Membership Management System (MMS)
BASIC INSTRUCTIONS FOR CIRCLE OFFICERS
2022-2023

Updated July 21, 2022
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What is MMS?

DESCRIPTION OF THE PROGRAM

NEW FOR 2022-2023

To return to the Table of Contents at any time, Click the OAK-MMS logo in the top right corner.
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 2022

• Slide 9 - Officer Administration Page
• Slide 18 - Special Items & Pin Type
• Slide 23 - Application Review and Approval
• Slide 27 - Membership Payment
• Slide 28 - Membership Fee Verification and Final Approval
• Slide 31 - Select the Shipping Type
How to Access My MMS Account

LOG IN CREDENTIALS, OFFICER ADMINISTRATION PAGE, EDIT YOUR ACCOUNT

To return to the Table of Contents at any time, Click the OAK-MMS logo in the top right corner.
Start at odk.org

Ceremony Type and Shipping: Because OΔK is suspending national initiation ceremonies (see below), we will no longer asking the type of ceremony the circle is conducting. Also, we will no longer mail membership materials directly to members. As we did before the pandemic, membership materials will be shipped to the circle. Because shipping prices have greatly increased, we will now charge the circle the exact cost of expediting shipping instead of a flat rate.

Circle Contact Changes: As Jamie Bouldin joins the staff, we will be reassigning staff members assigned to circles. The Circle Contact is noted on your MMS administration page. Circle contacts will be reaching out to you in August to learn your plans for the year.

Click here to login as a Circle Officer.
Login Credentials

If currently listed as a circle officer, you will automatically have an account created for you. Your email address serves as the login.

On your first time logging in, create a new password by clicking on the link labeled, “Forgot your password?” This 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.

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.

You can also login by clicking the “key” at the top of the membership application.
The first part of the Administration area provides information about the officers for which OΔK has received Officer Information forms.

Faculty Advisors, Circle Coordinators, Alumni Advisors and Circle Assistants must submit the Circle Advisor Agreement. Student officers must submit the Student Officer Update Form.

- **Circle Coordinator**: Timothy Alan Reed
- **Vice President**: 
- **Vice President**: 
- **Vice President**: 
- **Vice President**: 
- **Vice President**: 
- **Alumni Advisor**: 
- **Assistant**: Z Test

**MMS Instructions**: Link to a .pdf of these instructions

**Circle Contact**: Your circle's point of contact at ODK Headquarters

**Maximum Annual Student Initiates**: Number of students your circle can initiate each year

**List of Authorized Officers**: (This should have all 5 required officers)
Set Up and Update Your Application

Review Past Orders

Submit Membership/Certificate Orders

Download Spreadsheet Report of Members

Review and Manage Submitted Applications

Review Circle Minimum Standards met

If the list of active officers above is not correct, please submit ADDITIONS or 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:Advisor or Honors Causa Applications

Circle Minimum Standards Tracking
See your circle’s report

Standards
Initiated FY2020

Status
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.

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.

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

Circles can add special questions and fields to the national application.

To return to the Table of Contents at any time, Click the OAK-MMS logo in the top right corner.
Check over the previous application for any changes, spelling corrections, or updates in information that will improve your application.

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

Have officers complete a “test application” to ensure all fields report in the manner intended. Remember to delete test applications.

All application changes are live when the “submit” button is selected. Make sure everything is set before the application is saved.
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.) that is required and cannot be changed. The default application has the required items. 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. Circles are limited to the options shown and cannot create items specific to only their campus.
How Custom Questions Work

The new application is dynamic using Branching logic. 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. (If your school does not appear, the “RECEIVE Applications” box is not checked.)

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. For example, 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.
Customize the Application

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

Start Here

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
Activating/Deactivating Your Application

OΔK has a date-only process for activating the application. This can be reset for each recruitment period.

Customize membership application for your circle

Back to admin panel

SUBMIT

INSTRUCTIONS: Circles must set the open and close dates for your application. Use the dropdown boxes in each date area. To have your application open at all times, leave all date fields empty

Applications Open: Sep 15 2021
To RECEIVE Applications, use the dropdown fields above. Applications with automatically OPEN at 12:01 a.m. (Eastern) on the date selected

Applications Close: Oct 30 2022
To STOP RECEIVING Applications, use the dropdown fields above. Applications with automatically CLOSE at 11:59 p.m. (Eastern) on the date selected
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.

Pin Type

To have a single and lasting symbol of membership for all initiates, the new "Key of Membership" is the only pin issued for ceremonies.

Demographic Items

Five demographic items have been added to the application to aid our efforts in understanding the diversity and inclusivity of our membership. The data will be redacted from the application view available to circles and will not appear in circle spreadsheet downloads. Only the National Headquarters will have access to the data.
Custom Text Fields

Highlighted areas represent fields selected by the circle to appear on the application. When your circle reactivates its application, be sure to check your custom questions to ensure they are still what you want for the new fiscal year.

**Before Selection**

<table>
<thead>
<tr>
<th>Question 1</th>
<th>Question 2</th>
<th>Question 3</th>
</tr>
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<tbody>
<tr>
<td>What is your anticipated graduation month (MM/YYYY)?</td>
<td>Please list your Activities and Leadership Positions for the Scholarship Phase</td>
<td>What is your personal leadership philosophy? (250 word max)</td>
</tr>
<tr>
<td>Please list your Activities and Leadership Positions for the Athletics Phase</td>
<td>Please list your Activities and Leadership Positions for the Campus or Community Service, Social, Religious Activities and Campus Giving Phase</td>
<td>What is your T-shirt size (XS, S, M, L, XL, 2XL, 3XL)?</td>
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<td>Please list your Activities and Leadership Positions for the Creative and Performing Arts Phase</td>
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Don’t forget to click Submit!
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.
Application Review and Approval

Four Steps to Application Processing
Application Review and Approval

There are four (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 this takes less than 14 days.

Only circle officers are permitted to access applications. Applications can be printed or downloaded for a 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.

*If the circle seeks to surprise a Faculty/Staff or Alumni member with induction into OΔK, then a circle advisor may complete the application form for that individual.
Step 1: Application Review

The 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.
Step 2: Accept or Reject

Each circle has its own process by which they review and vote on candidates for membership. Circles may choose to print applications to PDF and distribute them for review, or print hard copies.

a. Select applications to print
b. Click 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.”
Correcting 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. (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 collect the fees locally 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 directly to the national headquarters ([http://odk.org/national-membership-enrollment-and-payment/](http://odk.org/national-membership-enrollment-and-payment/)) but the circle is responsible for verifying that each new member has paid before the order is submitted.

- Circles using the online payment system must notify their circle contact, or National Headquarters (odknhdq@odk.org), in advance.
- All payment systems will be set to off until OAK HQ 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 Verification and Final Approval

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

2. **Fee Paid to Circle**: If the circle is accepting the fee locally, the advisor must mark the bubble in that column when payment is received.

3. **Fee Paid through ODK Portal**: If the payment is through the online form, ODK HQ will mark the bubble in that column. Please note this is not an automatic process and can take up to 24 hours.

4. 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.

5. Applicants will ONLY appear on the Membership Order if Accepted and Marked Paid.
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”

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. OAK 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!)
Select the Shipping Type

Regardless of the type of ceremony the circle is conducting (its own independent in-person, hybrid or virtual, or participating in the National Virtual Initiation Ceremony), all certificates and pins will be shipped to the faculty advisor or circle coordinator. OΔK HQ will not ship directly to new initiates. It is the responsibility of the advisors to distribute materials in a timely manner. All membership materials should be ordered well in advance of the ceremony.

**Expedited Shipping:** For expedited shipping, we will charge the circle the exact cost instead of a flat rate because shipping prices have greatly increased. Normal shipping is still free to the circle. However, if a circle places multiple orders for a single ceremony, OΔK HQ reserves the right to charge additional shipping fees.

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Certificate and Pin Delivery:

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

- OΔK will ship the certificates and pins to the circle via UPS. Shipping usually takes two business days if the order is submitting before 10 a.m. If you require overnight shipping, check the box below.

- [ ] I request expedited shipping. Please send certificates and pins by overnight delivery and bill us. I understand that OΔK will invoice the circle for the shipping which may be as much as $100.
Revised Amount Owed Section

To fully demonstrate what the circle will owe upon submission of the order, this section has been revised. The order below shows what an order would look like with expedited shipping.

<table>
<thead>
<tr>
<th>Amount Owed</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total membership fees owed (@ $88.00):</td>
<td>$176.00</td>
</tr>
<tr>
<td>Total discounts (fees paid online or Advisor/Honorary fees waived):</td>
<td>($264.00)</td>
</tr>
<tr>
<td>Shipping:</td>
<td>$30.00</td>
</tr>
<tr>
<td>Total Order:</td>
<td>$206.00</td>
</tr>
</tbody>
</table>

☐ 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.

To return to the Table of Contents at any time, Click the OΔK-MMS logo in the top right corner.
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
- If the pin is not returned, an additional $15.00 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. 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.

Please email odknhdq@odk.org to inquire about this process.
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 Order Form you want, open and print.
General Membership
Record Management

REVIEW, MANAGE, AND DOWNLOAD MEMBERSHIP LISTS AND INDIVIDUAL RECORDS.

To return to the Table of Contents at any time, Click the ΩΔK-MMS logo in the top right corner.
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.
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(es)
5. Click to Download
Circle Minimum Standards Tracking

KNOW WHAT YOUR CIRCLE HAS COMPLETED AND NEEDS TO COMPLETE

To return to the Table of Contents at any time, Click the OAK-MMS logo in the top right corner.
Minimum Standards

The OΔK Minimum Standards synthesize the various bylaws and policies that require specific action by the circles into 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 year from 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.

When a circle meets one of the criteria, a staff member at OΔK HQ tags that in the MMS system, which is then displayed on the circle’s administrative panel.

Red = Incomplete
Green = Complete

The "CMS-#" refers to the specific Circle Minimum Standard

These boxes change to green when the standard is met
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 final reminders:

✓ Certificate request submission should be placed NO LESS than 14 calendar 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.