



Membership Management System (MMS)

BASIC INSTRUCTIONS FOR CIRCLE OFFICERS

2020-21





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What is MMS?

DESCRIPTION OF THE PROGRAM

NEW FOR 2020-21



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:

- Tailor the national applications to the needs of the circle
- Accept 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.



What's New for FY 2021

1. **New Section Titles** for better referencing when talking with OK HQ staff. [Slide 10]
2. **Application Period Beginning and End Dates** – circles will enter the schedule of your application cycle so ODK National Headquarters will be able to schedule resources to support the circle. [Slide 18]
3. **Expanded Application Management Panel** – more information and easier viewing. [Slides 25]
4. **New Payment Tracking** – separates payments made to circle from those made online. [Slides 28-29]
5. **Select Type of Ceremony** (In-person, Circle Virtual, National Virtual). [Slide 32]
6. **Certificates and Pins Mailing** – options now tied to invoicing. [Slides 33-34]
7. **Revised Amount Owed Section** – includes credits for online payments, honorary, and charges for mailing. [Slide 34]



How to Access My MMS Account

LOG IN CREDENTIALS, OFFICER ADMINISTRATION PAGE, EDIT YOUR ACCOUNT

Start at odk.org

The screenshot shows the OΔK website homepage. At the top, there is a navigation bar with links: HOME, ABOUT OΔK, MEMBERS, PROGRAMS, GET INVOLVED, CIRCLE OFFICERS (which is currently selected), and DONATE. A red arrow points to the "CIRCLE OFFICERS" link. Below the navigation bar, there is a large image of a lizard's head with the text "WE'RE IN THE BUSINESS OF SAVING MORE". On the right side of the page, there is a sidebar titled "Circle Officer Links" with a list of links. A red arrow points to the "Click here to login as a Circle Officer." link in the main content area.

CIRCLE OFFICERS

- MMS Login ←
- New for 2020-21
- Officer Updates
- Circle Officer Handbook
- Dates and Deadlines
- Initiation Process

MMS Login

Welcome to the OΔK Membership Management System (MMS).
The MMS has been updated for FY 2021 and all Circle Minimum Standards have now been verified. If you have a question about your Circle Minimum Standards, please email us at odknhdq@odk.org.

MMS Guide – FY 2021
The MMS Guide FY 2021 will be available in mid-August. There are a number of improvements for the coming year.

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



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.

A screenshot of a web-based login form. At the top, it says "Please enter your login name and password below." Below that are two input fields: one for "Email:" and one for "Password:". Underneath the password field is a blue "ENTER" button. At the bottom left of the form is a link "Forgot your password?"

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

[Primary Contact:](#)

List of Authorized Officers (This should have all 5 required officers)

Circle Officers

FACULTY ADVISOR	Train McLaughlin	train@odk.org
CIRCLE COORDINATOR	Z Test	Ztest@odk.org
STUDENT PRESIDENT	Odie Kappa	odie@odk.org
STUDENT VICE PRESIDENT	Number 1	no1@odk.org
TREASURER	Cashius Moneybags	cash@odk.org

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/>

The first part of the Administration area provide information about the officers for which ODK has received Officer Information forms.

Advisors must have submitted the Circle Advisor Agreement.



Officer Administration Page

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

Application Set Up: Customize and Activate Your Circle's Membership Application - You must review, change, and activate your application before you begin recruiting

Application Management: Review and Approve Membership Applications

Create and Submit a Special Membership Application: For Advisor or Honoris Causa Applications

Set up and Update Your Application

Certificate Orders ← Submit or Review Past Membership/Certificate Orders

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

[Review Past Certificate Orders](#)

Account Management

Download Excel of Members ← Download Spreadsheet Report of Members

[Edit Your Account](#)

Circle Minimum Standards Tracking ← Review Circle Minimum Standards met

Standards	Status
Initiated FY2020	

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

Developing Your Membership Application

CIRCLES CAN ADD SPECIAL QUESTIONS AND FIELDS TO THE NATIONAL 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:

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.
- 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:

<input checked="" type="radio"/> Junior
<input type="radio"/> Senior
<input type="radio"/> Graduate Student
<input type="radio"/> Faculty/Staff
<input type="radio"/> Alumni
<input type="radio"/> Honoris Causa



Customize the Application

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

Applications

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

[Application Management: Review and Approve Membership Applications](#)

[Create and Submit a Special Membership Application: For Advisor or Honoris Causa Applications](#)

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.

Setting the Application Dates



Beginning in FY 2021, ODK has added the beginning and end dates for the circles application cycle. This can be reset for each recruitment period.

Customize membership application for your circle

[Back to admin panel](#)



Check to RECEIVE Applications. Uncheck to STOP Applications.

Applications Open: Jul 10 2020

(the RECEIVE applications checkbox will automatically be checked at 12:01 a.m. on above date)

Applications Close: Jul 26 2020

(the RECEIVE applications checkbox will automatically be unchecked at 11:59 p.m. on above date)



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 Government 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 information that has already been listed above.
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 Government 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 information that has already been listed above.
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

SUBMIT





Application Review and Approval

THREE STEPS TO APPLICATION PROCESSING



Application Review and Approval

There are 4 steps in the Application Review and Approval Process:

- Step 1 - Review Applications
- Step 2 - Accept/Reject Applications
- Step 3 - Verify Payment and Approve for Membership
- Step 4 - Submit the Certificate Order

For on-campus or in-person initiation ceremonies: All of these steps should 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.

For virtual ceremonies: All of these steps should be completed no less than 7 calendar days prior to your virtual initiation ceremony. Since certificates and pins are shipped after the ceremony for virtual ceremonies, the timeline is shorter.

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.

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.



Step 1: Application Review

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

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 in your profile.

To review submitted applications:

1. Go to MMS and login.
2. Go to Circle Admin Page. Click on the “Application Management”
3. On this page you will notice the bold “Unhandled (UNH).” This means that the application has not been approved or rejected.
4. Select the name to view the submitted application.

Applications not yet on any certificate order:								
Name	App Date	Class	Acc/Rej/Unh	Fee Paid to Circle	Fee Paid Online	Check to print application(s)	Approved for Initiation	
Mac Street	2018/09/09	Junior	<input checked="" type="radio"/> / <input type="radio"/> / <input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
bob smith	2018/09/09	Junior	<input checked="" type="radio"/> / <input type="radio"/> / <input type="radio"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Odie Kappas	2018/09/09	Honoris Causa	<input checked="" type="radio"/> / <input type="radio"/> / <input type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
double guy	2018/09/09	Faculty/Staff	<input checked="" type="radio"/> / <input type="radio"/> / <input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Tracey Riley	2017/10/05	Graduate Student	<input checked="" type="radio"/> / <input type="radio"/> / <input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Step 2: Accept or Reject

Each circle has a process by which the review and vote on candidates for membership. Circles may choose to print applications to PDF and post them for review or print hard copies.

- a. Select applications to print
- b. Select print applications
- Once all applications have been reviewed and the circle has voted, return to the Application or to the Applications panel to **Accept or Reject** each application.
- Rejected applications will be stored on a page called Rejected Applications, while the approved applications will appear with the bold term "Accepted."

Applications not yet on any certificate order:							
Name	App Date	Class	Acc/Rej/Unh	Fee Paid to Circle	Fee Paid Online	Check to print application(s)	Approved for Initiation
Mac Street	2018/09/09	Junior	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
bob smith	2018/09/09	Junior	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Odie Kappas	2018/09/09	Honoris Causa	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
double guy	2018/09/09	Faculty/Staff	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Tracy Riley	2017/10/05	Graduate Student	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Correct the Information on a Membership Application



If you find a problem with information provided on a Membership Application, 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
6. Select **Save Changes**
7. Return to the Application Management page. Check to ensure the payment box is checked.
8. Complete the Certificate Order information again.
9. Double Check the Certificate Order to ensure Name has been added or removed from the order.
10. **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.
11. (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.)



Step 3: 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/>

- We now have the ability to turn the payment system on and off for each circle.
- Circles using the online payment system must notify the National Headquarters in advance.
- All payment systems will be set to off until ODKHQ is instructed to start accepting payments. As soon as the certificate order is submitted, the payment portal will be turned off.

Step 3: Membership Fee and Final Approval



Step 3 requires the verification of payment of fees.

- a. Each column can be sorted by clicking on the column header in blue.
- b. Paid Fee to Circle: If the circle is accepting the Lifetime National Membership Fee, the advisor must mark the bubble in that column when payment is received.
- c. Paid Fee Online: If the payment is through the online form, ODK Staff will mark the bubble in that column. Advisors cannot mark bubbles in this column.
- d. When an application has been Accepted and marked Paid, the Name box will change to green to indicate the individual is Approved for membership and check will appear in the Approved for Initiation column
- e. Applicants will ONLY appear on the Membership Order if Accepted and Marked Paid

Applications not yet on any certificate order:								
Name	App Date	Class	Acc/Rej/Unh	Fee Paid to Circle	Fee Paid Online	Check to print application(s)	Approved for Initiation	
Mac Street	2018/09/09	Junior	<input checked="" type="radio"/> / <input type="radio"/> / <input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
bob smith	2018/09/09	Junior	<input checked="" type="radio"/> / <input type="radio"/> / <input type="radio"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Odie Kappas	2018/09/09	Honoris Causa	<input checked="" type="radio"/> / <input type="radio"/> / <input type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
double guy	2018/09/09	Faculty/Staff	<input checked="" type="radio"/> / <input type="radio"/> / <input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Tracey Riley	2017/10/05	Graduate Student	<input checked="" type="radio"/> / <input type="radio"/> / <input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Step 4: 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.

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	
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



Select What Type of Ceremony

You will be required to select what type of ceremony you will be holding. This will help the National Headquarters with planning resources.

Ceremony Type:

Please select which type of ceremony you have planned for the date listed above.

- In person/On Campus
- Circle Virtual Digital Ceremony
- National Virtual Initiation Ceremony



Select the Certificate/Pin Shipping

You will need to choose how you would like your certificates and pins to be shipped. Your certificate invoice will show the cost of shipping.

Certificate and Pin Delivery:

Please choose how you would like your certificates and pins to be shipped:

- Option 1 - OΔK will mail the certificates and pins to the circle. Both to be distributed by the circle. Free shipping unless expedited.
 I request expedited shipping at the flat rate of \$65. Please send certificates and pins by overnight delivery and bill us.
- Option 2 - We mail the certificate to the initiate and the pins to the circle. The circle will distribute the pins. Cost per mailer is \$3.00. The certificates will not be sent until all membership fees have been received by the National Headquarters.
- Option 3 - We mail both the certificate and pin to the initiate. Cost per parcel is \$6.00. The certificates and pins will not be sent until all membership fees have been received by the National Headquarters.



Revised Amount Owed Section

To fully demonstrate what the circle will owe upon submission of the order, this section have been revised. The order below shows what an order of 5 new members would look like with Option 3 shipping.

Amount Owed:

Amount Owed:	
Total membership fees owed (@ \$88.00):	\$176.00
Total discounts (fees paid online or Advisor/Honorary fees waived):	(\$264.00)
Shipping:	\$30.00
Total Order:	\$206.00
<input type="checkbox"/> I acknowledge that the information on this form, including initiate information, circle contact information, shipping address, and billing is correct.	



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.

- If the certificate and pin are returned, an \$8.00 processing fee will be withheld from the credit (Total \$80 credit)
- If the pin is not returned, an additional \$15.00 will be withheld from the credit (Total \$65 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. *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.*



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

Certificate Orders
Complete and Submit a Certificate Order Form
Review Past Certificate Orders

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

Past Certificate Orders
Certificate Order Form -- 2019/06/10 --- Member Summary
Certificate Order Form -- 2018/12/18 --- Member Summary



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

The screenshot shows a menu titled "Applications" with three options: "Customize and Activate Your Circle's Membership Application", "Review and Approve Membership Applications", and "Create and Submit a Special Membership Application". A blue arrow points from the number 1 in the list above to the "Review and Approve Membership Applications" option.

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

The screenshot shows a search interface with a text input field containing the placeholder "Search for membership applications by name:" and a "GO" button with a circular icon.



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

KNOW WHAT YOUR CIRCLE HAS COMPLETED AND NEEDS TO COMPLETE



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.

Circle Minimum Standards Tracking is reset on September 1 each year.

- The circle advisor and voting F/S member columns will be reset when we learn of a vacancy in these positions.
- The student officer columns will be reset if we have not received an update for more than 1 calendar years form the last update.



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

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.