

## **MEMBER MANAGEMENT – RI INTEGRATION / SYNCHRONIZATION**

ClubRunner and Rotary International have worked together to greatly enhance their interface.

All member updates are done through ClubRunner (Admin) and the information synchronizes to and with Rotary International. DO NOT ENTER ANYTHING directly at Rotary.Org.

### **New Members**

- When you add a member – new to Rotary – to ClubRunner, it processes within minutes and the member number is sent back to ClubRunner from Rotary International.
- If Rotary has any questions – such as a name that appears to already be on the system, they will research before finalizing.
- Go to Active Member List, Add Member Link.

### **Transfer Members in**

- *The member must be terminated from the former club before they can be transferred to the new club. Rotary will not add the member until they are terminated from the other club.*
- We can now easily add members as transfers from another club and retain their current member number.
- There are fields for entering information such as member ID, former club and former District. The more we have the better. But, even if we just have the city of the former club, Rotary will research and match the member record.
- Of course, we should also try to enter the name the same as it is on the current / former Rotary record. But, again, if there are questions Rotary will research.
- Process as a New Member, but complete transfer fields.

### **Returning Member**

- Go to the Inactive Member List (that is where they are after terminating)
- Locate the member name
- Click Change Status
- Select Activate Membership

### **Honorary Members**

- We can now change a member from Active to Honorary through ClubRunner (this is fairly new). We no longer need to do that both on ClubRunner and at Rotary.org.
- Go to Active Member List, locate the member name, select the Change Status, select Change Membership Status

### **Terminating Members**

- We can terminate the member on ClubRunner and it is processed almost immediately by Rotary International.
- When a member is transferring out, you will terminate them with the reason “transfer to another club”.
- Go to the Active Member List, select MarkEx on the line by their name, enter the reason.

All of this depends on the accuracy of our information. If the records between ClubRunner and Rotary International match for a member, then any changes are quickly processed.

We also must be sure NOT TO CHECK THE BOX at the bottom of the Add, Change or Terminate screen. If we check the box, then the information will not integrate and synchronize with Rotary.