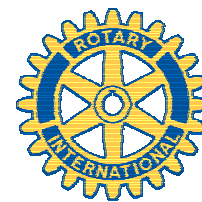


Club Secretary Handoff Checklist



By first week in June

Activity	Outgoing Secretary	Incoming Secretary
Have a working login for RI Member Access (a User Name & Password that works)		<input type="checkbox"/>
Have used <u>outgoing Secretary's RI Member Access login</u> to visit the "Update Membership Data" section of RI Member Access		<input type="checkbox"/>
Have verified that incoming President and Secretary are identified in RI Member Access "Update Club Data" (these change automatically on July 1)	<input type="checkbox"/>	
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	<input type="checkbox"/>	
All membership information available and ready to file Semi-Annual Report	<input type="checkbox"/>	
Have verified that incoming club officers are identified in District Website (president-elect, secretary-elect, treasurer-elect) (these will change automatically on July 1)	<input type="checkbox"/>	
Have a working login for the District Database (a User Name & Password that works)		<input type="checkbox"/>
Have successfully updated my own member profile in the District Database		<input type="checkbox"/>
Know how to report attendance in the District Database		<input type="checkbox"/>
RI-CAS Clubs		
If needed, have downloaded a copy of the RI-CAS install file and given to incoming Secretary	<input type="checkbox"/>	
If planning to run RI-CAS on a personally-owned computer, have a downloaded copy of the RI-CAS install file, and have successfully installed RI-CAS on my machine		<input type="checkbox"/>
Have run a backup of the RI-CAS database and given to incoming Secretary for "trial restore"	<input type="checkbox"/>	
Have successfully restored a "trial" backup of my club's RI-CAS database		<input type="checkbox"/>
Have a configured email client (Outlook, Outlook Express, etc.) on my machine		<input type="checkbox"/>
Have a copy of the Club Secretary's Manual, available from District or RI Websites: http://www.rotary.org/newsroom/downloadcenter/pdfs/229en.pdf		<input type="checkbox"/>

First week in July

Activity	Outgoing Secretary	Incoming Secretary
Have reported my club's June attendance in the District Database	<input type="checkbox"/>	
RI-CAS Clubs		
Have run a "Send Month-end Data to District" from RI-CAS for June	<input type="checkbox"/>	
Have run a backup of the RI-CAS database and given it to incoming Secretary (all June attendance complete)	<input type="checkbox"/>	
Have successfully restored a year-end backup of my club's RI-CAS database (and saved the year-end backup)		<input type="checkbox"/>