



MY ROTARY FOR CLUB OFFICERS

CREATE ACCOUNT & LOGIN

My Rotary, your site for online Rotary business, can be reached directly at www.rotary.org/myrotary or by clicking on *My Rotary* on www.rotary.org (A).

FIRST TIME USERS

1. Click on *Sign in / Register* (B), then on *Create account* (C).
2. Enter your name, e-mail address and confirm that you are older than 18.
3. If your e-mail address is in the Rotary International (RI) member database, you will receive an activation e-mail. Click on the link in the activation e-mail sent to you by RI to complete the online registration process.
4. Create your password, select your secret question and enter your response for use if you need to reset your password, and click Submit.

Note: If your e-mail address is not in the RI member database, you will be asked for additional identifying information as part of step 2. RI will contact your club to confirm your membership, add you to the RI member database, and send you an automated e-mail to complete the registration process.

FOR RETURNING USERS

1. Enter your login e-mail address.
2. Enter your password.
3. Click the *Sign in* button (C).

NEED HELP?

Consult the list of [Frequently Asked Questions](#) or [send us an e-mail](#).



MY ROTARY FOR CLUB OFFICERS

CLUB ADMINISTRATION

The screenshot shows the My Rotary website navigation. The 'Manage' link is highlighted with a red circle and the number '1'. Below it, the 'CLUB & DISTRICT ADMINISTRATION' section is expanded, and 'Club Administration' is highlighted with a red circle and the number '2'. An inset window displays the 'CLUB ADMINISTRATION' page, which includes a 'SIGN IN' button and several administrative options:

- ADD/EDIT/REMOVE**: Add/edit/remove member. Add new members, edit current member contact information, and remove members that are no longer in your club.
- Add/edit/remove club officers**: Install, edit, or remove current and incoming club officers.
- Update club meeting details**: Update the time and place of your club's regular weekly meetings.
- Update a club's permanent mailing address and contact info**: Use this form to update your club's mailing address and contact information, including phone, fax, email, and website URL.
- Add or remove vendor partner organization**: Add a third-party service to manage your club and membership via an automated feed, or remove an existing data integration with an outside service.
- Official Directory preferences**: Update your preferences for the Official Directory.

The main section for club officers is under **(1) Manage** -> **(2) Club Administration**. This section is only available from 1 July to 30 June of your year of service.

In this reference guide you will learn :

- how to update membership data ?.....3
- how to update club officer data ?..... 4
- how to edit club data? 4
- how to view the club's balance? 5
- how to pay membership dues? 5

Note:

The functions described in this infosheets are available to all club officers that are reported as such to RI. It includes president, secretary, executive secretary, treasurer, foundation chair and membership chair.



MY ROTARY FOR CLUB OFFICERS

UPDATING MEMBERSHIP DATA

All membership changes have to be announced within 30 days, but no later than 1 July and 1 January.

ADD A MEMBER

1. Click on *Add/edit/remove member* in the main menu.
2. Choose the *Add Members* link near the top of the page.

Club Data Reports Membership CRS MCR

Active Members 55 record(s) **Add Members** Terminated Members Deceased Members

3. Click on *Search for an existing member* if the member is already (or has been) a Rotarian or on *Continue* to create a new record.

Either search for a Rotarian who is already a member of another club, or add a new member.

To avoid adding someone who is already in the RI database, it is highly recommended that you search for the member before adding him/her as a new member.

Current/former Rotarian **New member**

Search for an existing member **Continue**

A. SEARCH FOR AN EXISTING MEMBER

4. Enter ID number if known, and then click on *Submit*. If ID is unknown, enter Last Name and Country, and then click on *Submit*.
5. Click on the name of the person you are adding.
6. Enter the requested information, and then click on *Add member & Update Contact*.

B. NEW RECORD

4. Enter the requested information, then click on *Save*.

TERMINATE A MEMBER

1. Click on *Add/edit/remove member* and choose the *Terminate* link next to the member's name.
2. Use the drop down fields to indicate the member's *Termination Reason* and effective *Termination Date*.
3. Click on *Terminate* and *OK* on the confirmation page.

	Membership ID	Last Name	First Name	Admitted	Member Type
View Edit Terminate	00000000	SMITH	JUDITH	30-Jun-2006	Member
View Edit Terminate	00000000	SMITH	JUDITH	31-Dec-2009	Honorary Member

UPDATE MEMBER INFORMATION

1. Click on *Add/edit/remove member* and choose the *Edit* link next to the member's name to do the following:
 - Change a member's admission date (For dates more than 30 days in the past, send an e-mail to data@rotary.org indicating the member's name, ID number, and correct date.)
 - Change a member's type of membership.
 - Add the name of the sponsor.
 - Update a member's contact information (address, e-mail, phone, spoken languages, etc) by clicking on *contact information* at the top of the page.

Home > Member Access > Update Membership Data

Have a question? Visit our FAQ.

Club Data Members **Contact Information**



MY ROTARY FOR CLUB OFFICERS

UPDATING CLUB DATA

CLUB OFFICERS

(CLUB PRESIDENT, SECRETARY, EXECUTIVE SECRETARY, TREASURER, FOUNDATION CHAIR, MEMBERSHIP CHAIR)

1. Click on *Add/edit/remove club officers* in the *Club Administration* menu.

A. MODIFY CURRENT OFFICERS

1. Under *Assigned Current Year Officers* and next to an existing position, click on *Edit Term* to modify the *End Date*. Click on *Remove* to remove the current officer from history.

Assigned Current Year Officers			
	Position	Start Date	End Date
Edit Term	Remove	President	01-Jul-2014 - 30-Jun-2015

B. ADD CURRENT OR INCOMING OFFICERS

1. Click on *Assign* under *Unassigned Current Year Officer Positions* or under *Unassigned Incoming Year Officer Positions*, next to the position that you would like to assign.

Unassigned Incoming Year Officer Positions	
	Position
Assign	Treasurer

2. Click on *Add* in front of the name of the club member. Then click on *Add Current Officer* or *Add Incoming Officer*.
3. Verify the *Position* from the drop down menu and verify the *Start and End Date*. To validate, click on *Submit*.

MEETING PLACE DETAILS

1. Click on *Update club meeting details* in the *Club Administration* menu.
2. Click on *Edit* under *Meeting Details* to modify the meeting date, time or place. To validate, click on *Submit Changes*.
3. To submit alternative meeting dates, times or places, please contact Data Services at data@rotary.org.

CLUB'S CONTACT INFORMATION

1. Click on *Update a club's permanent mailing address and contact info*.
2. Click on *View/Edit* to enter or modify the club's address, phone, fax, e-mail or website. To validate, click on *Save Changes*.

OFFICIAL DIRECTORY (OD)

1. Click on *Edit Official Directory Preferences* to change the version of the OD received.
2. Select *CD-ROM* or *online* from the drop down menu and click on *Submit Changes*.

Note: the online version is the one available in My Rotary under *Learning & Reference* -> *About Rotary* -> *Official Directory* (see picture)



INVOICE PREFERENCE

If your club wishes to receive the electronic version only of the club invoice, check the box and click on *Save*.

Invoice Preference	
<input checked="" type="checkbox"/>	Check this box to remove your club from receiving the invoice paper copy (electronic version is acceptable).
Save	Cancel



MY ROTARY FOR CLUB OFFICERS

CLUB DUES

To allow the club treasurer to view, print and pay the semi-annual dues invoice online, the club president or secretary must first add the club treasurer to RI's database via *Add/edit/remove club officers* -> *Add Club Officers*.

VIEW THE AMOUNT OWED TO RI

Click on *Pay or view club invoice* in the *Club Administration* menu.

The outstanding balance is shown is USD and in your local RI currency, converted with the current month's exchange rate.

Account Overview

	ITEM NUMBER	ITEM DATE	ITEM DESCRIPTION	LOCAL AMOUNT - EURO	USD AMOUNT
<input checked="" type="checkbox"/>			Semiannual Dues	1000.80	1251.00
			Outstanding Balance	1000.80	1251.00

Download

- [View Current Invoice](#)
- [View Current Invoice Details](#)
- [View Previous Invoice](#)
- [View Previous Invoice Details](#)

Make Payment

Payment Amount Euro

USD equivalent 1251.00

Current RI Exchange Rate per USD 0.8

Continue

Dues are calculated based on RI membership information as of 1 January and 1 July. Payment is due upon receipt. If you have questions about your account, please contact your [Financial Representative](#).

PAY ONLINE

To pay online

1. Under *Account Overview*, select the items you wish to pay and modify if necessary the payment currency.
2. Click on *Continue*.
3. Enter or confirm the billing information and click on *Continue*.
4. If the amount and contact information are correct click on *continue*, if you wish to make any changes click on *edit*.
5. Enter your credit card information and click on *continue* to finalize the payment.

GET A COPY OF THE CLUB INVOICE AND DETAILS

1. Click on *Pay or view club invoice* on the main menu.
2. In the download section, click on *View current Invoice* and *View Current Invoice Details*.

Download

- [View Current Invoice](#)
- [View Current Invoice Details](#)
- [View Previous Invoice](#)
- [View Previous Invoice Details](#)

NEW BILLING SYSTEM

Since January 2015, each club receives a one-page invoice that clearly states the amount of membership dues, subscriptions, and any outstanding balances owed to Rotary. This replaces the former SAR mailing that included a cover page, the semiannual report, worksheets, new member forms, the club roster, and a set of detailed instructions.

The club invoice is based on the membership numbers reported to Rotary by 1 January and 1 July of each year. Adjustments to the bill are no longer possible.

It is therefore very important that the club secretary reports all membership changes in My Rotary within 30 days, but no later than 1 July and 1 January.

For more information, consult the list of [Frequently Asked Questions](#) available on [Rotary.org](#).