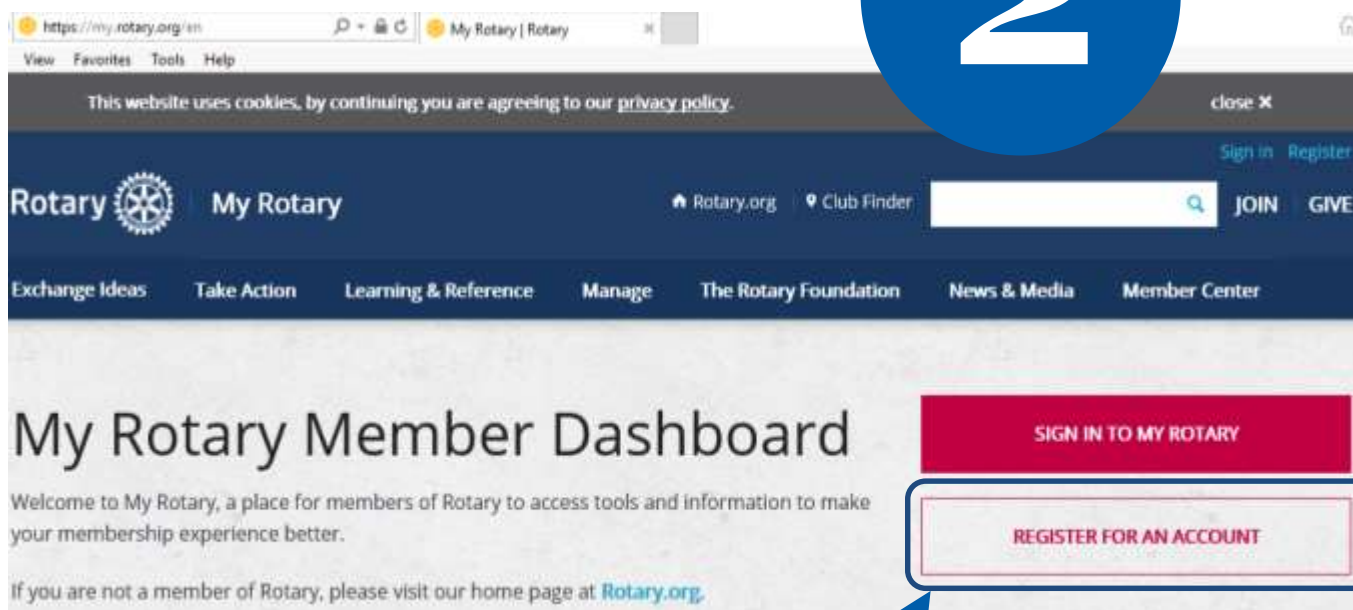
First go to www.rotary.org.



1

Then click on **My Rotary**.

2



Click on **Register** for an account.

3

If you are not a first time user, enter your email address and password. Then click on **Sign In**.

If you are a first time user, click on **Create account**.

SIGN IN

SIGN-IN EMAIL *

[Forgot email?](#)

PASSWORD *

[Forgot password?](#)

☒ REMEMBER ME ?

SIGN IN

WHY CREATE AN ACCOUNT?

Signing in to My Rotary gives you a customized experience and easier access to tools and information that are relevant to you.

Anyone can create an account and sign in. Existing Member Access users can re-register with their current user ID. For tips on registering and using the site, see our [website resources](#). For assistance, [contact us](#).

CREATE ACCOUNT

ACCOUNT REGISTRATION

*Required

FIRST NAME *

LAST NAME *

SIGN-IN EMAIL *

ARE YOU 18 YEARS OLD OR OLDER? *

☐ YES

☐ NO


CONTINUE

Fill in the Account registration information and click on **Continue**.

4

5

ROTARY.ORG > MY ROTARY



Rotary

You will be informed that an e-mail has been sent to you.

ACCOUNT REGISTRATION

Thank you for registering, you've completed the first step in the process. You will receive an email sent to your sign-in email with a link to activate your account.

6

Complete your Rotary.org registration

Hello

You're just one step away from completing your registration. You can now connect with Rotary leaders, exchange ideas, and take action.

Activate my [account](#)

Check your email for the address you provided in the step above. You will receive this message. Click on the blue link to finalize the process.

ACCOUNT SET-UP

Thank you for activating your account. Just a few more steps to complete the process.

*Required

CREATE PASSWORD *

Your password must be at least eight characters and contain one lowercase letter and one uppercase letter, as well as any part of your sign-in email address.

CONFIRM PASSWORD *

SECURITY QUESTION *

- select -

ANSWER *

(The answer to your security question must be at least four characters.)

CREATE ACCOUNT

Fill in all the mandatory information and click on **Create account.**

7

ACCOUNT SET-UP

Congratulations, your account was successfully created.

Your profile has been created.

As part of becoming a registered user of My Rotary, you've also created a profile. Once you sign in you can complete your profile and review or change your privacy settings to control who sees your information.

You are a member of the community.

You can also participate right away in the Rotary community by joining discussion groups and connecting to other members.

☐ REMEMBER ME

CONTINUE

MY PROFILE

Click on **Continue.**

8

ROTARY.ORG > MY ROTARY

Rotary



My
Rotary

Congratulations! You have created your **My Rotary account.**

MY ROTARY

9

HOW TO MANAGE CLUB OFFICERS

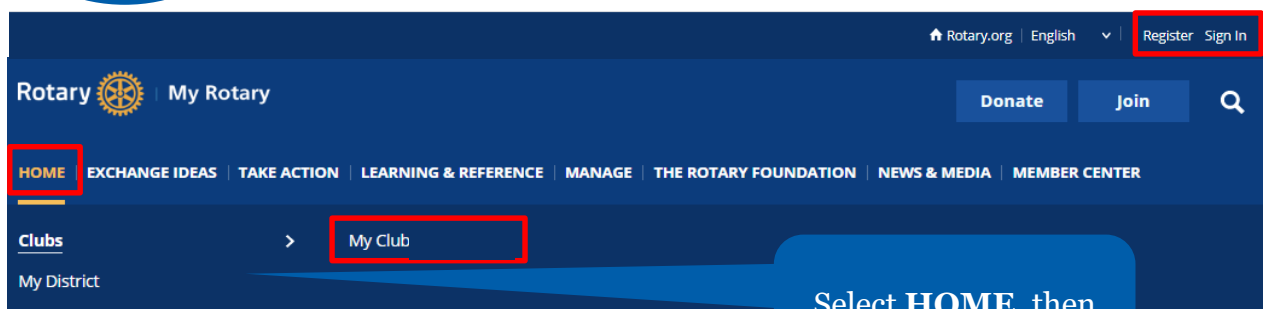


1

GO TO YOUR CLUB'S PAGE

Go to My Rotary and sign in.

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



2

GO TO THE MANAGE CLUB OFFICERS PAGE

Madrid Puerta de

Select **Members.**

Club Details **Members** Administration

Rotary Club

NOT EDITABLE

Location	District	Chartered
null, Spain		2002

Contact Information

[EDIT](#)

Email Address	None
Phone Number	
Fax Number	

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

Lane Cove

Club Details

Members

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

ADD A MEMBER

MANAGE CLUB OFFICERS

Select **MANAGE CLUB OFFICERS**.

Search club members

Term

E-Mail

Name

E-mail

Q SEARCH

3

VIEW CLUB OFFICERS

Manage Club Officers

Select club members to fulfill designated roles

This page shows the list filled and empty club roles.

Here, you can add, edit, or remove club officers.

Name

2019-2020



Use the arrow to select the year.

CLUB OFFICERS (6)

CLUB EXECUTIVE SECRETARY/DIRECTOR



BmQkVXEjdH ZiYNvCerBf WbROv

Start: 2019-07-01 End: 2020-06-23



Start: 2020-06-24 End: 2020-06-30



CLUB FOUNDATION CHAIR



LuK DMYUYtBh sDoeVwJEO

Start: 2019-07-01 End: 2020-06-30



4

ADD A CLUB OFFICER

Manage Club Officers


Select club members to fulfill designated roles

Term

2020-2021

▼

CLUB OFFICERS (6)

CLUB FOUNDATION CHAIR Unassigned	<div>+</div>
CLUB MEMBERSHIP CHAIR Unassigned	<div>+</div>
CLUB PRESIDENT <div><div> vdbcjb N ttBgaP Start: 2020-07-01 End: 2021-06-30</div></div>	<div>...</div>

Select the + by a role to assign a member to that role.

Note: Only incoming and current club officers can add officers to My Rotary.




Select a member

Select a member for the role of **Club Executive Secretary/Director** for 2020-07-01 through 2021-06-30.

To search for a member, type a name or email address. Then select **SEARCH**.

Or, scroll through the member list to find a member.

CLUB MEMBERS (36)

	IZ CLFNKNxnN BkywqVJwmT Member Member since 2006	<input type="button" value="SELECT"/>
	nJnWrJJ vzUIGvIr de Honorary Member since 2020	<input type="button" value="SELECT"/>
	gl vZVU wykyCHiO Club President Member since 2018	<input type="button" value="SELECT"/>

Choose **SELECT** by the member's name to assign that member the role.

Confirm Officer Details

Please make sure the member's email address is up-to-date.

Member

IZ CLFNKNxnN BkywqVJwmT

Review the officer's details and confirm the information is correct.

Term

2020-2021 Start: 2020-07-01 End: 2021-06-30

Role

Club Executive Secretary/Director

Start Date

2020-07-01

End Date

2021-06-30

Member Email*

Select **FINISH**.

FINISH

5 REMOVE A CLUB OFFICER

< Members

Manage Club Officers


Select club members to fulfill designated roles

Name


 


CLUB OFFICERS (6)

CLUB EXECUTIVE SECRETARY/DIRECTOR




BmQkVXEjdH ZiYNvCerBf WbROv
Start: 2019-07-01 End: 2020-06-23







Start: 2020-06-24 End: 2020-06-30



CLUB FOUNDATION CHAIR



LuK DMUYUyBh sDoeVwjEo
Start: 2019-07-01 End: 2020-06-30



Select the ... in the member's record.

View Member Details

Remove from officer role

Select Remove from officer role.

Remove this person from officer role?

The club officer position will become unassigned. Please select an end date.

End Date*

2020-06-23



REMOVE

CANCEL AND BACK TO CLUB ROSTER

Select **REMOVE**.

Manage Club Officers

Select club members to fulfill designated roles

Name

2019-2020



CLUB OFFICERS (6)

CLUB EXECUTIVE SECRETARY/DIRECTOR



BmQkVXEjdH ZiYNvCerBf WbROv

Start: 2019-07-01 End: 2020-06-23



Start: 2020-06-24 End: 2020-06-30



CLUB FOUNDATION CHAIR



LuK DMYUYtBh sDoeVwJEo

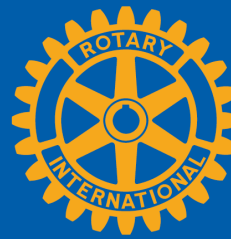
Start: 2019-07-01 End: 2020-06-24



Start: 2020-06-25 End: 2020-06-30



HOW TO ADD A MEMBER



ROTARY.ORG > MY ROTARY | Sign in/Register

Club Finder Location/Language

Rotary My Rotary Exchange Ideas Take Action Learning & Reference **Manage** The Rotary Foundation Member News

CLUB & DISTRICT ADMINISTRATION

- Club Administration**
- District Administration
- Contributions
- Reports
- Club Invoice

Community Marketplace
RSS Feeds
Mobile Apps
Member Data Integration

BRAND

- Our Stor
- Guidelin
- Logos
- Material
- Ads
- Images & Video
- Strengthening Rotary Resources

EXPENSES

1

Go to rotary.org and sign in to MyRotary. Then go to **Manage**, then **Club Administration**.

CLUB ADMINISTRATION

CLUB FINANCES

★ **Club Invoice**
View your club's invoice, pay dues with a credit card, or update invoice preferences.
[Club invoice](#) | [Daily club balance report](#) | [Edit invoice preferences](#)
[Rotary exchange rates](#)

CLUB & MEMBER DATA

☆ **Update Member Data**
Report membership changes within 30 days, or by 1 January or 1 July, to ensure your club invoice reflects the latest information. Record new member sponsors so they receive recognition.
[Add, edit, or remove members](#) | [Add, edit, or remove club officers](#) | [Record a new member sponsor](#)

2

Click on **Add/edit/remove member**

Club Data

Rotary Club of: [Redacted]
Club Number: [Redacted]

Active and Honorary Members 22 record(s) **Add Members** Terminated Members Deceased Members

The following are active and honorary members:

	Membership ID	Last Name	First Name				
View	Edit	Terminate	8918182	cbvcbv	cbcxbv	02-Jul-2014	Member

3

Click on **Add Members**.

4

Club Data | Members

Either search for a Rotarian who is already a member of another club or add a new member.

To avoid adding someone who is already in the RI database, it is highly recommended that you search for the member before adding him/her as a new member.

Search for an existing member

Continue

Click **Continue** if you are adding someone who is not in Rotary's database.

First, click **Search for an existing member** to see if the new member is already in Rotary's database (e.g., transferring member from another club or if you know that the new member has been a Rotaractor or alumni before).

Club Data | Members

Search by IDs

ID

Submit

Club Data | Members

Please report the name as it appears in Latin alphabet in the individual's passport or other government issued document.

Club Information (Non Editable)

Club Number	Club Name	Chartered
28549	Sakado Satsuki	13 February 1992

Add Members

Prefix

First Name: **Required**

Middle Name

Last Name: **Required**

Suffix

Gender: **Required**

E-mail Type

E-mail Address

Language: **Required**

Street Address Line 1: **Required**

Street Address Line 2

Save and Continue

Complete the required fields and click **Save and Continue**. You have successfully added a new member.

5

Or criteria below

Last Name: ***2 characters required**

Middle Name

First Name:

Country/ Geographical Region

Select country

Club Name

Submit

Enter known information and click **Submit**. The system will search for matching records.

Search Results

Name	City, State	Country/ Geographical Region	Most Recent Club Name	Position
bob	xyz	Bahamas		Honorary Member
Brian	Nassau	Bahamas		
D. Anthony	Nassau	Bahamas	South-East Nassau	Member

6

Member Type and Admission Date

For Member Type assign Active or Honorary. Admission Date must be within the last 30 days.

Member Type **Required**

Admission Date For Your Club **Required**



Once the search results appear, click on the person's name for the person you want to add, and click **Add member and Update Contact**.

Add member & Update Contact

Transferring members can only be admitted to your club the day after their former club terminated their membership in MyRotary. Members who have not yet been terminated by their former club cannot be admitted as an active member until this is done.

HOW TO REMOVE A MEMBER



ROTARY.ORG > MY ROTARY | Sign in/Register

Club Finder Location/Language

Rotary My Rotary Exchange Ideas Take Action Learning & Reference **Manage** The Rotary Foundation Member News

1

CLUB & DISTRICT ADMINISTRATION

- Club Administration
- District Administration
- Contributions
- Reports
- Club Invoice

TOOLS

- Community Marketplace
- RSS Feeds
- Mobile Apps
- Member Data Integration

Go to rotary.org and sign in to MyRotary. Then go to **Manage**, then **Club Administration**.

PRODUCTS

- Shop
- Licensed Vendors
- Special Offers

TRAVEL & EXPENSES

Images & Video
Strengthening Rotary Resources

Home | Manage | Club & District Administration | Club Administration

CLUB ADMINISTRATION

CLUB FINANCES

★ **Club Invoice**
View your club's invoice, pay dues with a credit card, or download your club's invoices.

Club invoice | Daily club balance report | Edit club preferences | About the club invoice | Rotary exchange rates

CLUB & MEMBER DATA

★ **Update Member Data**
Report membership changes within 30 days, or by 1 January or 1 July, to ensure your club invoice reflects the latest information. Record new member sponsors so they receive recognition.

Add, edit, or remove members | Add, edit, or remove club officers | Record a new member sponsor

2

Click on **Add/edit/remove member**.

Club Data

Rotary Club of: **Sakado Satsuki**

Club Number: **28549**

Active and Honorary Members 22 (s) [Add Members](#) [Terminated Members](#) [Deceased Members](#)

The following are active and honorary members

	Membership ID	Last Name	First Name	Admitted	Member Type
View Edit Terminate	8918182	cbvcbv	cbcxbv	02-Jul-2014	Member
View Edit Terminate	8918198	dffvjk	sdfsaj	01-Aug-2014	Member
View Edit Terminate	8195128	Doty	Adam	30-Jul-2014	Honorary Member

3

Find the member's name on your list, and click **Terminate**.

Terminate

Only use this option if you wish to terminate membership of a Club Member.

Terminate Member

cbvcb cbcxbv cbvcbv cbvcbv

Termination Reason

--

Termination Date

-- -- 2014

Select the reason you are removing the member and enter the termination date. Then click **Terminate**.

Terminate

4

[Club Data](#) | [Members](#)

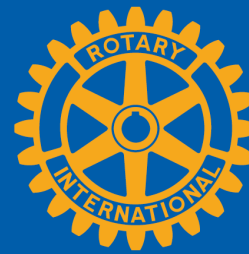
The member has been terminated successfully.

Click 'OK' to return to the Update Membership Data page.

OK

Once you click Terminate, you will get this message confirming that the member was removed. Click **OK**.

HOW TO EDIT MEMBER INFORMATION



ROTARY.ORG > MY ROTARY | Sign in/Register

Club Finder Location/Language

Rotary My Rotary Exchange Ideas Take Action Learning & Reference **Manage** The Rotary Member

CLUB & DISTRICT ADMINISTRATION

- Club Administration
- District Administration
- Contributions
- Reports
- Club Invoice

TOOLS

- Community Marketplace
- RSS Feeds
- Mobile Apps
- Member Data Integration

BRAND CENTER

- Our Story
- Guidelines
- Logos
- Materials
- Ads
- Images & Video
- Strengthening Rotary Resources

TRAVEL & EXPENSES

1

Go to rotary.org and sign in to MyRotary. Then go to **Manage**, then **Club Administration**.

Home | Manage | Club & District Administration | Club Administration

CLUB ADMINISTRATION

CLUB FINANCES

☆ **Club Invoice**
View your club's invoice, pay dues with a credit card, or update invoice preferences
[Club invoice](#) | [Daily club balance report](#) | [Edit invoice preferences](#) | [About the club invoice](#) | [Rotary exchange rates](#)

CLUB & MEMBER DATA

☆ **Update Member Data**
Report membership changes within 30 days, or by 1 January or 1 July, to ensure your club invoice reflects the latest information. Record new member sponsors so they receive recognition.
[Add, edit, or remove members](#) | [Add, edit, or remove club officers](#) | [Record a new member sponsor](#)

2

Click on **Add/edit/remove member**

Club Data

Rotary Club of:

Club Number:

Active and Honorary Members 22 record(s) [Add Members](#) [Terminated Members](#) [Deceased Members](#)

The following are active and honorary members

	Membership ID	Last Name	First Name	Admitted	Member Type
View Edit Terminate	8918182	cbvcbv	cbcxvb	02-Jul-2014	Member
View Edit Terminate	8918198	dffvjk	sdfsaj	01-Aug-2014	Member

Click on **Edit** next to the members name.

3

[Club Data](#) [Members](#) [Contact Information](#) [Membership](#) [Officer History](#) [Committees](#)

Note: Use this to edit member contact information.

Member Information

Membership ID [Edit Member Admission Date](#)

Membership Change Date

Member Type and Sponsorship Information

Member Type [Edit Member Type or Sponsor Name](#)

Name/ Rotarian Info

Prefix [Edit Member Information](#)

First Name:

Middle Name

Last Name

Suffix

Use this to edit member contact information.

4

Edit member information and click the appropriate button.

[Club Data](#) | [Members](#) | [Contact Information](#) | [Membership](#) | [Officer History](#) | [Committees](#)

Edit member information below. Press "Save Changes" button when finished.

Note: Member Address Information is accessed via the 'Contact Information' link above.

Name/ Rotarian Info

Prefix <input type="text" value="cvbcb"/>	Gender Required <input type="text" value="Male"/>
First Name: Required <input type="text" value="cbcxb"/>	Date of Birth <input type="text" value="--"/> <input type="text" value="--"/> <input type="text" value="--"/>
Middle Name <input type="text" value="cvbcb"/>	Deceased <input type="checkbox"/>
Last Name Required <input type="text" value="cbvcbv"/>	
Suffix <input type="text"/>	
Callname <input type="text"/>	

[Save Changes](#)

5

Make additional changes or confirm and click **Save Changes**

HOW TO UPDATE CLUB DATA



Rotary 

My Rotary Exchange Take Action Learning & Reference **Manage**

1

Go to Rotary.org and sign in to MyRotary. Then go to the **Manage** tab, and choose **Club Administration**.

CLUB & DISTRICT ADMINISTRATION

Club Administration Marketplace

District Administration

Contributions Mobile Apps

Reports Member Data Integration Logos Materials

Home | Manage | Club & District Administration | Club Administration

CLUB ADMINISTRATION

CLUB FINANCES

Choose links to view and update your club data.

☆ **Club Invoice**
View your club's invoice, pay dues with credit card, or update invoice preferences
[Club invoice](#) | [Daily club balance report](#) | [Edit invoice preferences](#) | [About the club invoice](#) | [Rotary exchange rates](#)

CLUB & MEMBER DATA

☆ **Update Member Data**
Report membership changes within 30 days, or by 1 January or 1 July to ensure your club invoice reflects the latest information. Record new member sponsors so they receive recognition.
[Add, edit, or remove members](#) | [Add, edit, or remove club officers](#) | [Record a new member sponsor](#)

☆ **Update Club Data**
Provide club information for the Official Directory.
[Update meeting details](#) | [Update mailing address and contact info](#) | [Edit vendor partner organization](#) | [Update Official Directory preferences](#)

2

Manage Club Data

Your club information will be listed in the Official Directory as shown below. To make changes, click "Edit" for each of the sections below. Information must be entered by 10 March, each Rotary year, to appear in the Official Directory.

Note: Club contact information will be published in Rotary media, including Club Locator on the RI website. Club officer information will be published in the Official Directory only.

Rotary Club of:	Your club name will appear here.
Year of Admission:	1961
Number of Active Members (not including honorary)	38

Go to: [Address](#) | [Official Directory](#) | [Current Officers](#) | [Incoming Officers](#) | [Partner Organization](#) | [Sponsored Rotarians](#)

Club's Permanent Mailing Address and Contact Information

This address is used by RI for mailings to current and future club officers and should reflect only permanent club mailing address, not personal officer address.

NOTE

	Address	Phone	Fax	E-mail	Website
View/Edit	Your club address will appear here.	1-234-567-8901	1-987-654-3210		www.yourrotaryclub.com

Meeting Details

Confirm your club's permanent mailing address, phone, fax, email address, and website are correct. Click **View/Edit** to make changes. Be sure to add your email address.

	Meeting Place	Address	Meeting Day	Meeting Time	Alternate Place/Time/Day
Edit	Sunrise Hotel	123 Sunrise Lane, Sunnyville, IL, USA	Wed	1200	

Check your club's meeting place and address and meeting day and time, and click **Edit** to make changes.

Invoice Preference

Check this box to remove your club from receiving the invoice paper copy (electronic version is acceptable).

☐

Indicate how you wish to receive your invoice.

Save

Cancel

Rotary



May 2015

Edit Meeting Details

Click "Submit" when done. To go back, click "Cancel."

Note: Changes will be reflected in Club Locator within 24 hours.

Rotary Club:

Meeting Day

Thursday

Meeting Time (Enter as 24-hour time, e.g. 1445)

2000

Meeting Place

Address Line 1 **Required**

Address Line 2

Address Line 3

City **Required**

Postal Code

Country/ Geographical Region **Required**

State/ Province/ Territory

Enter your state/province/territory here.

If you have an alternate meeting day, time, or place, please enter it here (limit 50 characters).

Submit Changes

Cancel

4

Make your changes and click on **Save Changes**.

HOW TO CHOOSE OR UPDATE A CLUB MANAGEMENT VENDOR IN MY ROTARY



1

NAVIGATE TO THE CLUB MANAGEMENT VENDOR PAGE

Rotary.org | Club Finder | Search | JOIN | GIVE

Exchange | The Rotary Foundation | News & Media | Member Center

Go to My Rotary and select **Sign In** or **Register** for an account if you haven't already

SIGN IN

SIGN-IN EMAIL *

Forgot email? ?

PASSWORD *

Forgot password?

☒ **REMEMBER ME** ?

SIGN IN

WHY CREATE AN ACCOUNT?

Signing in to My Rotary gives you a customized experience and easier access to tools and information that are relevant to you.

Anyone can create an account and sign in. Existing Member Access users can re-register with their current user ID. For tips on registering and using the site, see our [website resources](#). For assistance, contact us.

CREATE ACCOUNT

SIGN IN TO MY ROTARY

REGISTER FOR AN ACCOUNT

Rotary Spotlight

2016, The...
ator - 100...
bility and...
star rating...
only 1...
sionals...
2016, an...
d...
ndation

Rotary
ALLIANCE 2017

Go to the **Manage** tab and choose **Club Administration**

Profile | Delegation | Account Settings | Sign Out(RIMailTest+Tai-5649376@gmail.com)

Rotary.org | Club Finder | Search | JOIN | GIVE

Exchange | Take Action | Learning & Reference | **Manage** | The Rotary Foundation | News & Media | Member Center

Club & District Administration

Club Administration

District Administration

Contributions

Reports

Rotary Club Central

Community Marketplace

Official Rotary Apps

Club Management Systems & Website Providers

Marketplace Resources

Brand Center

Our Story

Guidelines

Logos

Materials

Ads

Images & Video

Strengthening Rotary Resources

Products & Services

Shop.rotary.org

Licensed Vendors

Special Offers

Rotary Global Rewards

Travel & Expenses

Club & Member Data

Go to **Club & Member Data** and click on **Designate a club management vendor**

☆ Update Member Data

Report membership changes within 30 days, no later than 1 January or 1 July, to ensure your club invoice reflects the latest information. Add and new member sponsors.

[Add, edit, or remove members](#) | [Add, edit, remove club officers](#) | [Record a new member sponsor](#)

☆ Update Club Data

Provide club contact information and choose club management providers.

[Update meeting details](#) | [Update mailing address and contact information](#) | [Designate a club management vendor](#)

2

CHOOSE A VENDOR TO UPDATE CLUB DATA

Scroll down to **Club Management Systems** and click on **Full Access**. This button will disappear from this page until you terminate this vendor.

Club Management Systems

A Rotary or Rotaract club can simplify its recordkeeping by using one or more club management vendors to upload club records to Rotary International's database. A district committee may also use a vendor to view club data and provide access to club information. (Note that, though many vendors may be authorized to view a club's data, only one vendor may be authorized to update a club's data.) First, your club must be a customer of a club management vendor. Find a list of the vendors and their services on the [Club Management Systems Website Providers](#) page of My Rotary. Then, your club can allow the vendor access to club data by choosing the appropriate link below.

What kind of access do you want to provide a data management vendor?

One who can update your club's data from RI.

Full Access

One who can only view and show you your club's data.

View-only Access

This step should be done before choosing a vendor to **view** club data.

You can only choose **one** vendor to update club data in Rotary's database on your club's behalf. You should choose **only** update vendor if your club and district are using the same provider.

Select the vendor from the drop-down menu

Identify and authorize a Club Management Vendor

Please read the Agreement below and click on "I Agree" to authorize Rotary International to complete the data integration process and submit your authorization.

Rotary Club and Rotaract Club Authorization to Initiate Data Integration Agreement

Identify the club management vendor you are authorizing from the dropdown menu below.

Club management vendor

Start Date

01/10/2018 00:00:00

By clicking the "I agree" button, I make the representations and warranties, authorize RI to complete the data integration process in rotary.org/myrotary and agree to abide by the terms and conditions set forth below:

1. I represent and warrant that I have the authority to act on behalf of my club (the "Club") and to enter this Agreement with RI. I represent and warrant that the members of my Club understand that their personal and member data will be shared with and used by Rotary International, including its foundation, employees, subsidiaries, agents, and representatives (collectively "RI"), and the club management vendor identified above ("Club Management Vendor").
2. The Club grants RI express consent to integrate Club data, including individual member data, with the Club Management Vendor. The Club represents and warrants that it has granted the Club Management Vendor express consent to provide Club data, including individual member data to RI. The Club grants RI express consent to provide Club data to the Club Management Vendor.
3. The Club understands that it can withdraw its express consent at any time by returning to <https://my.rotary.org/manage/club-district-administration/club-administration> and following the appropriate steps or by contacting RI staff at data@rotary.org. The Club understands that such a withdrawal of consent applies on a go forward basis only and does not affect data that may have been integrated between RI and the Club Management Vendor when consent was current or not withdrawn.
4. The Club agrees to authorize RI or its members (existing now or in the future), individually or collectively, for a period of five (5) years, to use, disclose, and disseminate any of the data it provides to RI hereunder and the data integrated between RI and the Club Management Vendor for any privacy or confidentiality laws or regulations, data breach or data theft.

I agree to the terms and conditions set forth in this Rotary Club and Rotaract Club Authorization to Initiate Data Integration Agreement.



I Agree

I Disagree

Click I Agree

3 CHOOSE A VENDOR TO VIEW CLUB DATA

Once you select a vendor to update club data, go back to **Club Management Systems** and click on **View-only Access**. This button will always be present on this page.

Club Management Systems

A Rotary or Rotaract club can simplify its recordkeeping by using one or more club management vendors to link its own membership records to Rotary International's database. A district or zone may also use a vendor to view club data if the club allows that vendor access to club information. (Note that, though more than one vendor may be authorized to view a club's data, only one may update the data.) First, your club must be a customer of a club management vendor. Find a list of the vendors that provide database services on the [Club Management Systems & Website Providers](#) page of My Rotary. Then, your club can allow the vendor access to club data by choosing the appropriate link below.

What kind of access do you want to provide a data management vendor?

One who can only view and show you your club's data.

View-only Access

	Vendor	Start Date
Terminate	Roster on Wheels	03-Apr-2018

You can let **multiple** vendors **view** club data. You should do it only if your club and district are using different vendors. However, because these vendors can't update club data, changes you make through their software will not be made in Rotary's database.

Rotary Club and Rotaract Club Authorization to Initiate Data Integration

Identify the club management vendor you are authorized to integrate.

Club management vendor

Select the vendor from the drop-down menu

If you are allowing this vendor to view or to view and update your club data on behalf of your club, under the dropdown menu "Access granted to" below, please select "Club".

If you are allowing this vendor view-only access to your club data for viewing by your district or zone, under the dropdown menu "Access granted to" below, please select "District" or "Zone," as applicable.

Access granted to

Select the party that has access to view club data (Rotary club, district, or zone) from the drop-down menu

You can allow multiple vendors view-only access to your club data, but only one vendor can update your data. Repeat this process as many times as necessary if you are allowing multiple vendors to view your club data.

Start Date

01/10/2018 00:00:00

By clicking the "I agree" button, I make the representation and warrant that I have the authority to act on behalf of my club (the "Club") and to enter this Agreement with RI. I represent and warrant that the members of my Club understand that their personal and member data will be shared with and used by Rotary International, including its foundation, employees, subsidiaries, agents, and representatives (collectively "RI"), and the club management vendor identified above ("Club Management Vendor").

1. I represent and warrant that I have the authority to act on behalf of my club (the "Club") and to enter this Agreement with RI. I represent and warrant that the members of my Club understand that their personal and member data will be shared with and used by Rotary International, including its foundation, employees, subsidiaries, agents, and representatives (collectively "RI"), and the club management vendor identified above ("Club Management Vendor").

2. The Club grants RI express consent to integrate Club data, including individual member data, with the Club Management Vendor. The Club represents and warrants that it has granted the Club Management Vendor express consent to provide Club data, including individual member data to RI. The Club grants RI express consent to provide Club data to the Club Management Vendor.

3. The Club understands that it can withdraw its express consent at any time by returning to <https://my.rotary.org/manage/club-district-administration/club-administration> and following the appropriate steps or by contacting RI staff at data@rotary.org. The Club understands that such a withdrawal of consent applies on a go forward basis only and does not affect data that may have been integrated between RI and the Club Management Vendor when consent was current or not withdrawn.

4. The Club understands that it can withdraw its express consent at any time by returning to <https://my.rotary.org/manage/club-district-administration/club-administration> and following the appropriate steps or by contacting RI staff at data@rotary.org. The Club understands that such a withdrawal of consent applies on a go forward basis only and does not affect data that may have been integrated between RI and the Club Management Vendor when consent was current or not withdrawn.

Click I Agree

I agree to the terms and conditions set forth in this Rotary Club and Rotaract Club Authorization to Initiate Data Integration Agreement.



I Agree

I Disagree

4

CORRECT OR CHANGE VENDORS FOR UPDATING CLUB DATA

Club Management Systems

A Rotary or Rotaract club can simplify its recordkeeping by using one or more vendors to provide database services on the Club Management Systems & Website Providers page of My Rotary. Then, your club can allow the vendor access to club data by choosing the appropriate link below.

What kind of access do you want to provide a data management vendor?

One who can only view and show you your club's data.

View-only Access

	Vendor	Start Date	Access Level	Access Granted To
Terminate	Roster on Wheels	03-Apr-2018	Read	Taipei An Ho

Go to **Club Management Systems** and click **Terminate**

Terminate Partner Organization

The partner organization can be terminated by one day prior to today.

Partner Organization: Club Communicator

StartDate

10-Jan-2018

EndDate

09-JAN-2018

Enter the end date and click **Submit**

Submit

Cancel

Club Management Systems

A Rotary or Rotaract club can simplify its recordkeeping by using one or more vendors to provide database services on the Club Management Systems & Website Providers page of My Rotary. Then, your club can allow the vendor access to club data by choosing the appropriate link below.

What kind of access do you want to provide a data management vendor?

One who can update your club's data from RI.

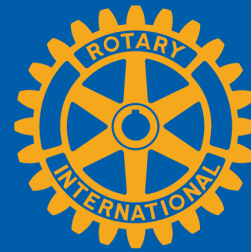
Full Access

One who can only view and show you your club's data.

View-only Access

Scroll down to **Club Management Systems** and click on **Full Access** to enter a different vendor

HOW TO PAY YOUR INVOICE



ROTARY.ORG > MY ROTARY | Sign in/Register

Club Finder Location/Language

Rotary My Rotary Exchange Ideas Take Action Learning & Reference **Manage** The Rotary Foundation Member News

CLUB & DISTRICT ADMINISTRATION

- Club Administration
- District Administration
- Contributions
- Reports
- Club Invoice

TOOLS

- Community Marketplace
- RSS Feeds
- Mobile Apps
- Member Data Integration

BRAND CENTRAL

- Our Story
- Guidelines
- Logos
- Materials
- Ads
- Images & Videos
- Strengthening Rotary Resources

EXPENSES

1

Go to rotary.org and sign in to MyRotary. Then go to **Manage**, then **Club Administration**.

Home | Manage | Club & District Administration | Club Administration

CLUB ADMINISTRATION

CLUB FINANCES

★ **Club Invoice**
View your club's invoice, pay dues with a credit card, or update invoice preferences

Club invoice | Daily club balance report | Edit invoice preferences | About the club invoice | Rotary exchange rates

CLUB & MEMBER DATA

★ **Update Member Data**
Report membership changes within 30 days, or by 1 January or 1 July, to ensure your club invoice reflects the latest information. Record new member sponsors so they receive recognition.
[Add, edit, or remove members](#) | [Add, edit, or remove club officers](#) | [Record a new member sponsor](#)

★ **Update Club Data**
Provide club information for the Official Directory.
[Update meeting details](#) | [Update mailing address and contact info](#) | [Edit vendor partner organization](#) | [Update Official Directory preferences](#)

2

Scroll down on **Club Administration** page and select **Pay or view club invoice**.

Rotary Club Of

Account Overview

As of 08 September 2014

Please select the items you wish to pay, select your payment currency (if you wish to change your default currency)
Continue to payment page to enter your credit card information.

Item Number	Item Date	Item Description	Local Amount - Yen	USD Amount
SAR-0001313688	01-Jul-2014	Semiannual Dues	51408.00	504.00
		Outstanding Balance	51408.00	504.00

Payment Currency

Yen

Payment Amount

USD equivalent

Current RI Exchange

Rate per USD

Select your payment currency and select
Continue to payment page to enter
your credit card information.

[Continue to payment page](#)

3

Enter Billing Information

First Name

Middle Name

Last Name

Billing Address

City/State/Postal
Code

Kawagoe

350-0034

Country

Japan

Phone

348583475

E-mail

club_secy@rotary.org

Payment Type

Visa

Enter your billing
information and
select **Continue**.

4

Previous

Continue

Summary

Amount 8.00 Yen

Name

E-mail club_secy@rotary.org

Billing Address

Payment Type Visa

[Edit](#)

[Edit](#)

Continue

5

Confirm payment information and select **Continue**.

Payment details:

Card No.:

1111111111111111 *

Expiration date:

01 15 *

Security code:

123

What is a security code? *

Continue

6

Enter credit card information and select **Continue**.

Your payment is submitted.

Thank you for paying your

Dues online. This is your receipt; please print and save for your records.

Date (i.e. 01-Mar-2004):

Your transaction ID number is:

Your member ID is:

Amount paid:

Your Club Name is:

Your Club ID is:

You will get this message to confirm your payment.

7

For Club Executives (Non ClubRunner Subscribers)

This guide is designed to help Club Executives with the District Version of ClubRunner. This contains step by step instructions on how to perform your club duties in ClubRunner on the District.

Access Rights.....	2
Navigation	2
Add or Remove Members	3
Edit Members Information	3
Changing the Clubs Meeting Information.....	3
Specify your Clubs Website.....	4
Define Club Executives.....	4
Assign my Club’s Attendance Manager	5
Reporting Attendance for your Club.....	5
Switch on Data RI Integration	6

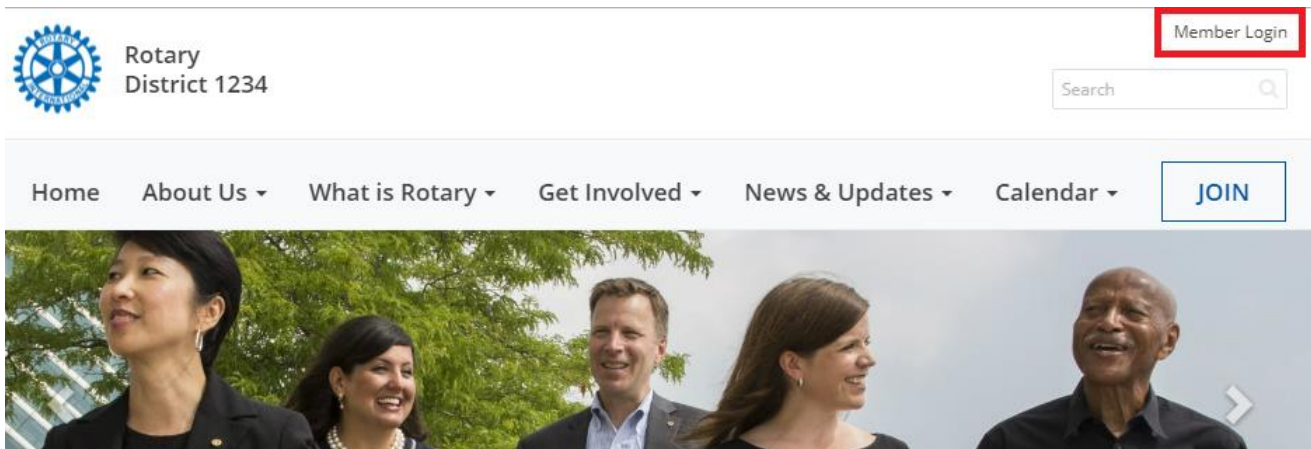
Access Rights:

- By Default; only the Club Executives (President, President-Elect, Past President, Secretary, Treasurer, and Executive Secretary) have access rights to change information about the Club.
- If you are NOT identified as a Club Executive and should be, then contact your District Secretary and have them set you up as the Executive
- A District Administrator is the only one that can grant members access to the District that are not Club Executives.

Note: Club Access Levels do NOT apply to the District website, they are only used for Club websites.

Navigation:

1. To login you're the District's site please click **Member Login** near the top right.



2. Now enter your login information. If you do not know what your login information is please click on the following link to retrieve it.
<http://clubrunner.helpserve.com/Knowledgebase/Article/View/1331/390/i-cannot-login-to-clubrunner>
After you login it will take you back to the District's home page. Click **Member Area** near the top right to go to the Administration page.
3. On the grey menu bar near the top, click the **For Club** tab.
4. This opens the blue menu bar below it. In this area you can access different areas of ClubRunner to perform your duties.

Add or Remove Members:

If you have a new member or find that someone is missing from ClubRunner, you can add that member easily.

To add a member:

1. **Login** to the District and click on the **Member Area**, near the top right.
2. Click **For Clubs** on the grey menu bar, near the top.
3. Click **Membership Lists** on the blue menu bar.
4. On the right, click the **Add New Member** link.
5. Fill in as much of the member's information as you can.
6. Click on the **Add Member** button to add the member to your club.

To mark a member as an Ex-member (inactive member):

1. **Login** to the District and click on the **Member Area**, near the top right.
2. Click **For Clubs** on the grey menu bar, near the top.
3. Click **Membership Lists** on the blue menu bar.
4. Find the member and click **Change Status** on the right.
5. Click the button called **Terminate Membership**.
6. Enter the member's termination date as the *Ex-Member as of*.
7. Next, please indicate a **reason** for terminating the member.
8. Once the termination date and reason have been populated the **Terminate Member** button should become enabled.
9. Press the **Terminate Member** button to make the member inactive.

Edit Members Information:

If you need to update a member's profile follow the below instructions:

To edit a member:

1. **Login** to the District and click on the **Member Area**, near the top right.
2. Click **For Clubs** on the grey menu bar, near the top.
3. Click **Membership Lists** on the blue menu bar.
4. Now click on the **member's name** to get into their profile.
5. You can click on the different tabs to get to the different areas within the profile.
6. Click on the **Edit** button to be able to make changes.
7. Click the **Save** button when complete.

Changing the Clubs Meeting Information:

It is important to update your club's meeting time and place on the District website. This information is posted for all clubs in the Club Directory and "Where Clubs Meet" pages.

To edit your club's meeting information:

1. **Login** to the District and click on the **Member Area**, near the top right.
2. Click **For Clubs** on the grey menu bar, near the top.
3. Click **Edit Club Information** on the blue menu bar.
4. This will now show the Club's details.
5. Click **Edit Club Info** near the right to edit the Club's information.

6. Each area has club information. If you need to update one of the areas, click on the **Edit** button.

Note: Make sure your meeting address is an actual street address, not just a location. This data will be used to display your meeting place on a map. We will check this in the next step.

The map is located near the right side of the screen while on the **Club Information** page. If the map is incorrect: There may be a spelling mistake in the address, or a part of the address missing, such as the city or state/province. Also make sure you didn't input the actual address under "Meeting Place", which should really be the name of the venue.

Note: You can manually add the Latitude or Longitude to correct the map. You can get this data from Google maps.

Specify your Clubs Website:

Your District site has a listing of clubs and their website links. To change your Club's website link, please follow the same steps as **Changing the Clubs Meeting Information**. The website is listed in the **Contact Info** area.

Define Club Executives:

Your Club's listing of executives and directors appear in several places:

- The District organization chart
- The District's auto-generated group mailing lists.
- Your Club's website (if your Club has ClubRunner).

Note: Although the Clubs' Executive's names appear on a web page, their email addresses do not.

It is also important to state who your executives are so they can access ClubRunner to do their duties for the Club.

1. **Login** to the District and click on the **Member Area**, near the top right.
2. Click **For Clubs** on the grey menu bar, near the top.
3. Click **Define Club Executives** on the blue menu bar.
4. On this page you can edit, add, or remove club officers.

To Define a New Position:

1. Click on the **Add New Position** button found in the top right corner.
2. Select the **Position** of the officer being added. (Only a District Administrator can create new positions to be added to this list)
3. By default, the system enters a **title** for you. This title will appear on the website. You can change it if needed. For example, if you selected the position as **Other**, the title could be changed to **Website Administrator**.
4. Select the **member's name** from the dropdown list.

5. Once done, click on the **Save** button to save the changes.

Note: If you do not see the member's name in the listing, you will need to add this member to your Club.

Assign my Club's Attendance Manager:

Each Club has an attendance contact (called the Attendance Manager) who is the person that will be reached for information regarding the club's attendance.

By default this is the Club Secretary, but you can change this to be any member of your Club.

To change the Attendance Manager for your Club:

1. **Login** to the District and click on the **Member Area**, near the top right.
2. Click **For Clubs** on the grey menu bar, near the top.
3. Click **Assign Attendance Manager** on the blue menu bar.
4. Select a new contact person from the drop down list of your members.
5. Press **Select** to save the changes.

To change the Attendance Manager back to the default (Club Secretary):

1. **Login** to the District and click on the **Member Area**, near the top right.
2. Click **For Clubs** on the grey menu bar, near the top.
3. Click **Assign Attendance Manager** on the blue menu bar.
4. Check off the box next to "Assign back to club secretary?"
5. Press **Select** to save the changes.

Reporting Attendance for your Club:

To report your club's monthly attendance, follow these steps:

Note: You must be a club executive to be able to report attendance for your club.

1. **Login** to the District and click on the **Member Area**, near the top right.
2. Click **For Clubs** on the grey menu bar, near the top.
3. Click **Club Attendance Report** on the blue menu bar.
4. Fill in the fields on this page, including the attendance percentage for that month.
5. Press **Save**.

Note: If your club is using ClubRunner, attendance gets reported automatically to the District if your club is using the attendance module. For help reporting through your club site, please refer to the help section on your site.

Switch on Data RI Integration:

Before you can turn on RI integration for your Club from the District site you need the Club President, Secretary or Club Executive to log onto the RI website (<http://www.rotary.org>) and set ClubRunner as the club management vendor. This will allow changes to flow from ClubRunner to RI.

For more help on this see the RI Integration Guide:

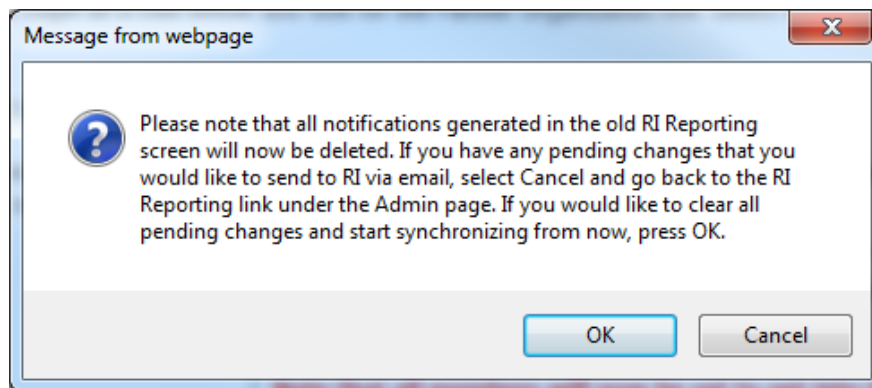
<http://clubrunner.helpserve.com/Knowledgebase/Article/View/438/408/set-up-automatic-integration-with-rotary-international>

1. Login to the District Version of ClubRunner.
Note: You must be a Club Executive: President, President Elect, or Secretary to have access.
2. In the grey menu bar click **For Clubs**.
3. On the blue menu bar click **RI Integration**.
4. Check the checkbox to switch on Data Integration between ClubRunner and RI, then click **OK**

☐ Switch on Data Integration between ClubRunner and RI for all active member records within my club.

Note that all members will now be set to opt into the fields the club has selected below. Any members who wish to opt out of specific fields can update their preferences under the Privacy tab of their profile.

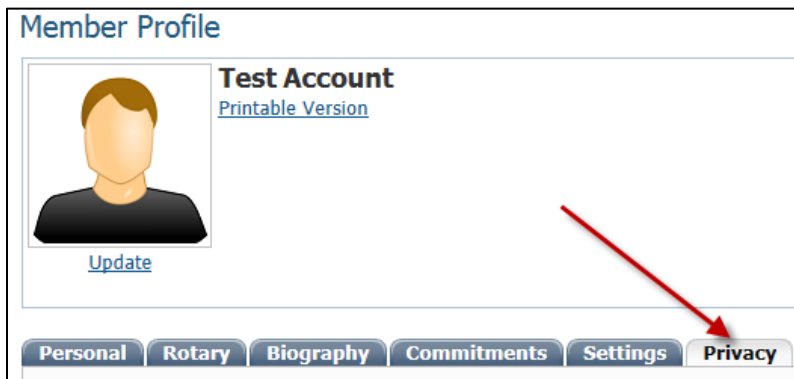
I agree to the [Terms and Conditions](#) of this integration.



5. Lower on the page you can customize the privacy options by selecting the appropriate fields to synchronize to RI. This will set the RI integration privacy defaults for all members. Members will still have the option to decline sharing information if they choose. Once done press the **Update Privacy** button.

How do I set a member's own privacy options?

1. For Club members who prefer not to send data updates: Go to their ClubRunner member profile and select the **Privacy Tab**.



2. Click the **Edit** button and uncheck the fields that the member does not wish to share with RI. Then click the **Save** button.

RI Privacy

This section allows you to specify which fields you would like to update at Rotary International's database. If your club has opted out of certain fields, those will not be updated, even if you opt in. For a field that your club has opted into, you can choose to opt out by unchecking it from the list below.

Name <input checked="" type="checkbox"/> (Club Opted In)	Home Phone <input checked="" type="checkbox"/> (Club Opted In)
Home Address <input checked="" type="checkbox"/> (Club Opted In)	Cell <input checked="" type="checkbox"/> (Club Opted In)
Business Address <input checked="" type="checkbox"/> (Club Opted In)	Business Phone <input checked="" type="checkbox"/> (Club Opted In)
Birthday <input checked="" type="checkbox"/> (Club Opted In)	Home Fax <input checked="" type="checkbox"/> (Club Opted In)
	Business Fax <input checked="" type="checkbox"/> (Club Opted In)
	Primary Email <input checked="" type="checkbox"/> (Club Opted In)

Save
Cancel

Note: Name (highlighted in red) is required and is not uncheck able.

Support & Training

Visit our **Support Center** at www.ClubRunnerSupport.com to access all resources available, including submitting a support ticket, searching the knowledgebase, downloading helpful “how-to” documents and viewing on-demand demos. The following is a list of all the various resource guides available to you.

<p><u>Knowledgebase</u></p> <p>This is where you will find access to hundreds of articles answering frequently asked questions on how to do virtually everything on ClubRunner.</p>	<p><u>Downloads</u></p> <p>This area contains useful documents referenced within this guide, including the Member Cheatsheet, access rights matrix, presentation agenda, and more.</p>
<p><u>On-Demand Videos</u></p> <p>For frequently asked questions on how to do certain things on ClubRunner, we have recorded video tutorials available for you to view.</p>	<p><u>Webinar Training</u></p> <p>We hold several webinars every week on the various modules of ClubRunner. These are open to any member of your club, and we recommend that you send your board members to attend.</p>
<p><u>Submit a Ticket</u></p> <p>For technical support, use our Support Center to submit a ticket, or send an email to support@clubrunner.ca. Our turnaround time for email tickets is 2 business days.</p>	<p><u>Community</u></p> <p>Start a conversation with other ClubRunner customers on best practices, tips and tricks, feature enhancements and more. The discussion forum is a great place to learn how other customers are utilizing ClubRunner to manage their club website.</p>

For the latest ClubRunner updates, follow us on:

