

The National Leadership Honor Society

# MyODK Circle Officer BASIC INSTRUCTIONS FOR CIRCLE OFFICERS

2024-2025

MyODK

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# What is MyODK?

DESCRIPTION OF THE PROGRAM

# What is MyODK?



MyODK is a Member Engagement Platform (MEP) that provides members with 24/7 access to stay connected and engaged with O $\Delta$ K throughout their lifetime. MyODK is powered by aarwinMEP, developed by JL Systems.

#### For Members

- 1. Permanent Record for your  $O\Delta K$  Experience
- 2. Update Personal and Professional Information (addresses, emails, career changes)
- 3. View all  $O\Delta K$  activities (officer positions, volunteer roles, events attended)
- 4. Access Member Benefits (links to members-only benefits)
- 5. Networking (connect with members through the Discord Communities, register for the National Leadership Conference, search for other OΔK members in your field)

#### For Circles

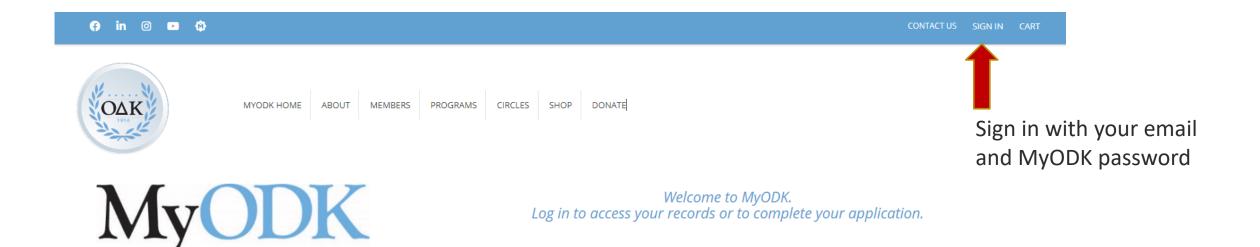
- 1. Application process with more customizable fields
- 2. Access to reports and data about members
- 3. National and local fee payment options during the recruitment process
- 4. Greater access to training and support

# How to Access a MyODK Account

LOG IN CREDENTIALS, CIRCLE EXECUTIVE PAGE, EDIT YOUR ACCOUNT

# Start at my.odk.org





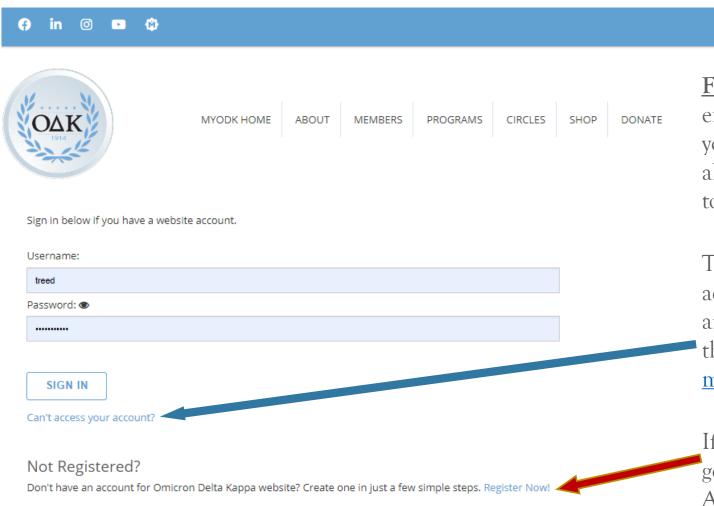
Log in to access your records or to complete your application.

**Johnson Center for Leadership** O∆K National Headquarters odknhdq@odk.org (f) (☐) in (🖄

## Login Credentials



CONTACT US SIGN IN CART



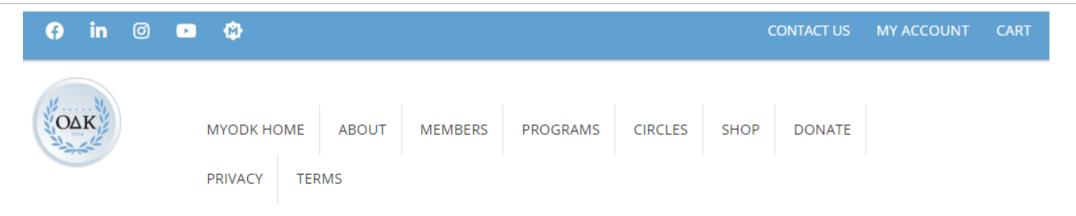
**First Time:** You should have received an email providing you with a link to set up your credentials. As a member of  $O\Delta K$ , you already have a record in the portal. You need to activate it.

The first time you sign in, go to "Can't access your account?" You will need to enter an email. If the system does not recognize the email, you need to contact <a href="myodk@odk.org">myodk@odk.org</a>

If you have received a Quick Activation link, go to Register Now! and select Quick Activation.

# MyODK Home Page







#### Welcome to MyODK

ACCESS YOUR RECORDS

APPLY FOR MEMBERSHIP

#### Upcoming Events

2024 National Leadership Conference Registration

#### Member Benefits

ACCESS SPECIAL MEMBER BENEFITS

#### OΔK Online Communities

You have opted in to Online Communities. Login to Discord.

# Your MyODK Account Dashboard

Governance



#### **General Membership Information**



MEMBER'S REGISTER NOW



Upload Photo
Remove



Phone: 5404585345

Website: https://www.linkedin.com/in/reedtimothya/

#### Membership Info

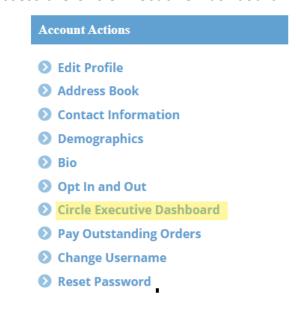
Circle: Virginia Polytechnic Institute and State University Type: Lifetime Member Initiation Member Type: Faculty Staff Initiate Current Class: Alumni Initiation Date: 11/13/1989

#### Demographics



#### **Account Actions**

These are how you update personal information and access the Circle Executive Dashboard



#### Circle/Company Affiliations

**University** (Admin) Started: 9/23/2024

Pay Outstanding Orders

Leave Company

- All Positions

Start

7/1/2022

End

12/31/2099

## Circle Executive Dashboard





#### University of South Carolina Columbia - Circle Executive Dashboard

Welcome to the Circle Executive Dashboard

This dashboard allows circle officers to create and manage applications, create membership lists for download, and pay circle fees.

Please note: Not all features are active yet. We are rolling out features as officers and members become familiar with the system.

For assistance, email myodk@odk.org or call (540) 458-5336 during regular business hours (M-F 8:30 a.m. - 5:30 p.m. Eastern).

## Circle Executive Dashboard



#### Circle Officers Information

All circles are required to have a Circle Coordinator, Faculty Advisor, Student President, Student Vice President, and a Treasurer (student or staff).

If the list of active officers below is not correct, please submit ADDITIONS or CHANGES by through the O∆K webpage at Update Circle Leadership

NOTE: Student President does not show because she was entered on June 30, 2023. Student Officers automatically expire after one year unless they submit a new form or contact  $O\Delta K$  to say their appointment has been extended.

Maximum Annual Student Initiates:

#### Circle Officers

0			
Position	Name	Email	Start Date
Faculty Advisor	Courtney Robbins Worsham	courtney.worsham@moore.sc.edu	7/1/2013
Circle Coordinator	Kimberly A. McMahon	kmcmahon@sc.edu	1/12/2022
Student Vice President	Natalie Trimble	ntrimble@email.sc.edu	8/25/2023
Student Treasurer	Lauren Nicole Casey	Incasey@email.sc.edu	8/28/2023

The first part of the dashboard area provides information about the officers for which Oak has received Officer Agreements. This is required for Circle executives to have access to the Circle Executive Dashboard. Faculty Advisors, Circle Coordinators, Alumni Advisors and Circle Assistants must submit the Circle Advisor Agreement. Student officers must submit the Student Officer Agreement.

# Creating Your Membership Application

CIRCLES CAN ADD SPECIAL QUESTIONS AND FIELDS TO THE NATIONAL APPLICATION

# Application Development Process



#### REVIEW

The application process requires that all fields be accurate when the application is finalized. Review all questions and items before starting the application creation process.

#### **CREATE**

MyODK is different from MMS. Each application is unique, and items from past applications are not used to create the next application. However, applications are available for officers to review.

#### **PUBLISH**

All application changes are <u>live</u> when the "submit" button is selected. Make sure everything is set before the application is saved.

## Application Structure



The National Membership 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.



#### Application Management

Initiation Scheduled: 10/27/2024

Rules for Customizing and Activating Your Circle's Membership Application and Payment Portal

- INITIATION DATE: The initiation date must be set first. The application must close no less than 14 days before the initiation date.
- MAXIMUM NUMBER OF APPLICATIONS: The circle may now opt to set a maximum number of applications they will accept. Circles should remember to be selective, not exclusive, in its recruitment process. Once the maximum number of applications is reached, the application will automatically close and can only be reopened with HQ assistance.
- APPLICATION DATES: Application Open/Close dates are required for the application setup process. Once set, these cannot be changed without HQ approval.
- **PAYMENT PORTAL:** If the circle is using the MyODK payment portal for National Initiation Fees, the portal will automatically open when the application is APPROVED by the circle. **The portal will automatically close eight (8) calendar days before the initiation date unless the circle sets an earlier date.**



#### Customize and Activate Your Circle's Membership Application

BEFORE you begin recruiting, the Circle must review, update, and activate your application. The application process requires:

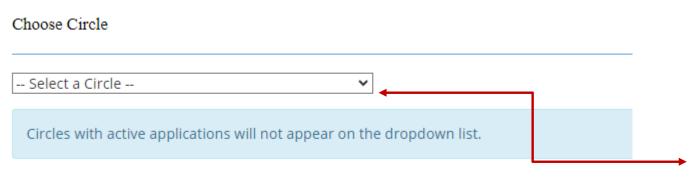
- 1. a date for initiation,
- 2. open and close dates for the application, and
- 3. open and close dates for the ODK payment portal.

Custom questions with the ^ will only show on student applications.

**SETUP APPLICATION** 



#### Select Your Circle



Enter Your Dates. All Dates are Required Fields

#### Please enter the following information

Initiation Ceremony Date

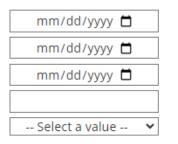
Date to open application

Last day to accept applications

Number of applications being accepted. Leave blank if no limit

Accepted applicants will pay online using the ODK National Payment Portal

# The application closes at 12:00:01 (a.m.) Eastern. Set your application for the date <u>after</u> you want it to close. Ex: For Dec. 1, set the date to Dec 2.



**NOTE:** Circle may only have one (1) application process open at a time. If you have an open application, you will not be able to start another one.

If this drop-down does not appear, it means the system has recognized you as the circle officer, and you need to proceed to set the dates.

This cannot be changed, so be sure!

Give yourself time to review, accept, and approve.

This date must be no less than 14 calendar days before the ceremony. #

Once this limit is reached, no more applications will be allowed.

Circles select to use the payment portal or have applicants pay the circle.

## Application Creation - Local Dues



 $O\Delta K$  can now collect one-time local dues for circles in addition to the National Initiation Fee. Once initiation is complete and the Society ensures that all prospective members participated,  $O\Delta K$  will send the local dues as either a check or an electronic payment to the circle. Members pay a \$4 service fee regardless of whether local dues are added.

#### To opt in to this while creating your circle's application:

#### Please enter the following information

Initiation Ceremony Date mm/dd/yyyy 📋 Opens at 12:00:01 Eastern Date to open application mm/dd/yyyy 📋 Closes at 12:00:01 Eastern Last day to accept applications mm/dd/yyyy 📋 Number of applications being accepted. Leave blank if no limit Choose "yes" Accepted applicants will pay online using the ODK Yes National Payment Portal Choose "yes" Would you like ODK to collect the Initiate's first year of Yes your Local Membership Dues? Enter the amount of local dues How much are your local dues?



### Select Custom Questions

How Custom Questions Work

The national application is dynamic using conditional 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.

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



Select the items you want members to answer. Then, all selected questions become required for the applicant to complete.

Please select the questions for applicants

SELECT ALL	UNSELECT ALL	
	What is your anti	cipated graduation month/year (MM/YYYY) <mark>? ^</mark>
	Please include yo	ur LinkeIn Public Profile URL
	Are you a full-tim	e student (enrolled in 12 credit hours or more each semester)? ^
	Please list your A	ctivities and Leadership Positions for the Academics and Research Pillar
	Please list your A	ctivities and Leadership Positions for the Athletics Pillar
	Please list your A	ctivities and Leadership Positions for the Service to Campus and Community Pillar
	Please list your A	ctivities and Leadership Positions for the Communications Pillar
	Please list your A	ctivities and Leadership Positions for the Creative and Performing Arts Pillar
	Which of our pilla	ers speak most to you and why? Academics, Athletics, Service, Communications, or Arts. (250 word max.)
	What do you hop	e to achieve through your membership in Omicron Delta Kappa? (250 word max.)
	Describe how you	u expect to be engaged in our circle's programs.

**NOTE:** Items with a carat "^" at the end will not appear for faculty, staff, alumni, and honorary applicants



#### Review the Application Questions

This is a crucial step. You cannot change questions once the application set-up is complete.

Please review the information you entered

Is there a limit to the number of applications being created -

Date to open applications - 2024-08-29

Last day to accept applications - 2024-09-12 Note: The application Ceremony Date - 2024-10-10 application d

Note: The application closes at 12:00:01 Eastern on this date. If you want to include this application date, set the close date to the next day (2024-09-13)

#### **Application Questions you selected**

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

Are you a full-time student (enrolled in 12 credit hours or more each semester)?

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

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

What about your personality, skills, beliefs, or characteristics has contributed to your unique leadership style? (250 word max.)

Check and submit if you are ready and the above information is correct.

Once submitted any questions missed cannot be added to the application. Carefully review your application questions. Click the Previous button below to edit your selection if needed.

# Special or Surprise Initiation



membership

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

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

This shall not be used for student initiates. This form should be used for NEW Circle Advisors.

To complete a Special Application, select the button in the Application Management dashboard. Before starting the application, make sure you have the required information about the person. Individuals submitted through this form will be invoiced directly to the circle.

**NEW!** One additional feature is that you can search the database to see if the person you are inviting is already a member.

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# 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:

- 1. Step 1 Review Applications
- 2. Step 2 Accept/Reject Applications
- 3. Step 3 Verify Payment and Approve for Membership
- 4. 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  $O\Delta K$  can process your order, print certificates, and ship them to you in time. Many times this takes less than 14 days. The minimum time allowed is seven (7) days before the ceremony.

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 committees 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 the member must accept. A third party may no longer complete the application for the initiate. A third party can complete Honorary and Special Initiates\* but MUST include all required information accurately submitted.

\*If the circle seeks to surprise a Faculty/Staff or Alumni member with induction into O $\Delta K$ , then a circle advisor may complete the application form for that individual.

# Step 1: Application Review



#### Review and Approve Membership Applications

Circles should follow their pre-determined recruitment and selection plan to review and accept applications. NOTE: the application system will automatically close based on dates established by the circle. Once those dates are set, a circle can not alter the timeline.

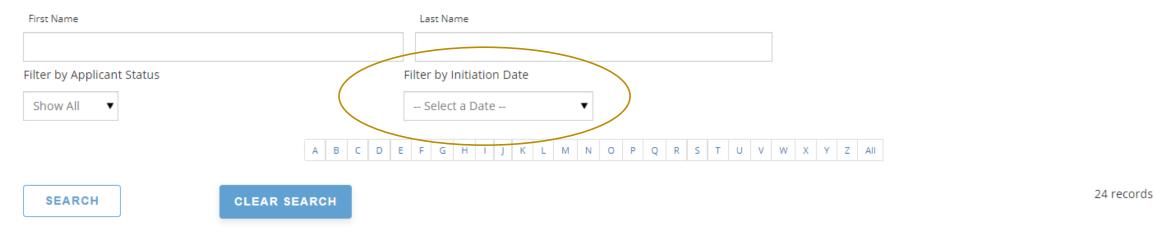


To access applications, select Application Management

Start by filtering by initiation date. (Although you can have only one application active, uncleared data from previous applications may still appear if you do not filter by the initiation date.

#### Application Management

To de-select a search term, click "Clear Search" below.

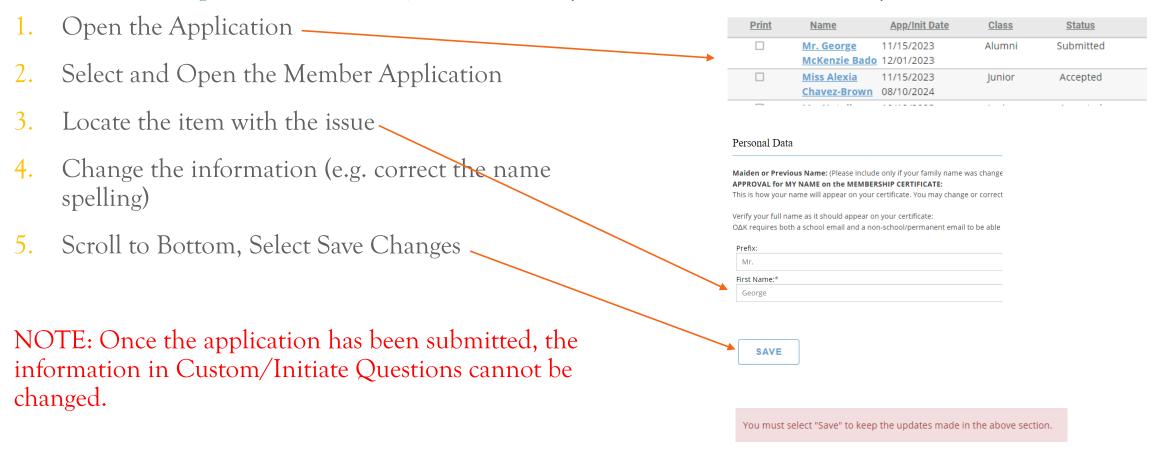


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## Correcting the Personal Data

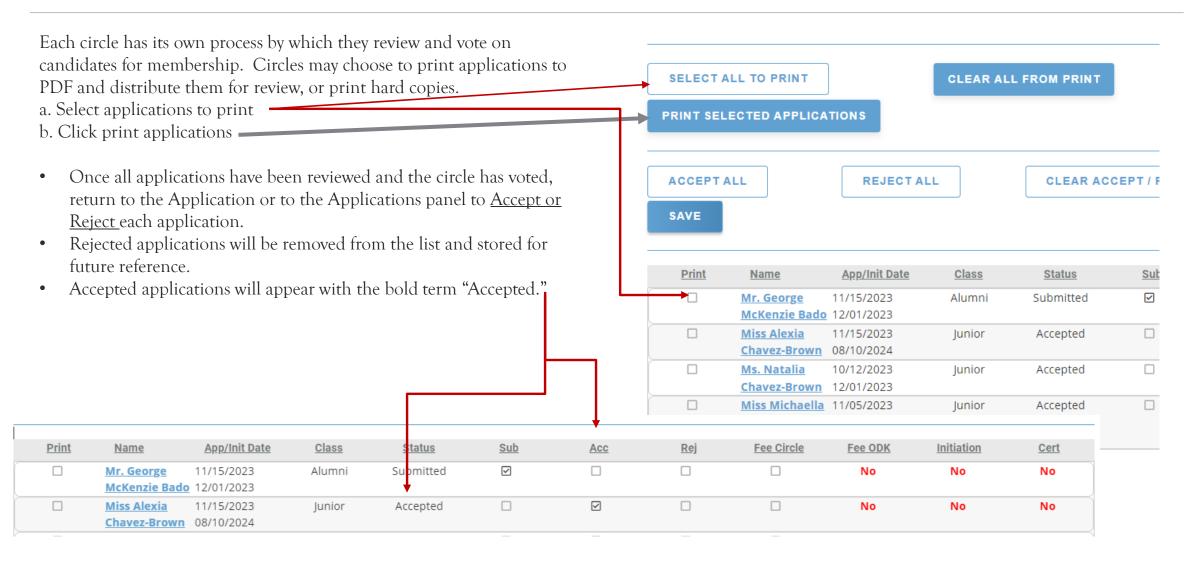


If you find a problem with the information provided on a National Membership Application, you can ask the individual to change their Personal Data, or an officer may edit the information BEFORE you submit the final order.



# Step 2: Accept or Reject





# Application Dashboard



<u>Print</u> <u>Na</u>	<u>ime</u>	App/Init Date	Class	<u>Status</u>	Sub	Acc	<u>Rej</u>	Fee Circle	Fee ODK	<u>Initiation</u>	Cert
	George (enzie Bado	11/15/2023 12/01/2023	Alumni	Submitted					No	No	No
	s <u>Alexia</u> vez-Brown	11/15/2023 08/10/2024	Junior	Accepted					No	No	No
_						_					
Print Na	<u>ame</u>	App/Init Date	Class	Status	Sub	Acc	<u>Rej</u>	Fee Circle	Fee OUK	<u>Initiation</u>	<u>Sert</u>
□ <u>Eliz</u>	abeth Andersor	08/11/2024 08/25/2024	Junior	Approved					Yes	Yes	Yes
□ <u>Kay</u>		08/10/2024 08/25/2024	Senior	Approved					Yes	Yes	Yes
□ Sier		08/09/2024 08/25/2024	Junior	Approved					Yes	Yes	Yes
□ <u>Mac</u>	<u>ckenzie Clayton</u>	08/11/2024 08/25/2024	Junior	Approved					Yes	Yes	Yes
		08/12/2024 08/25/2024	Senior	Approved					Yes	Yes	Yes
		08/10/2024 08/25/2024	Senior	Approved					Yes	Yes	Yes
Sus	a <u>n Jessica Gietl</u>	08/11/2024 08/25/2024	Junior	Approved					Yes	Yes	Yes
□ <u>Syd</u>		08/11/2024 08/25/2024	Senior	Approved					Yes	Yes	Yes
☐ <u>Kee</u>		08/09/2024 08/25/2024	Senior	Approved					Yes	Yes	Yes
☐ <u>Kat</u>		08/12/2024 08/25/2024	Junior	Accepted		( • <del>)</del>			No	No	No
					_		_	_			

# Application Status Messages



At each stage of the application process, the applicant will be notified of their status. The following are the messages they will see on their Applicant Dashboard.

\* There are different messages depending on the payment process.

This is what appears on the Applicant Dashboard

Membership Info

Circle: University of Houston

Type: Lifetime Member

Initiation Member Type: Student Initiate

Current Class: Senior Initiation Date: 10/8/2024

Status: SUBMITTED (Application pending acceptance)

Status	Dashboard Message	Confirmation Message
STARTED	(Application pending submission)	You have started the membership application.
SUBMITTED	(Application pending acceptance)	Your application has already been submitted.
ACCEPTED	(Application pending approval)	Your application is pending payment. Please select PAY YOUR MEMBERSHIP FEES at link below.
APPROVED	(Application accepted and paid)	Your application has been accepted and paid.
COMPLETED	(Completed)	Your initiation has been completed.
REJECTED	(Rejected)	Your application for membership in Omicron Delta Kappa has not been accepted by the circle through which you applied. Your MyODK profile will remain active to allow you to apply again in the future. If you have questions, please contact a Circle Advisor.

# Step 3: Membership Payment



#### For Circles using the MyODK payment portal:

- 1. Upon acceptance:
  - a. Application status becomes: ACCEPTED (Application pending approval)
  - b. Application message will be: Your application is pending approval. Please check your outstanding orders to pay your initiation fees.
- 2. Upon payment:
  - a. Application Status becomes: APPROVED (Application accepted and paid)
  - b. Application message will be: Your application has been approved and paid.
  - c. And, they will receive an email confirmation of payment.
- 3. After Initiation Ceremony (without changes to record)
  - a. Application Status becomes: COMPLETED

# Step 3: Membership Fee Verification



Circles not using the MyODK payment portal will need to verify payment on the Circle Executive Dashboard.

Applicants for Circles not using the MyODK Payment portal will see these messages.

- 1. Upon acceptance:
  - a. Application status becomes: ACCEPTED (Application pending approval)
  - b. Application message will be: Your application is pending approval. Your circle is not using the MyODK payment portal for this initiation. Please contact your circle advisor to pay your initiation fee.
- 2. Upon payment:
  - a. Application Status becomes: APPROVED (Application accepted and paid)
  - b. Application message will be: Your application has been approved and paid.
  - c. And, they will receive an email confirmation of payment.
- 3. After Initiation Ceremony (without changes to record)
  - a. Application Status becomes: COMPLETED

## Step 4: Certificate Order Form

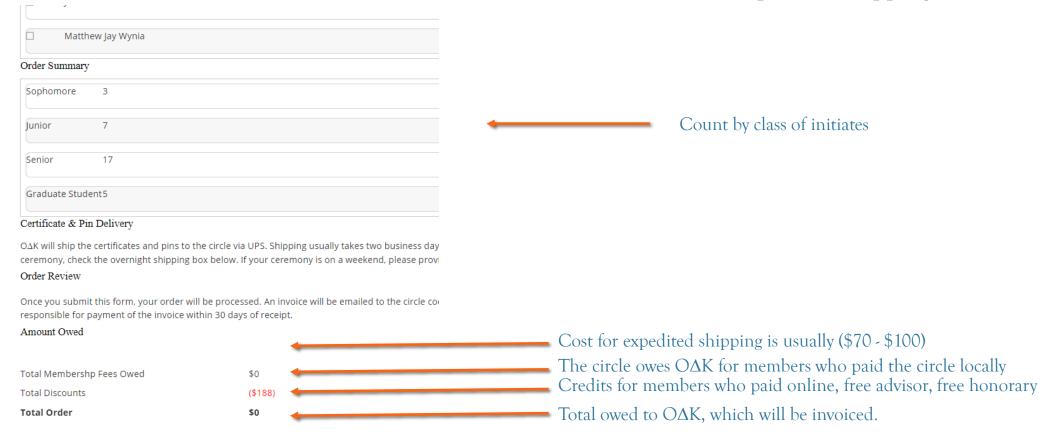


	Certificate Order Form
Select which address for	Shipping Information
shipping.	Please select the shipping address. (Address must not be a P.O. Box.)
	Dr. Kent Sun 23320 15 Mile Rd Big Rapids, MI 49307-8202 (Work) ▼
Initiation date is	Please choose the initiation event
	Ferris State University O∆K Membership Application - Initiation Ceremony August 2024 ▼
automatically inserted	Initiation Date 8/25/2024
	The below individuals are approved and were marked as paying their fee to the circle.
Ship date, type and tracking are provided by $O\Delta K$	Ship Date 08/19/20 Tracking # 1225610349576 Shipment Type UPS  Arrive Date 08/21/20 Ship Notes  Mark Certificate as UnPaid  SAVE
	Member's Names
List of initiate names	Elizabeth Anderson      Kaylee Carlson

## 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.



# Instructions for Applicants

THE NEW PROCESS IS EASIER BUT STILL NEEDS EXPLANATION

# Instructions to Applicant



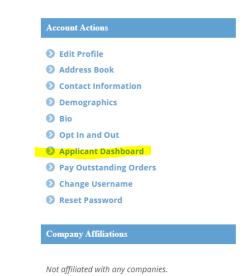
MyODK is different from MMS because each applicant must create an account to gain access to the application.

These accounts will eventually be deleted if the applicant is not accepted and initiated.

#### Steps to Apply

- 1. Create and Activate an Account on my.odk.org
- 2. Go to the Applicant
  Dashboard in Manage My
  Account OR use the
  "Apply for Membership"
  button on the homepage





Instructions for Applying can be found at: <a href="https://odk.org/members/apply-for-membership/">https://odk.org/members/apply-for-membership/</a>

Membership Info

No membership information on record

# Instructions for Application



3) Start Application

#### Applicant Dashboard

Welcome to the OΔK National Lifetime Membership Application portal on MyODK. The status of your application or membership is below. Please note: Not all features are active yet. We are rolling out features as officers and members become familiar with the system. For assistance, contact myodk@odk.org at any time or or call (540) 458-5336 during regular business hours (M-F 8:30 a.m. - 5:30 p.m. Eastern).

START APPLICATION

- Account Actions

  Edit Profile
  Address Book
  Contact Information
  Demographics
  Bio
  Opt In and Out
  Applicant Dashboard
  Pay Outstanding Orders
  Change Username
  Reset Password
- 4) Edit Profile if necessary NOTE: Anytime the profile is changed, it automatically updates the application.
- 5) Select a Circle

Choose your Circle

-- Select a Circle --

# Instructions for Application



- 6) Applicant completes the following steps:
  - Personal Data updating and adding as necessary
    - Applicants must enter two email addresses
  - Initiation Data
    - Class
    - Pillars
    - Marketing Information
    - Legacy Information
  - Demographic Data (only birthdate is required)
  - Academic Information
  - Employment Information (if full-time employee)
  - Custom Questions (Initiate Questions)
  - Review and Save or Submit

Initiation Data
Select an Initiation Class. *
Junior
Please select which of the ODK Pillars in which you are active. *
☑ Academics and Research
☐ Athletics
☑ Communications
☐ Creative and Performing Arts
☐ Service to Campus and Community
How did you learn about Omicron Delta Kappa National Leadership Honor Society? Select all that apply. *
☑ Campus advertisement (e.g., campus newspaper, poster/flyer, electronic display)
☐ I know friends/other students who are in ODK
☐ A member of my family is in ODK
☐ I received a general invitation to join from my circle
☐ A faculty/staff member recommended ODK
☐ Online search (e.g., Google, Bing, Yahoo)
☐ I learned about ODK through my Merit Page connections
☐ I received an invitation from the ODK National Headquarters
☐ Social media (e.g., Facebook, Instagram, Twitter)
☐ A student member of ODK recommended me
□ Other
Are you an OΔK Legacy? A legacy is a member of your family inducted into OΔK at any circle, in any year, even if that circ
Do you have a relative that is a member of ODK? *
⊘ No
○ Yes

## End of Part 1



That's all for now.

This will get you started on your application process.

Look for Part 2 Training on how to manage reports, registering for events, and other features coming in September.

QUESTIONS?