USGA Handicap Review Tool - Phase 2 User Guide

1. Introduction

This guide details the Phase II enhancements to the Handicap Review feature. These updates aim to provide clubs with more comprehensive tools for monitoring handicaps and ensuring fairness. Key new features include:

- **Club-Wide Review:** Run the Handicap Review process for your entire active club roster at once.

- **Enhanced Results Page:** A dedicated page to view the results of club-wide reviews, including detailed statuses and filtering options.

- **Automatic Expiry:** Pending recommended adjustments will automatically expire after 14 days if no action is taken.

- **Improved Golfer Details:** More insights into a golfer's performance, including Actual vs. Expected score differentials and a Competition Factor.

- **Audit Logs:** Tracking of when club-wide reviews are initiated.

2. Accessing Handicap Review

To access the Handicap Review features for your club:

1. Navigate to your club's main page.

2. Select the "**Handicap Review**" tab.

(Fig. 1 - New Handicap Review tab)

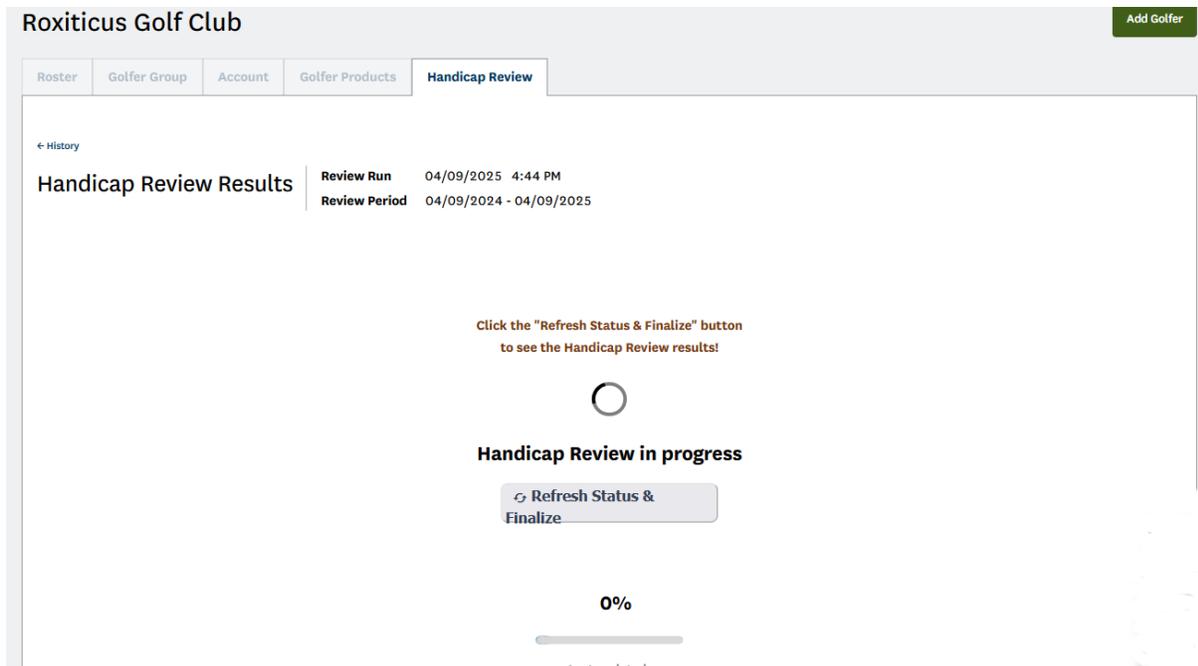## 3. Running a Club-Wide Handicap Review

You can now initiate a Handicap Review for all active members of your club simultaneously.

- **Prerequisite:** You can only start a *new* club-wide review if there are **no** golfers with "Pending" recommended adjustments from previous reviews (either club-wide or targeted). If there are pending adjustments, the "New Handicap Review" button will be disabled. You must address these pending items first (see Section 5).

- **Steps:**

    1. Go to the "Handicap Review" tab on your club page.

    2. If available, click the "**New Handicap Review**" button.

    3. A confirmation window will appear. Click "**Confirm**" to proceed. *(See Fig. 2)*

    4. The system will begin processing all eligible golfers in your club. You will be taken to the **Handicap Review Results page**.
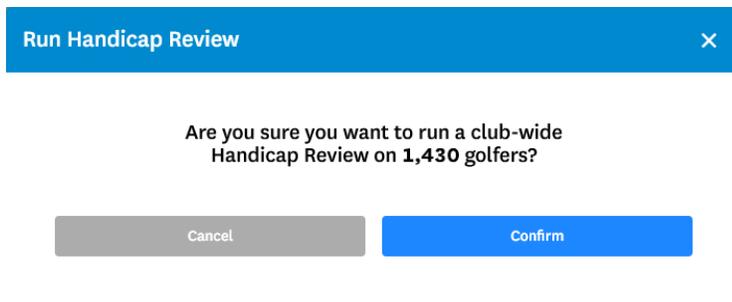

(Fig. 2 - Confirmation Modal)

- **During Processing:**

    - An indicator will show that the review is running.

    - A "**Refresh Status & Finalize**" button allows you to update the status manually. (See Fig. 3 - 4)

    - Each time you manually update the status, the page will display the "Last Updated" timestamp.

    - ***Note - to complete the review, once the status hits 99%, you need to click the button one last time to finalize the review.***

(Fig. 3 - Status Percentage at 0%)
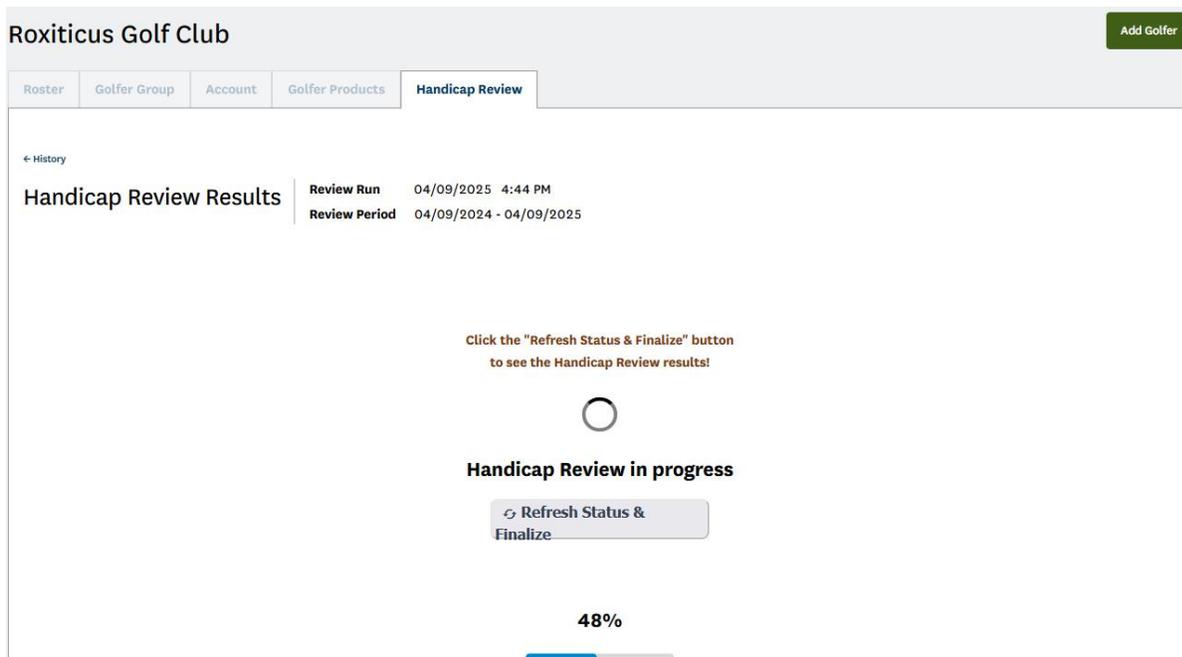
(Fig. 4 - Status Percentage at 48%)

4. Understanding the Handicap Review Results Page

Once the club-wide review is complete, the results page displays detailed information for all golfers included in the review. *(See Fig. 5)*

(Fig. 5 - Handicap Review Results page)

- **Display Grid:** Includes all the standard golfer details as provided in the targeted Handicap Review, plus a new "**Expiration Date**" field for golfers recommended for an adjustment.

- **Filtering Options:** Use the filters at the top to narrow down the list to the various categories: *(See Fig. 6)*

  - **Name:** Filter by golfer name.

  - **Gender:** Filter by gender.

  - **Status:** Filter golfers based on their Handicap Review status:

    - **All (Default):** Shows all active golfers processed in this review.

    - **Adjustment Recommended:** Golfers flagged for potential adjustment. Sub-filters include:

      - Pending: Recommendation made, awaiting action (within 14-day expiry).

      - Applied: Recommendation was applied by the club.

      - Denied: Recommendation was denied by the club.

- Expired: Recommendation was not actioned within 14 days and expired.

- **No Adjustment Recommended:** Golfers processed, but no adjustment flagged. *This will be the majority of the golfers in the club*.

- **Ineligible (All):** There are 2 categories of ineligible golfers. Golfers who are *excluded from the Handicap Review processing* and golfers who were processed during Handicap Review but are *not eligible for Handicap Index adjustment*. Sub-filters are defined below, and whether the group falls into the "excluded" or "not eligible" category.

  - < 20 Scores: Incomplete scoring record (3-19 scores)

    - Not eligible for Handicap Index adjustment.

  - Not Home Club: Golfer's designated Home Club is different.

    - Not eligible for Handicap Index adjustment.

  - < 3 Scores (NH): Not enough scores to calculate a Handicap Index.

    - Excluded from Handicap Review processing

  - Withdrawn H.I.: Golfer's Handicap Index is withdrawn.

  - Existing Pending Review: Another club has an active pending review for this golfer.

    - Excluded from Handicap Index processing

  - Existing Modified Golfer: Golfer's Handicap Index is currently modified.

    - Not eligible for Handicap Index adjustment.

Handicap Review Results | **Review Run** 04/09/2025 4:44 PM
| **Review Period** 04/09/2024 - 04/09/2025

Golfer Name	Gender	Status	
	Select... ⌄	7 selected ⌄	Reset

Export To Excel | Apply | Deny | Adjustment Recommended = 9 | No Adjustment Re... | ...e Filters —

☐ Select All

☐ Adjustment Recommended

  ☐ Applied

  ☐ Denied

  ☐ Expired

  ☑ Pending

☐ No Adjustment Recommended

☑ Ineligible

  ☑ < 20 Scores

  ☑ Not Home Club

  ☑ < 3 Scores (NH)

  ☑ Withdrawn H.I.

  ☑ Existing Pending Review

  ☑ Existing Modified Golfer

☐	Golfer Name	Recommended Adjustment	Status	Applied by	Date Applied	Expiration Da...	View Details
☐	▓▓▓▓	+ 1	Pending	-	-	04/11/202...	Details
☐	▓▓▓▓	- 1	Pending	-	-	04/11/202...	Details
☐	▓▓▓▓	- 1	Pending	-	-	04/11/202...	Details
☐	▓▓▓▓	- 1	Pending	-	-	04/11/202...	Details
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▓	▓▓▓▓		Ineligible	-	-	04/11/202...	Details

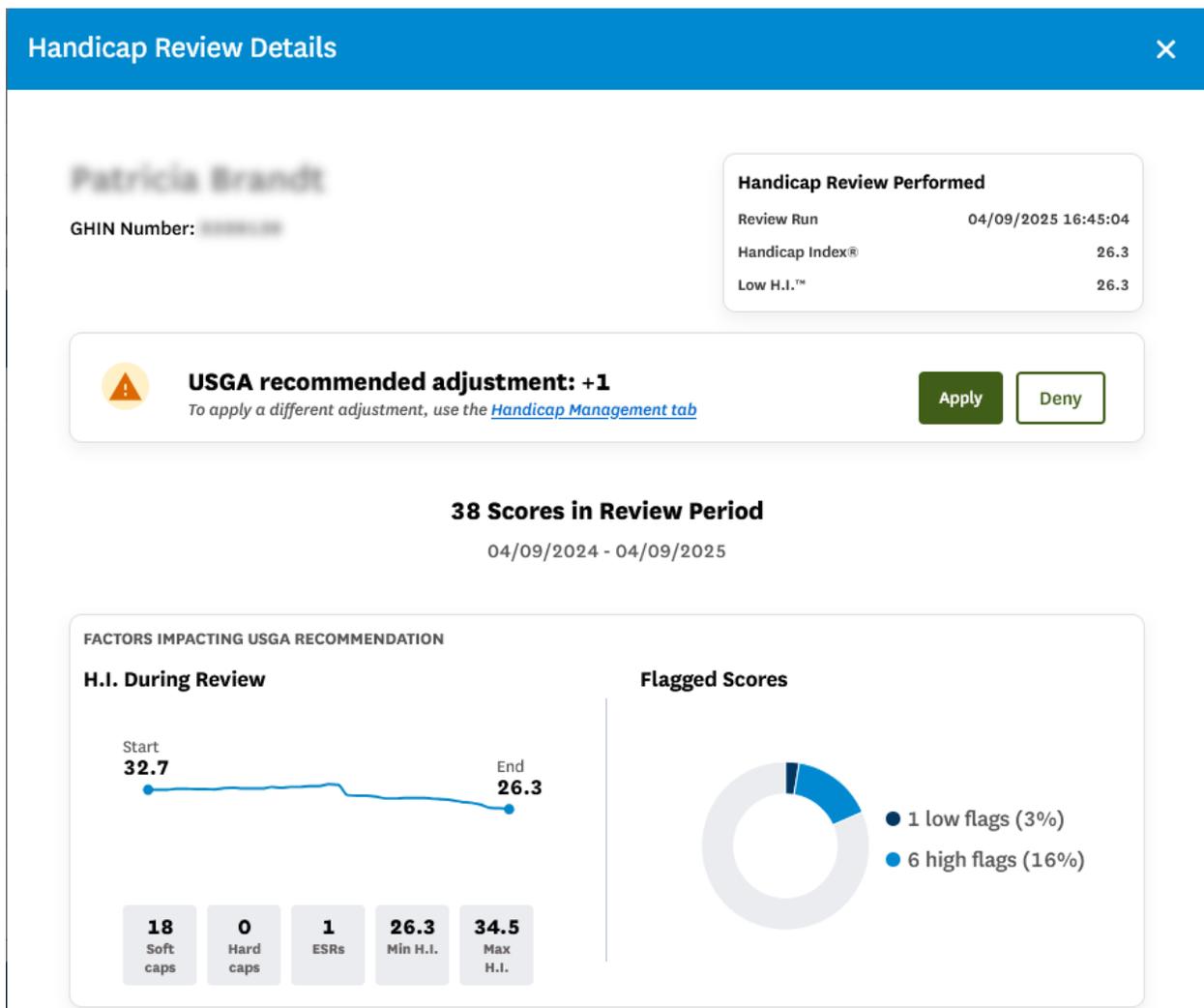|< < **1** 2 > >| 10 ⌄   1 of 14 pages (137 items)

(Fig. 6 - Handicap Review Results page with Filtering options)

5. Managing Recommended Adjustments (Applying/Denying)

When the review recommends adjustments ("Pending" status), the club must decide whether to apply or deny the adjustment. *There are 3 ways to manage the recommended adjustment for the pending list of golfers.*

- *Individual Golfer via the Details Modal* -

  - Click the "Details" column link associated with the chosen golfer

  - This will bring up the "Details" modal displaying all relevant data points collected during Handicap Review processing.

  - Click the "Apply" or "Deny" button.

  - Confirm the action.

  - The golfers will be changed to "Approved" or "Denied" based on the action, *(See Fig. 7)*

- *Multiple Golfers via the Display Grid*

  - Click the individual checkboxes next to each golfer,

- Click the "Apply" or "Deny" button.

- Confirm the action.

- The selected golfers will be changed to "Approved" or "Denied" based on the action. *(See Fig. 8)*

- **All Golfers via the Display Grid**

  - Click the checkbox in the header row

  - Choose to select "golfers on the current page only" or "select all golfers on all pages"

  - Click the "Apply" or "Deny" button.

  - All golfers will be changed to "Approved" or "Denied" based on the action. *(See Fig. 9)*

(Fig. 7 - Apply/Deny individual Golfer via the Details Modal)

(Fig. 8- Applying the recommended adjustment to 3 select golfers | Confirmation screen shown)

(Fig. 9- clicking the checkbox in the header row allows the club to select the page of golfers or "all" golfers)