ADDING NEW MEMBERS to Rotary International and DaCdb

Please print these instructions before you start.
Always start in My Rotary first when adding members

If you're adding a member who has been in Rotary before, SKIP to <u>Step 1</u> below, and use "Search for an existing member"

Adhering to these "best practices" in adding members to both the District (DaCdb) and RI (My Rotary) databases will result in better data, less confusion, and accessible contact information on prospects.   These steps should be done in order:

1. When a New Member is first proposed (signed application with 2 sponsor signatures) and submitted for Board approval,
   - Add the member to DaCdb with the member type "**Proposed**".
   - The member type "Potential" can also be used to track prospects who haven't yet applied, and then they can be upgraded to "Proposed" when they apply for membership.
2. Begin collecting all known contact information in DaCdb.   This is a continuous process with most new members – requesting info, waiting, etc. The photo seems to be the hardest part.
3. When the new member is approved by the Board, don't change anything online. Rather, **invoice** the member for dues, meals, etc. per your club's practice.
4. When the member's payment arrives, it's time to activate the membership. <u>The member's "Start Date" in DaCdb and with RI is the date you receive full payment</u>. At that time, he's a member and eligible to come to meetings prior to his introduction to the Club.

Step 1 – Add the new Member to Rotary International
   (requires the login of your current club President or Secretary

1. Sign into **My Rotary**, using either the President's or Secretary's login.
   - Go to www.rotary.org
   - Click on **My Rotary** - either at the top or bottom of the page
   - Sign In – (If you haven't before registered for a My Rotary login, click Register and follow the prompts)
   - Click on **Manage** – either at the top or bottom of the page
   - Look for **Club Administration** – click on **Add/edit/remove member**
   - When your club's member listing opens, click the **Add Members** button
2. Use the **Search for an existing member** button – search by last name, then narrow things down. New members regularly don't tell us they've been in Rotary before. Skipping this step results in duplicate RI Member records and fragmentation of their Foundation contribution accounts.   If you find an apparent **prior membership**, contact the new member and verify.   That member will need to be terminated by that club's secretary before you can add him to your club.
3. Assuming you don't find a prior membership, add the new member, following the prompts – enter minimal required fields.
   a. **If you do find a prior membership, skip to "Adding Prior Members" below**
4. Retrieve the RI Member Number (assigned when you add the member)

Step 2 – Add the new Member to DaCdb (www.rotary7750.org/directory)

1. Open DaCdb, log in, and open the Member Profile in Edit mode. Put the RI Member Number in the Member ID field (upper LH corner).
2. Change the Member to Active and enter the actual "Start Date" as the date you receive the payment.
3. Complete any other new known contact information, and click "Update" to save.
4. All further updates to Active Member records in DaCdb are sent automatically to RI – you never need to open that member's profile in RI Member Access again.

This sequence ensures several things:
- That a member isn't added to RI's books prematurely, in which case they will assign a member number and add to your club's roster.   This is a problem when prospects change their minds.
- That future updates through DaCdb are "keyed" to the RI Member Access database, by means of the RI Member Number.   Again, prevents possible duplication in the case of a name change (i.e. "Frank" changed to "Franklin")

Adding Prior Members:

1. If you find the new member has been a member of another Rotary club, you can add him to your club, which retains the original RI Member Number
2. If you get a prompt that he's still a member of the prior club, you'll need to contact his club secretary to get him terminated from that club (through RI Member Access).   This precaution prevents a club from "poaching" other clubs' members.
3. If the member has been a member of another DACdb club, **do not create a new record in DaCdb**.   Instead, go to the My Club page, scroll down the left hand column and click "**Member Transfer**". A search box will allow you to find the member **if** he has been terminated by the prior club.   This will retrieve all the member's history and contact information, as well as the RI Member ID.
4. If the prior membership was outside D-7750, once the member has been added to your club, retrieve his RI number and add him to DaCdb, starting at Step #2 above (Adding a New Member to DaCdb).
5. If you find that the person has been a member of **more** than one other Club, contact The Rotary Foundation to have his prior Foundation contributions all moved to the "surviving" RI Member ID – the one you actually transferred to your club.   contact.center@rotary.org