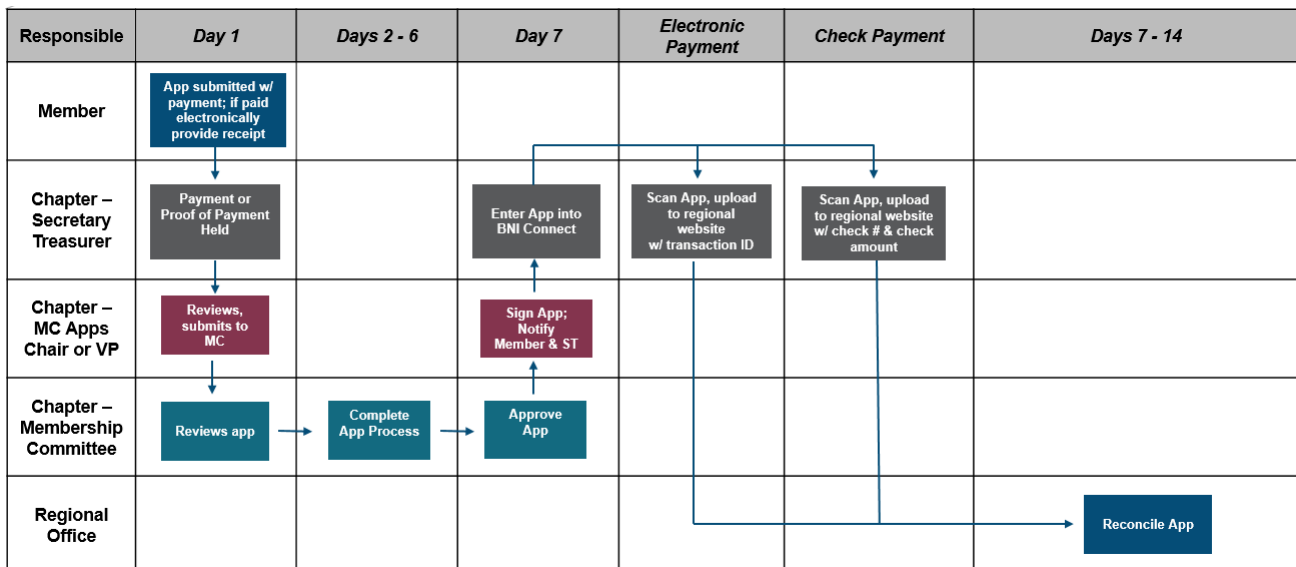# Mini LT Process Guide

Please note, some processes have been abbreviated on this document to highlight submission and BNI Connect processes. Find detailed instructions per role in the [Leadership Team Manual](#) on BNI University.

Application Submission Process:

- [Visitor Host enters Visitor record into BNI Connect.](#)
- Applicant completes written application and submits app and proof of payment to Membership Committee.
- Secretary/Treasurer holds payment (or proof of payment if electronic).
- Membership Committee process and approves application.
- Vice President signs back of application.
- Vice President notifies new Member.
- Vice President notifies Secretary/Treasurer and President of approval for induction.
- [Secretary/Treasurer enters the Application into BNI Connect.](#)
- [Secretary/Treasurer converts the Visitor to a Member.](#)
- Secretary/Treasurer goes to regional website and uploads Application (digital copy scanned with smart phone) **with Proof of Payment.**

  - Go to your regional website.
  - Click "Member & LT Resources".
  - Under Leadership Team Resources, click hyper link that says "Click here to submit VP approved New Member and Transfer Applications".
  - (OR Direct link: click [HERE](#))

- Electronic (e-Check) preferred but if new Member pays by paper check

  - Ensure check is payable to "BNI Global."
  - Mail to:
    - 11525 N. Community House Road, Suite 475, Charlotte, NC 28277
    - Attention: CORE Team

- For any questions or status updates on applications go to [regionaloffice.bni.com](#)

Responsible	Day 1	Days 2 - 6	Day 7	Electronic Payment	Check Payment	Days 7 - 14
Member	App submitted w/ payment; if paid electronically provide receipt					
Chapter – Secretary Treasurer	Payment or Proof of Payment Held		Enter App into BNI Connect	Scan App, upload to regional website w/ transaction ID	Scan App, upload to regional website w/ check # & check amount	
Chapter – MC Apps Chair or VP	Reviews, submits to MC		Sign App; Notify Member & ST			
Chapter – Membership Committee	Reviews app	Complete App Process	Approve App			
Regional Office						Reconcile App

Company Transfer Application Submission Process:

- Company Transfers require an approved application from the chapter
- Members need a minimum of 6 months credit to transfer chapters
- The application submission form on your regional website will ask if the application is for a Chapter Transfer. If "Yes" is selected, more transfer related questions will populate on the form.

Important to note: One of the requirements for Chapter transfers is Area Director approval. Please ensure all Chapter transfers are approved prior to the submission of the form.

Helpful BNI Connect Action Links:

Visitor Host: Managing Visitors

    Adding a Visitor that has not registered to attend the meeting
    Managing a visitor after attendance at your Chapter meeting

Secretary/Treasurer: Entering a new Member:

    Converting a Visitor to a Member
    Entering a new Member that was not entered at a Visitor

    ****If they were a previous member, please be sure to use the regular application process and search for the previous membership. That help article can be found HERE.

Process for Dropping a Member:

- LTs/DCs/ADs can all submit Dropped Member Form found on your regional website on the Member and LT Resources tab.
- Or submit here: Dropped Member Form

Requesting Return of Payment for Declined Applicants – New or Renewing:

- Go to your Regional Website and click Member & LT Resources
- Click on the link that says Click here for Director and LT support from your CORE Support Team
- Fill out the request form and include the following information in the body of the request:
  - Declined applicant's name
  - Reason for Decline
  - Proof of payment

Have a Question?

- Submit a Support Ticket to regionaloffice.bni.com:
  - LTs can submit requests for:
    - Reinstating an expired Member
      - (Expired Member = Member who is 16 days past renewal date)
    - Submit a declined applicant
    - Check status of application
  - ADs/DCs/LDCs can submit requests for:
    - Any administrative questions on regional operations
  - All requests can be submitted HERE

BNI Connect and University Support:

- Find helpful articles for navigating [BNI Connect here](#).
  - or Connect **and** University log-in issues send an email to support@bniconnect.com
  - or other Connect and University questions, submit a support ticket [BNI Connect Support.](#) Click "Submit a Request" in the upper right-hand corner.