

Portal Instructions

Introduction

The Indiana Retired Teachers Association website includes a membership portal which allows authorized members to access membership data. The portal has been designed to provide the information needed to assist area directors and local membership committees with information needed to contact area teachers, both active and retired.

Username and passwords are required to access the portal and will be distributed to all area directors and local presidents. Local presidents are encouraged to share them with membership chairs or other authorized users. Area directors will have access to information for each local in their area. Local users will only have access to their chapter information.

All users are expected to use the information confidentially, and only for the purpose of being able to provide the state office with accurate updates, to contact active teachers regarding membership and benefits in the organization, and to maintain local records of retired teachers.

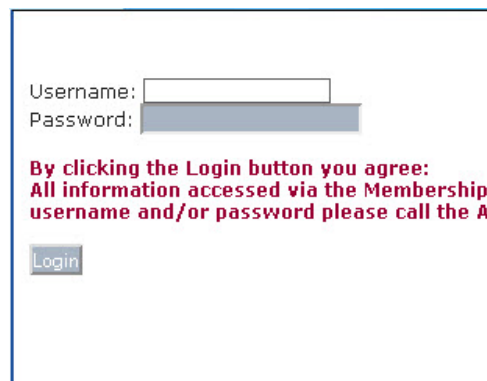
A cadre of computer facilitators is available to assist local chapters in the use of the portal. Please contact the IRTA office for the facilitator in your area, if not listed at the end of this document.

Accessing the Portal

The membership portal can be accessed in a number of ways. You are encouraged to book-mark the login page for future ease of access!

1. Use your favorite browser and go to www.retiredteachers.org. Click on «Membership.» Scroll down the bar at the left and click on «Leadership Portal.»
2. Scroll down the new page and click on “Leadership Portal” in the red box at the bottom of the page.

Login



Username:

Password:

**By clicking the Login button you agree:
All information accessed via the Membership
username and/or password please call the A**

Login

You have come to the right place if you see a screen that looks like this.

Enter your assigned username and password, then click on “Login.”

Once you have logged in successfully, you will see a screen that looks like this:

Enter as many search terms as you like, partial terms also work. All fields blank will return all names in your area.

Last Name: First Name: City: State: Zip:
Limits: Regular Member Associate Member Life Member Paid/Unpaid Dues Deduction
 County Sort By Active Teachers Minimum Age

Click here to search for records after you have set the limits
Click here to download mailing lists
Click here to logout when you are finished

Selecting All Information and Viewing on the Screen

Selecting information is relatively straightforward.

1. In the “County” box, you will find only the name of your local chapter, unless you are an area director. In that case, the names of all local chapters in your area will be listed and you may select all or none of them.
2. If you do not enter any information and do not select any limits, you will get a list of all names in your area when you click on the “Search” button
 - a. Column 1: Name
 - b. Column 2: Mailing Address
 - c. Column 3: City, State, Zip Address
 - d. Column 4: Membership Status
 - i. R = Regular Member (a retired teacher who is a member of the Teacher Retirement Fund (TRF), and receiving a pension.
 - ii. A = Associate Member (an active teacher who is a member of the TRF, or a friend of education who has joined IRTA
 - iii. L = Life Member (a retired teacher who is a member of TRF and has paid life membership dues
 - e. Column 5: The expiration date for IRTA members (Note that there is no expiration date for Life members
 - f. Column 6: If the member’s dues are being paid through Dues Deduction, there will be a “DD” in this column
 - g. Column 7: An icon of a pencil tip. By clicking on the icon, a drop-down box will open with the above information plus phone numbers, email address, and the name of the school corporation in which they are currently employed, or from which they retired. The box can be closed by clicking on “Close.”

Selecting Limited Information and Viewing on the Screen

You may enter as many search terms as you wish depending on the kind of information you are looking for. The limits of your search are relatively straightforward, and it is suggested that you experiment with the possibilities to get the information you want.

1. By entering any or all of the information listed on the first line, you can locate members by name or address. Entering a certain zip code, for instance, would only give you the persons in that area.
2. Selecting “Regular” will only give you paid regular members
3. Selecting “Associate” will only give you paid associate members
4. Selecting “Life” will only give you life members (obviously, paid!)
5. Use the “Paid/Unpaid” drop-down box as follows:
 - a. Do not select a member type as they return only paid members
 - b. Selecting “All” is the same as not entering any information
 - c. Selecting “Paid” will return only active, paid members of IRTA
 - d. Selecting “Unpaid” will return all members who have not paid IRTA dues
6. Use the “Dues Deduction” drop-down box as follows:
 - a. Selecting “Only” will return all members who have dues deducted
 - b. Selecting “Exclude” will return all members except those who have dues deducted
7. As stated earlier, area directors can select information by county using the “County” drop-down box
8. Information can be sorted in a variety of ways by using the “Sort By” drop-down box
9. By clicking on the “Active Teachers” box a list of current, active teachers will be returned, coded with shading as noted in the box above. You can limit the search on active teachers by using the “Minimum Age” drop-down box and making a selection (this would be helpful for making local membership predictions)

Using the Mailing List Feature

Once you have limited your search and have viewed the information online, you can download the information on one of two ways. Click on “Mailing List,” and you will see the two options available.

1. Download Excel List
 - a. An Excel file will be downloaded to your computer which can be used at your discretion as you would any other spreadsheet
 - b. If you have selected all information, the “Member Type” on the spreadsheet will only list “R,” “A,” or “L” for those whose dues are current
 - c. Address State will be listed as “Bad” if the current address is incorrect

- d. The expiration date for Life members has been entered as 3000
- e. If you are familiar with Excel, there is no limit to the kinds of sorting you will be able to do on your own

NOTE: *The Excel document you download will be in .csv (comma delimited) format!* For future use it is recommended that you do a “Save As.”

In the *File Name:* box, give the file a name that will be meaningful to you. In the *Save As Type:* box, select the Microsoft Worksheet version that you will be using.

- 2. Download PDF Labels
 - a. You can print mailing labels directly from the download
 - b. You can save the PDF file(s) and print the labels as needed
 - c. The labels will be formatted for 1 inch x 2 5/8 three-across labels, compatible with Avery © 5160 or 8160

Logout

When you click on “Logout” you will be redirected to the IRTA Home page.

Additional Suggestions

- 1. As indicated earlier, if you bookmark the login page, you will have easy access to the portal when you need it.
- 2. The downloaded Excel files will be assigned a number. It’s good practice to rename the file immediately to help you identify it later. For example, you might rename it Local Paid, or Local Life, etc., depending on what sorting criteria you used. (See the NOTE at the bottom of page 3 for additional information regarding saving files.)
- 3. You can only become proficient in using the portal by practicing!
- 4. Please bring any errors you find to the attention of the IRTA by either calling the office (888-454-9333) or, preferably, by sending an email to info@retiredteachers.org.

Portal Facilitators

The following persons have currently been identified as Portal Facilitators. If you have any questions, please feel free to contact them.

Calvin Biddle	Area 9	812-354-8069	caljbiddle@gmail.com
Jane Boultinghouse	Area 9	812-649-4632	jebretired@gmail.com
Dennis Bourquein	Area 7	812-934-4454	bourquein@etczone.com
Barry Conrad	Area 6	260-568-3002	conrad711@gmail.com