ADDING NEW MEMBERS to Rotary International and DACdb
<u>**Please print these instructions before you start**</u>

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 & birth date seem to be the hardest parts.
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 payment</u>. At that time, he/she's a member and eligible to come to meetings prior to his/her introduction to the Club.

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

1. Sign into **My Rotary**, using either the President's or Secretary's login.
    *   Go to www.my.rotary.org
    *   Sign In – (If you haven't before registered for a My Rotary login, click Register and follow the prompts)
    *   Mouse over **Manage**
    *   Look for **Club & District Administration >>** click on **Club Administration**
    *   Click on **Add, edit, or remove members**
    *   Click **ADD A MEMBER**

2. **Identify Member** – Search by last name, then narrow things down by adding first name. Enter EITHER an Email address or RI Member ID if you have one for a known prior member.

    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. If another club name is shown (other club affiliation), the member will need to be terminated by that club's secretary before you can add him/her to your club.

3. Assuming you don't find a prior membership, add the new member, following the prompts – enter minimal required fields.

Step 2 – Add the new Member to DACdb (www.dacdb/com)

1. **If the member is already in DACdb as a Potential or Proposed Member**, open DACdb, log in, and open the Member Profile in Edit mode.
2. Change the Member to Active and enter the actual "Start Date" as the date you entered the member in RI.
3. **If the member is <u>not</u> already in DACdb,** open DACdb, log in, open the Club Members View, then **RI Integration >> Member Compare** on the left side
4. Find the member alphabetically and click "Add to DACdb"
5. 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/Reconciling Prior Members:

1. If you find the new member has been a member of another Rotary club, you can add him/her to your club through Member Compare, which retains the original RI Member Number
2. <u>If the member has been a member of another DACdb club</u>, **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.
3. If you find that the person has been a member of **more** than one other club, contact RI Staff to have his prior member and Foundation records merged. contact.center@rotary.org
4. Use "Member Compare" in DACdb to verify the "surviving" RI Member ID and, if mis-matched, open the member's DACdb profile (right column) and update the Member ID (**don't** use the "Add to DACdb link" and create a duplicate DACdb profile).