

## ENTERING MEMBER INFORMATION AND PHOTOS

### ONLINE ENTRY

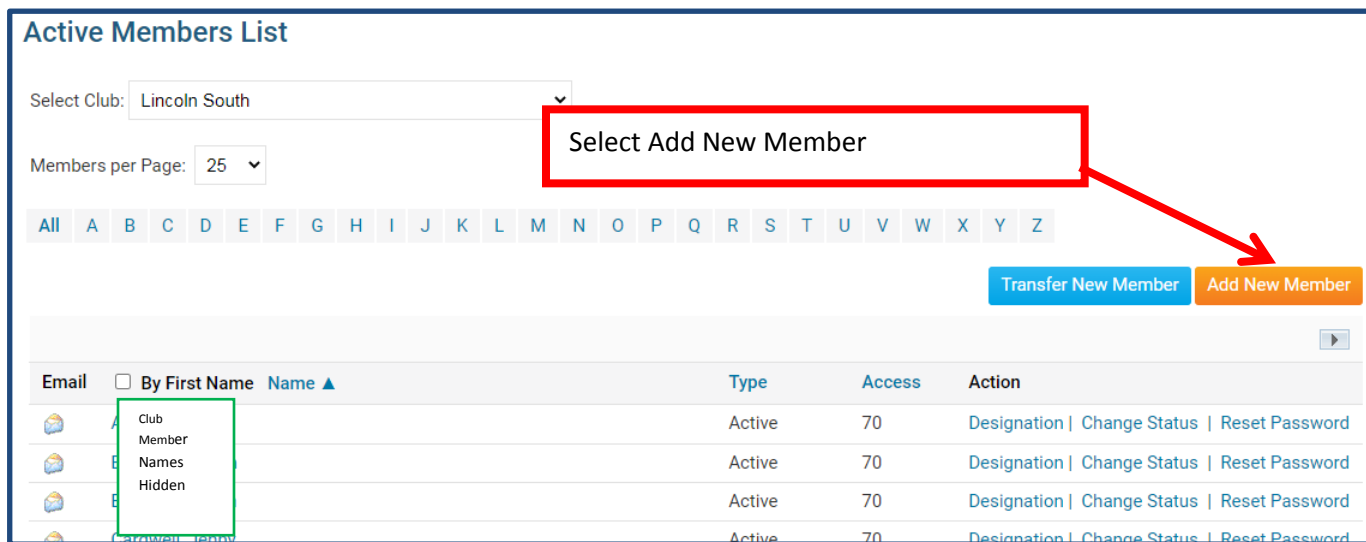
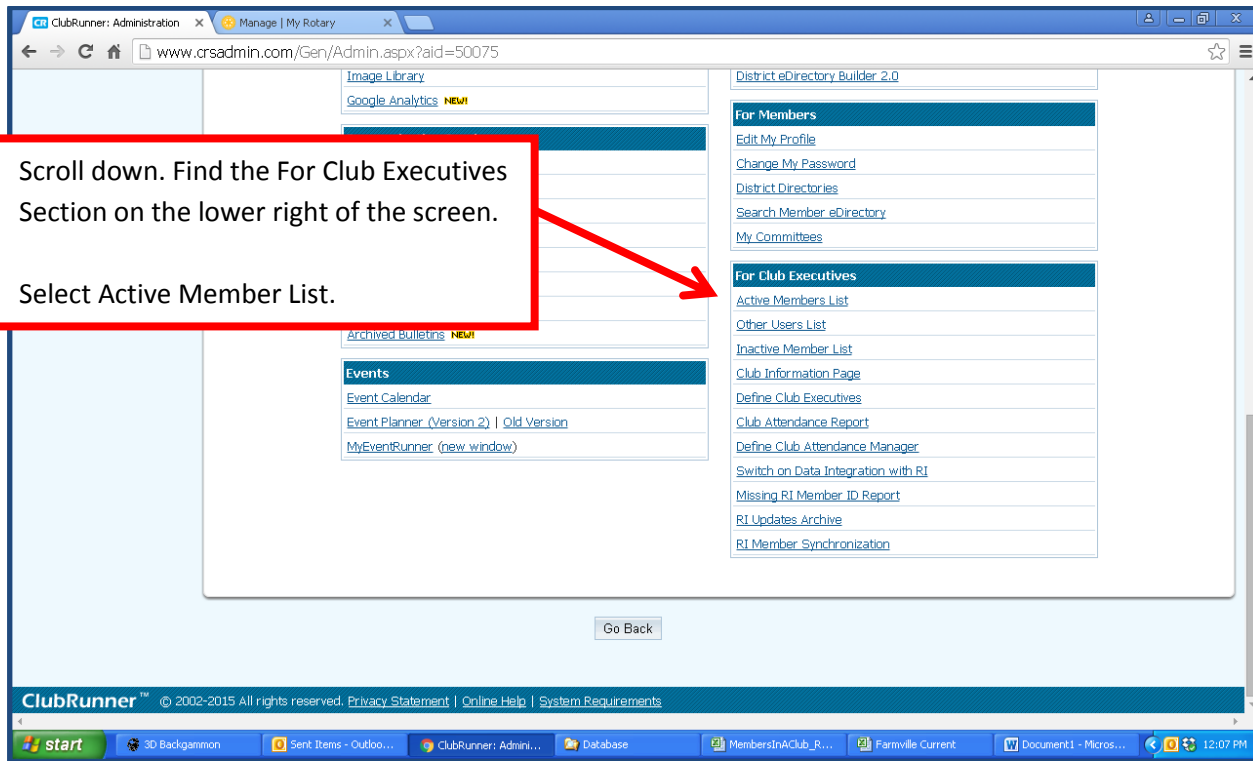
- Enter Member information through the District Website ([www.rotarydistrict5650.org](http://www.rotarydistrict5650.org)) or your club website if you have a ClubRunner Subscription.
- Information entered through ClubRunner (the websites mentioned above) will automatically transfer to Rotary International\* – 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, navigation links like 'About Us', 'Exchange Ideas', and 'Member Login'. A red arrow points to the 'Member Login' link. A red box contains the text: "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 for 'JOIN LEADERS' with photos of several people.

The bottom screenshot is the ClubRunner administration interface. The browser address bar shows 'www.crsadmin.com/Gen/Admin.aspx?aid=50075'. The page title is 'District 5650' and it says 'Welcome, Nicolette'. A navigation menu includes 'Admin', 'For Clubs', 'Grants', 'For Members', 'Membership', 'Organization', 'Communication', 'Website', 'Documents', 'Reports', 'Attendance', 'Events', and 'Help'. A red arrow points to the 'Administration' link in the 'Launchpad' section. A red box contains the text: "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 two columns of links: 'Home Page Editing' (Home Page Stories, Story Management, Edit Home Page Links, Download Files, Site Pages Management, Photo Albums Management, Documents Download, Website Sponsoring Area) and 'District, Clubs & Membership' (District Dashboard, Club & Membership Detail, Member Detail, Request Member Updates, Member Access Rights, Clubs Attendance Management, Edit Executives and Directors, Download Member Data). The Windows taskbar at the bottom shows the start button and several open applications.

## NEW MEMBERS

- For this purpose, “New” Members refers to New Active or Honorary Members only; Active-Satellite and Active-Corporate are included here
- Transferring Members, reinstating returning members or changing an Active Member to Honorary is discussed in a later section



NEW MEMBERS, Cont.

**Rotary Information and Integration**

Membership Type: Active \*

Sponsor: N/A ?

Rotary Member No.:

Date Joined Club: Dec 09, 2021 \*

Integration Options:  
 Report this new member to Rotary International  
 Do NOT report this new member to Rotary International

**Member Details**

Title:

First Name: \*

Middle Name:

Last Name: \*

Suffix:

Email:

Gender: \*

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

Do not change or the information will not "roll up" to Rotary as intended.

**Address**

Preferred Address:  Home  Work

Address 1: \*

Address 2:

City: \*

Country: United States of America \*

State: Nebraska \*

Zip Code: \*

**ClubRunner Account**

Username: ..6040 \*

Temporary Password: 50075 \*

Send email notification to this member?  System Welcome to the \$ACCOUNT\_FULL\_NAMES \$

**Add Member**

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

Select the Add Member Button.

NEW MEMBERS, Cont.

The screenshot shows a web browser window displaying a member profile page. The browser's address bar shows the URL: [www.crsadmin.com/Geny/Membership/MemberProfile.aspx?aid=50075](http://www.crsadmin.com/Geny/Membership/MemberProfile.aspx?aid=50075). The page title is "Member Profile".

On the left side, there is a navigation menu with the following items:

- Members
  - Active Member List
  - Other User List
  - Inactive Members List
- Report Updates
  - Define Club Executives
  - RI Integration
  - Monthly Club Attendance

The main content area shows the member profile for "Sample Sample". There is a placeholder for a photo with an "Update" link below it. A red arrow points from a text box to this "Update" link. Below the photo area are tabs for "Personal", "Rotary", "Biography", "Commitments", "Settings", and "Privacy". The "Personal" tab is selected, and an "Edit" button is visible. A red arrow points from the text box to this "Edit" button. Below the tabs is a "Member Details" section with the following information:

<b>Title</b>		<b>Gender</b>	Male
<b>First Name</b>	Sample	<b>Date of Birth</b>	
<b>Middle Name</b>		<b>Anniversary</b>	
<b>Last Name</b>	Sample	<b>Spouse/Partner First Name</b>	
<b>Nickname</b>		<b>Spouse/Partner Last Name</b>	
<b>Suffix</b>		<b>Spouse/Partner Nick Name</b>	
<b>Preferred Address</b>	Home	<b>Spouse/Partner Date of Birth</b>	
<b>Preferred Phone</b>	Home		
<b>E-mail</b>		<b>Alternate E-mail</b>	

Below the member details is a "Home" section with the following information:

<b>Address Line 1</b>	Sample	<b>Home Phone</b>	
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At the bottom of the page, there is a taskbar with several open applications: Microsoft Excel, 3D Backgammon, Member Profile, Inbox - Outlook Data, Entering Member Dat..., and How To Documents. The system clock shows 10:16 AM.

Two red arrows point from a text box to the "Update" link and the "Edit" button. The text box contains the following text:

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

### Active Members List





Select Club: Lincoln South

Members per Page: 25

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

**Select Transfer New Member**

Transfer New Member Add New Member

Email	<input type="checkbox"/> By First Name	Name ▲	Type	Access	Action
	<input type="checkbox"/>	Club	Active	70	Designation   Change Status   Reset Password
	<input type="checkbox"/>	Member	Active	70	Designation   Change Status   Reset Password
	<input type="checkbox"/>	Names	Active	70	Designation   Change Status   Reset Password
	<input type="checkbox"/>	Hidden	Active	70	Designation   Change Status   Reset Password

### Transfer Member Search - Lincoln South (6040)

Search By

Rotary ID  
 Email  
 Name and Country

Search Values

First Name

Last Name

Country -- All Countries --

**Select Search**

Search

If you have the Rotary ID that is the fastest, most accurate search.

Name and country works relatively well, though it may be hard to know how the name was on the system.

TRANSFERRING A MEMBER, cont.

Match the information provided by the member and select that record (sample results created):

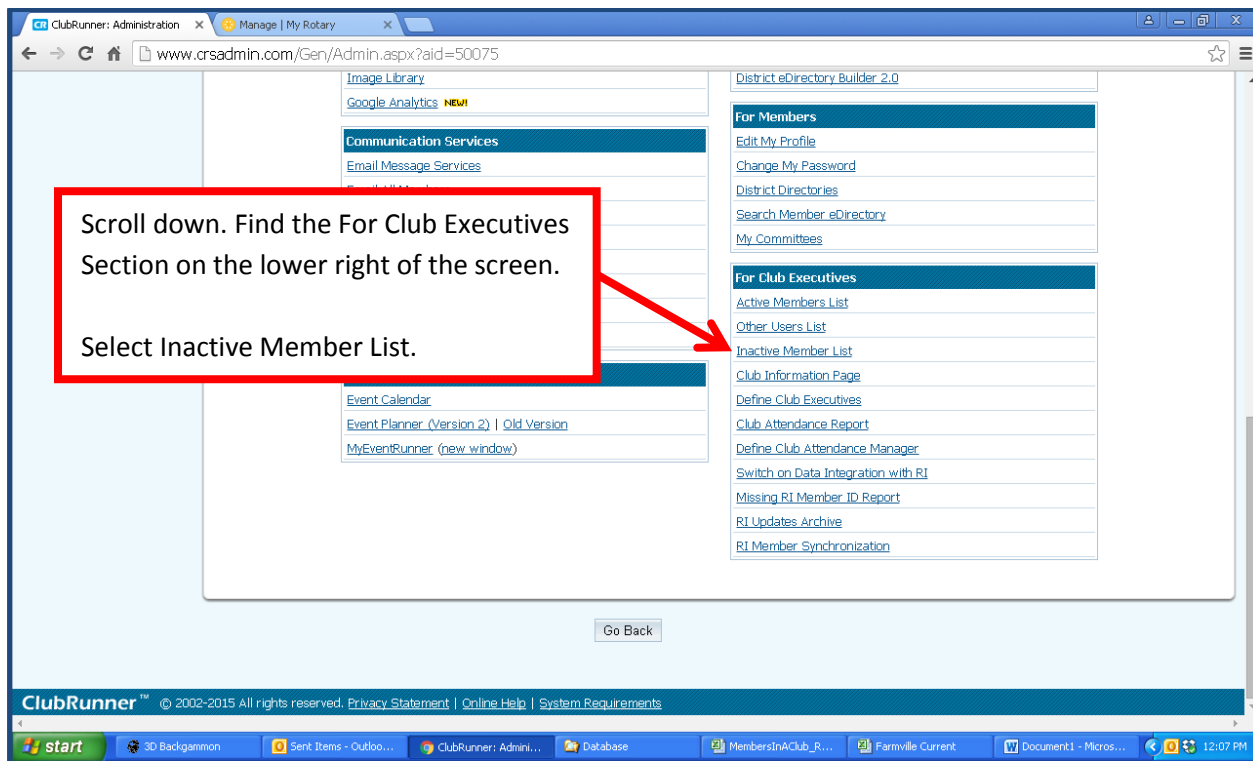
<b>Name:</b> John Doe <b>Rotary ID:</b> 1234567 <b>Location:</b> Omaha NE United States	ABC Rotary Club – <span>Current Member</span>	<a href="#">Add Member</a>
Warning: This member already has an active membership with Trophy Club		
<b>Name:</b> John Doe <b>Rotary ID:</b> 1235678 <b>Location:</b> Dallas TX United States	DEF Rotary Club – <span>Past Member</span>	<a href="#">Add Member</a>
<b>Name:</b> John Doe <b>Rotary ID:</b> 1236789 <b>Location:</b> Salt Lake City, UT United States	GHI Rotary Club – <span>Past Member</span>	<a href="#">Add Member</a>

The information at Rotary International will download to create the new member record.

You can update information as needed by accessing the member profile.

## 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 membership activation 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 are three options: 'Activate Membership', 'Change Status to Other User', and 'Edit Inactive Member Type'. The 'Activate Membership' option is selected.

Below the options, a text box states: 'Completing this form allows you to move this person to your Active Members list.' The form fields are as follows:

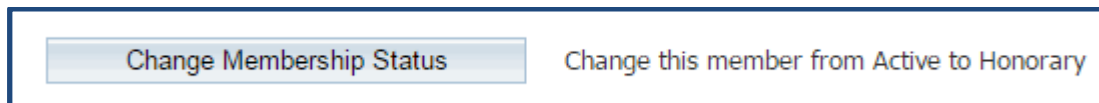
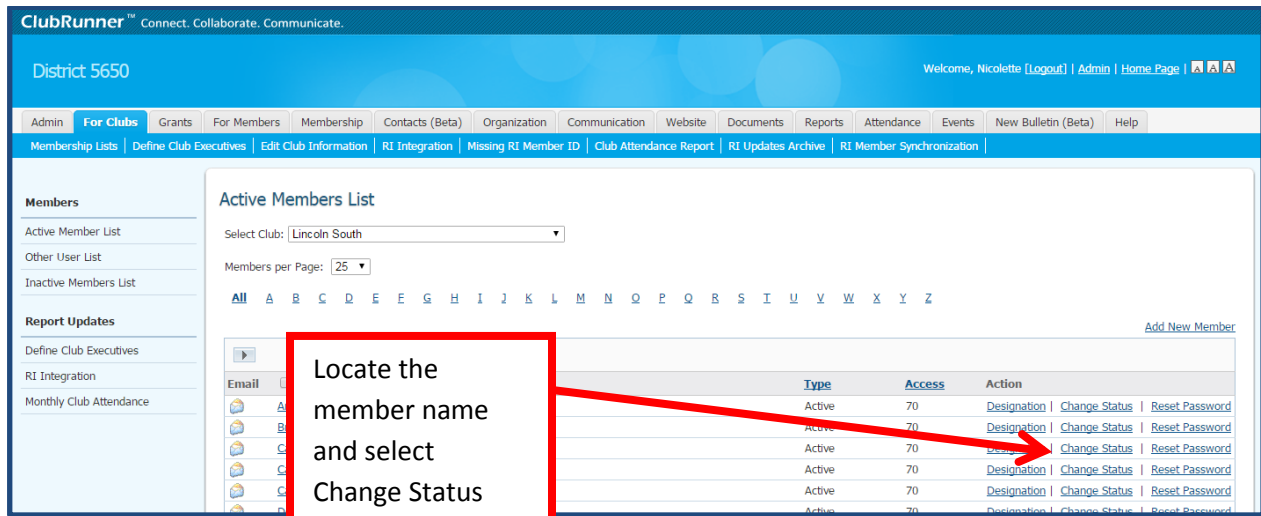
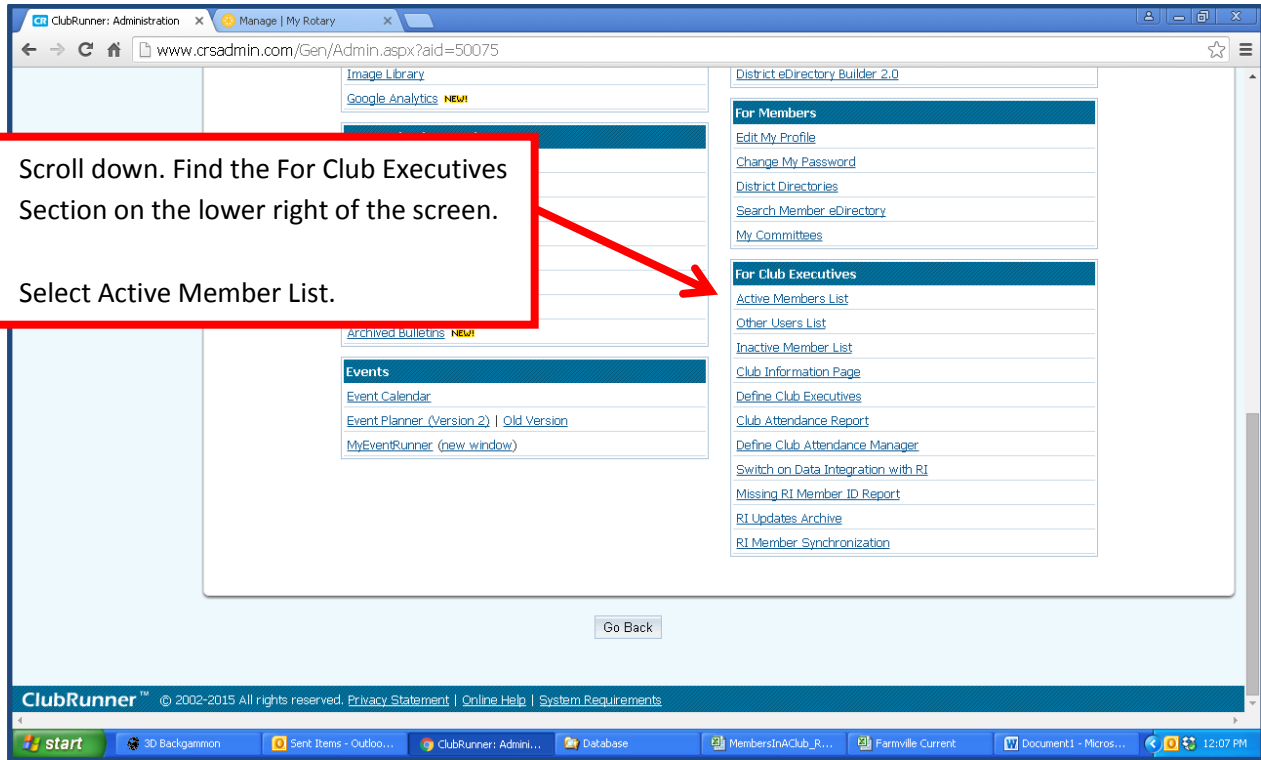
- Membership Type: Active
- Date Joined Club: Feb 04 2017
- Date Joined Rotary: Jul 15 2011
- Check here if you do NOT wish to notify Rotary International of this member's activation. If notification is skipped you must manually update Rotary International's records. (unchecked)

A 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.'

## HONORARY MEMBERS

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

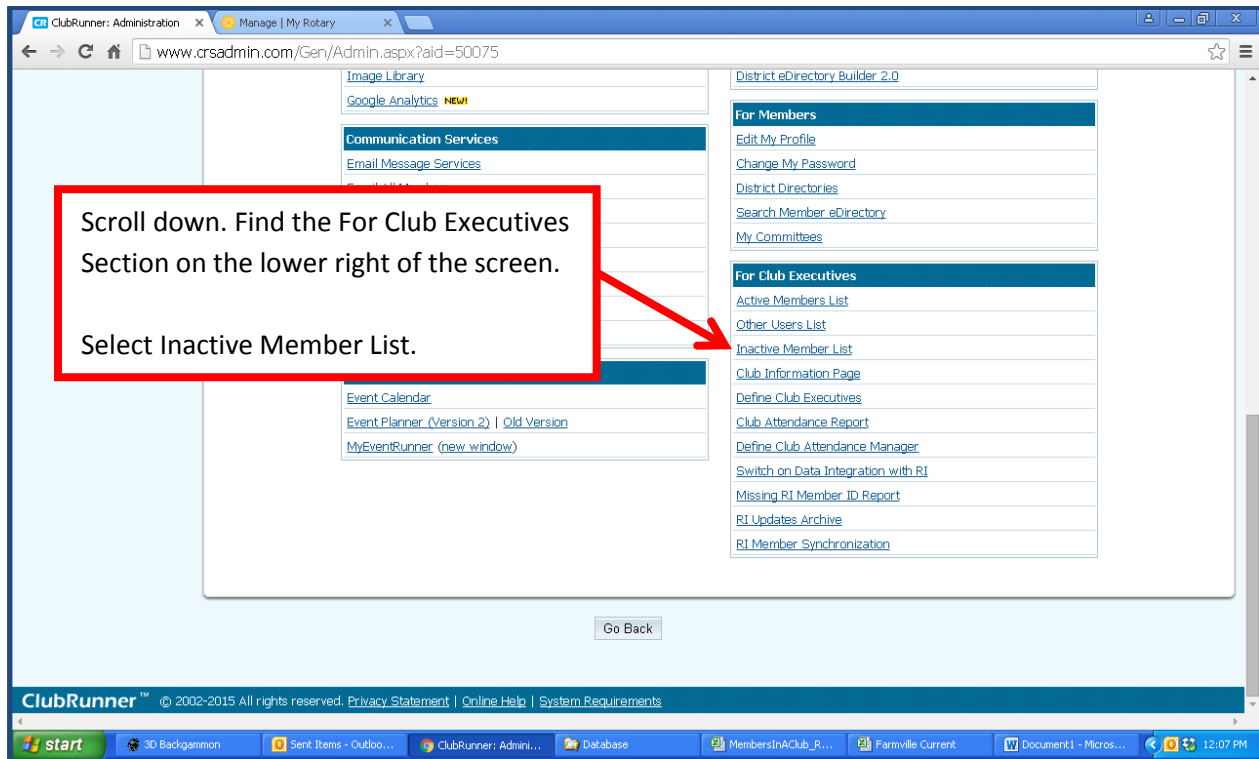
### Active Member to Honorary





## 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 in ClubRunner. A red box highlights the 'Activate Membership' button, with a red arrow pointing to it. Another red box highlights the 'Honorary' option in the 'Membership Type' dropdown menu, with a red arrow pointing to it. The form includes a title, instructions, a dropdown menu for 'Membership Type', a date field for 'Date Joined Club', a date field for 'Date Joined Rotary', a checkbox for notification, and an 'Activate Membership' button.

Please choose one of the following options to continue making changes to this person's status.

Activate Membership OR Change Status to Other User OR Edit Inactive Member Type

Change this person to an Active or Honorary member  
Change this Inactive member to an Other

Completing this form allows you to

Select the new membership type:

Membership Type: Active, Active, **Honorary**

Date Joined Club: [Date Picker]

Date Joined Rotary: Jul 06 2007 [Date Picker]

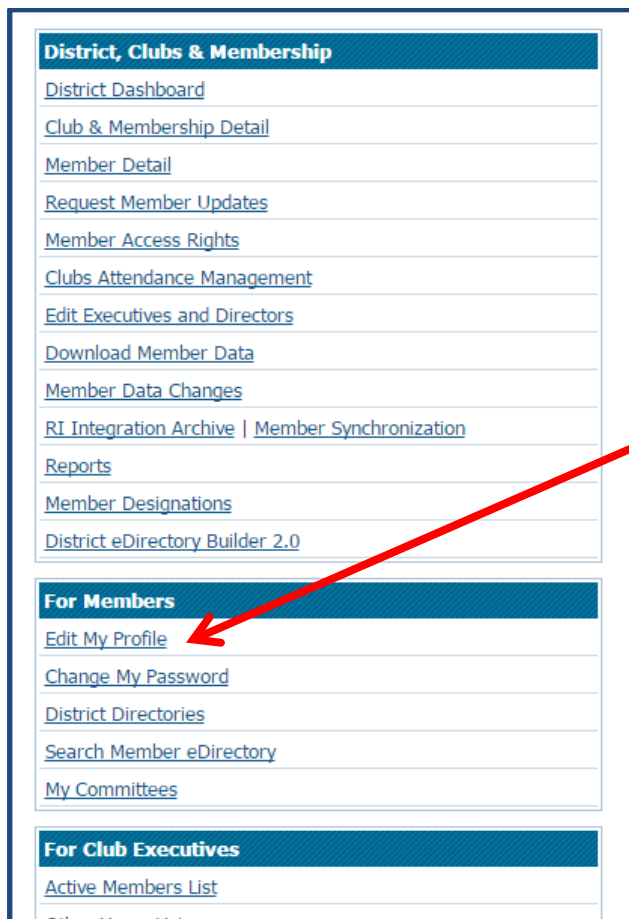
Check here if you do NOT wish to notify Rotary International of this member's activation. If notification is skipped you must manually update Rotary International's records.

Activate Membership

After Change Status, select Activate Membership.  
Select Honorary as the Membership Type and process.

## 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:

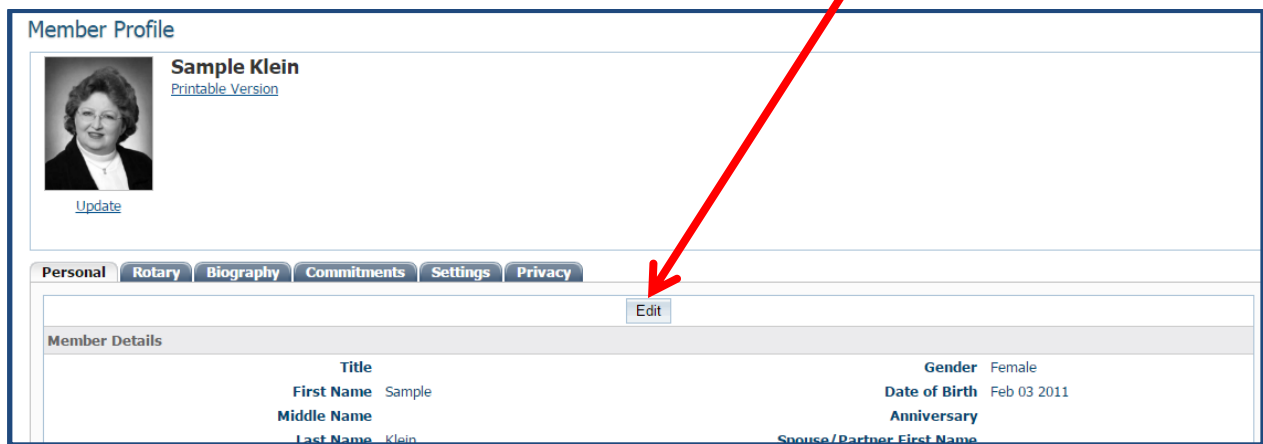


Scroll down. Find the For Members Section on the right column of the screen.

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](mailto: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.