



# MY ROTARY FOR CLUB OFFICERS

## MY ROTARY – REGISTER & LOGIN TO MY ROTARY

My Rotary, your web area for online Rotary business, can be reached directly at [www.rotary.org/myrotary](http://www.rotary.org/myrotary) or by going to [www.rotary.org](http://www.rotary.org) and clicking on My Rotary (A).

### FIRST TIME USERS

1. Click on *Register for an account* (B), then on Continue (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 sent to this address; please check your spam folder. Click on the link in the activation e-mail to complete the online registration process.
4. Create your own password. Select your secret question and set your answer to it (to be used in case you need to reset your password). Then 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 log-in e-mail address.
2. Enter your password.
3. Click on *Sign in to My Rotary* (D).

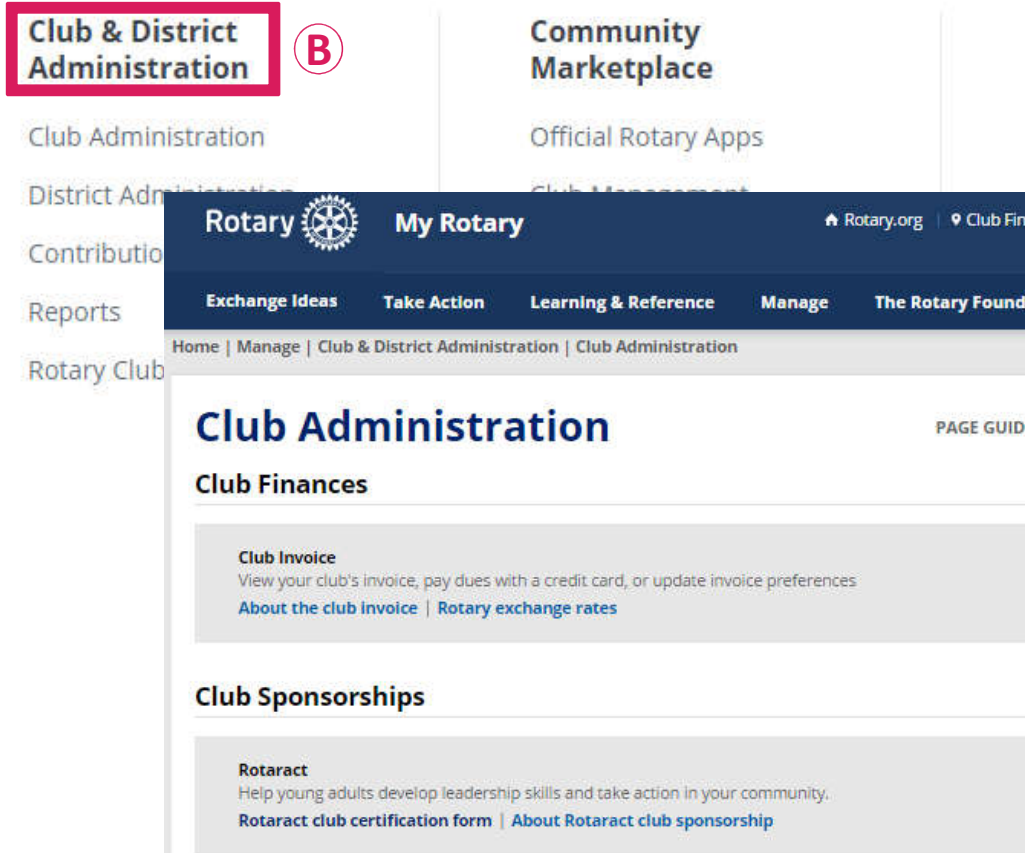
Now you can benefit from the various tools available in My Rotary.

### NEED HELP?

Consult our [HELP section](#) or [send us an e-mail](#).

The screenshot shows the My Rotary website interface. At the top, there is a navigation bar with the Rotary logo, a search bar, and links for 'JOIN' and 'GIVE'. Below this is a secondary navigation bar with links for 'About Rotary', 'Get Involved', 'Our Causes', 'Our Programs', 'News & Features', and 'For Members'. The main content area features a large banner with the text 'People of Action' and a background image of people. Below the banner is a dark blue navigation bar with the 'My Rotary' logo and a search bar. A 'Sign In' / 'Register' link is visible in the top right corner of this bar. Below the navigation bar is a grid of menu items: 'Exchange Ideas', 'Take Action', 'Learning & Reference', 'Manage', 'The Rotary Foundation', 'News & Media', and 'Member Center'. The bottom section of the screenshot shows a 'Sign In' form with fields for 'Sign-in Email' and 'Password', a 'Remember me' checkbox, and a 'SIGN IN' button (D). To the right of the form is a 'Why Create An Account?' section with text explaining the benefits of signing in. Below this section is a 'CREATE ACCOUNT' button (C). In the top right corner of the sign-in area, there are two buttons: 'SIGN IN TO MY ROTARY' (B) and 'REGISTER FOR AN ACCOUNT'.

## MY ROTARY - CREATE ACCOUNT & SIGN IN



Assuming RI has you on record as a current club officer, you can find useful administrative tools under **(A) Manage** → **(B) Club Administration**. You have editing rights in this section only during your year in office from 1 July to 30 June, although you also have the possibility to view data 12 months before taking office and 12 months after the end date of your term in office.

In this reference guide you will learn :

- how to update member data ..... 3
- how to update club officer data ..... 4
- how to update club data ..... 4
- how to view the club invoice ..... 5
- how to pay membership dues ..... 5

**Note:**

The functions described in these info-sheets are available to all club officers who are reported as such to RI. Included are president, secretary, club executive secretary, treasurer, foundation chair and membership chair.

## UPDATING MEMBERSHIP DATA

All membership changes have to be reported within 30 days, but no later than 30 June and 31 December.

### ADD A MEMBER

1. Go to *Club and Member Data*, and click on *Add/edit/remove members*.
2. Select the *Add Members* link near the top of the page.

Active and Honorary Members 27 record(s)

[Add Members](#)

3. If the member is already (or has been) a Rotarian, click on *Search for an existing member*. To create a new record, click on *Continue*.

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, First Name, Country and Club Name*, and then click on *Submit*.
5. Click on the name of the person you are adding.
6. Enter the requested information, 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 members* and select 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. On the confirmation page, click on *Terminate* and then *OK*.

		Membership ID	Last Name	First Name	Admitted	Member Type	
<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Terminate</a>	00000000	Johnson	Jordan	30-Jun-2006	Member
<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Terminate</a>	00000000	Blair	Wright	31-Dec-2009	Honorary Member

### UPDATE MEMBER INFORMATION

1. Click on *Add/edit/remove members* and select the *Edit* link next to the member's name. This will enable you 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](mailto: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.

[Club Data](#)

[Members](#)

[Contact Information](#)

### UPDATING CLUB OFFICER AND CLUB DATA

#### CLUB OFFICERS

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

1. Go to *Update Member Data* and click on *Add/edit/remove club officers*.

##### A. MODIFY CURRENT OFFICERS

1. Go to *Assigned Current Year Officers*. To modify the *End Date*, select the existing position and click on *Edit Term*. To remove the current officer from the position, click on *Remove*.

Assigned Current Year Officers				
	Position	Start Date	End Date	
<a href="#">Edit Term</a>	<a href="#">Remove</a>	President	01-Jul-2014	30-Jun-2015

##### B. ADD CURRENT OR INCOMING OFFICERS

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

Unassigned Incoming Year Officer Positions	
	Position
<a href="#">Assign</a>	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*.

#### CLUB EXECUTIVE SECRETARY

1. This is an optional officer position to provide administrative services.
2. Your club can assign a Rotarian or non-Rotarian to this position so that he/she gains the same access rights to My Rotary as a club officer.
3. To report a non-Rotarian exec. secretary who is not yet recorded in the RI database, you need to send a message to [data@rotary.org](mailto:data@rotary.org).
4. In the event that the same person continues to serve for several consecutive years, he/she needs to be re-assigned every Rotary year (see section B: "ADD CURRENT OR INCOMING OFFICERS").

#### MEETING PLACE DETAILS

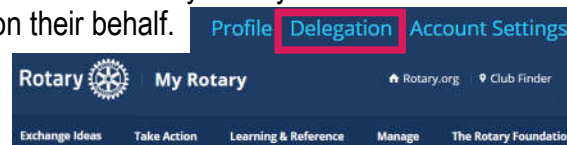
1. Go to *Update Member Data* and click on *Update meeting details*.
2. To modify the meeting date, time or place, click on *Edit*, then enter the new details. To validate, click on *Submit Changes*.
3. To submit alternative meeting dates, times or places, please contact Data Services at [data@rotary.org](mailto:data@rotary.org).

#### CLUB'S CONTACT INFORMATION

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

#### DELEGATION

*Club officers can delegate temporary permission to an individual in the same club who has an active My Rotary account to conduct online Rotary business on their behalf.*



### CLUB INVOICE

At the beginning of July and January, each club is sent an invoice that states the amount of membership dues, subscriptions, and any outstanding balances owed to Rotary. **As the club invoice is calculated on the membership counts reported to Rotary by the club**, the club secretary must report all membership changes in My Rotary within 30 days, but no later than 1 July and 1 January. Once issued, the bill is definitive and cannot be adjusted.

### VIEW THE AMOUNT OWED TO RI

To allow the club treasurer to view, print and pay the club invoice online, the club president or secretary must first add the club treasurer to the RI database. (See "Updating Club Officer and Club Data".)

In the *Club Administration* menu, click on *Club invoice*.

The outstanding balance is shown in USD and in your local RI currency, converted at the current month's [exchange rate](#).

#### Account Overview

ITEM NUMBER	ITEM DATE	ITEM DESCRIPTION	USD AMOUNT
<input checked="" type="checkbox"/>	01-Jul-2016	Semiannual Dues	1120.98
		Outstanding Balance	1120.98

#### Download

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

#### Make Payment

Payment Amount   
 Euro   
 USD equivalent **1245.53**  
 Current RI Exchange **0.90**  
  
 Dues are calculated based on RI membership information of 1 January and 1 July. Payment is due upon receipt. If you have questions about your account, please contact your Representative.

[To pay online](#)

### PAY ONLINE

1. Under *Account Overview*, select the items you wish to pay and, if necessary, change 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. To finalise the payment, enter your credit card information and click on *Continue*.

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