



# **Online Renewals: Approving Renewal Applications - Full Process For Leadership Teams**

All online renewals must be approved through BNI Connect in order to complete the process. This approval process can be done either before an application is submitted or after, depending on local policies and procedures.

## Quick Steps:

1. Access the Renewal Approval screen from one of the available links: the MC renewal reminder email, the Membership Dues report, the application received email, or the view pending applications screen.
2. Review the application (if submitted), member performance, and training details.
3. Select the appropriate approval options.
4. Choose the Approve or Decline button to submit the decision.

## Follow This Visual Guide:

## Options for Initiating the Approval Process

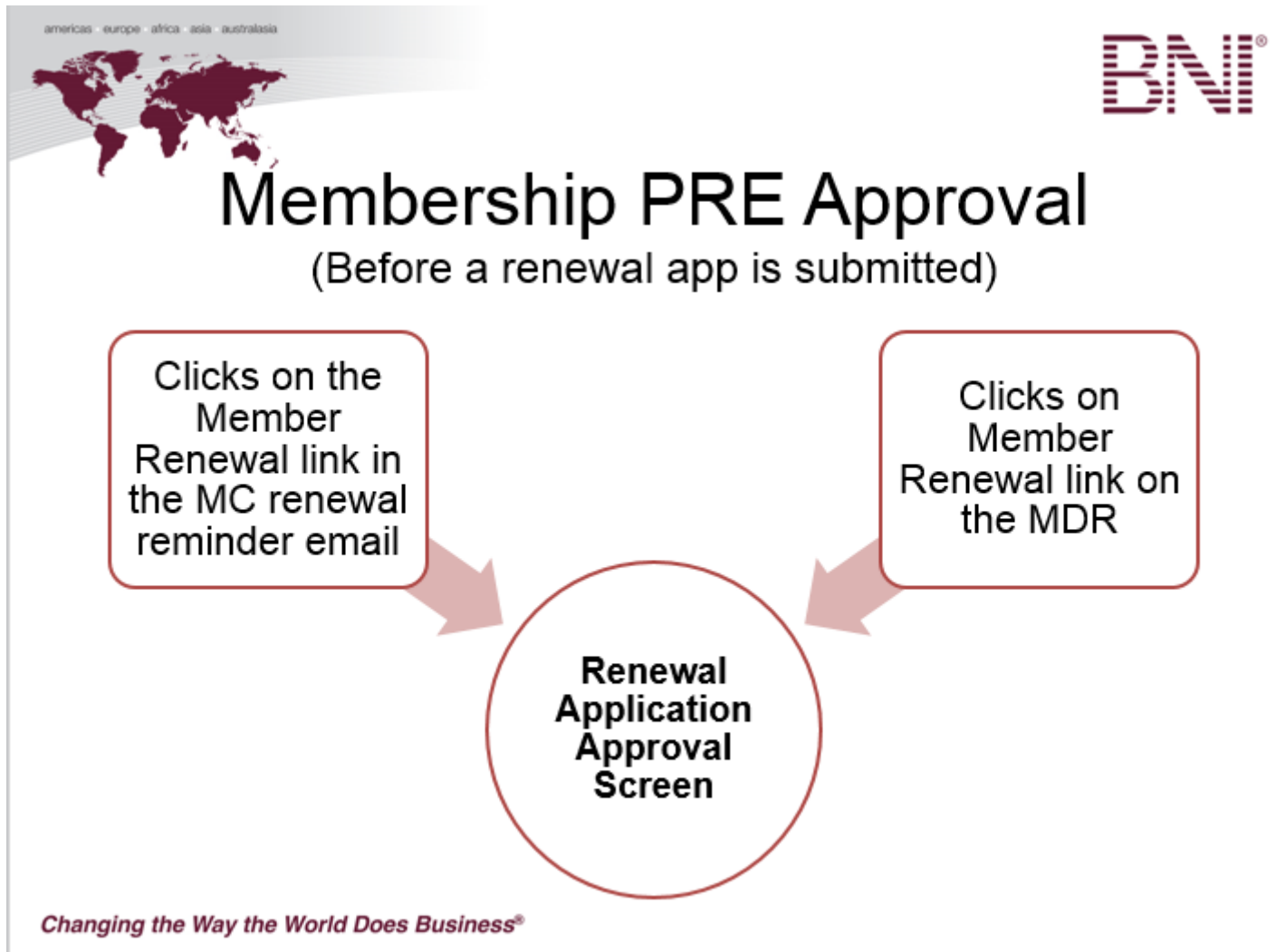


# Renewal Approvals

- Each online renewal **MUST** be approved in BNI Connect
- Approvals may be full, conditional, or denied
- Regions may allow pre-approvals, post submission approvals, or both
- Applications cannot be reconciled until approved

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## Pre Approval of a Membership - Before a Member has Submitted a Renewal Application Only



Note: The option to pre-approve a membership is decided by the regional and/or national office. If this option is unavailable, please contact your Executive Director.

## Option 1: Click the Renewal Link in the MC Renewal Reminder Email

### Upcoming Chapter Renewals - Membership Committee Reminder

Sys Admin [bni.notifications@trackbniconnect.com]

To: test01@bnitester.com



## Membership Committee Renewal Reminder

Chapter  
Chapter 1

Below are the members in your chapter that are due for renewal in 90 days. It is time to begin the process of reviewing these members.

Member Details:

Member Name	Email	Renewal Date	Chapter	Region	Options
Geremias Balderas	equustp+gbmontero@gmail.com	10/25/2014	Chapter 1	UAT Region 1	<a href="#">Pre-Approve</a>
Mentor	givry@gmail.com	10/25/2014	Chapter 1	UAT Region 1	<a href="#">Pre-Approve</a>

If enabled, the pre-approval link will appear in the MC Reminder email. Clicking this link will take you to the pre-approval screen

use contact your Leadership Team, Director Consultant or

e President, Membership Committee and your Chapter Director Consultant.

this system generated email.

## Option 2: Click the Renewal Link in the Membership Dues Report

Chapter ► Membership Dues Report						
Running User Jeremy Walsh		Run At Oct 23, 2014 1:36 PM		Country Antarctica	Region Shiver Region	Chapter BNI - Brrrr
Parameters						
Chapter:				BNI - Brrrr		
Report Date:				Oct 23, 2014		
Member Name	Industry	Type	Membership Status	Member Renewal	Due Date	
Sort First	Sort Last					
1	Alfred E. Newman	Animal Products	President, Member	Active		TERM+ 75 Mths
2	Albert Camus	Writer	Vice President, Member	Active		TERM+ 81 Mths
3	Art Garfunkel	Auction Real Estate	Secretary / Treasurer, Member	Active		TERM+ 22 Mths
4	Darcy Doolittle	Advertising Agency	Member, Mentor Coordinator	Active		Nov 1, 2014
5	Bob Jones	Surveyor	Member, Education Coordinator	Active		Jan 1, 2015
6	Harvey Keitel	Stor...	Membership	Active		Feb 1, 2015
7	Andy Test	Acc...		Active		Feb 1, 2015
8	Jacob Goodwin	Ch...		Active		Jun 1, 2015
9	Robert Lovejoy	Acc...		Active		Jun 1, 2015
10	Richard Martin	Ch...		Active		Jul 1, 2015
11	Jan Brough	BNI		Active		Sep 1, 2015
12	Shelley Osborne	BNI Professional	Member	Active		Sep 1, 2015
13	Sue Redknap	BNI Professional	Member	Active		Sep 1, 2015
14	Jamie Jones	Books	Member	Active		Oct 1, 2015
15	L. Wm. Brand Sr.	BNI Professional	Member, Membership Committee	Active		Jun 1, 2016
16	BNI Connect Support	BNI Professional	Visitor Host, Member, Membership Committee	Pending Renewal		Aug 1, 2016
17	Victoria Hosterelli	Acc...	Committee	Pending Renewal		Jun 1, 2017
18	Member B100	Acc...	Committee	Active		Aug 1, 2017
19	Preferences Forwarding	Boo...		Pending Renewal		Sep 1, 2017
20	Mike Jones	BNI	Committee	Active		Aug 1, 2018
21	Amy Burmeister	App...		Pending Renewal		Aug 1, 2020
22	Joe Sloe	Sho...		Active		Aug 1, 2020
23	Roger Dodger	Phy...		Active		Sep 1, 2020
24	Chuck Cronos	Direct Mail	Member, Events Coordinator	Active		Oct 1, 2020
25	Marky Mark	Architectural Interior Design	Member, Membership Committee	Active		Oct 1, 2020
26	Pending Member	Agricultural	Member, Membership Committee	Active		Oct 1, 2020
27	Beki Pardoe	Web Design	Visitor Host, Member	Active		Oct 1, 2020
28	Tammy Tester	Business Personal Assistant	Member	Active		Oct 1, 2020
29	Email Check Member	Barter Exchange	Member, Mentor Coordinator	Active		Mar 1, 2022
30	John Smith	Equipment Repair	Member	Active		Aug 1, 2022
31	Rebecca Goodwin	Computer Services	Member	Pending Renewal		Jan 1, 2043
32	Ross Gillett	Landscape Contractors		Pending Member		Sep 1, 2015

Members eligible for pre-approval will have a link available on the Membership Dues Report

Members with an already pending application can be approved through the pending applications screen

New Members Since  
Oct 1, 2014

A guide to accessing the membership dues report can be found [HERE](#).

A guide to accessing the pending applications screen can be found [HERE](#).

## The View Renewal Approval Screen - For Review Only

View Renewal Approval
Back

The review screen will show the member details, 6 months of PALMS data, and a link to the member profile to review other details such as Training History

**RENEWAL DETAILS**

Member Name	Mike Jones
Chapter Name	BNI - Brrrr
Renewal Date	08/01/2018

**MEMBER PERFORMANCE (LAST 6 MONTHS PALMS)**

P	A	L	M	S	RGI	RGO	RRI	RRO	V	1-2-1	TYFCB	CEU
2	0	0	0	0	12	5	8	19	3	20	65430	15

[Training Details](#)

## The Pre-Approval Screen

Pre-Approve Renewal
Back

### RENEWAL DETAILS

Member Name	Robert Lovejoy
Chapter Name	BNI - Brrrr
Renewal Date	06/01/2015

### MEMBER PERFORMANCE (LAST 6 MONTHS PALMS)

P	A	L	M	S	RGI	RG0	RRI	RRO	V	1-2-1	TYFCB	CEU
20	1	2	0	2	12	5	8	19	3	20	65430	15

[Training Details](#)

### PRE APPROVE

- 1  By checking this box, I certify that all necessary membership performance reviews and discussions pertaining to this renewal have taken place with both the Membership Committee and the Chapter Director Consultant as appropriate.
- 2  Approval is conditional
- 3  A Control letter has been sent

4
Pre-Approve

Leadership Team members with permission to approve memberships will have the approval options in addition to the member review information

1. Before a decision can be saved, the user must assert that they have fully completed the review process.
2. A conditional approval means that the member may have been issued a warning about performance or attendance, but an approval was granted. The conditions of this approval are subject to regional policy.
3. If control letters (such as a probation notification) have been sent, this can be noted before submission.

Note: Only pre-approvals are allowed. Declining a renewal can only be done post renewal application submission.

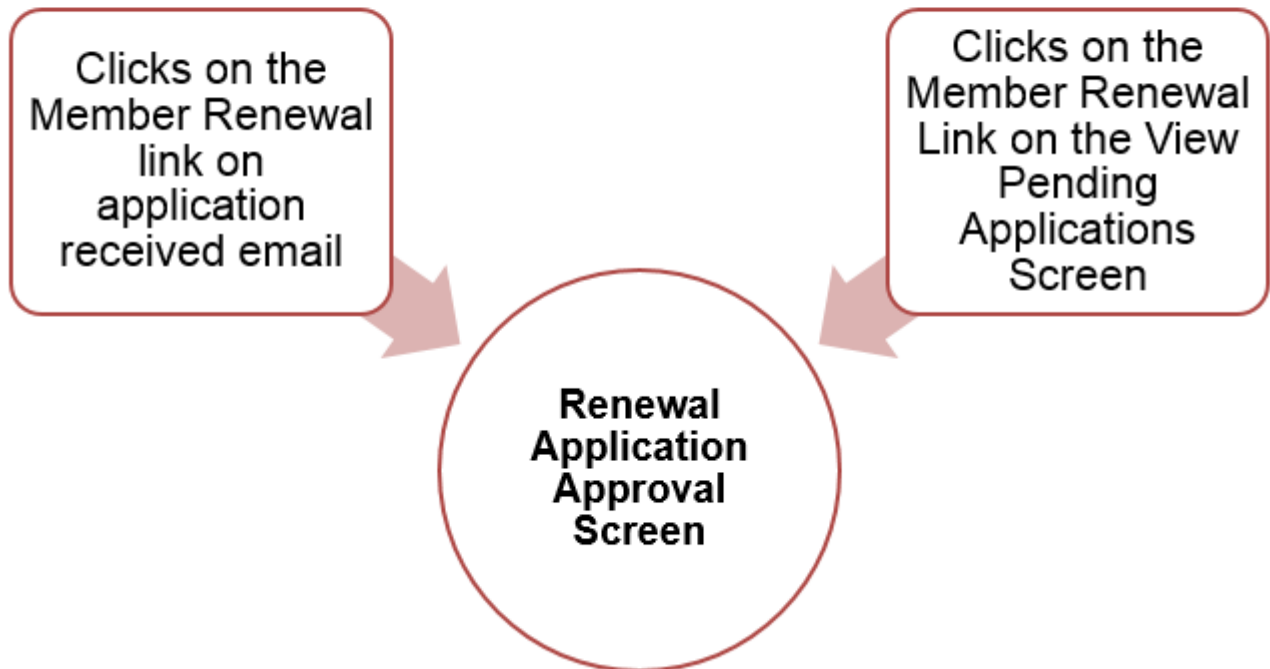


## Post Approval of a Membership - After a Member has Submitted a Renewal Application Only



### Membership POST Approval

(After a renewal app is submitted)





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Note: The option to post-approve a membership is decided by the regional and/or national office. If this option is unavailable, please contact your Executive Director.

## Option 1: Click the Approval Link on the Application Received Email

americas • europe • africa • asia • australasia



**BNI Connect**<sup>®</sup>  
Local Business - Global Network<sup>®</sup>

**Renewal Details**

*Chapter Name*  
BNI - Brrrr

*Renewing Member*  
John Smith

*Renewal Due Date*  
08/01/2020

Congratulations, A new renewal application has been received from John Smith for the BNI - Brrrr Chapter in Shiver Region. This is fabulous news and relates to the health and wellness of the BNI - Brrrr Chapter and our Region.

Please click below to be logged into BNI Connect(R) to approve this renewal. Remember, just as in new applications, best practices are to complete the approval process within 48 hours of the application. A copy of the application is attached.

**Approve This Renewal**  
<https://www.trackbniconnect.com/web/secure/adminRenewalApprovalForm?memberId=1132442>

**View Pending Applications**  
<https://www.trackbniconnect.com/web/secure/operationsChapterMembershipPendingApplication?overrideCountryId=364&overrideRegionId=365&overrideChapterId=366>

*This email was copied to the Vice President, Membership Committee and your Chapter Director Consultant. Please do not respond directly to this system generated email.*

## Option 2: Click the Renewal Link on the View Pending Applications Screen

**View Pending Applications** Back

Show **10** entries Refine

Member	Chapter	Application Type	Application Date	Value	Status	Received	Approve
Amy Burmeister	BNI - Brrrr	Cash Renewal	10/16/2014	7.00	Declined	No	
BNI Connect Support	BNI - Brrrr	Cash Renewal	07/01/2014	7.00	Offline Entry	No	
Preferences Forwarding	BNI - Brrrr	Renewal	10/21/2014	665.00	Submitted	No	
Rebecca Goodwin	BNI - Brrrr	Cash Renewal	10/21/2014	365.00	Submitted	No	
Ross Gillett	BNI - Brrrr	Offline Card Payment New	09/26/2014	7.00	Offline Entry	No	
Victoria Hosterelli	BNI - Brrrr	Renewal	10/20/2014	7.00	Submitted	No	

Showing 1 to 6 of 6 entries First Previous 1 Next Last

Clicking the Approval Link will bring you to the approval screen

Note: Online Approvals are only available for renewals submitted online.

## The View Renewal Approval Screen - For Review Only

**View Renewal Approval** Back

The review screen will show the member details, 6 months of PALMS data, a copy of the application, and a link to the member profile to review other details such as Training History

**RENEWAL DETAILS**

Member Name	Rebecca Goodwin	Click on the icon to review the full application form
Chapter Name	BNI - Brrrr	
Application Status	Submitted	
Renewal Date	01/01/2042	

**MEMBER PERFORMANCE (LAST 6 MONTHS PALMS)**

P	A	L	M	S	RGI	RGO	RRI	RRO	V	1-2-1	TYFCB	CEU
20	1	2	0	2	12	5	8	19	3	20	65430	15

[Training Details](#)

## The Post-Approval Screen

Renewal Approval
Back

**Leadership Team members with permission to approve memberships will have the approval options in addition to the member review information**

### RENEWAL DETAILS

Member Name	Victoria Hosterelli	<div style="display: flex; align-items: center; justify-content: center;"> <div style="border: 1px solid black; border-radius: 50%; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center; margin-right: 10px;">1</div> <div style="text-align: left;">  Click on the icon to review the full application form         </div> </div>
Chapter Name	BNI - Brrrr	
Application Status	Submitted	
Renewal Date	06/01/2015	

### MEMBER PERFORMANCE (LAST 6 MONTHS PALMS)

P	A	L	M	S	RGI	RGO	RRI	RRO	V	1-2-1	TYFCB	CEU
20	1	2	0	2	12	5	8	19	3	20	65430	15

[Training Details](#)

### APPROVE / DECLINE

2

3

4

By checking this box, I certify that all necessary membership performance reviews and discussions pertaining to this renewal have taken place with both the Membership Committee and the Chapter Director Consultant as appropriate.

Approval is conditional

A Control letter has been sent

5

Approve

Decline

6

1. For post approvals, a copy of the application will be available for review.
2. Before a decision can be saved, the user must assert that they have fully completed the review process.
3. A conditional approval means that the member may have been issued a warning about performance or attendance, but an approval was granted. The conditions of this approval are subject to regional policy.
4. If control letters (such as a probation notification or in the case of a declined renewal) have been sent, this can be noted before submission.

## After a Decision is Made, Pending Applications Will be Updated

View Pending Applications Back

Show  entries Refine

Member	Chapter	Payment Type	Application Type	Application Date	Value	Status	Received	Approve
<a href="#">Amy Burmeister</a>	BNI - Brrrr	Cash	Renewal	10/16/2014	7.00	Declined	No	
<a href="#">BNI Connect Support</a>	BNI - Brrrr	Cash	Renewal	07/01/2014	7.00	Offline Entry	No	
<a href="#">Preferences Forwarding</a>	BNI - Brrrr		Renewal	10/21/2014	665.00	Submitted	No	
<a href="#">Rebecca Goodwin</a>	BNI - Brrrr	Cash	Renewal	10/21/2014	365.00	Submitted	No	
<a href="#">Ross Gillett</a>	BNI - Brrrr	Offline Card Payment	New	09/26/2014	7.00	Offline Entry	No	
<a href="#">Victoria Hosterelli</a>	BNI - Brrrr		Renewal	10/20/2014	7.00	Approved	No	

Showing 1 to 6 of 6 entries First Previous 1 Next Last

## Notifications are Sent About Decisions

BNI Membership Renewal for Victoria Hosterelli of BNI - Brrrr has been Approved Int



**Sys Admin** <bni.notifications@trackbniconnect.com>

to me ▼



### Renewal Details

*Chapter Name*  
BNI - Brrrr

*Renewing Member*  
Victoria Hosterelli

*Renewal Due Date*  
06/01/2017

I'm pleased to announce that Victoria Hosterelli's renewal application has been approved for the BNI - Brrrr Chapter.

Click on the link to be directed to the member's profile :  
<http://www.trackbniconnect.com/web/secure/operationsRegionEditMembership?memberId=1211934>

Sincerely,

Sys Admin

21211144  
[u1@bnitester.com](mailto:u1@bnitester.com)

Shiver Region

For further assistance, please contact your Leadership Team, Director Consultant or Regional Office.

*This email was copied to the President, Secretary Treasurer, Membership Committee, Chapter Director Consultant and Regional Admin. Please do not respond directly to this system generated email.*

Approval and Declined emails are copied to the Regional Admins, Chapter Director Consultant, President, Vice President, Secretary Treasurer and Membership Committee.

## Happy Connecting!

Version 2014.10.23.1724



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