Club Secretary Handoff Checklist



By first week in June

Activity	Outgoing Secretary	Incoming Secretary
Have a working login for RI Member Access (a User Name & Password that works)		
Have used outgoing Secretary's RI Member Access login to visit and explore the "Update Membership Data" section of RI Member Access		
Have verified that incoming President and Secretary are identified in RI Member Access "Update Club Data" (these change automatically on July 1) (<i>should have been done in January for RI Directory</i>)		
Have verified that incoming club officers are identified in District Website (president-elect, Secretary-elect, treasurer-elect) (these will change automatically on July 1)		
Retrieved and saved most recent Club Recognition Summary (CRS) & Monthly Contribution Report (MCR) reports from Member Access and emailed to Club President and Foundation Chair		
All membership information available and ready to file Semi-Annual Report		
Have a working login for the District Database (a User Name & Password that works)		
Have successfully updated my own member profile in the District Database		
Know how to add a member to the RI Database, retrieve the RI Member Number, and then add the member to the District Database		
Know how to take meeting attendance in the District Database		
Know how to take meeting attendance offline from the District Database and then upload		
Know how to report attendance (monthly) in the District Database		
Copied any club-related electronic files (documents, etc.) to a CD or Flash Drive and passed on to incoming Secretary		
Have a computer with a high speed connection at home or the office to do club work – have loaded all club-related electronic documents received from outgoing Secretary		
Have a copy of the Club Secretary's Manual, available from District or RI Websites: http://www.rotary.org/RIdocuments/en_pdf/229en.pdf		

First week in July

Activity	Outgoing Secretary	Incoming Secretary
Have reported the club's June attendance in the District Database		
Ready to take attendance for first July meeting in the District Database		