

## How to identify new members who completed the CTA Online Membership Enrollment Form

Follow these steps to generate the “CTA Membership Transactions by Source” report:

1. Log into MyFalcon/Falcon/CTA 360Pro
2. Navigate to the Local organization profile
  - a. If you are a CTA 360Pro user, simply click on the Reports icon from the homepage, skip to step 4
3. Click on the report icon  located in the upper right-hand corner of the screen
4. Select “CTA Membership Transactions by Source” from the reports list
5. A report parameters page will appear. Select from the following options:

**CTA Membership Transactions by Source**

*Report Parameters*

Created From  

Created To  

Source Type  

- a. Created From – enter the first date of the date range you would like to generate
  - b. Created To – enter the last date of the date range you would like to generate
  - c. Source Type – select “Certificated Online”, or your desired source type, from the drop-down options
6. Click “GO”
7. When the report results appear, click on the export icon  and select “Excel”

Email Address	Contact ID	First Name	Last Name	Start Date	NEA Category	CTA Category	LEA Category
TEST@TEST.ORG	10449989	JUNE	BUGGS	7/1/2020	61% - 100%	61% - 100%	61% - 100%
KSKSK@HAJA.COM	10449837	KID	KIDD	7/1/2020	61% - 100%	61% - 100%	61% - 100%

## Important Notes and Reminders

- Completed online enrollments are saved to CTA’s database immediately; however, the records will be available to view on the “CTA Membership Transactions by Source” report as of midnight the following day.
  - For example, if an online enrollment form is completed today, you will have to wait until tomorrow to run the report and see the new record.
- For immediate confirmation that an online enrollment form was completed, you can do any of the following:
  - Login into MyFalcon/Falcon/CTA 360Pro/CTA 360 and search for the new member. Their individual profile and membership information will be available immediately upon completion of their online enrollment.
  - Run another available report, such as the “CTA Simple Roster” report and sort by date to see the most recent additions to the roster.
- The “CTA Membership Transactions by Source” report can also be utilized to generate enrollments completed via the CTA 360 mobile app. Simply select “CTA 360” from the report parameters page.

## Next Steps

- To ensure payroll dues deductions are initiated for new members in a timely manner, CTA asks that local leaders generate the “CTA Membership Transactions by Source” report on a regular and frequent basis and provide the new member data to the district payroll office.
- As an additional resource, CTA will continue to provide a weekly report to the Local President of new membership enrollments completed via the CTA online enrollment form and CTA 360.