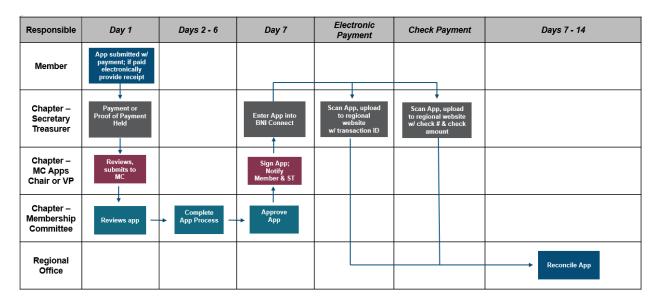


New Application Submission Process

Please note, some processes have been abbreviated on this document to highlight submission and BNI Connect processes. Find detailed instructions per role in the <u>Leadership Team Manual</u> on BNI University.

- □ <u>Visitor Host enters Visitor record into BNI Connect.</u>
- □ 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.
 - o Click "Member Resources & LT Resources".
 - Under Leadership Team Resources, click hyperlink that says "Click here to submit VP approved NEW MEMBER applications".
 - o (OR Direct link: click <u>HERE</u>)
 - NOTE: Please complete all required fields thoroughly to expedite app processing.
- Electronic (e-Check) preferred but if new Member pays by paper check
 - o 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

Secretary/Treasurer: Entering a new member <u>Converting a Visitor to a Member</u> 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. <u>That help article can be found HERE</u>.

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 <u>Click here for Director and LT support from your</u> <u>CORE Support Team</u>

- 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
 - o All requests can be submitted HERE

BNI Connect and University Support:

- □ Find helpful articles for navigating <u>BNI Connect here</u>.
- □ For Connect **and** University log-in issues send an email to support@bniconnect.com
- □ For other Connect and University questions, submit a support ticket <u>BNI Connect Support.</u> Click "Submit a Request" in the upper right-hand corner.