

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

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

All member updates are done through ClubRunner 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 they have any questions – such as a name that “appears” to already be on the system for some reason, they will research before finalizing.
- Go to Active Member List, Add Member Link.

### **Transfer Members in**

- 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. Of course, the more we have the better. But, even if we just have the “city” of the former club they will research and match the member record.
- Of course, we should also try to enter the name the same as it is on the Rotary record. But, again, if there are questions Rotary will research.
- We may need to work with the former club. Rotary will not add the member until they are terminated from the other club.
- Same as add, but complete transfer fields.

### **Returning Member**

- Go to the Inactive Member List (that is where they are after terminating)
- Locate the member
- Change the status from Terminated to Active

### **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, select the member profile, change the status from Active to Honorary.

### **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 depend 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 or Terminate screen. If we check the box, then the information will not synchronize with Rotary.