MEMBER MANAGEMENT – RI INTEGRATION / SYNCHRONIZATION

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

The following information is how you enter on ClubRunner.

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.

Add 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 New Member Button.
- DO NOT use this for members with existing Rotary Member IDs; those are all entered as transfers

Transfer New 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.
- Use the search fields to locate the member record
- When you find the correct record, select the Add Member link on the right
- The information will then "roll down" from Rotary International; leave the fields "as is"
- After the member is added, you can go to the member profile and update

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
- 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; if a member is transferring out they must be terminated before receiving club can add them
- When a member is transferring out, you will terminate them with the reason "joined   other club".
- Go to the Active Member List, select Change Status link on the line by their name, enter the reason.

For this to work, leave the Report button selected. If you do not report, then the information will not "roll up" to Rotary as outlined. The buttons look like this:

⦿ Report this [new member/termination/status change] to Rotary
○ Do NOT report this [new member/termination/status change] to Rotary