



# MyRotary Reporting Rotaract Training Night





**Rotaract Committee** 



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- Logging into MyRotary
- Adding New Rotaractors to your Club
  - Editing Member Information
    - <u>Member Termination</u>
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- Updating Club Data (Meeting location and Contact Information)



# Logging into MyRotary



About Store

Start by typing My.Rotary.org into your favorite web browser

🛞 My Rotary   My Rotary 🗙 +	$\sim$		٥	×
← → C  my.rotary.org/en/	☆	*		:
Your session has expired, please log in again			>	:
🔒 Rotary.org   English 🗸   Register Sign In				
Rotary 🛞   My Rotary Join Q				
HOME   EXCHANGE IDEAS   TAKE ACTION   LEARNING & REFERENCE   MANAGE   THE ROTARY FOUNDATION   NEWS & MEDIA   MEMBER CENTER				

My Rotary

Utilize either sign in option to get to the login page. If this is your first time logging in, please utilize the register button. Your email must be listed as an active member of a club in order to register for a MyRotary Account.

SIGN IN TO MY ROTARY

**REGISTER FOR AN ACCOUNT** 

### My Rotary Member Dashboard

Welcome to My Rotary, a place for members of Rotary to access tools and information to make your membership experience better.

If you are not a member of Rotary, please visit our home page at **Rotary.org**.



**Rotary Spotlight** 



		Sign in	
		Sigirin	
l ogin e	mail addre	55	
Logino	man addre		 
Passwo	rd		
•••••			
Ren	iember me		
		Sian in	
Need he	elp signing ir	n?	

Utilize your login credentials to access your club's Rotaract Page











# Adding New Members



Rotaract Club (Community)

Club details Members	(	Click the Mem	pers Tab	
<b>Location</b> Georgia, United States	District 6900	Chartered 2012	Club ID 12345	✓ EDIT Our Meeting Location
Contact Infor	mation		EDIT	Language English Notes
Email Address ourclubpresident@ourclub.	org			<b>When</b> Wednesday at 19:00 First Wednesday and fourth Thursday
Dhana Mumhau				inserved reading and roardin marsday

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Rotaract Club (Community)

Club details Members

Scroll until you see your current membership list and the option to "add a member"

If you have questions about your club membership, please contact Data Services

### Add a member





Scroll down until you see options to check email addresses

Scroll

Rotaract Club (Community)

Club details Members

< Back | Step 1 of 3

Idontify momhor

< Back | Step 1 of 3

# Identify member

First, see if your new member is already in Rotary's database. Enter any information you have of the person you'd like to add - only one field is required.

### Please use only latin characters

#### Email

Enter email

#### Member ID

Member ID

#### First name



#### Last name

**Q** SEARCH FOR MEMBER

The first step is to see if the member is already listed in the database. The best way to do this is using their email address. However, you can also do this by looking up their first and last name.

### CANCEL

RESULTS	(10184)		Filter by country/region	If you utilize their first and anyone with a similar nam the below menu	last name, ne will pop up in
	John Doe Doe.John@gmail.com +1234567890 ID#111111	John Doe's Address Here United States	OTHER CLUB AFFILIATION My Rotary Club	CONTINUE WITH THIS PERSON	This is what happens if you try to add a
	<b>John Doe</b> Doe.John32@gmail.com +34 5555555 ID#99999999	John Doe's Address Here Spain	OTHER CLUB AFFILIATION Spain Rotary Club	CONTINUE WITH THIS PERSON	member that is already listed in the RI database once you click
	<b>John Doe</b> Doe.John12@gmail.com +11444444 ID#7777777	John Doe's Address Here United States	OTHER CLUB AFFILIATION US Rotary Club	CONTINUE WITH THIS PERSON	"continue"
	John Doe Doe.John82@gmail.com +33 9999999 ID#8888888	John Doe's Address Here Philippines	OTHER CLUB AFFILIATION Philippines Rotary Club	CONTINUE WITH THIS PERSON	
	<b>John Doe</b> Doe.John11@gmail.com +1 444444444 ID#4444444	John Doe's Address Here United States	OTHER CLUB AFFILIATION US Rotary Club	CONTINUE WITH THIS PERSON	

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Rotaract Club (Community)

You will be asked to verify member information

Club details Members

< Back | Step 2 of 3

### Enter Member Details

Double-check to ensure this member's information is up-to-date. You can edit the member's information if needed.

#### **PERSONAL DETAILS**

Full Name\*

John Doe

### 

→ C 🏻 → C my.rotary.org/en/club/fcbfcadb-8bbb-4869-9455-c149d1f1802d/add-member

#### Language\*

English

🛛 🗸

Your privacy and that of club members is important to Rotary and the personal data you share with Rotary will only be used for core business purposes. These purposes include financial processing, supporting The Rotary Foundation, facilitating event planning, communicating key organizational messages and responding to your inquiries. Rotary's privacy policy can be found at my.rotary.org/privacy-policy. Questions about this policy can be directed to privacy@rotary.org



CANCEL

### Once verified, you can continue



Club details Members

### < Back | Step 3 of 3

## Add Membership Information

#### Member type\*

Honorary	$\otimes$ $\checkmark$
Admission date*	
YYYY-MM-DD	曲
Procedure certification*	

I certify that this individual was added in accordance with our club bylaws and understands and accepts the conditions of membership.

However, once you go to add this member, the ONLY option is to add them as an honorary member. This is only if they are already listed in the database already. You will not be able to list them as an active member, until they are removed from association with another Rotaract Club.

CONTINUE

CANCEL

Go Back To ADD a Member Page

Π

QE

< Back | Step 1 of 3

# Identify member

First, see if your new member is already in Rotary's database. Enter any information you have of the person you'd like to add - only one field is required.

### Please use only latin characters

#### Email

### Member ID

Member ID

#### First name

Enter first name

#### Last name

Enter last name

**Q** SEARCH FOR MEMBER

### If we were to look up a member via their email address, we can easily see if they are in the system.

### CANCEL

Q A

Page 1

>

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Sorry, we couldn't find a result to your search. Check the spelling of your search and try again. Or you can add the person as a new member.



If the email address is not listed, you should have the option to add this person as a new member



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My Rotaract Club

Rotaract Club (Community)

Scroll down to start typing their information

Club details Members

Back | Step 2 of 3

## Enter Member Details

Double-check to ensure this member's information is up-to-date. You can edit the member's information if needed.

### Full Name\*

This field accepts non-Latin characters

### Prefix

Prefix

#### First name\*

Field cannot contain non-latin characters

### Middle Name

Field cannot contain non-latin characters

### Last name\*

Field cannot contain non-latin characters

Begin filling out all the required information which is designated with an \*

# Scroll

Q B

D

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#### → C ( my.rotary.org/en/club/fcbfcadb-8bbb-4869-9455-c149d1f1802d/add-member

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### ④ 🖻 ☆ 🗰 🖪 🖪

uffix					
Select				~	
iender*					
Not give	en			~	
Gender is o	only visible to club off	icers.			
ate of bi	rth				
Day	Month		Year of Birth*		
DD	Select	~	YYYY		

# Gender\* Not given Male Female Self-describe

Prefer not to identify

Not given

noemail@gmail.com

Scroll

### Year of birth is only visible to club officers. Email\*



Country Code

Phone



### Address\*

The most important piece of information to be input is the member's email address. Again, this is how they will be able to register for a MyRotary account and be able to gain access to everything MyRotary has to offer.

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Second line optional



#### my.rotary.org/en/club/fcbfcadb-8bbb-4869-9455-c149d1f1802d/add-member C

### Language\*

Select...

Your privacy and that of club members is important to Rotary and the personal data you share with Rotary will only be used for core business purposes. These purposes include financial processing, supporting The Rotary Foundation, facilitating event planning, communicating key organizational messages and responding to your inquiries. Rotary's privacy policy can be found at my.rotary.org/privacy-policy. Questions about this policy can be directed to privacy@rotary.org

"Continue"

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CANCEL

**End Polio Now** Home Careers Rotary.org

**Contact Us** 





Once you've verified the information is correct. Click



« Back | Step 3 of 3

# Add Membership Information

### Member type\*

Select... Honorary Active Admission date\* YYYY-MM-DD Procedure certification\*

I certify that this individual was added in accordance with our club bylaws and understands and accepts the conditions of membership.



Since this is a new member, you will have the option to select them as an active member. Select their active membership date. Then certify that the information is in accordance with club bylaws.

YYYY-MM-DD								<b></b>
4			Aug	gust 2	022			
	31	1	2	3	4	5	6	
	7	8	9	10	11	12	13	
	14	15	16	17	18	19	20	
	21	22	23	24	25	26	27	
	28	29		31	1	2	3	
			Se	lect too	lay			



If you have questions about your club membership, please contact Data Services



# Adding a Member Key Takeaways

- The email address is the most important information. Without the correct email address in the database, the member is unable to register for their own MyRotary account.
- Once a member is registered into MyRotary, they can then update their own address, phone number and any additional information they'd like to include.



# Editing Member Info







#### Profile

# Edit Contact Information

Scroll

### Email

Email\*

Primary Email for RI communication

scroll through and update the information, you'd like to edit. Here you can add multiple email addresses. It is important, that the email address is correct.

ADD ANOTHER EMAIL

### Phone

+ ADD ANOTHER PHONE

### Address

Address Type\*

Address\*

1234 Rotary Way

Address Line 2

### Address Line 3

Country/Region\*

United States 🛞 👻

~

~

City\*

Atlanta

State/Province/Territory\*

Georgia

Postal Code\*

1234

Primary Address for RI communication

#### + ADD ANOTHER ADDRESS



Once you've made the changes. Click "Save Changes".





# Member Termination





Rotaract Club (Community)

Club details Members

< Back | Step 1 of 2

Scroll to update information

Scroll

### Select Termination Details

Please provide a date and reason for termination and review how this data will be used by Rotary.

## Select Termination Details

Please provide a date and reason for termination and review how this data will be used by Rotary.

#### **Termination Date\***



#### **Termination Reason\***

Select...

#### HOW THIS INFORMATION WILL BE USED

We are sorry to see members leave Rotary. The personal information provided to Rotary about members termination will not be shared and will be used to better understand why members leave Rotary. We may also use this information to contact former members about future memberships opportunities. Please contact membershipdevelopment@rotary.org with any questions.



#### **Termination Date\***



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#### Termination Reason\*

 Select...

 Terminated - Personal

 Terminated - Relocation

 Terminated - Family Obligations

 Terminated - Business Obligations

 Terminated - Joining New Club

 Terminated - By club for cause

 Terminated - Deceased

### Select the applicable termination date and reason and then click continue

## Confirm Termination Details

Please confirm the details of this member's termination

Member Name

### John Doe

**Termination Date** 

2022-08-14

#### **Termination Reason**

Personal

Procedure Certification\*

I certify that this individual was terminated in accordance with the Standard Rotary Club Constitution.

CONFIRM TERMINATION

CANCEL AND BACK TO CLUB ROSTER

Review the information for accuracy. Once verified, certify and confirm termination.

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→ C í my.rotary.org/en/club/fcbfcadb-8bbb-4869-9455-c149d1f1802d/roster

If you have questions about your club membership, please contact Data Services

Search by email address

### Add a member

### Manage club officers

Search club members

Search by name

The member will still show up on your membership list for at least 24 hours after termination. However, the options for this member will be limited. D

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 CLUB MEMBERS (17)
 Role V Member status V

 Image: State of the state o

**Q** SEARCH



# Updating Club Officers

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If you have questions about your club membership, please contact Data Services

### Add a member

### Manage club officers

### Search club members

Search by name	Search by email address	Q SEARCH	Se me ch	elect the three dots ne ember that you'd like t lose "assign a club off	ext to the to add and ficer role"
CLUB MEMBERS (17)			Role 💙	Member status 💙	
<b>John Doe</b> D: 111111		Member 2022 - Present 888888	View member details	••••	
Jane Doe           ID: 222222		Member 2018 - Present	Edit membership Terminate membership	•••	

	♠ Rotary.org   English v   🛞
Rotary 🛞   My Rotary	Donate Join Q
HOME   EXCHANGE IDEAS   TAKE ACTION   LEARNING & REFERENCE   MANAGE   THE ROTARY FOUL	NDATION   NEWS & MEDIA   MEMBER CENTER
My Rotaract Club Rotaract Club (Community)	IMPORTANT: If you know your Club President for the following year, designate this person before the end of the Rotary year. This will ensure that access is easily rolled over to the incoming President at the start of the next Rotary Term.
Club details Members	

< Back | Step 1 of 2

Jane Doe	click continue
Available Terms	
Available Terms           2022-2023         2023-2024	
Available Terms 2022-2023 2023-2024 Available club officer roles	
Available Terms 2022-2023 2023-2024 Available club officer roles *Role required by the Standard Rotary	Club Constitution, Article 11, Section 4.
Available Terms 2022-2023 2023-2024 Available club officer roles *Role required by the Standard Rotary Select	Club Constitution, Article 11, Section 4.

CANCEL

Select	<ul> <li>✓</li> </ul>
Rotaract Advisor	
Rotaract Foundation Chair	
Rotaract Membership Chair	
Rotaract Public Image Chair	
Rotaract Secretary*	
Rotaract Service Projects Chair	
Rotaract Treasurer*	

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# Updating Club Data: Mailing Address & Phone Number



Rotaract Club (Community)

From the Club landing Page. Select Club Details



Members

Back | Step 2 of 3

## Enter Member Details

Double-check to ensure this member's information is up-to-date. You can edit the member's information if needed.



To edit club contact information, click "edit". This is the Rotaract Club (Community) information that RI will utilize to communicate and send invoices to. Therefore, it is important that this information is correct and up to date. Club details Members Club ID Location District Chartered / EDIT Georgia, United States 6900 2012 12345 **Our Meeting Location** Language English Contact Information EDIT Notes When Email Address Wednesday at 19:00 ourclubpresident@ourclub.org First Wednesday and fourth Thursday Dhana Number



Rotaract Club (Community)

Club details Members

Select the information that you would like to update and do so accordingly.

< Back

### Edit Contact Information

**Email Address** 

ourclubpresident@ourclub.org				
Country Code	Phone Number			
United States ±1	123456789			

Country Code	Phone Number	
United States +1	123456789	
Country Code	Fax Number	
Select 🗸		
Nebsite		
Ourclub.org		
Mailing Address*		
123 Rotary Way		
Country/Region*		
United States	⊗   ~	
lity*		
Atlanta		
state/Province/Territory*		
Georgia	~	
Postal Code*		
12345		
Rotary Language*		Ve
English	~	
SAVE CHANGES	CANCEL	)

### Verify the changes and click save



Rotaract Club (Community)

Club details Members			You should see the updated information on the landing page		
Location Georgia United States	District	Chartered	Club ID		🖌 EDIT
deorgia, ornea states	0,00	2012	12343	Our Meeting Location	
Contact Infor	mation		EDIT	<b>Language</b> English	
Email Address				Notes When	
ourclubpresident@ourclub	.org			Wednesday at 19:00 First Wednesday and fourth Thursday	

Next

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# Updating Club Data: Meeting Location/Date/Time



Rotaract Club (Community)

Members

Club details

To edit meeting information, select "edit" in this area shown below

🖌 EDIT

Club ID Location District Chartered Georgia, United States 6900 2012 12345 **Our Meeting Location** Language English Contact Information 🖌 EDIT Notes Email Address When Wednesday at 19:00 ourclubpresident@ourclub.org First Wednesday and fourth Thursday Dhana Number



Rotaract Club (Community)

Club details Members

Scroll through to the information listed

Scroll

### < Back

# Edit meeting

Overview

Preview

Meeting Name

### Overview

**Meeting Name** 

#### Language\*

English

#### Notes

### Preview

### **Our Meeting Location**

#### Language

English

You can Name your meeting and select the spoken language of the

club

### Notes

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### When

Wednesday at 19:00 First Wednesday and fourth Thursday

Where (In-Person)

1234 We meet Here Atlanta, GA 30312

Where (Online)

Ourclub.org

Zoom link will be provided in event description

.

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### When

### When

#### Meeting Day\*

Wednesday

### Frequency

First Wednesday and fourth Thursday

### Time (HH:MM)\*

19:00

### Where

### Meeting format\*

In Person and Online

Our club meeting location changes or rotates on a consistent basis

**Meeting Location Name** 

Meeting Address\*

1234 We meet Here

Here you can update the day, frequency, time, and meeting format.

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#### Country/Region\*

United States

City\*

Atlanta

#### State/Province/Territory\*

Georgia

Postal Code\*

30312

#### Details for joining remotely\*

Zoom link will be provided in event description

URL\*

ourclub.org

SAVE CHANGES CANCEL

Once you have verified the information. Click "Save Changes"

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### Search

Site Members Clubs



If done correctly, your club should now be discoverable in the rotary club search found on the club finder website.

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(10) Athens

Watkinsville

National

20

Madison

Commerce



# Key Takeaways

- Make sure there is a President reported at all times
- If you're not currently designated as club president, contact your DRC or DRR with your cooresponding email address and they will work with RI to get you uploaded ingo the system
- Email addresses are important in linking a MyRotary account with your club. It is important that this information is correct.
- Once you have access into MyRotary then you can explore all the areas to help your club.



# Stay connected!

For membership data issues: data@rotary.org For general Rotaract queries: rotaract@rotary.org

