

ENTERING MEMBER INFORMATION AND PHOTOS

ONLINE ENTRY

- Enter Member information through the District Website (www.rotarydistrict5650.org) or your club website if you have a ClubRunner Subscription.
- Information entered through ClubRunner (the websites mentioned above) will automatically transfer to Rotary International* – you only need to enter it once! In most cases the information is integrated within a few hours of entry on ClubRunner.
- Do not enter the information directly on the Rotary International website to avoid issues with data not matching between ClubRunner and Rotary International
- If you need assistance logging in to the District Website, check the “How To Guides” page of the District Website ([click here](#)). For Login assistance, review the document *Using the District Website: Logging in*
- Access to add or update Member, Officer or Club information on ClubRunner is limited to Current Club Officers (and Administrators for clubs with ClubRunner Subscription).

The image shows two screenshots. The top screenshot is the Rotary District 5650 website. It features the Rotary logo, the text "Rotary District 5650", and a "Member Login" link in the top right corner. A red arrow points from the "Member Login" link to a text box that says: "After you log on, your name will appear and this link changes to Member Area. Select the Member Area link to access administrative functions." Below this is a banner with the text "JOIN LEADERS" and a photo of four people.

The bottom screenshot is the ClubRunner Administration page. The URL is www.crsadmin.com/Gen/Admin.aspx?aid=50075. The page title is "District 5650" and it says "Welcome, Nicolette (Logout) | Admin | Home Page". A navigation menu includes "Admin", "For Clubs", "Grants", "For Members", "Membership", "Organization", "Communication", "Website", "Documents", "Reports", "Attendance", "Events", and "Help". A red arrow points from the "Administration" link in the left sidebar to a text box that says: "This is the Administration Page. If another view shows (called Launchpad), click the Administration link." An "Important Notice" box states: "Please note that we will be performing our monthly server maintenance to ClubRunner on Sunday, December 20, 2015 between 12:00 AM and 6:00 AM Eastern Time. The downtime will be about 45 minutes to 1 hour." The main content area has a "Home Page Editing" section with links like "Home Page Stories", "Story Management", "Edit Home Page Links", "Download Files", "Site Pages Management", "Photo Albums Management", "Documents Download", and "Website Sponsoring Area". There is also a "District, Clubs & Membership" section with links like "District Dashboard", "Club & Membership Detail", "Member Detail", "Request Member Updates", "Member Access Rights", "Clubs Attendance Management", "Edit Executives and Directors", and "Download Member Data".

NEW MEMBERS, Cont.

Rotary Club of Lincoln South
Lincoln, NE, United States

Title
First Name
Middle Name
Last Name
Suffix
Gender Male Female

Membership Type Active
Sponsor

Date Joined Rotary Jan 02 2016
Date Joined Club Jan 02 2016

Member Mailing Address

Home Work

Address Line 1
Address Line 2
City
Country United States
State Nebraska
Zip/Postal Code

Enter Member Information – use full names.

Date Joined defaults to today. The date can be changed but no more than 30 days back.

Home Work

Address Line 1
Address Line 2
City
Country United States
State Nebraska
Zip/Postal Code

Transferring Member?

No Yes

Rotary Member No.
Former Rotary Club
District

ClubRunner Account

Email
Login Name
Temporary Password 6040

Send email notification to this member? System Welcome New Member

Report this new member to Rotary International
 Do NOT report this new member to Rotary International

Enter an Email Address.

Default Login Name and Password will be set but you can set specific information (many choose to use Email as Login Name)

Leave these buttons alone (to ensure that the RI Integration will work properly).

Select the Add Member Button.

Report this new member to Rotary International
 Do NOT report this new member to Rotary International

NEW MEMBERS, Cont.

The screenshot displays a web browser window with the URL www.crsadmin.com/Gen/Membership/MemberProfile.aspx?aid=50075. The page title is "Member Profile". On the left, there is a sidebar with navigation links: "Members" (Active Member List, Other User List, Inactive Members List), "Report Updates" (Define Club Executives, RI Integration, Monthly Club Attendance), and "Update" buttons. The main content area shows a profile for "Sample Sample" with a placeholder photo and a "Printable Version" link. Below the photo is an "Update" button. A red box highlights the "Update" button and the "Edit" button in the "Personal" tab. A red arrow points from the "Update" button to the "Edit" button. The "Personal" tab is selected, showing a form with fields for "Member Details" (Title, First Name, Middle Name, Last Name, Nickname, Suffix, Preferred Address, Preferred Phone, E-mail) and "Home" (Address Line 1, Home Phone). The "Rotary" tab is also visible. A red box contains the text: "Select update to add photo." and "Select Edit to update other data on this page."

Select update to add photo.

Select Edit to update other data on this page.

The Rotary member number will populate to the Rotary tab.

TRANSFERRING A MEMBER

It is important to process the steps in order for Rotary International (through ClubRunner) to effectively manage the transfer of a member.

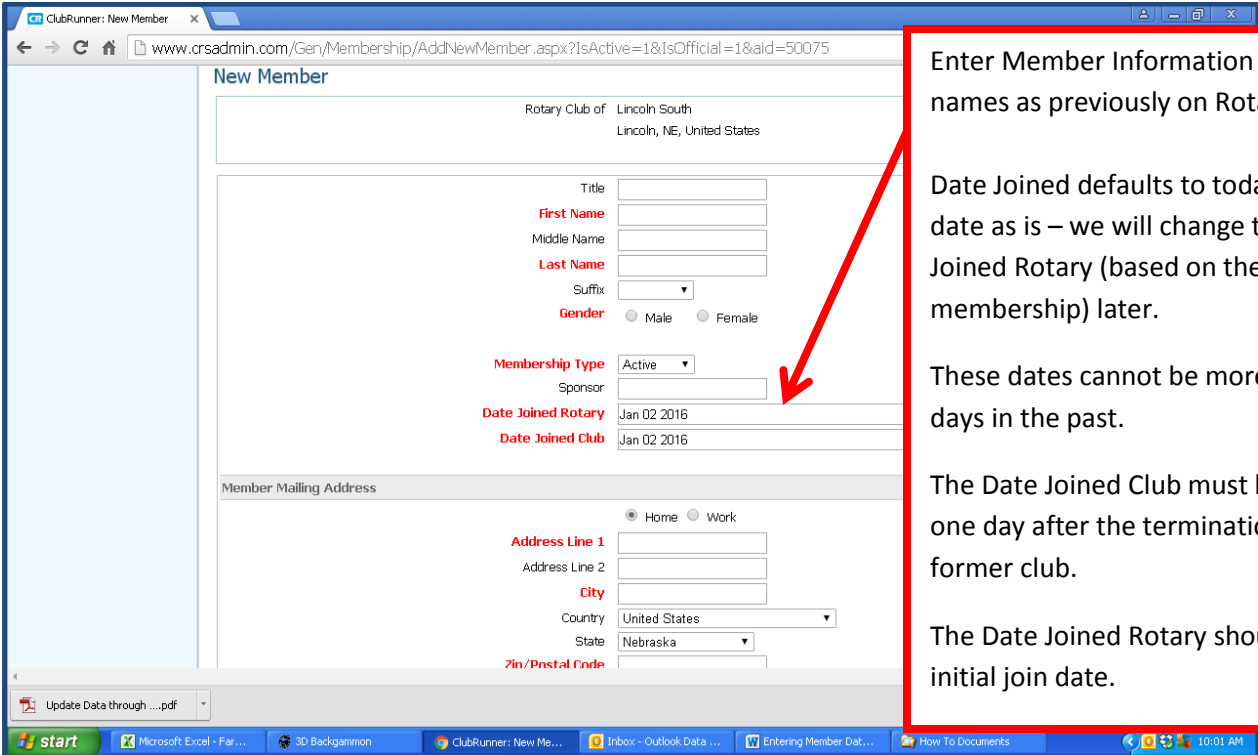
STEP 1 – the FROM club terminates the member on ClubRunner; the club (or member) should generate the printable version of the profile to provide information to the new club; this includes the member number

STEP 2 – the TO club adds the member, on ClubRunner, marking it as a transfer and including the pertinent information

From the Secretary Manual of Rotary International ([click here](#)):

When a member transfers to your club, ask their previous club to confirm their membership and that the member doesn't owe the club any money. If you don't receive a statement within 30 days, you can assume that the member doesn't owe any money. Transferring members and former members who rejoin a club need not pay a second admission fee.

Start the process the same as NEW MEMBER.



The screenshot shows the 'New Member' form in ClubRunner. A red box highlights the 'Date Joined Rotary' and 'Date Joined Club' fields, which both default to 'Jan 02 2016'. A red arrow points from the 'Date Joined Rotary' field to the explanatory text in the red box. The text in the box provides instructions on how to handle the date and membership information for transferring members.

Enter Member Information – use full names as previously on Rotary.

Date Joined defaults to today. Leave that date as is – we will change the Date Joined Rotary (based on their previous membership) later.

These dates cannot be more than 30 days in the past.

The Date Joined Club must be at least one day after the termination date of the former club.

The Date Joined Rotary should be their initial join date.

Member Mailing Address

Home Work

Address Line 1

Address Line 2

City

Country United States

State Nebraska

Zip/Postal Code

Transferring Member?

No Yes

Rotary Member No.

Former Rotary Club

District

ClubRunner Account

Email

Login Name

Temporary Password 6040

Send email notification to this member? System Welcome New Membe

Report this new member to Rotary International

Do NOT report this new member to Rotary International

Remember that you can only use Transfer if the member has already terminated from the former club.

Mark the YES box in Transferring Member?

Enter the Member Number that you received from the member or former club.

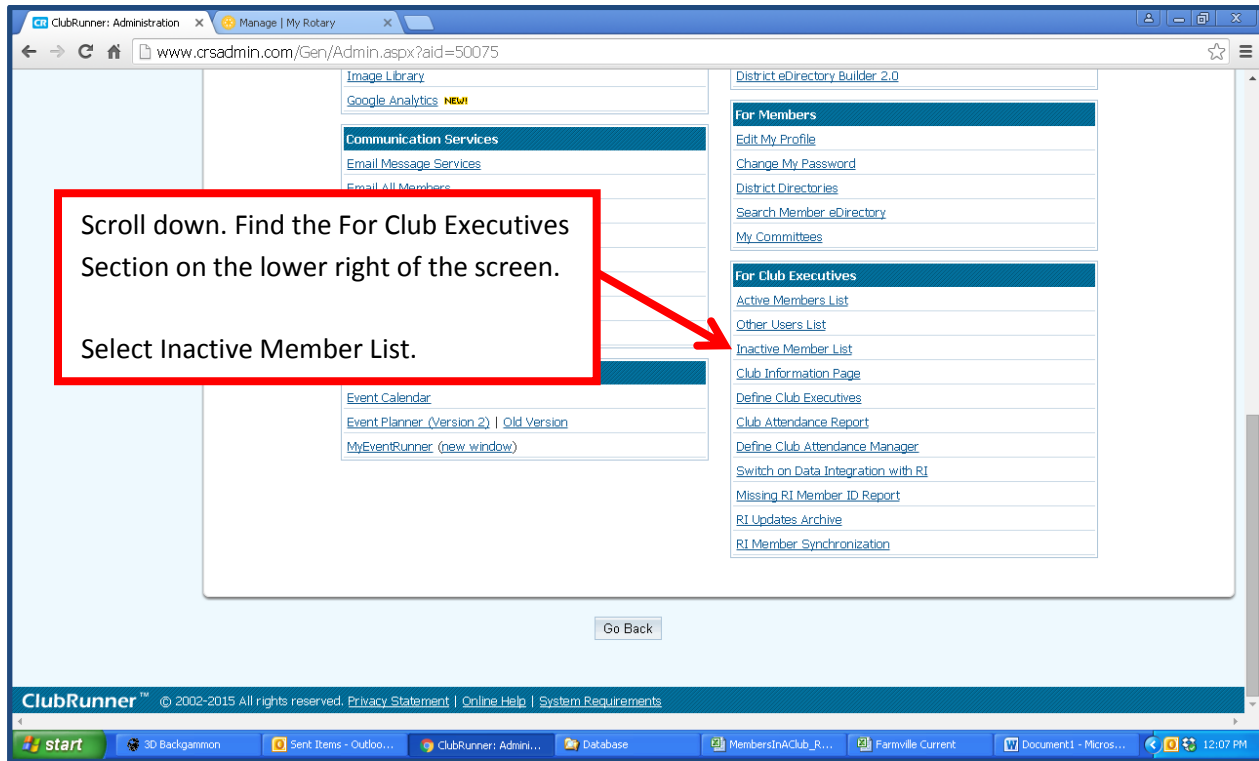
Enter the former Club Name (and number if known).

Enter the District of the former club (if known)

Continue to enter and update data the same as NEW MEMBER.

REINSTATING A MEMBER

- Once you have selected the Inactive Member List from the Administration Page, select the Inactive Member Name from the list.



- Locate the name and select the Change Status link

The screenshot shows the 'Change Status' form. A red box highlights the 'Activate Membership' button with the text: 'Select Activate Membership to change the member from Inactive to Active.' Below this, the form offers three options: 'Activate Membership', 'Change Status to Other User', and 'Edit Inactive Member Type'. The 'Activate Membership' option is selected.

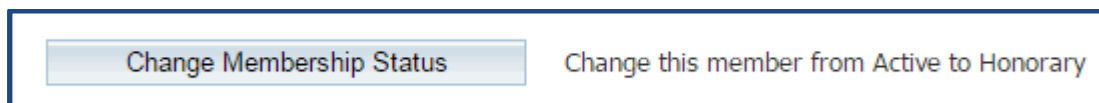
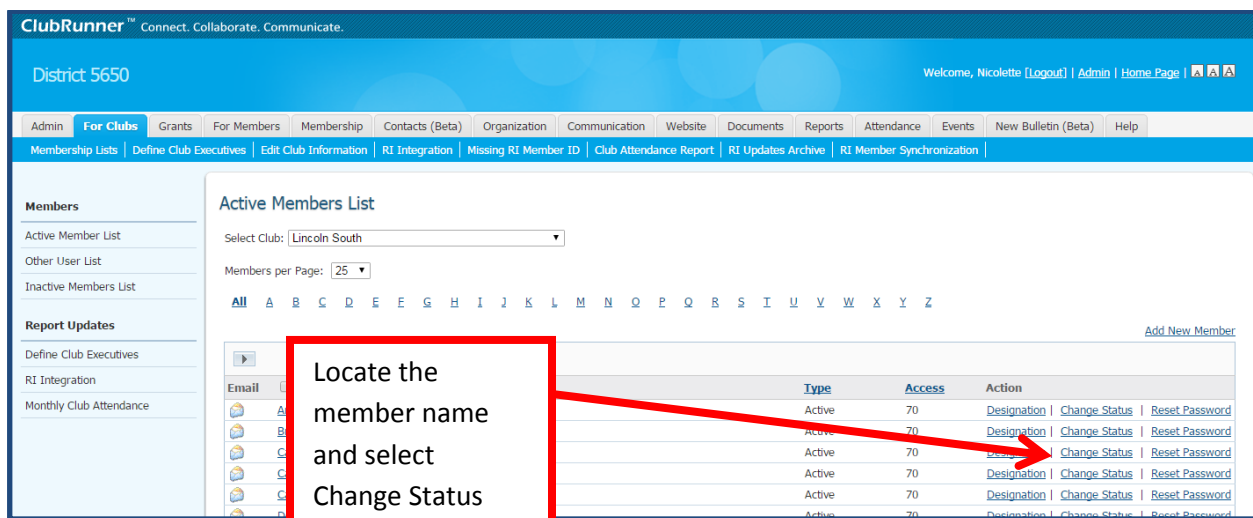
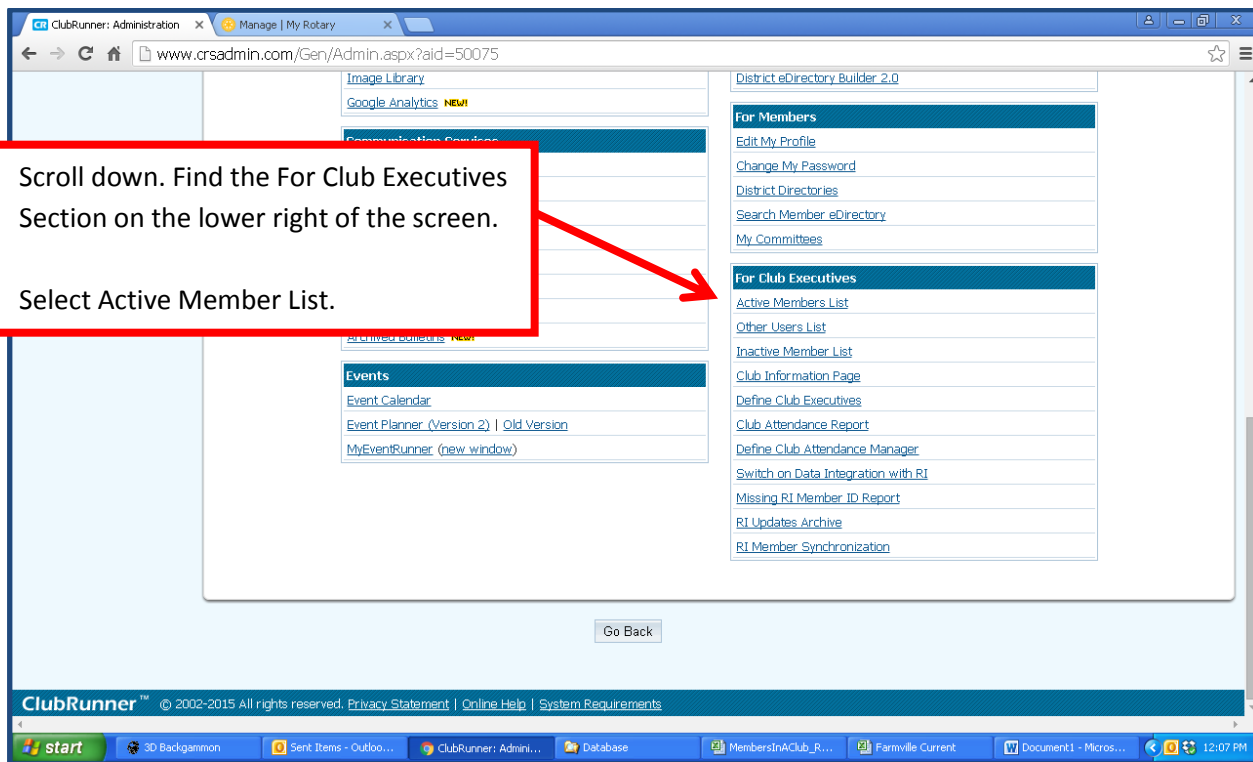
A second red box highlights the 'Activate Membership' button at the bottom of the form with the text: 'It is best to leave the information on this page as shown and select Activate Membership.' The form includes the following fields:

- Membership Type: Active
- Date Joined Club: Feb 04 2017
- Date Joined Rotary: Jul 15 2011
- Check here if you do NOT wish to notify Rotary International of this member's activation. If notification is skipped you must manually update Rotary International's records.

HONORARY MEMBERS

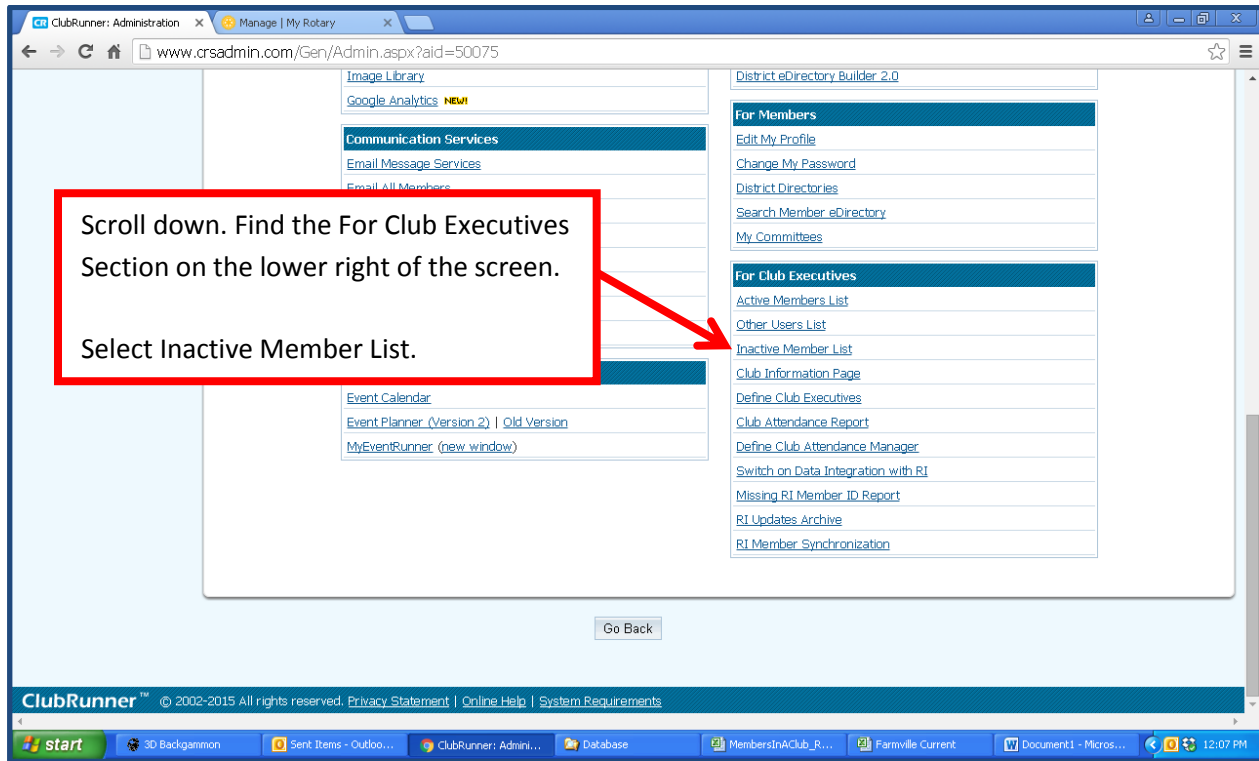
- You can change a member to Honorary on ClubRunner and this information will integrate with Rotary International.

Active Member to Honorary



Inactive (terminated) Member to Honorary

- You may choose to add a former member back to Rotary – but as an Honorary Member



- Locate the name and select the Change Status link

The screenshot shows the 'Change Status' form. A red box highlights the 'Activate Membership' button, with an arrow pointing to it. A text box contains the following instructions:

After Change Status, select Activate Membership.

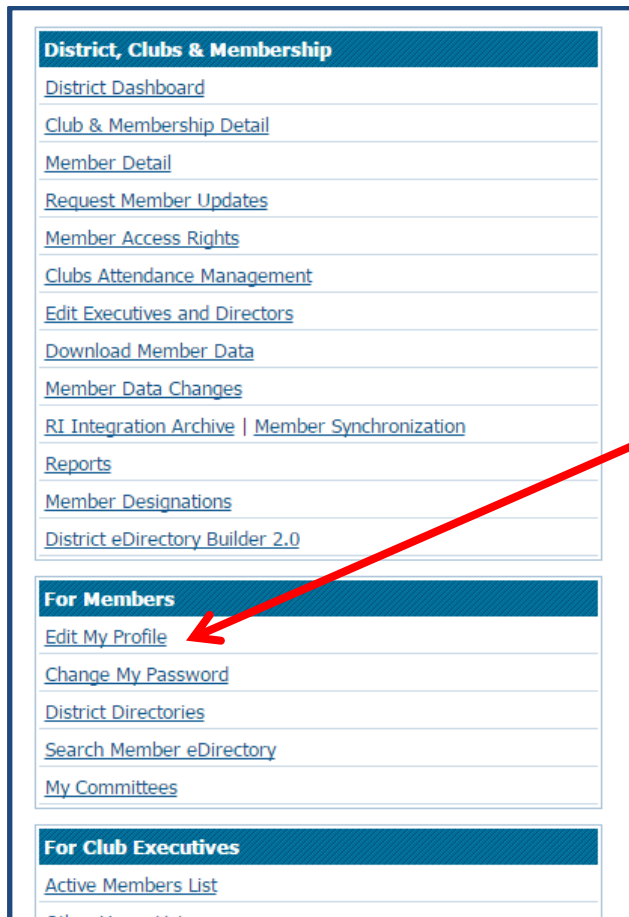
Select Honorary as the Membership Type and process.

The form includes the following fields and options:

- Buttons: Activate Membership, Change Status to Other User, Edit Inactive Member Type
- Membership Type dropdown: Active, Active, **Honorary**
- Date Joined Club: [Empty field]
- Date Joined Rotary: Jul 06 2007
- Checkbox: Check here if you do NOT wish to notify Rotary International of this member's activation. If notification is skipped you must manually update Rotary International's records.
- Final Button: Activate Membership

UPDATING MEMBER INFORMATION AND ADDING PHOTOS

- Once a member is in the system, information can be updated by the member or Current Club Officers (or Administrators for clubs with ClubRunner Subscription)
- The member logs on to ClubRunner (the first time they will need to register)
- On the Admin page:

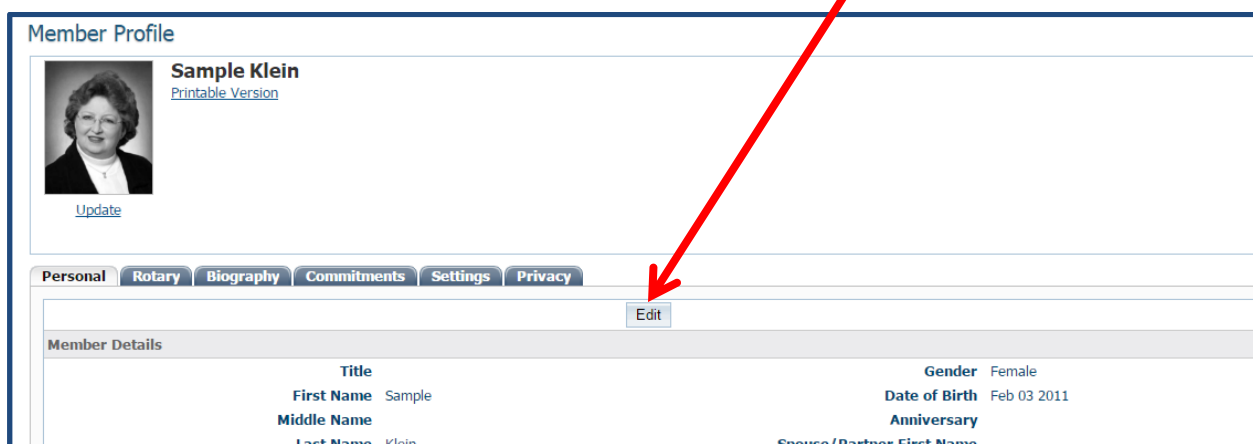


Scroll down. Find the For Members Section on the right column of the screen.

Select Edit My Profile.

From there select the edit button on the page to change the information. Select Save.

The various can be selected to view and/or change information specific to that page.



For assistance (including telephone help and tutoring), with the websites, setting RI Integration, etc., contact Exec@rotarydistrict5650.org

* ClubRunner (websites mentioned at the top of this document) is fully integrated with the Rotary International database.

Information entered through ClubRunner (the websites mentioned above) will automatically transfer to Rotary International* – you only need to enter it once!

- In most cases the information is integrated within a few hours of entry on ClubRunner.
- It is possible that it may take a little research such as the case of transferring members since that has to be coordinated with the former club.
- This research will be conducted by ClubRunner and Rotary International so need for you to be concerned unless you are notified that action is needed by you.