



**OMICRON DELTA KAPPA**  
The National Leadership Honor Society

# Membership Management System (MMS)

Basic Instructions for Circle Officers

2019-20

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# 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

Log In Credentials, Officer Administration Page, Edit Your Account

# Start at odk.org



**OMICRON DELTA KAPPA**  
The National Leadership Honor Society

A screenshot of the Omicron Delta Kappa website. The navigation bar includes links for HOME, ABOUT OΔK, MEMBERS, PROGRAMS, GET INVOLVED, CIRCLE OFFICERS, and DONATE. The CIRCLE OFFICERS menu is expanded, showing links for MMS Login, New for 2019-20, Circle Officer Handbook, Dates and Deadlines, Initiation Process, Materials, and Circle Awards. Below the navigation bar, there are four circular portraits of women, likely current or past Circle Officers.

## MMS Login

Welcome to the OΔK Membership Management System (MMS).

**PLEASE NOTE THAT ALL APPLICATIONS HAVE BEEN SET TO "OFF."**

Circle Advisors must review and revise (if necessary) the circle application in the MMS Administrative Panel. Once the application has been reviewed, the advisor must check "RECEIVE Applications" for the applications to be visible to prospective members.

Click [here](#) to login as a Circle Officer.

[View MMS Guide.](#)

## Circle Officer Links

- [MMS Login](#)
- [New for 2019-20](#)
- [Circle Officer Handbook FY 2020](#)
- [Initiation Process](#)
- [Dates and Deadlines](#)
- [Materials](#)

[Branding and Editorial Guidelines](#)  
[Bulk Honor Cords and Stoles](#)  
[Circle Templates](#)  
[Initiation Materials](#)

Omicron Delta Kappa MMS

Revised: August 2019

# 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](mailto: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?](#)



[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



## Administration area for Z Test Circle

**MMS Instructions** ← [Link to a .pdf of these instructions](#)

**Circle Officers** ← [List of Authorized Officers \(This should be at least 4\)](#)

CIRCLE COORDINATOR	Z Test	Ztest@odk.org
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*If the list of active officers above is not correct, please go the submit changes through the Update Leadership web page:  
<https://odk.org/circle-officers/circle-leadership/update-leadership/>*

**Applications** ← [Manage and Update Your Application](#)

[Customize and Activate Your Circle's Membership Application](#) - *You must review, change, and activate your application before you begin recruiting*  
[Review and Approve Membership Applications](#)  
[Create and Submit a Membership Application](#)

**Certificate Orders** ← [Submit or Review Past Membership/Certificate Orders](#)

[Complete and Submit a Certificate Order Form](#)  
[Review Past Certificate Orders](#)

**Account Management** ← [Download Spreadsheet Report of Members](#)

[Download Excel of Members](#)  
[Edit Your Account](#)

# 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.
- **NOTE: Only OΔK-HQ Staff should create new accounts. DO NOT OVERWRITE previous information for new officers. Each new officer should receive his or her unique ID and password.**



Editing user: smith@university.edu	
Name:	<input type="text" value="John Smith"/>
Login Name/Email:	<input type="text" value="smith@university.edu"/>
Password:	<input type="password" value="...."/>
Confirm Password:	<input type="password" value="...."/>
Check to receive emails when a membership application is submitted	<input checked="" type="checkbox"/>
Title:	<input type="text" value="Director of Student Center"/>
Address line 1:	<input type="text" value="209 Student Center"/>
Address line 2:	<input type="text" value="University"/>
City:	<input type="text" value="University Town"/>
State:	<input type="text" value="VA"/>
Zip:	<input type="text" value="24450"/>
Phone:	<input type="text" value="(540) 458-5339"/>
Fax:	<input type="text" value="(540) 458-5342"/>
First time officer?	<input checked="" type="checkbox"/>
Disabled account:	<input type="checkbox"/>
<input type="button" value="SUBMIT"/>	





# Developing Your Membership Application

# Application Development Timeframe



- Review: Review the previous application for any changes, spelling correction, or changes in information that will improve your application.
- Revise: Revisions should always occur BEFORE you start accepting applications for a cycle. All applicants should receive the same application version.
- Test: Have officers complete “test application” to ensure all fields report in the manner intended. Remember to delete test applications.
- Publish: All application changes are “live” when the “submit” button is selected. Make sure everything is set before you activate your application.

Check to RECEIVE Applications. Uncheck to STOP Applications.

# Application Structure



The National Leadership Honor Society Membership Form (Application) has two types of items: Required (by the Society) and custom (inserted by the circle).

- **Required** items include the basic membership information (name, email, address, etc.) is required and cannot be changed. The default application has the required items and the pin selection is open. If the circle does not change any fields, this is the application your prospective members will see.
- **Custom** items are those that the circle chooses to select and add to the application. Only the items selected and approved by the circle will appear on the application seen by individuals on your campus.



# How Custom Questions Work

- The new application is dynamic using Branching logic. It *changes* based on the first two (2) choices (branches) 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. *(If your school does not appear, the "RECEIVE Applications" box is not checked.)*

\* College/University Name:

- 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.
- 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 only the fields the circle requires for them.

\* Initiation Class:

- Junior
- Senior
- Graduate Student
- Faculty/Staff
- Alumni
- Honoris Causa



# Customize the Application

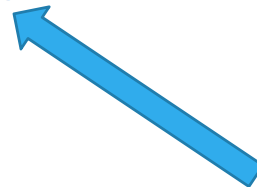
- To edit your custom fields, select “Customize and Activate Your Circle’s Membership Application”

## Applications

[Customize and Activate Your Circle's Membership Application](#) - *You must review, change, and activate your application before you begin recruiting*

[Review and Approve Membership Applications](#)

[Create and Submit a Membership Application](#)



**Start Here**

# Activating/Deactivating Your Application



All application forms are “UNCHECKED” on July 1 each year to allow for the system to reset. Any active application is retained. No new applications can be submitted until the circle checks the box to RECEIVE Applications.

## ❖ To ACTIVATE Applications:

- ❖ CHECK the box at the top of the Customization page.



Customize membership application for your circle

Check to RECEIVE Applications. Uncheck to STOP Applications.

## ❖ To DEACTIVATE Applications:

- ❖ UNCHECK the box at the top of the Customization page
- ❖ Anytime you are not in actively accepting applications, turn off your application. All circle applications are “Unchecked” on July 1 each year to start the new recruiting year.

# Custom Text Fields



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

Before Selection

Select any custom questions to ask on the membership application by placing the cursor on the item. To select multiple items or to deselect items, hold down CONTROL key while clicking.

What is your anticipated graduation month (MM/YYYY)?

Please list your Activities and Leadership Positions for the Scholarship Phase

Please list your Activities and Leadership Positions for the Athletics Phase

Please list your Activities and Leadership Positions for the Campus or Community Service, Social, Religious Activities and Campus Governance Phase

Please list your Activities and Leadership Positions for the Journalism, Publications, Speech, and the Mass Media Phase

Please list your Activities and Leadership Positions for the Creative and Performing Arts Phase

Please list your Significant Honors and/or Achievements

Describe your most significant leadership experience while attending college/university (250 words max)

What do you hope to achieve through your membership in Omicron Delta Kappa?

What is your personal leadership philosophy? (250 word max)

What is your T-shirt size (XS, S, M, L, XL, 2XL, 3XL)?

Please list in detail your college organization memberships, leadership positions held, as well as awards and honors received. Do not include more than 10 items.

Please list and describe your Leadership Positions affiliated with on-campus employment/student work program. (limit 250 words)

After Selection

Select any custom questions to ask on the membership application by placing the cursor on the item. To select multiple items or to deselect items, hold down CONTROL key while clicking.

What is your anticipated graduation month (MM/YYYY)?

Please list your Activities and Leadership Positions for the Scholarship Phase

Please list your Activities and Leadership Positions for the Athletics Phase

Please list your Activities and Leadership Positions for the Campus or Community Service, Social, Religious Activities and Campus Governance Phase

Please list your Activities and Leadership Positions for the Journalism, Publications, Speech, and the Mass Media Phase

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Describe your most significant leadership experience while attending college/university (250 words max)

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Please list in detail your college organization memberships, leadership positions held, as well as awards and honors received. Do not include more than 10 items.

Please list and describe your Leadership Positions affiliated with on-campus employment/student work program. (limit 250 words)

**Don't forget  
to 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. To limit pin type, select the pin that all members will receive.

Pin Type:

-  Laurel Crowned
-  Traditional
-  1914
- Let applicant choose pin type



# 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 for that individual.
- This is the **ONLY** time you can complete an application for the individual.
- This should not be used for student inductees.
- This form should be used for **NEW** Circle Advisors.

## To complete the special or surprise application:

1. Go to the Administration Area on MMS.
2. Select "Create and Submit a Special 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.*

# Publish the Application

- Once you have customized all fields, select Submit. The changes will occur immediately.
- To review the new application, Return to the login/application (membershi.odk.org)
- Remember, you **must select** a circle AND a class for to review the application for your circle. (see slide 12)



Pin Type:

-  Laurel Crowned
-  Traditional
-  1914
- Let applicant choose pin type

 ←



# Application Review and Approval

Three Steps to Application Processing

# Application Review and Approval



- There are 3 steps in the Application Review and Approval Process:
  - Review Applications
  - Approve/Reject Applications
  - Certificate Order Processing
- All of these steps must be completed no less than 14 calendar days prior to your initiation ceremony. This ensures that OΔK can process your order, print certificates, and ship them to you in time. Many times it 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: Circle advisors or other members of the circle are not permitted 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 and Special Inductions 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. Email notification is not given unless you specifically request for this to be turned on.
- 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.



# 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.

# Correct the Information on a Membership Application



- If find a problem with information provided on a Membership Application or Certificate Order, you can change the information BEFORE you submit the final order.
- 1. Open the Membership Order Form
- 2. Select the Membership Summary
- 3. Select and Open the Member Application
- 4. Change the information (e.g. correct the name spelling)
- 5. Scroll to Bottom, Accept or Reject AND mark paid or unpaid.
- 6. Select Save Changes
- 7. Return to the Certificate Order
- 8. Double Check the Certificate Order to ensure Name has been added or removed from the order.
- 9. FINAL STEP: **Notify ODK HQ that you have made any alterations IMMEDIATELY.** 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 at the National Headquarters.
- 10. (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.)



# 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 be ordered.
- From the Administrative Panel, go to Certificate Orders. “Select Complete and Submit a Certificate Order Form”

## Certificate Orders

[Complete and Submit a Certificate Order Form](#)

[Review Past Certificate Orders](#)

- 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.** The order will appear immediately in “Review Past Certificate Orders.” If it does not, contact the National Headquarters (odknhdq@odk.org)

# 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	
<a href="#">Click here for member summary</a>	
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 Honors Causa:	0
Total number of new members:	2
Total cost (Membership fee is \$88.00):	\$176.00



# After the Ceremony

The Initiation process is not complete until you make sure all records are handled.



## 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 refunded.*
- 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



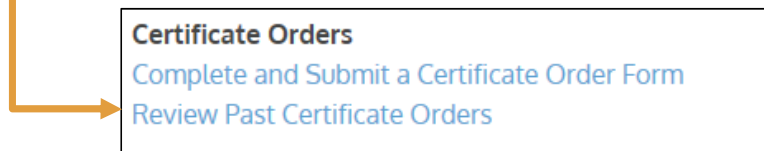
- Once a ceremony has been held, all fees are fully paid, and the initiation process is closed, the circle advisor should log in to MMS and process “unhandled” applications.
- All unhandled applications should be marked “rejected.”
- Once this process is complete, the application queue should be empty 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

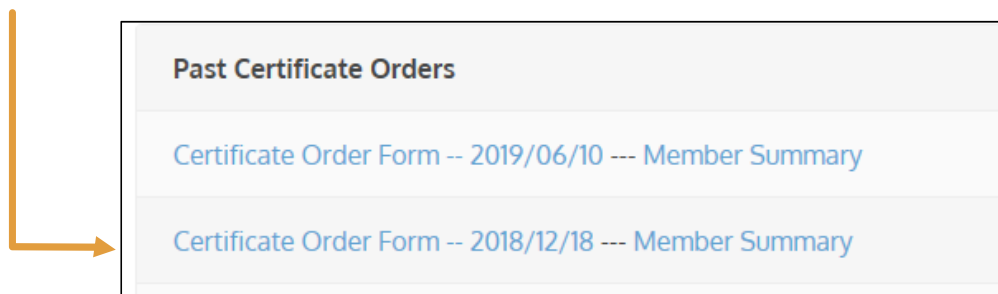


- Advisors can download past certificate orders in an Excel or CSV file of applications, initiated or rejected members, and unhandled records.

## 1. Select Certificate Orders



## 2. Select Certificate Form you want, open and print.





# General Membership Record Management

Review, Manage, and Download Membership Lists and Individual Records.

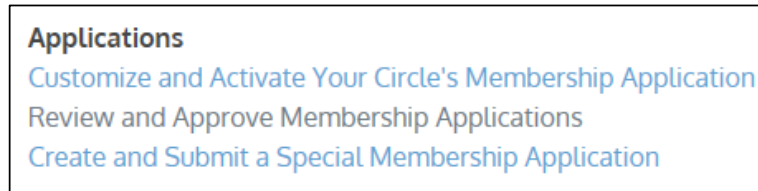




# Search for an Individual Member

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

1. Select Review and Approved Membership Applications



2. Type the name you want to find and select Go.

Search for membership applications by name:  

# Exporting Rosters



- Advisors can download an Excel file of applications, initiated or rejected members, and unhandled records.
  1. Go to Account Management
  2. Select "Download Excel of Members"
  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](#)



# Circle Minimum Standards Tracking

# Minimum Standards



- The OΔK Minimum Standards synthesize the various bylaws and policies that require specific action by the circles in one list. These minimum standards will be the basis by which the national organization considers a circle “in good standing.” Only circles in good standing will be eligible for Clay Grants, Gift of Membership, and Circle Recognition Awards. Print a copy of the [OΔK Minimum Standards](#) for your records.

# Tracking



- To assist Circles in tracking which of the minimum standards they have met for each year, OΔK has placed a tracking system in the MMS.
- Each time a circle meets one of the criteria, a staff member at OΔK National Headquarters tags that in the MMS system which is then displayed on the circle's administrative panel.
- Red = Incomplete.
- Green = Complete.

Circle Minimum Standards Tracking

Standards	Status
Two Advisors	Complete
Both Advisors Initiated	Incomplete
Student President	Incomplete
Vice President	Incomplete

# 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](mailto: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.