

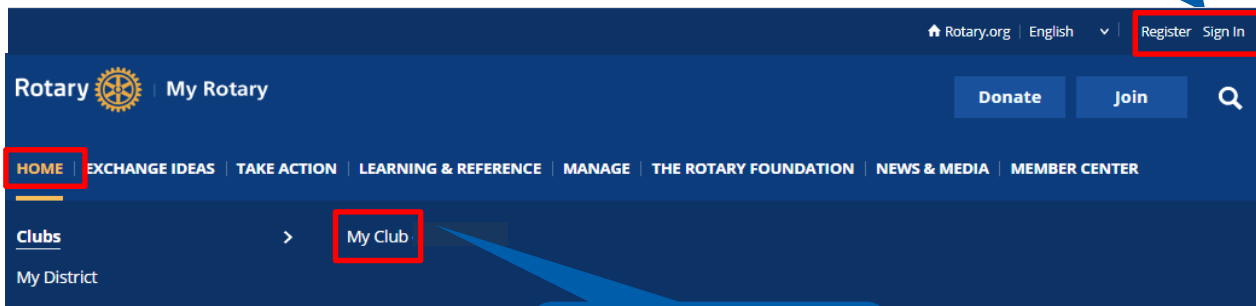
HOW TO CHOOSE OR CHANGE A CLUB MANAGEMENT VENDOR



1

GO TO YOUR CLUB'S PAGE

Go to My Rotary and sign in.
Or select **Register** to get a My Rotary account.



Select **HOME**, then **My Club**.

In the **My Club** page,
scroll down to **Club Management Systems**.

2

CHOOSE THE VENDOR YOU HAVE AN AGREEMENT WITH TO UPDATE CLUB DATA

Club Management Systems



Select **EDIT** to choose a club management vendor.

Edit Club Management Systems

A Rotary or Rotaract club can simplify its recordkeeping and support Rotary programs and membership by using one or more club management vendors to share club members' personal data among the club, Rotary International and the club management vendorlink its own membership records to Rotary International's database. A district or zone may also use a vendor to view club members' personal data if the club allows that vendor access to club information. (Note that, though more than one vendor may be authorized to view a club members's personal data, only one may update the data.)

First, your club must be a customer of a club management vendor. Find a list of the vendors that provide database services on the Club Management Systems & Website Providers page of My Rotary. Then, your club can allow the vendor access to club members' personal data by choosing the appropriate link below.

Please visit RI's Privacy Policy (found at <https://my.rotary.org/en/privacy-policy>) for more information about how RI processes personal data. Please consult with the Club Management Vendor to determine its practices for processing personal data.

Note: You can allow multiple vendors view-only access but only one vendor can update your data. Repeat this process as many times as necessary if you allow multiple vendors view-only access to your club data.

Vendor	Start Date	Access Type	Access For
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Select **+ ADD VENDOR**.

Add Club Management Vendor

Please review the Agreement below and click on "I Agree" to submit your authorization and authorize Rotary International to complete the data integration process and submit your authorization.

Rotary Club and Rotaract Club Authorization to Initiate Data Integration Agreement

SELECT THE VENDOR AND ACCESS LEVEL

Club Management Vendor*

Choose the vendor you have an agreement with from the list.

Vendor Access Level*

- View & Edit Access. Allow the vendor to view and edit your club data.
- View-Only Access. Allow the vendor view-only access to your club data.

Select **View & Edit Access**.

You can choose only one vendor to update club data in Rotary's database on your club's behalf.

If your club and district use the same vendor, only select that one.

Check the **Certification** box.

Certification*

I agree to the terms and conditions set forth in this Rotary Club and Rotaract Club Authorization to Initiate Data Integration Agreement.

Start Date

6/29/2020

By clicking the "I agree" button, I make the representations and warranties and agree to abide by the terms and conditions set forth below and, authorize RI to complete the data integration process in rotary.org/myrotary.

I AGREE

CANCEL

3 CHOOSE A VENDOR TO VIEW CLUB DATA

Edit Club Management Systems

A Rotary or Rotaract club can simplify its recordkeeping and support Rotary programs and membership by using one or more club management vendors to share club members' personal data among the club, Rotary International and the club management vendorlink its own membership records to Rotary International's database. A district or zone may also use a vendor to manage its membership records. (Note that, though more than one vendor may be used, only one may update the data.)

First, your club must be a customer of a club management vendor. For more information on the Club Management Systems & Website Providers page of My Rotary. Then, your club must be authorized to share club data by choosing the appropriate link below.

Please visit RI's Privacy Policy (found at <https://my.rotary.org/en/privacy-policy>) to learn more about how we process personal data. Please consult with the Club Management Vendor to determine its privacy policy.

Note: You can allow multiple vendors view-only access but only one vendor can manage your club data. You can update the process as many times as necessary if you allow multiple vendors view-only access to your club data.

If your club and district are using different vendors, you can select additional vendors to view your club's data.

Vendor	Start Date	Access Type	Access For	
ClubRunner	04/11/2016	View & Edit	My Club	TERMINATE

Select + ADD VENDOR to add a view-only vendor.



Rotary Club and Rotaract Club Authorization to Initiate Data Integration Agreement

SELECT THE VENDOR AND ACCESS LEVEL

Club Management Vendor*

Swiss RCMS - SEMDA

Choose the vendor you have an agreement with from the Club Management Vendor list.

Vendor Access Level*

View-Only Access. Allow the vendor view-only access to your club data.

Select View-Only Access.

Please indicate why you're authorizing Rotary International to enable club data integration with this vendor*

- Club intends to use vendor's services to manage club data
- District intends to use vendor's services to view club data

Select who will be able to view club data (club or district).

Check the Certification box.

Certification*

I agree to the terms and conditions set forth in this Rotary Club and Rotaract Club Authorization to Initiate Data Integration Agreement.

Start Date

6/29/2020

By clicking the "I agree" button, I make the representations and warranties, terms and conditions set forth below and, authorize RI to complete the data at rotary.org/myrotary.

Select I AGREE.

I AGREE

CANCEL

Edit Club Management Systems

A Rotary or Rotaract club can simplify its recordkeeping and support Rotary programs and membership by using one or more club management vendors to share club members' personal data among the club, Rotary International and the club management vendorlink its own membership records to Rotary International's database. A district or zone may also use a vendor to view club members' personal data if the club allows that vendor access to club information. (Note that, though more than one vendor may be authorized to view a club members's personal data, only one may update the data.)

First, your club must be a customer of a club management vendor. Find a list of the vendors that provide database services on the Club Management Systems & Website Providers page of My Rotary. Then, your club can allow the vendor access to club members' personal data by choosing the appropriate link below.

Please visit RI's Privacy Policy (found at <https://my.rotary.org/en/privacy-policy>) for more information about how RI processes personal data. Please consult with the Club Management Vendor to determine its practices for processing personal data.

Note: You can allow multiple vendors view-only access but only one vendor can update your data. Repeat this process as many times as necessary if you allow multiple vendors view-only access to your club data.

Vendor	Start Date	Access Type	Access For	
ClubRunner	04/11/2016	View & Edit	My Club	TERMINATE
Swiss RCMS - SEMDA	06/29/2020	View-Only	My District	TERMINATE

+ ADD VENDOR

Both vendors now show on the Edit Club Management Systems page.

You can use multiple vendors to view club data. Because view-only vendors can't update club data, changes you make through their software will not be made in Rotary's database.



4

CHANGE VENDORS TO UPDATE CLUB DATA

Edit Club Management Systems

A Rotary or Rotaract club can simplify its recordkeeping and support Rotary programs and membership by using one or more club management vendors to share club members' personal data among the club, Rotary International and the club management vendor linking its system to Rotary International's database. A district or zone may also use a vendor to view club members' personal data if the club has provided the necessary information. (Note that, though more than one vendor may be authorized to view a club members' personal data, only one vendor can update the data.)

First, your club must be a customer of a club management vendor. Find a list of the vendors that provide data management services on the Club Management Systems & Website Providers page of My Rotary. Then, your club can allow the vendor access to club member information by clicking the link below.

Please visit RI's Privacy Policy (found at <https://my.rotary.org/en/privacy-policy>) for more information about how we use your information. You should also consult with the Club Management Vendor to determine its practices for processing personal data.

Note: You can allow multiple vendors view-only access but only one vendor can update your data. Repeat this process as many times as necessary if you want to allow multiple vendors view-only access to your club data.

Go to **Edit Club Management Systems** and select **TERMINATE** next to the vendor with View & Edit access.

Vendor	Start Date	Access Type	Access For	
ClubRunner	04/11/2016	View & Edit	My Club	TERMINATE
Swiss RCMS - SEMDA	06/29/2020	View-Only	My District	TERMINATE

+ ADD VENDOR

Are you sure you want to terminate this vendor?

This cannot be undone.

Select **CONFIRM**.

CONFIRM

CANCEL