Membership Management System (MMS)

Basic Instructions for Circle Advisors

2018-19

Table of Contents

- What is MMS?
- How to Access My MMS Account
- Log In Credentials
- Officer Administration Page
- Edit Your Account
- Developing Your Membership Applications
- Application Review, Approval, and Rejection
- Special or Surprise Inductions
- Change a Membership Application
- Membership Payments
- Membership Certificate Order

- Returning Certificates/Pins
- Clearing Unhandled Records
- Downloading Past Certificate Orders
- Search for an Individual Member
- Exporting Rosters
- MMS Assistance

What is MMS?

- MMS refers to the Membership Management System developed by Omicron Delta Kappa to coordinate the mandatory national membership application, approval, and certificate process.
- MMS allows circle advisors, and with some limitations circle presidents, to:
  - Approve or reject individuals who have applied for membership
  - Review initiation rosters from previous years
  - Download reports and spreadsheets of applicants and approved members
  - Manage their personal administrative accounts
- MMS provides specific initiation reports but not real time membership rosters and contact information.

How to Access My MMS Account
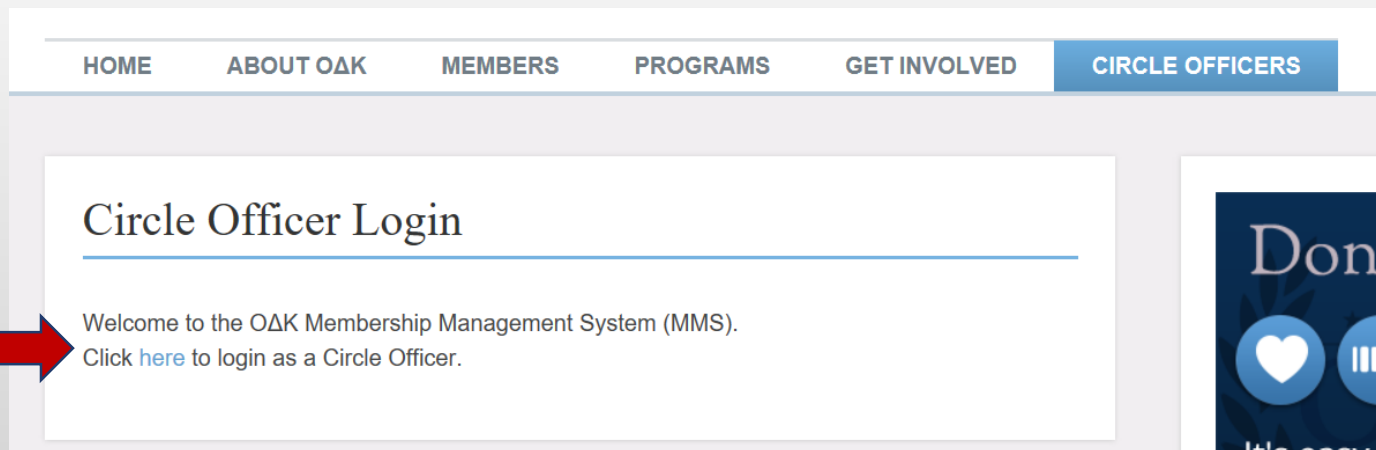
Login Credentials

- Click "Circle Officer Login" under "Circle Officers" tab:
- If currently listed as a circle officer, you will automatically have an account created for you. Your email address serves as the login.
- If you have trouble remembering your password or need an account created for you or for student officers, email the Membership Services Coordinator, at odknhdq@odk.org.
- On your first time logging in, you should create a new password. To do this, click on the link labeled, "Forgot your password." This link will take you to a form that will ask for your email address. After you submit your email address, you will receive an email, to that address, that will include a link to create a new password.

Please enter your login name and password below:

Email:

Password:

ENTER

Forgot your password?

OMICRON DELTA KAPPA
The National Leadership Honor Society

Circle Officer Login

The National Leadership Honor Society Membership Form

You can also login by clicking the "key" at the top of the membership application.

Officer Administration Page
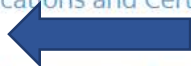
Edit Your Account

- To further edit your account, click "Edit Your Account" from your Circle Administration page. You will be taken to a page containing all of your stored information.
- You should ensure all information is complete and updated regularly to maintain the most current information. You can also change your password from this page by typing in a new password in both fields that ask for it.
- You may also click the checkbox so you are sent an alert by e-mail whenever an individual submits an application for membership at your institution. We recommend you do this during membership recruitment time unless you check your applications page regularly.

Developing Your Membership Application

Beginning in July 2018, circles have the ability to tailor the national membership application to suit their needs.

- The basic membership information (name, email, address, etc.) is required and cannot be changed.

- The application a prospective member sees will be determined by the "Class" they select. If an applicant selects "Junior," s/he will receive the application with academic data and custom questions. If the applicant chooses Faculty/Staff, s/he will receive an application that has fewer fields unless the circle requires them in the specialty section.

- The three areas that can be tailored by a circle are:

    1. **Pin Type:** Choose 1 pin for all members or allow members to select from the 3 pins offered by ODK.
    2. **Specialty Selections:** This allows circles to collect employment information about members who are not juniors or seniors. It also allows to seek information about past higher education degrees for graduate students and faculty/staff appointments. Circles may also ask for the student's institutional ID number, if required.
    3. **Custom Questions:** This section allows circles to select up to 20 questions from our database to include on your application. Everything from short statements about phases to essays is available.

- The default application is the new basic version with a few extra fields added by the national headquarters. If you do not change any fields, this is the application your prospective members will see.

A Dynamic Application

- The new application is dynamic. It *changes* based on the first two (2) choices made by the applicant.

- When first opened in a web browser, ALL applicants see the same application.

- The **first** change occurs when they select College/University. This narrows their choices to only that circle.

* College/University Name:	Z Test Circle

- The **second** change occurs when they choose Initiation Class. Juniors and Seniors may see a different application depending on the selection made in the Special Request Fields.

* Initiation Class:
- ◉ Junior
- ○ Senior
- ○ Graduate Student
- ○ Faculty/Staff
- ○ Alumni
- ○ Honoris Causa

Changing Membership Application Fields

Custom Text Fields

- Highlighted fields above represent fields selected by the circle to appear on the application

Before Selection

After Selection

Don't forget to Submit!

SUBMIT

Special Items & Pin Type

Special Request Fields

You can limit the items non-students view and control specific items like Student ID, employment and university history for non students.

For the above selected questions, ask:
- ○ Juniors/Seniors/Graduate Students Only
- ● Everybody

- ☐ Ask for Student ID
- ☐ Ask for current employment information (non junior/senior)
- ☑ Ask for college/university history (non junior/senior)

Pin Type

You can allow students to select one of three pin types or remove the choice and select to have all student receive the same pin.

Pin Type:
- ● Laurel Crowned
- ○ Traditional
- ○ 1914
- ○ Let applicant choose pin type

Application Development Timeframe

- Application revisions should always occur BEFORE you start accepting applications for a cycle. All applicants should receive the same application version.

- Any field(s) you add to the application will add data to your spreadsheet downloads.

- To remove a selected Custom Question: Select Control/Enter
  - If you remove this field, the column will remain since the older data is still in the system.

- You can manage your downloads by simply deleting spreadsheet columns you do not use once you have completed the download.

Special or Surprise Initiation

Many circles want to surprise a faculty member, alumnus, or honoris causa member with initiation into OΔK. That is perfectly fine to do. Please note the following:

- Anyone using the circle's customized form will receive notification that an application has been received.

- If you do not want your "surprise inductee" to be notified, you can complete the application form that individual.

- This is the ONLY time you can complete an application for the individual.

- This should not be used for student inductees.

To complete the special or surprise application:

1. Go to the Administration Area on MMS.
2. Select "Create and Submit a Membership Application"
3. Complete the form with all information and submit.

Because the advisor is completing the form, the advisor will receive confirmation from the system that application has been received.

Membership Applications and Certificate Order Forms
Edit Your Account
Edit Your Circle's Membership Application

Create and Submit a Membership Application

Application Review and Approval

- There are 3 steps in the Application Review and Approval Process:
  - Review Applications
  - Approve/Reject Applications
  - Certificate Order Processing

- <u>All of these steps must be completed no less than 14 calendar days prior to your initiation ceremony.</u> This ensures that OΔK can process your order, print certificates, and ship them to you in time. Many times is takes less than 14 days. However, in order to qualify for national recognition, the circle must meet the 14 day rule.

- Only faculty advisors and circle coordinators are permitted to access applications. Applications can be printed for officers or committee to review.

- Advisors can download a spreadsheet of application information to provide to officers or committee as well.

Application Review

- The online Membership Application form is designed to be processed online.

- IMPORTANT NOTICE: <u>Effective July 2017,</u> **we no longer permitted circle coordinators, faculty advisors, or other members of the circle to complete an application for the initiate. This includes FACULTY/STAFF and ALUMNI because the application constitutes a contract and includes permissions that must be accepted by the member, a third party may no longer complete the application for the initiate. Honoris Causa can be completed by a third party but MUST include all required information accurately submitted.**

- When an application is submitted it will be made available for review by the circle advisors at the circle where the member is applying. <u>Email notification is not given unless you specifically request for this to be turned on.</u>

- To review submitted applications:
  - Go to Circle Officer Login and login.
  - Go to Circle Admin Page. Click on the "Membership Applications and Certificate Order Forms" link.
  - On this page you will notice the bold "Unhandled." This means that the application has not been approved or rejected.
  - Select the name to view the submitted application.
  - The Faculty Advisor or Circle Coordinator can then accept or reject membership applications.
  - Once all applications have been accepted or rejected, the initiation class has been established.

Application Approval/Rejection

- By clicking on the name of the individual, you will be shown a copy of the membership application submitted by the prospective member. Individuals are not considered members until their membership fees are paid to the national headquarters, their application is accepted and ordered, and they attend an initiation ceremony. (See Membership Payment slide)

- Rejected applications will be stored on a page called Rejected Applications, while the approved applications will appear with the bold term "Accepted."

- The membership certificate order form will automatically include the names of approved applicants.

- Each column can be sorted by clicking on the column header in blue.

Applications not yet on any certificate order:

Name	App Date	Class	Acc/Rej/Unh	Paid Fee	Print checked
Timothy Reed	2018/08/31	Faculty/Staff	◉ / ○ / ○	☑	☐
Wilbur Jones	2018/08/31	Faculty/Staff	◉ / ○ / ○	☑	☐
Test test	2018/08/09	Junior	◉ / ○ / ○	☑	☐
Rohan Roger	2018/05/03	Senior	◉ / ○ / ○	☐	☐
			Accept all / Reject all / Unhandle all	Set all as paid	Select all to print / Clear all

Membership Acceptance

- The Omicron Delta Kappa Bylaws state that no one should receive the symbols of membership (certificate and pin) prior to payment of the National Lifetime Membership Fee.
- We recommend you set a deadline for payment of fees. Only after you have received the fees or confirmation from the National Headquarters that we have received the payment online, should you process the Certificate Order Form through MMS.
- If an accepted applicant did not pay the fees, a circle officer can reject that application before it is processed.

Change a Membership Application Form

- If you need to reject or accept a candidate AFTER you have submitted the final order. You must do this BEFORE the order is processed.

  (We do not recommend this but it may be necessary if a student pays late or decides to drop out BEFORE we process the order.)

1. Open the Membership Order Form
2. Select the Membership Summary
3. Select and Open the Member Application
4. Scroll to Bottom, Accept or Reject AND mark paid or unpaid.
5. Select Save Changes
6. Double Check the Certificate Order to ensure Name has been added or removed from the order.
7. FINAL STEP: **Notify ODK HQ that you have made any alterations IMMEDIATELY.**

Click here for member summary

	App Date	Class	Acc/Rej	Paid Fee	Print checked
Louise Latture	2017/10/11	Honoris Causa	Accepted	☐	☑

Membership Payment

- The circle is responsible to make sure each new member pays the national lifetime membership fee. There are two options:
- **Circle Pays from Invoice** - Each circle has the option to either collect the fees from the initiate and remit a single check or credit card payment to the national headquarters.
- **Initiates Pay via web form** - Initiates can also pay online, but the circle is responsible to verify that each new member has paid before the initiation date. http://odk.org/national-membership-enrollment-and-payment/

  ❖**NOTE**: Individuals are not considered members until their membership fees are paid to the national headquarters, their application is accepted and ordered, and they attend an initiation ceremony.

Membership Certificate Order

- Once your circle accepts applications, the Faculty Advisor or Circle Coordinator must submit **a Membership Certificate Order Form** to complete the membership process.
- The link to this order form will only be visible after accepting applications that have yet to have been ordered. The link to the order form will appear underneath the list of applications and above the "See Rejected Applications" link.

- The membership certificate order form will automatically include the names of accepted applicants.
- **Please verify the individuals, spelling of names, and the total number, fill in all the remaining information including shipping address, and submit the membership certificate order form.**
- **You MUST click SUBMIT for your order to be processed.** We recommend you email ODK headquarters (odknhdq@odk.org) to ensure your order has been received.

Example of the Certificate Order Form

Important things to look for:

1. Make sure all the names are spelled correctly and are appropriate. OΔK does not permit nicknames like "Scooter" on the certificate.

2. Are the numbers correct? Did you miss approving someone?

3. Is the initiation date correct? (In January, we get many "the year before" dates!)

Initiation Date: (MM/DD/YYYY)	2018/04/08

Member's names:

Timothy A. Reed

Matthew I. Hibdon

Click here for member summary

Total number of Juniors:	2
Total number of Seniors:	0
Total number of Graduate Students:	0
Total number of Faculty/Staff:	0
Total number of Alumni:	0
Total number of Honoris Causa:	0
Total number of new members:	2
Total cost (Membership fee is $88.00):	$176.00

Returning Certificates/Pins

- The official policy of Omicron Delta Kappa is that there are no refunds once certificates have been printed.
- We will refund membership fees provided the certificate and pin are returned to the OΔK Headquarters no less than 30 days after the initiation ceremony. After 30 days, OΔK has the right to refuse to refund the fees. *Please note that because the individual was not fully initiated, he/she will still not be considered a member of OΔK even if the fees were not eligible for a refund.*
- If the certificate and pin are returned, a credit will be issued to the circle or individual (depending on original payment) of $80.00 ($88 less an $8 certificate fee).
- If the pin is not returned, an additional $10.50 will be withheld from the credit.
- If no certificates or pins are returned, the circle will be held accountable for all membership fees approved as part of the membership order.

Clearing Unhandled Records

- Once a ceremony has been held, all fees are fully paid, and the initiation process is closed, the circle advisor should log in to MMS and process "unhandled" applications.

- All unhandled applications should be marked "rejected."

- Once this process is complete, the application queue should be empty and ready for the next round of applications.

- OΔK national headquarters will audit all circle records on an annual basis and reject any application that has been left "unhandled" for more than 12 consecutive months.

Downloading Past Certificate Orders

- Advisors can download past certificate orders, Excel or .csv file of applications, initiated or rejected members, and unhandled records.
    1. Select Membership Applications and Certificate Order Forms
    2. Select Certificate Form you want, open and print.

Administration area for Z Test Circle

Membership Applications and Certificate Order Forms
Edit Your Account
Edit Your Circle's Membership Application

See Rejected Applications

Past Certificate Orders

Certificate Order Form -- 2016/04/04

Certificate Order Form -- 2015/03/11

Search for an Individual Member

- Advisors can now search all MMS records for an individual using the search function under the Membership Applications link.

    1. Select Membership Applications and Certificate Order Forms
    2. Type the name you want to find and select Go.

Administration area for Z Test Circle

Membership Applications and Certificate Order Forms
Edit Your Account
Edit Your Circle's Membership Application

Search for membership applications by name: [   ] GO

Exporting Rosters

- Advisors can download an Excel or a .csv file of applications, initiated or rejected members, and unhandled records.
  1. Select Membership Applications and Certificate Order Forms
  2. Scroll down to "Export of applications based on submission date:"
  3. Enter dates.
  4. Select Status
  5. Click to Download

Export of applications based on submission date:

From:	Select Month
	Select Day
	2017

To (excluding this date):	Select Month
	Select Day
	2018

Status(es):	Initiated
	Accepted but not Initiated
	Rejected
	Unhandled

CLICK HERE FOR .XLS EXPORT OF MEMBERSHIP APPLICATIONS AND CERTIFICATE ORDERS

MMS Assistance

- If you ever need assistance with MMS, do not hesitate to call the OΔK national headquarters (540-458-5336). Our office hours are 8:30 am – 5:30 pm Eastern, Monday through Friday. You can also email us at odknhdq@odk.org

- Some reminders:
  - ✓ Certificate request submission should be placed NO LESS than 14 days BEFORE your CEREMONY.
  - ✓ ALL initiates must have PAID BEFORE we will issue certificates and pins. For circles paying by check, this means an invoice has been issued. For those paying online, we will only process those paid.
  - ✓ Do not count on weekend deliveries for certificate orders.
  - ✓ We will not process refunds after 30 days post-ceremony.