



Resolving Member Compare Discrepancies in DACdb

Rationale:

This white paper covers the best practices for resolving discrepancies between membership data in My Rotary and DACdb, as identified by Member Compare or District Compare utilities in DACdb (My Club tab, "RI Integration" on left menu).

IMPORTANT: Where Member Compare discrepancies exist, please DO NOT use either the "Add to RI" or "Add to DACdb" links except as described below. In several cases, those links will produce a duplicate profile that requires further reconciliation. Rather, determine which of the following six (6) situations actually exist and act accordingly:

Upon running Member Compare, you'll find mismatched members, where a member is only in the RI column or only in the DACdb column. You'll also find situations where the member is listed in BOTH columns (at the top of the DACdb column, and alphabetically in the RI column with no corresponding DACdb entry). There are multiple different situations that can cause this. Here's what to do in each:

1. **Member in DACdb column only** (scroll down alphabetically to ensure the member is not in the RI column under a different Member ID) -- This means that the person is NOT a Rotarian (not on RI's list of members of your club). In this case:
 - a. If the person is NOT a member of your club, simply **terminate** them in DACdb and you're finished.
 - b. If they **are** a member of your club, go to [My Rotary](#), Club Administration, and add the member in RI, using this best practice process: <https://rotary7750.org/wp-content/uploads/2017/05/201310ADDINGNEWMEMBERSinDaCdbAndMyRotary.pdf>
 - c. Note that you cannot add a member in RI with a start date more than 30 days in arrears. Pick a date within the past 30 days, add the member and then email Contact.Center@Rotary.org, requesting a date correction.
 - d. Once the member has been added to RI's books, they will appear on the RI side of the Member Compare listing, along with their RI Member ID. Simply highlight and **copy** the Member ID, then click on the Member Name in the DACdb column. The profile will open in Edit mode and you can paste the Member ID into DACdb, click **Update** and you're finished.

IMPORTANT: The primary root cause of either adds or terminations entered in DACdb and NOT being posted by RI is entering either a termination date or a start date more than 30 days either way from the current date. Particularly, terminations back-dated more than 30 days in DACdb will NOT be accepted by RI and that member will remain missing from RI until noticed in Member Compare and corrected manually.

2. **Member in RI column only, NOT in DACdb** --
 - a. If the person is NOT a member of your club, go to **My Rotary**, Club Administration and **terminate** them in RI and you're finished. The "Terminate in RI" link may work for you in this case.
 - b. If they **are** a member, you need to add them to DACdb. In this unique case, use the "Add to DACdb" link and a DACdb profile will be created, with the correct RI Member ID.

3. **Member in BOTH DACdb and RI columns on different lines, with a SLIGHTLY mismatched Member ID (apparent typo) --**
 - a. If you can convince yourself that it's simply a transcription error, just highlight and **copy** the correct Member ID from the RI column, then click on the Member Name in the DACdb column. The profile will open in Edit mode and you can paste the Member ID into DACdb, click **Update** and you're finished.
4. **Member in BOTH DACdb and RI columns on different lines with significantly MISMATCHED (non-zero) Member ID --**
 - a. This is the most challenging situation. In most cases, this means that the member has duplicate records in the RI database. The only way to fix this is through a human in Evanston. Send an email to contact.center@rotary.org, giving the member's name, club name (club ID would help) and BOTH member IDs. Ask that they confirm they're the same member and then **merge** the member data under a single ID.
 - b. When you have confirmation that's been done, simply highlight and **copy** the Member ID from the RI column, then click on the Member Name in the DACdb column. The profile will open in Edit mode and you can paste the surviving Member ID into DACdb, click **Update** and you're finished.
5. **Member in BOTH DACdb and RI columns with member ID of Zero in DACdb --**
 - a. Simply highlight and **copy** the Member ID from the RI column, then click on the Member Name in the DACdb column. The profile will open in Edit mode and you can paste the Member ID into DACdb, click **Update** and you're finished.
6. **Members with mismatched Member Type (Active vs. Honorary or vice-versa) and matching Member IDs --**
 - a. If the member type is incorrect in DACdb, click on the Member Name and the profile will open in Edit mode. Change the member type and click **Update** and you're finished.
 - b. If the member type is incorrect in RI, go to [My Rotary](#), Club Administration and change the member type (you may have to terminate an Active member before changing to Honorary).

Once you have Member IDs matching in both columns, you can do all your Club Administration in DACdb and changes will automatically be updated in RI, linked via the Member ID.

Any time you add a new member, using this Best Practice will eliminate the possibility of mismatches or duplications between DACdb and RI:

<https://rotary7750.org/wp-content/uploads/2017/05/201310ADDINGNEWMEMBERSinDaCdbAndMyRotary.pdf>

If you have trouble with any of these processes, email support@dacdb.com, including your Club ID and the Member ID with which you're having trouble.

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