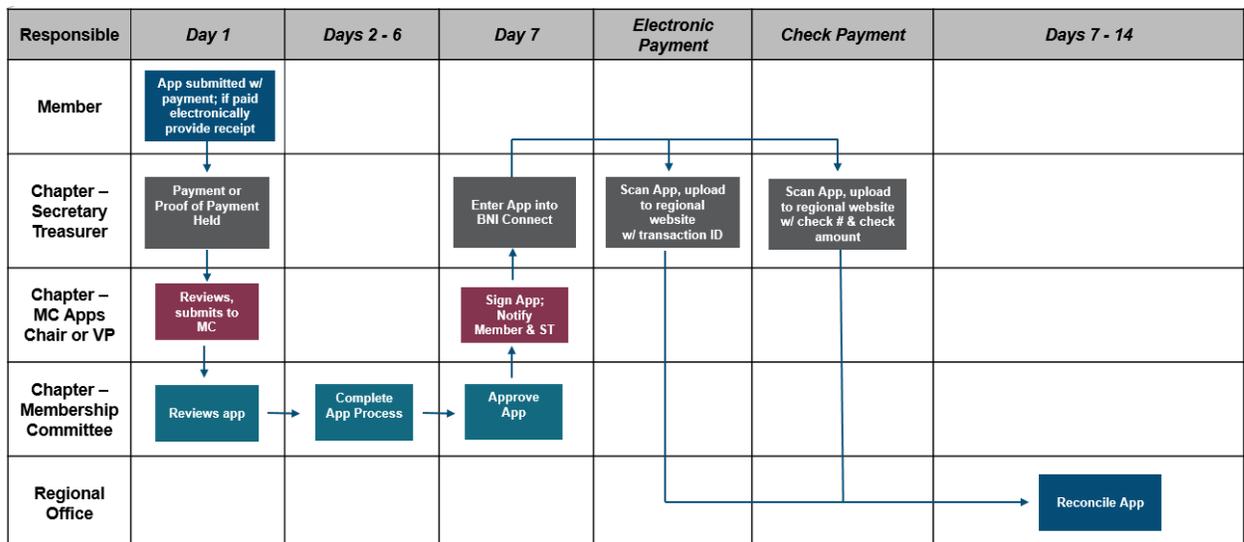# New Application Submission Process

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

- ☐ 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.**
    - o Go to your regional website.
    - o Click "Member Resources & LT Resources".
    - o Under Leadership Team Resources, click hyperlink that says "Click here to submit VP approved NEW MEMBER applications".
    - o (OR Direct link: click HERE)
    - o **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."
    - o 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

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 to reinstate an expired member, submit a declined applicant or check the status of an application
- ☐ Fill out the request form and include the following information in the body of the request:
    - o Declined applicant's name
    - o Reason for Decline
    - o Proof of payment

Have a Question?
- ☐ Submit a Support Ticket to regionaloffice.bni.com:
    - o 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
    - o 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 BNI Connect here.
- ☐ For Connect **and** University log-in issues send an email to support@bniconnect.com
- ☐ For other Connect and University questions, submit a support ticket BNI Connect Support. Click "Submit a Request" in the upper right-hand corner.