LT Mini 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 Business Builder.

Online Application Submission Process:

1. Visitor Host enters Visitor record into BNI Connect.
2. Applicant completes online application.
3. Membership Committee processes and approves application (offline).
4. Vice President approves the application online in BNI Connect.
5. Member completes payment.
6. CORE Support Team Reconciles Membership in BNI Connect.

**Please note: A returning Member is not subject to an application fee if they have a Certificate of Credit to redeem.

Visitor Host Managing Visitors how to instructions in BNI Connect:

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

Complimentary Nonprofit Membership Process:

Every Chapter in the CORE has been granted one complimentary nonprofit Membership for an approved applicant of their choice. Please follow the below process to ensure the applicant's Membership is fully processed:

1. Nonprofit organization representative applies to the Chapter using the online application process on BNI Connect. Director your potential applicants to your regional website, Apply For Membership tab.
   - Applicant should select online payment (not COC) when applying
2. Chapter VP approves the application in BNI Connect.
3. Chapter VP submits a ticket HERE with the following:
   - Applicant name AND 501c(3) documentation
4. Regional admin will fully process the Membership so the applicant can be inducted.

Help! Our Member can't renew because they expired. (no longer have access)

- Leadership Team Member submits a ticket to have Member's access reinstated. Go to your Regional web site > Member & LT Resources > Click here for Director and LT support from your CORE Support Team.

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

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.

Member Transfer Process:

Members wishing to Transfer Chapters require the Member to submit a [Chapter Transfer Request Form](#) via their Regional website > Member & LT Resources > Chapter Transfer Resources.

Once submitted, the form will be routed to the Area Director over the *outgoing* Chapter.
It will then be the responsibility of the AD to:

1. Conduct due diligence on the transfer, including informing and discussing transfer with outgoing Chapter.
2. Approve the transfer by replying to the routed email from the Ops Team.
3. Communicate the decision to Member.

If transfer request is approved, the Regional Ops Team will drop the Member from their current Chapter and send them a link to apply to the new Chapter.
**IMPORTANT NOTE: Member should select Certificate of Credit as the payment option and use the same email address that was in their previous profile.

4. New Chapter Membership Committee processes the application and if approved, VP approves the application in BNI Connect.
5. Regional Ops Team reconciles the application which reestablishes the Membership.

There is no longer a minimum requirement of months on a Certificate of Credit for Member to transfer to transfer. Additionally, no application fee is due when there is a COC used for a new Member.

Ordering a Name Badge

New Member Name Badges

- When a new Member is reconciled in BNI Connect, they will receive a "Welcome to BNI" email
  - It will contain a form to fill out for their complimentary new Member name badge
  - Please note: the name badge will be printed and shipped exactly as indicated on the form

Replacement Name Badges

- Members can order a BNI branded name badge using a [form](#) located on each Regional website under Member and LT Resources.
- Replacement name badges are a low price of $8, including shipping and handling.

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

BNI Connect and Business Builder Support:

If upon trying to use the forgot password option at the sign-in screen you are still having log in issues, please submit a support ticket to: support@bniconnect.com or support@bnibusinessbuilder.com

- Find helpful articles for navigating [BNI Connect here](#)
- For additional Connect and Business Builder questions, submit a support ticket [BNI Connect Support.](#) Click "Submit a Request" in the upper right-hand corner.

Have more questions about Region Operations and/or applications?

- Leadership Team and ADs/DCs/LDCs can submit a Support Ticket to regionaloffice.bni.com or [here](#).