

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.

Online Application Submission Process:

- [Visitor Host enters Visitor record into BNI Connect](#)
- Applicant completes online application
- Membership Committee processes and approves application (offline)
- Vice President approves the application online
- Member completes payment
- CORE Support Team Reconciles Membership in BNI Connect

Chapter Transfer Application Submission Process:

- Chapter Transfers require the Member to submit a [Chapter Transfer Request Form](#) via their Regional website under Chapter Transfer Resources
- Once submitted, the form will be routed to
 - The AD over that area
 - The VP of the incoming Chapter
- It will then be the responsibility of the AD to
 - 1. Approve the transfer, and 2. Send the Member the fillable PDF application
- Member submits the completed PDF application to the Chapter for approval
- MC approves the application and VP or ST upload the approved app to the [Approved App Link](#) under Chapter Transfer Resources

Note: Members need a minimum of 6 months credit to transfer chapters

Company Name Change/Classification Change Process:

- Company Name and/or classification change requires LT submission of the [Company Name/Classification Change Request Form](#) on your regional website
 - The change must be approved by the MC prior to submission of the form
 - Members may not submit the form for themselves

Paper Application Submission Process (for Visitor Days only):

- [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** to the Director and LT Support Link found your regional website under Member and LT Resources
- 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

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](#)

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.
- Direct Link: [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)
 - 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