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USGA Handicap Review Tool - Phase 3 User Guide

23 days ago · Updated

1. Introduction

This guide describes the **Phase 3 enhancements** to the Handicap Review feature. Building on functionality introduced in earlier releases, Phase 3 introduces a more structured and time-bound workflow for managing Handicap Index reviews, improving transparency for both club administrators and golfers.

These enhancements provide clubs with greater control over the review process, clearer communication with golfers, and additional data insights to support handicap decisions.

Key capabilities include:

Phase 3 introduces the following major updates:

- Notify Path and Manual Path communication options
- Updated 10-day expiration window
- Quartile Breakdown data view
- Enhanced Played to Handicap Index chart

- Rollback Adjustment capability
- Email notification delivery status tracking

Notify Path & Manual Path communication options

When initiating a Handicap Review (individual or club-wide), administrators can choose how golfers are informed of recommended adjustments:

- **Notify Path** – The system automatically sends email notifications to affected golfers explaining the recommended adjustment and outlining the appeal process.
- **Manual Path** – Club administrators manage golfer communication outside the system.

Updated 10-day expiration window

The review expiration period has been reduced from 14 days to **10 days** and now a two-phase workflow:

- **Manual Path** - Handicap Review expiration timeframe = **10 days**.
- **Notify Path** - Handicap Review expiration timeframe = **10 days** total. The 10-day window has been broken into two distinct phases:
 - Club Admin has 5 days from the date the Handicap Review was run to review the recommended adjustments and either initiate or deny them.
 - The golfer has the remaining time in the 10-day expiration window after being notified to appeal the adjustment.

Advanced Data Point Enhancements:

Additional analytics are now available in the Handicap Review details view, including:

- **Quartile Breakdown Grid** displaying Handicap Review data across four date-based quartiles (Q1–Q4) within the 365-day review period.
- **Enhanced “Played to Handicap Index” Chart** providing improved visualization of scoring performance over time.

Expanded Administrative Controls

- **Rollback Adjustment** capability, allowing administrators to reverse a selected Handicap Review adjustment.
- **Email Notification Status Tracking** is displayed directly in the Handicap Review table, indicating whether golfer notifications were successfully delivered.

These enhancements provide clubs with improved visibility, stronger communication tools, and a clearer workflow for managing Handicap Index reviews.

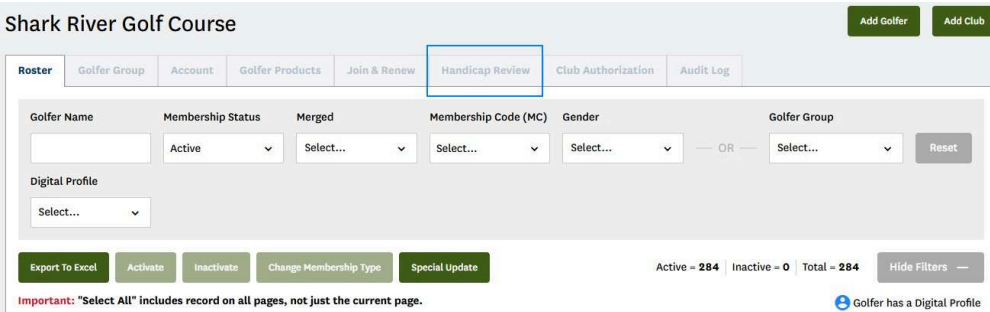
2. Running Handicap Review using the "Notify" path

Note - The **Notify Path** is best for clubs that want to automate the communication process for **alerting golfer(s) via email** of a pending recommended adjustment. After the review completes, choose which recommended H.I. adjustments to initiate. Then, the golfer(s) are notified and given a timeframe to appeal.

IMPORTANT: For club-wide Handicap Review only! When you initiate the notification for a subset of golfers in the Notify path, any golfers not notified, but pending a Handicap Index adjustment, will be set to "denied". This is in place to ensure that all golfers have the same opportunity to appeal their adjustment.

2a - Club-wide Handicap Review - (Notify Path)

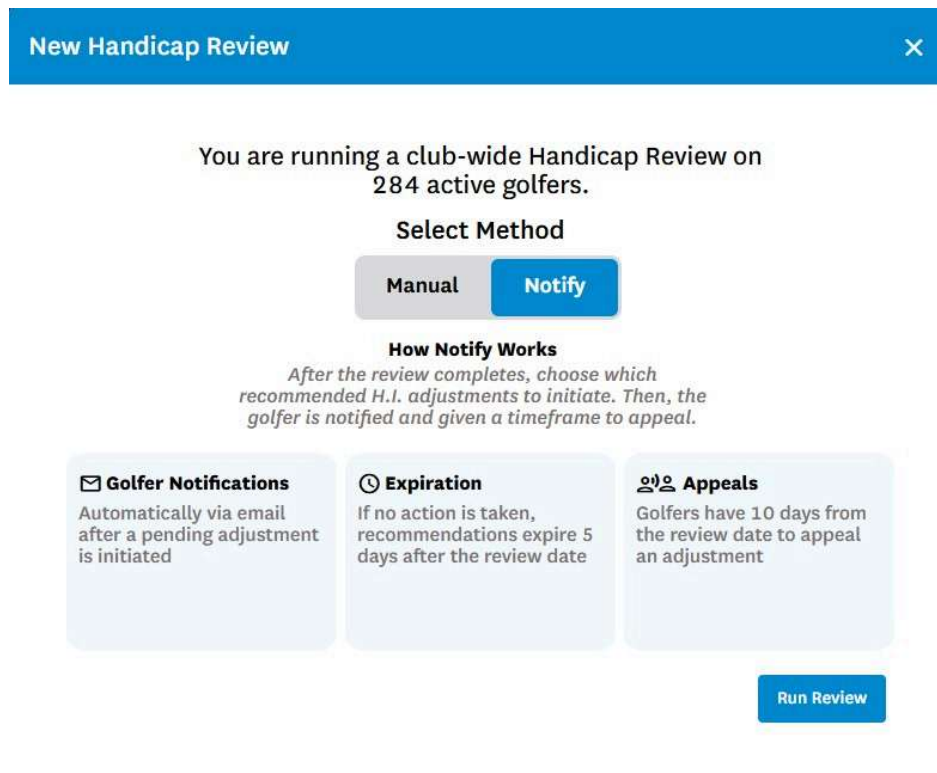
1. In case of a club-wide handicap review, click the Handicap Review tab of a club's page. (see Fig. 1)



The screenshot shows the 'Shark River Golf Course' interface with the 'Handicap Review' tab selected. The interface includes a navigation bar with tabs: Roster, Golfer Group, Account, Golfer Products, Join & Renew, Handicap Review (highlighted), Club Authorization, and Audit Log. Below the navigation bar, there are several filter fields: Golfer Name, Membership Status (set to 'Active'), Merged, Membership Code (MC), Gender, and Golfer Group. A 'Reset' button is located to the right of the Golfer Group field. Below the filters, there is a 'Digital Profile' dropdown menu. At the bottom of the interface, there are several action buttons: 'Export To Excel', 'Activate', 'Inactivate', 'Change Membership Type', and 'Special Update'. To the right of these buttons, there is a summary: 'Active - 284 | Inactive - 0 | Total - 284' and a 'Hide Filters' button. A small red text note at the bottom left states: 'Important: "Select All" includes record on all pages, not just the current page.' A small blue icon with a plus sign and the text 'Golfer has a Digital Profile' is located at the bottom right.

(Fig. 1 - Handicap Review tab)

2. From the Handicap Review tab, click the **New Handicap Review** button
3. This will open a newly implemented modal that lets us select the "Manual" or "Notify" path. *The manual path will work the same way as before, except the expiration date has been reduced from 14 days to 10 days.* For this flow, click the **"Notify"** path. (see Fig. 2)



(Fig. 2 - New Handicap Review Modal - Notify)

Explanation of the Notify Path for club-wide Handicap Review:

Golfer Notifications - Automatically via email after a pending adjustment is initiated

Expiration - If no action is taken to initiate the notification, recommended adjustments expire 5 days after the review was run and the golfer(s) are not adjusted, and the status is changed to "expired."

Appeals - Golfers have 10 days from the review date to appeal an adjustment. During this appeal period, you can:

- Accept the Appeal - where you would "Deny" the adjustment, the golfer H.I. is NOT adjusted, and the status is changed to "denied."
- Override the Appeal - where you can "Apply" the adjustment, the golfer's H.I. is adjusted immediately, and the status is changed to "applied."
- Do Nothing - wait until the 10-day expiration window expires; the golfer's H.I. is adjusted, and the status is changed to "applied."

4. To start the Handicap Review, click the **"Run Review"** button.

5. After the club-wide review is completed, we can view the list of pending adjustments for the golfers. (see Fig. 3)

← History

Handicap Review Results Review Run: 04/04/2026 7:55 PM
Review Period: 04/04/2025 - 04/04/2026

Golfer Name: Gender: Select... Status: Select...

 Adjustment Recommended = 13 No Adjustment Recommended = 623 Ineligible for Review = 99

<input type="checkbox"/>	Golfer Name	Recommended Adjustment	Status	Applied by	Date Applied	Expiration Date	Scores Posted	High Flags	Low Flags	View Details
<input type="checkbox"/>	[Redacted]	-1	Pending	-	-	04/06/2026	7	0 (0.0%)	2 (28.6%)	Details
<input type="checkbox"/>	[Redacted]	-2	Pending	-	-	04/06/2026	11	0 (0.0%)	2 (18.2%)	Details
<input type="checkbox"/>	[Redacted]	+3	Pending	-	-	04/06/2026	8	3 (37.5%)	0 (0.0%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	-	-	04/06/2026	56	3 (5.4%)	5 (8.9%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	-	-	04/06/2026	130	0 (0.0%)	13 (10.0%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	-	-	04/06/2026	91	0 (0.0%)	9 (9.8%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	-	-	04/06/2026	106	0 (0.0%)	8 (7.5%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	-	-	04/06/2026	87	0 (0.0%)	9 (10.3%)	Details
<input type="checkbox"/>	[Redacted]	+1	Pending	-	-	04/06/2026	58	6 (10.3%)	3 (5.2%)	Details
<input type="checkbox"/>	[Redacted]	+2	Pending	-	-	04/06/2026	7	3 (42.9%)	0 (0.0%)	Details

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(Fig. 3 - Handicap Review Results page - Club)

6. From there, we can choose to notify all golfers at once (see Fig. 4) or select specific golfers using the checkboxes. (see Fig. 5)

← History

Handicap Review Results Review Run: 04/05/2026 1:09 PM
Review Period: 04/05/2025 - 04/05/2026

Golfer Name: Gender: Select... Status: Select...

 Adjustment Recommended = 7 No Adjustment Recommended = 205 Ineligible for Review = 31

<input type="checkbox"/>	Golfer Name	Recommended Adjustment	Status	Email Notifications	Applied by	Date Applied	Expiration Date	Scores Posted	High Flags	Low Flags	View Details
<input type="checkbox"/>	[Redacted]	3	Pending	N/A	-	-	04/06/2026	9	3 (33.3%)	0 (0.0%)	Details
<input type="checkbox"/>	[Redacted]	1	Pending	N/A	-	-	04/06/2026	93	0 (0.0%)	7 (7.5%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	N/A	-	-	04/06/2026	49	0 (0.0%)	4 (8.2%)	Details
<input type="checkbox"/>	[Redacted]	+3	Pending	N/A	-	-	04/06/2026	13	3 (23.1%)	0 (0.0%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	N/A	-	-	04/06/2026	67	0 (0.0%)	5 (7.5%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	N/A	-	-	04/06/2026	55	0 (0.0%)	4 (7.3%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	N/A	-	-	04/06/2026	71	0 (0.0%)	6 (8.5%)	Details
<input checked="" type="checkbox"/>	[Redacted]	0	No Adj.	N/A	-	-	04/06/2026	26	0 (0.0%)	0 (0.0%)	Details
<input checked="" type="checkbox"/>	[Redacted]	0	No Adj.	N/A	-	-	04/06/2026	72	0 (0.0%)	0 (0.0%)	Details
<input checked="" type="checkbox"/>	[Redacted]	0	No Adj.	N/A	-	-	04/06/2026	40	2 (5.0%)	0 (0.0%)	Details

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(Fig. 4 - Handicap Review Results - Select ALL Golfers)

← History

Handicap Review Results Review Run 04/05/2026 1:09 PM
Review Period 04/05/2025 - 04/05/2026

Golfer Name: Gender: Status:

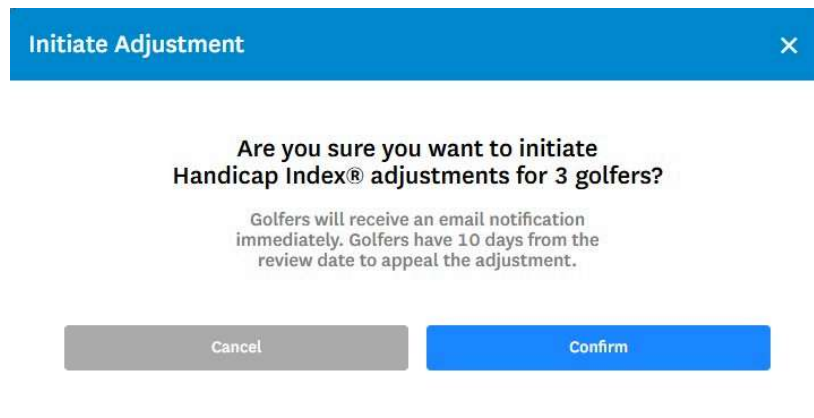
 Adjustment Recommended = 7 | No Adjustment Recommended = 205 | Ineligible for Review = 31

<input type="checkbox"/>	Golfer Name	Recommended Adjustment	Status	Email Notifications	Applied by	Date Applied	Expiration Date	Scores Posted	High Flags	Low Flags	View Details
<input checked="" type="checkbox"/>	[Redacted]	+3	Pending	N/A	-	-	04/06/2026	9	3 (33.3%)	0 (0.0%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	N/A	-	-	04/06/2026	93	0 (0.0%)	7 (7.5%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	N/A	-	-	04/06/2026	49	0 (0.0%)	4 (8.2%)	Details
<input checked="" type="checkbox"/>	[Redacted]	+3	Pending	N/A	-	-	04/06/2026	13	3 (23.1%)	0 (0.0%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	N/A	-	-	04/06/2026	67	0 (0.0%)	5 (7.5%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	N/A	-	-	04/06/2026	55	0 (0.0%)	4 (7.3%)	Details
<input checked="" type="checkbox"/>	[Redacted]	-1	Pending	N/A	-	-	04/06/2026	71	0 (0.0%)	6 (8.5%)	Details
<input type="checkbox"/>	[Redacted]	0	No Adj.	N/A	-	-	04/06/2026	26	0 (0.0%)	0 (0.0%)	Details
<input type="checkbox"/>	[Redacted]	0	No Adj.	N/A	-	-	04/06/2026	72	0 (0.0%)	0 (0.0%)	Details
<input type="checkbox"/>	[Redacted]	0	No Adj.	N/A	-	-	04/06/2026	40	2 (5.0%)	0 (0.0%)	Details

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(Fig. 5 - Handicap Review Results - Select Some Golfers)

- Once you have selected the golfer(s) that you want to "Notify", click the **"Initiate Notification"** button.
- Assume that we initiate the notification for the 3 golfers selected above, you will now see the confirmation modal (see Fig. 6)



(Fig. 6 - Initiate Notification: Confirmation Modal)

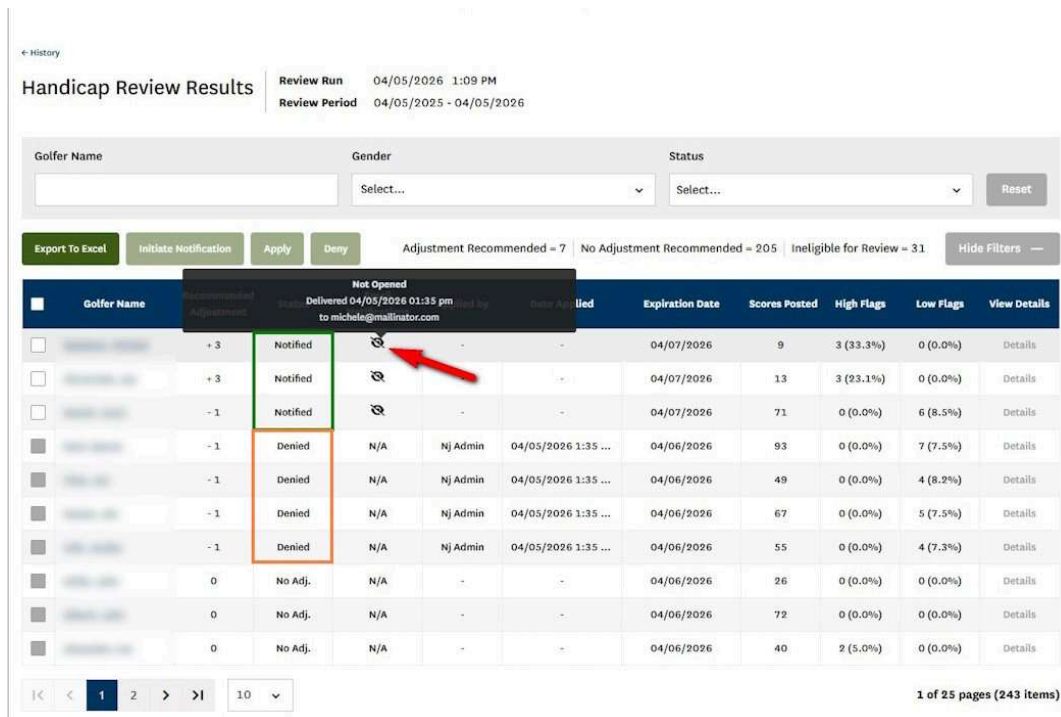
- Click **"Cancel"** to return to the Handicap Review Results screen; otherwise, click the **"Confirm"** button to continue.

When we press the **"Confirm"** button, the emails will be sent to the 3 golfers, allowing them 10 days from the review date to appeal the process. The 3 golfer's statuses will be set to **"Notified"**.

This will not send an email notification to the 4 golfers not selected. Their status will be set to **"Denied"**.

(see Fig.7)

- Click the "**icons**" in the Email Notifications column to see the status of the email sent to the golfer. The icons tell you whether a golfer received the email and if the email was opened. A red circle with a slash through it indicates the email was not delivered. The eye icon with a slash through it indicates the email was delivered but not opened. The eye icon with no slash, though it means the email was delivered and read. (see Fig. 7)



Handicap Review Results

Review Run: 04/05/2026 1:09 PM
Review Period: 04/05/2025 - 04/05/2026

Filters: Golfer Name, Gender, Status

Buttons: Export To Excel, Initiate Notification, Apply, Deny

Summary: Adjustment Recommended = 7, No Adjustment Recommended = 205, Ineligible for Review = 31

Golfer Name	Adjustment	Status	Reason	Applied	Expiration Date	Scores Posted	High Flags	Low Flags	View Details
[Redacted]	+3	Notified	Delivered 04/05/2026 01:35 pm to michete@mailinator.com	-	04/07/2026	9	3 (33.3%)	0 (0.0%)	Details
[Redacted]	+3	Notified	[Redacted]	-	04/07/2026	13	3 (23.1%)	0 (0.0%)	Details
[Redacted]	-1	Notified	[Redacted]	-	04/07/2026	71	0 (0.0%)	6 (8.5%)	Details
[Redacted]	-1	Denied	N/A	Nj Admin	04/05/2026 1:35 ...	93	0 (0.0%)	7 (7.5%)	Details
[Redacted]	-1	Denied	N/A	Nj Admin	04/05/2026 1:35 ...	49	0 (0.0%)	4 (8.2%)	Details
[Redacted]	-1	Denied	N/A	Nj Admin	04/05/2026 1:35 ...	67	0 (0.0%)	5 (7.5%)	Details
[Redacted]	-1	Denied	N/A	Nj Admin	04/05/2026 1:35 ...	55	0 (0.0%)	4 (7.3%)	Details
[Redacted]	0	No Adj.	N/A	-	04/06/2026	26	0 (0.0%)	0 (0.0%)	Details
[Redacted]	0	No Adj.	N/A	-	04/06/2026	72	0 (0.0%)	0 (0.0%)	Details
[Redacted]	0	No Adj.	N/A	-	04/06/2026	40	2 (5.0%)	0 (0.0%)	Details

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(Fig. 7 - Handicap Review Results - Notify)

- Optional Final Step - Once the golfer has been notified, the following options are available during the appeal process window:

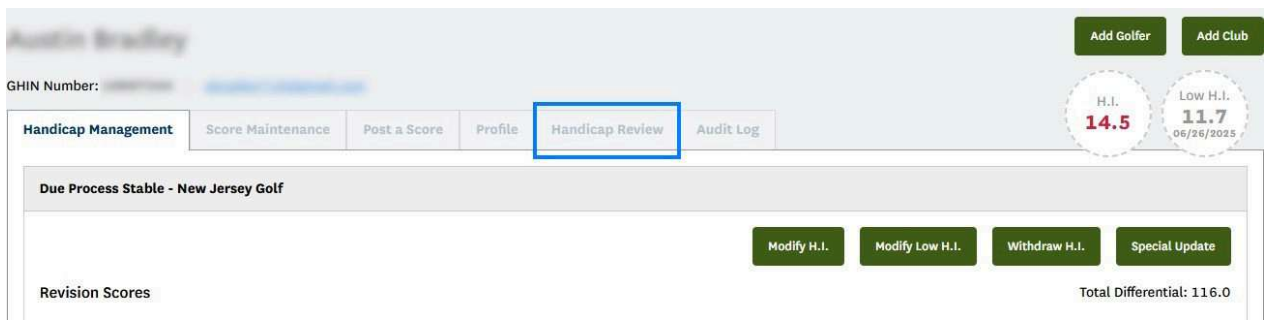
Accept the Appeal - where you would "**Deny**" the adjustment, the golfer H.I. **is NOT adjusted, and the status is changed to "denied."**

Override the Appeal - where you can "**Apply**" the adjustment, the golfer's H.I. **is adjusted immediately, and the status is changed to "applied."**

Do Nothing - wait until the 10-day expiration window expires; the golfer's H.I. **is adjusted, and the status is changed to "applied."**

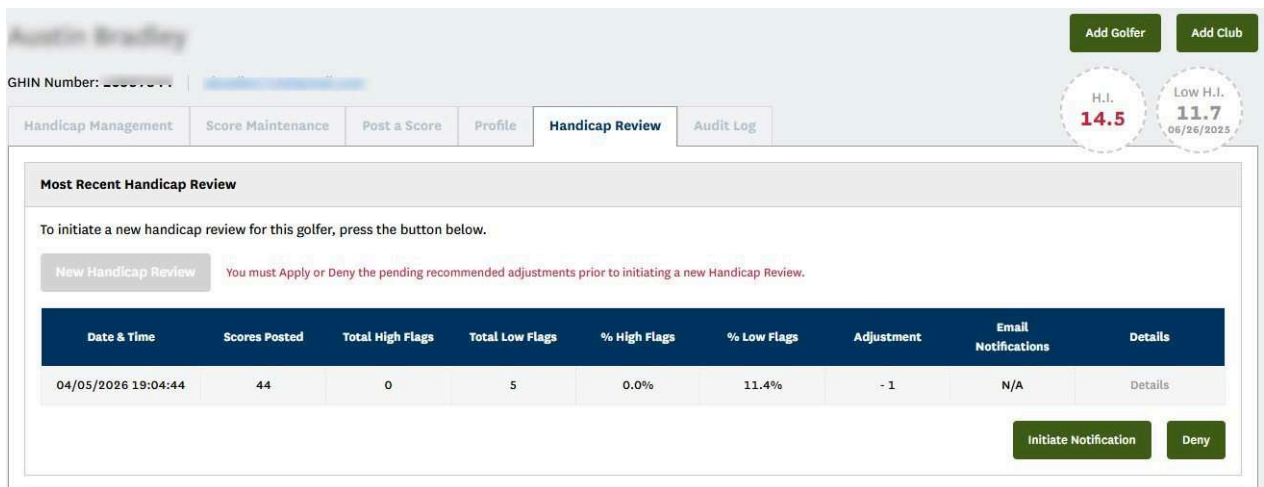
2a - Individual Golfer Handicap Review - (Notify Path)

- In case of a single golfer handicap review, click the Handicap Review tab on the golfer landing page. (see Fig. 8)



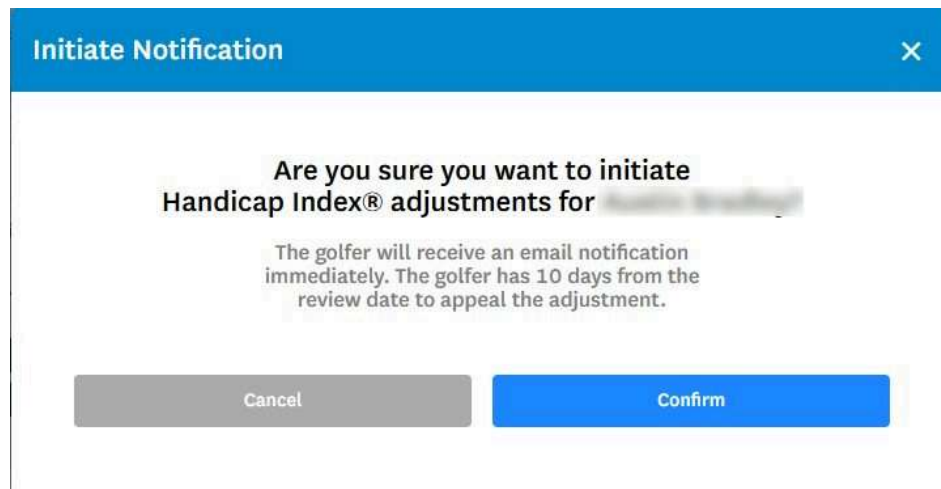
(Fig. 8 - Individual Golfer Page - Handicap Review)

2. Similar to the club-wide Handicap Review, from the Handicap Review tab, click the **"New Handicap Review"** button.
3. From the new modal window, click the **"Notify"** option, then click the **"Run Review"** button.
4. After the individual golfer review is completed and the golfer is pending an adjustment, it will be listed within the **"Most Recent Handicap Review"** frame. (see Fig. 9)



(Fig. 9 - Individual Golfer Page - Handicap Review Results)

5. Click the **"Deny"** button, and the golfer's Handicap Index will not be adjusted, and their status will be set to "denied".
6. If you determine that you want to proceed with the adjustment, click the **"Initiate Notification"** button,
7. The confirmation modal will appear (see Fig. 9)

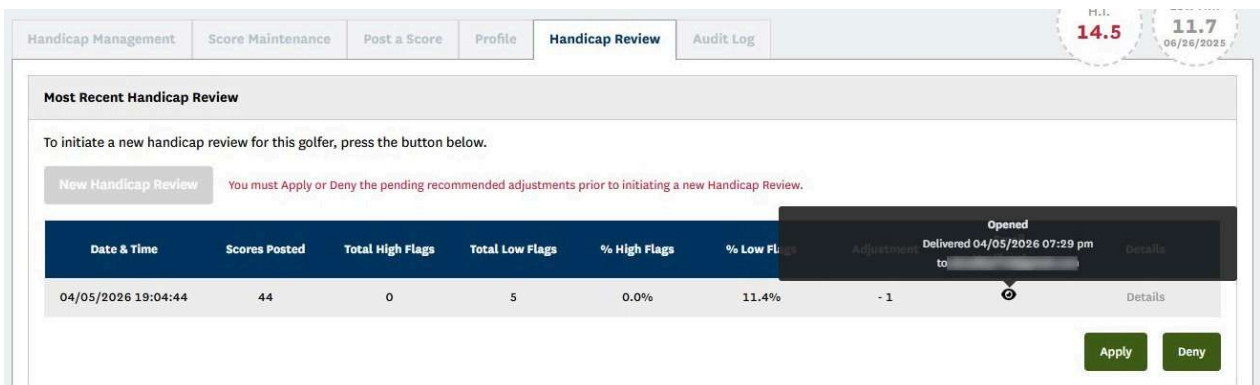


(Fig. 9 - Initiate Notification: Confirmation Modal - Golfer)

- Click "**Cancel**" to return to the golfer's Handicap Review Results screen; otherwise, click the "**Confirm**" button to continue.

*Press the "**Confirm**" button, the emails will be sent to this golfer, allowing them 10 days from the review date to appeal the process. The golfer's status will be set to "**Notified**".*

- Similar to the club-wide Handicap Results page, you can click the "**icons**" in the Email Notifications column to see the status of the email sent to the golfer. (see Fig. 10)



(Fig. 10 - Individual Handicap Review Results: Notifications)

- Optional Final Step - Once the golfer has been notified, the following options are available during the appeal process window:

Accept the Appeal - where you would "**Deny**" the adjustment, the golfer H.I. is **NOT adjusted**, and the status is changed to "**denied**."

Override the Appeal - where you can "**Apply**" the adjustment, the golfer's H.I. is **adjusted immediately**, and the status is changed to "**applied**."

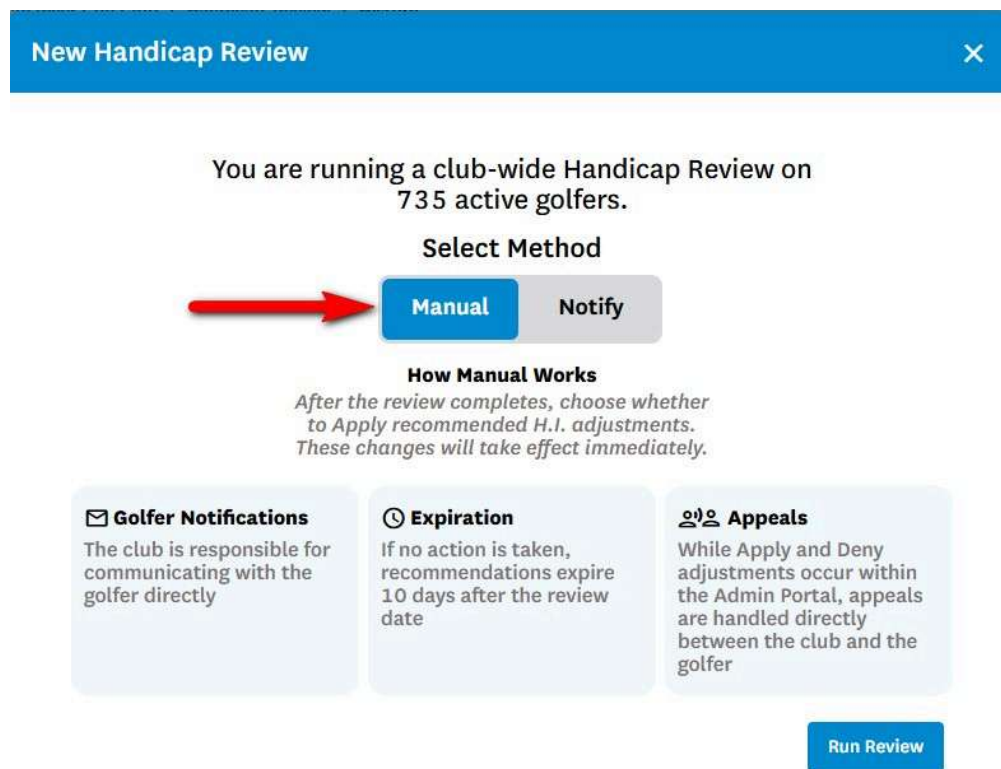
Do Nothing - wait until the 10-day expiration window expires; the golfer's H.I. **is adjusted, and the status is changed to "applied."**

3. Running Club-Wide Handicap Review using the "Manual" path

Note - The "**Manual**" path is best for clubs that want to handle the Handicap Review and potential adjustment to a golfer's Handicap Index privately. This would allow the club to **review any pending adjustments and** have discussions with the affected golfers. Within the 10-day window after running the review, you can "**Apply**" or "**Deny**" the adjustments. If the club runs the Handicap Review and does not act, after 10 days, the golfer's status is changed to "expired" and no adjustment is applied to the Handicap Index.

3a - Club-wide Handicap Review - (Manual Path)

1. In case of a club-wide handicap review, click the Handicap Review tab of a club's page.
2. From the Handicap Review tab, click the **New Handicap Review** button
3. This will open a newly implemented modal that lets us select the "Manual" or "Notify" path.
The manual path will work the same way as before, except the expiration date has been reduced from 14 days to 10 days. For this flow, click the "Manual" path. (see Fig. 11)



(Fig. 11 - New Handicap Review Modal - Manual)

Explanation of the Manual Path for club-wide Handicap Review:

Golfer Notifications - The club is responsible for communicating with the golfer directly.

Expiration - If no action is taken recommendations expire 10 days after the review date.

Appeals - While Apply and Deny adjustments are handled in the Admin Portal, appeals are handled directly between the club and the golfer.

4. To start the Handicap Review, click the **“Run Review”** button.

5. After the club-wide review is completed, we can view the list of pending adjustments for the golfers. (see Fig. 12)

Manasquan River Golf Club

← History

Handicap Review Results | Review Run: 04/04/2026 7:55 PM | Review Period: 04/04/2025 - 04/04/2026

Adjustment Recommended = 13 | No Adjustment Recommended = 623 | Ineligible for Review = 99

Golfer Name	Recommended Adjustment	Status	Applied by	Date Applied	Expiration Date	Scores Posted	High Flags	Low Flags	View Details
[Redacted]	-1	Pending	-	-	04/06/2026	7	0 (0.0%)	2 (28.6%)	Details
[Redacted]	-2	Pending	-	-	04/06/2026	11	0 (0.0%)	2 (18.2%)	Details
[Redacted]	+3	Pending	-	-	04/06/2026	8	3 (37.5%)	0 (0.0%)	Details
[Redacted]	-1	Pending	-	-	04/06/2026	56	3 (5.4%)	5 (8.9%)	Details
[Redacted]	-1	Pending	-	-	04/06/2026	130	0 (0.0%)	13 (10.0%)	Details
[Redacted]	-1	Pending	-	-	04/06/2026	91	0 (0.0%)	9 (9.9%)	Details

(Fig. 12 - Handicap Review Results page: Manual path)

6. You can choose what golfers to **“Apply”** and **“Deny”** based on offline communications with the golfer.

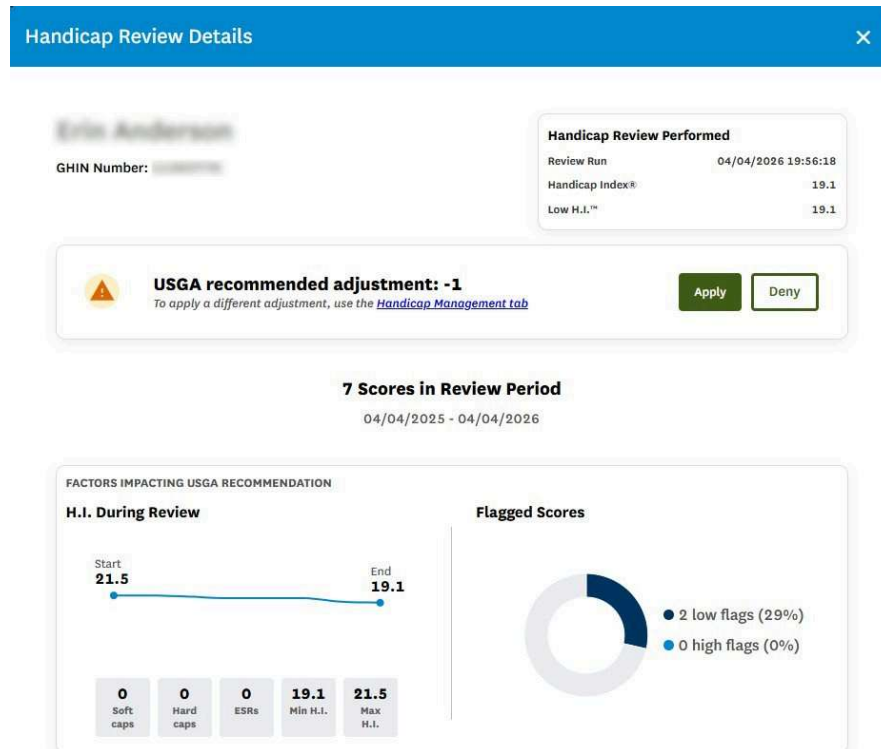
*If you do not **“Apply”** or **“Deny”** adjustments to any pending golfers and 10 days pass since the Handicap Review date, the adjustments will not be applied and the golfer status will display as **“Expired”**.*

7. 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. 13)



(Fig. 13 - Golfer Details Modal: Manual)

- **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. 14)

Handicap Review Results Review Run 04/05/2026 1:09 PM
Review Period 04/05/2025 - 04/05/2026

Golfer Name: Gender: Status: Reset

Export To Excel Initiate Notification Apply Deny Adjustment Recommended = 7 | No Adjustment Recommended = 205 | Ineligible for Review = 31 Hide Filters

<input type="checkbox"/>	Golfer Name	Recommended Adjustment	Status	Email Notifications	Applied by	Date Applied	Expiration Date	Scores Posted	High Flags	Low Flags	View Details
<input checked="" type="checkbox"/>	[Redacted]	+3	Pending	N/A	-	-	04/06/2026	9	3 (33.3%)	0 (0.0%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	N/A	-	-	04/06/2026	93	0 (0.0%)	7 (7.5%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	N/A	-	-	04/06/2026	49	0 (0.0%)	4 (8.2%)	Details
<input checked="" type="checkbox"/>	[Redacted]	+3	Pending	N/A	-	-	04/06/2026	13	3 (23.1%)	0 (0.0%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	N/A	-	-	04/06/2026	67	0 (0.0%)	5 (7.5%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	N/A	-	-	04/06/2026	55	0 (0.0%)	4 (7.3%)	Details
<input checked="" type="checkbox"/>	[Redacted]	-1	Pending	N/A	-	-	04/06/2026	71	0 (0.0%)	6 (8.5%)	Details
<input type="checkbox"/>	[Redacted]	0	No Adj.	N/A	-	-	04/06/2026	26	0 (0.0%)	0 (0.0%)	Details
<input type="checkbox"/>	[Redacted]	0	No Adj.	N/A	-	-	04/06/2026	72	0 (0.0%)	0 (0.0%)	Details
<input type="checkbox"/>	[Redacted]	0	No Adj.	N/A	-	-	04/06/2026	40	2 (5.0%)	0 (0.0%)	Details

1 of 25 pages (243 items)

(Fig.14 - HR Results- Some Golfers: Manual)

• **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. 15)

Handicap Review Results Review Run 04/05/2026 1:09 PM
Review Period 04/05/2025 - 04/05/2026

Golfer Name: Gender: Status: Reset

Export To Excel Initiate Notification Apply Deny Adjustment Recommended = 7 | No Adjustment Recommended = 205 | Ineligible for Review = 31 Hide Filters

<input type="checkbox"/>	Golfer Name	Recommended Adjustment	Status	Email Notifications	Applied by	Date Applied	Expiration Date	Scores Posted	High Flags	Low Flags	View Details
<input checked="" type="checkbox"/>	[Redacted]	3	Pending	N/A	-	-	04/06/2026	9	3 (33.3%)	0 (0.0%)	Details
<input checked="" type="checkbox"/>	[Redacted]	1	Pending	N/A	-	-	04/06/2026	93	0 (0.0%)	7 (7.5%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	N/A	-	-	04/06/2026	49	0 (0.0%)	4 (8.2%)	Details
<input type="checkbox"/>	[Redacted]	+3	Pending	N/A	-	-	04/06/2026	13	3 (23.1%)	0 (0.0%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	N/A	-	-	04/06/2026	67	0 (0.0%)	5 (7.5%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	N/A	-	-	04/06/2026	55	0 (0.0%)	4 (7.3%)	Details
<input type="checkbox"/>	[Redacted]	-1	Pending	N/A	-	-	04/06/2026	71	0 (0.0%)	6 (8.5%)	Details
<input type="checkbox"/>	[Redacted]	0	No Adj.	N/A	-	-	04/06/2026	26	0 (0.0%)	0 (0.0%)	Details
<input type="checkbox"/>	[Redacted]	0	No Adj.	N/A	-	-	04/06/2026	72	0 (0.0%)	0 (0.0%)	Details
<input type="checkbox"/>	[Redacted]	0	No Adj.	N/A	-	-	04/06/2026	40	2 (5.0%)	0 (0.0%)	Details

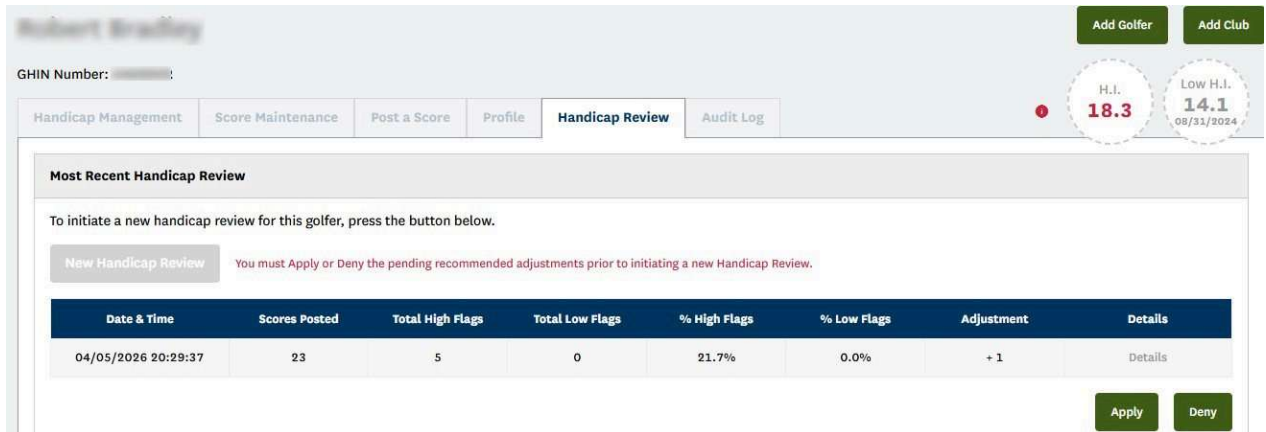
1 of 25 pages (243 items)

(Fig. 15 - HR Results- All Golfers: Manual)

3b - Individual Golfer Handicap Review - (Manual Path)

1. In case of a single golfer handicap review, click the Handicap Review tab on the golfer landing page.

2. Similar to the club-wide Handicap Review, from the Handicap Review tab, click the "**New Handicap Review**" button.
3. From the new modal window, click the "**Manual**" option, then click the "**Run Review**" button.
4. After the individual golfer review is completed and the golfer is pending an adjustment, it will be listed within the "Most Recent Handicap Review" frame. (see Fig.16)



(Fig. 16 - HR Resuls- Individual Golfer: Manual)

5. Click the "**Deny**" button, and the golfer's Handicap Index will not be adjusted, and their status will be set to "**Denied**".
6. Click the "**Apply**" button, and the golfer's Handicap Index will be adjusted immediately, and their status will be set to "**Applied**".

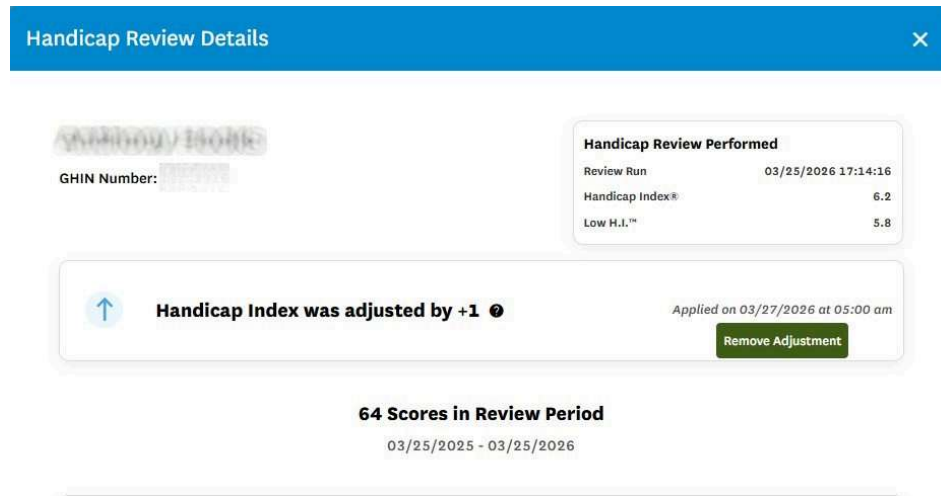
*If you do not "**Apply**" or "**Deny**" adjustments for the golfer and 10 days pass since the Handicap Review date, the adjustments will not be applied and the golfer status will display as "**Expired**"*

4. Removing an "Adjusted" Handicap Index

A new rollback button was added in the Handicap Review Details modal that allows the rollback of the selected handicap review. To rollback a handicap review:

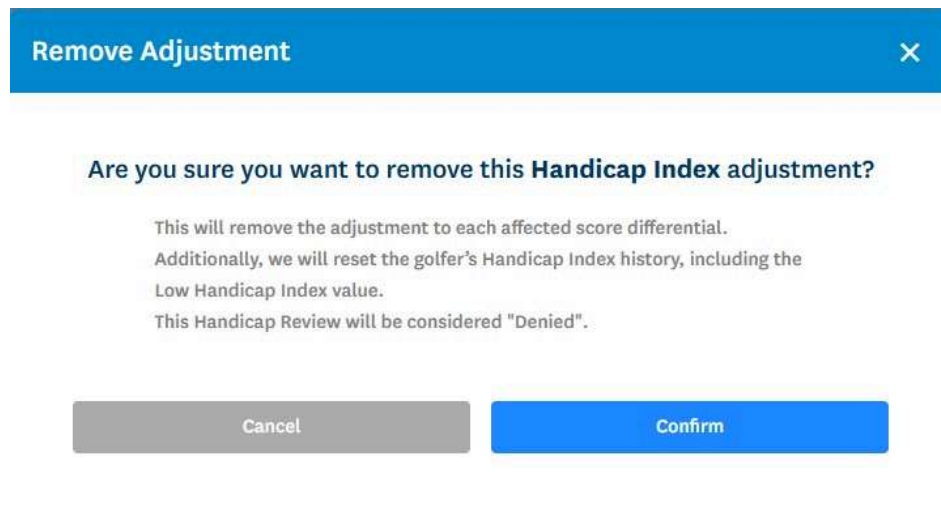
- The handicap review recommendation must be applied, and it must **modify the current Handicap Index**.
- The adjustment must come from the **Handicap Review**.
- The adjustment must not be **Expired, Denied, or Ineligible**.

- This option will be available only to the club admin of the Home Club that applied the adjustment
1. To roll back or remove a Handicap Index adjustment, navigate to the Details modal for the golfer. (see Fig.)



(Fig. - Golfer Details Modal - Remove Adjustment)

2. Click the "**Remove Adjustment**" button.
3. The confirmation modal will appear (see Fig.)



(Fig. - Golfer Details Modal - Remove Adjustment)

4. Clicking "**Cancel**" will remove the modal, and the golfer's Handicap Index will remain adjusted.
5. Click the "**Confirm**" button to remove the adjustment. The golfer's status will be set to "**Denied.**"

Enhancements:

Quartile Breakdown Grid:

- Key data points from the 365-day Handicap Review period (flags, rounds, score differentials, competitive factor) are now broken down by four date-based quartiles (Q1–Q4).
- Quartile data is calculated on demand when the user expands the collapsible “Handicap Review Data - Quartile Breakdown” banner in the modal.
- Cumulative totals across quartiles match the overall Handicap Review data, and edits/deletions to scores automatically update the breakdown.

The Quartile Breakdown grid is located on the golfer's Details Modal. (see Fig.)

	Totals	Q4 (01/04/2026 - 04/03/2026)	Q3 (10/04/2025 - 01/03/2026)	Q2 (07/04/2025 - 10/03/2025)	Q1 (04/04/2025 - 07/03/2025)
High Flag Count	0	0	0	0	0
Low Flag Count	9	0	0	6	3
General Rounds Count	81	4	16	36	25
General Rounds Average Score Diff	16.8	20.0	17.7	16.1	16.7
Competition Round Count	10	3	2	2	3
Competition Round Average Score Diff	18.6	18.7	22.6	18.0	16.1
Competition Factor	1.8	-1.3	4.9	1.9	-0.6

(Fig. - Golfer Details Modal - Quartile Breakdown)

Enhanced “Played to Handicap Index” Chart:

- We also updated the Played to Handicap Index chart to better visualize the relationship between rounds played and Handicap Index over time.
- See new Tooltip Text below:

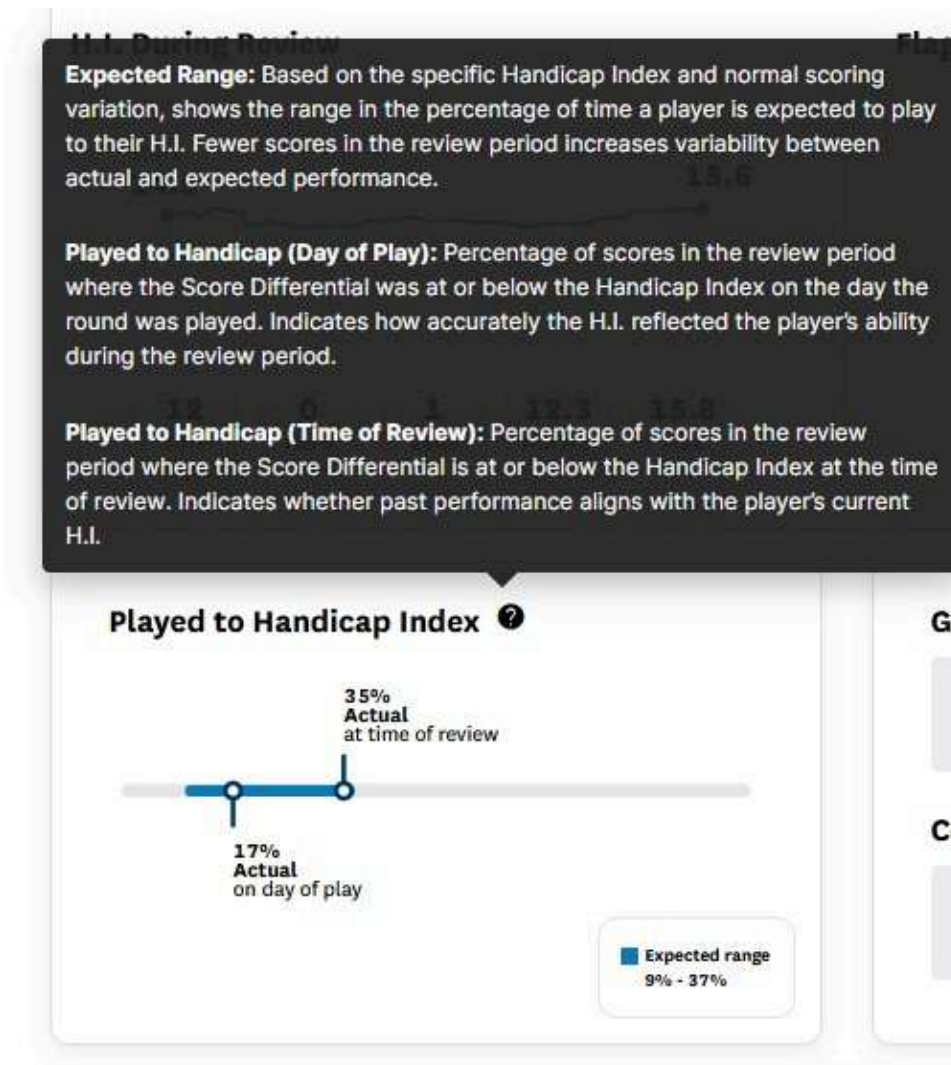
Expected Range: Based on the specific Handicap Index and normal scoring variation, shows the range in the percentage of time a player is expected to play to their H.I. Fewer scores in the review period increases variability between actual and expected performance.

Played to Handicap (Day of Play): Percentage of scores in the review period where the Score Differential was at or below the Handicap Index on the day the round was played. Indicates how accurately the H.I. reflected the player’s ability during the review period.

Played to Handicap (Time of Review): Percentage of scores in the review period where the Score Differential is at or below the Handicap Index at the time of review. Indicates whether

past performance aligns with the player's current H.I.

The Played to Handicap Index chart is located on the golfer's Details Modal. (see Fig.)



(Fig. - Golfer Details Modal - Played to H.I.)

Added "Notified" filter to Handicap Review Results Page

The following is a detailed description of the Handicap Review Results page, including the addition of the "Notified" status filter. (see Fig.)

← History

Handicap Review Results

Review Run 03/31/2026 9:05 PM
Review Period 04/01/2025 - 04/01/2026

Golfer Name: Gender: Status:

Adjustment Recommended = 6 No Adjustment Recommended = 0

<input type="checkbox"/>	Golfer Name	Recommended Adjustment	Status	Email Notifications	Applied by	Date Applied	Expiration Date
<input type="checkbox"/>	[Redacted]	- 1	Applied		Nj Admin	04/02/2026 5:00 ...	04/16/2026
<input type="checkbox"/>	[Redacted]	+ 2	Denied	N/A	Nj Admin	03/31/2026 9:07 ...	04/16/2026
<input type="checkbox"/>	[Redacted]	- 1	Denied	N/A	Nj Admin	03/31/2026 9:07 ...	04/16/2026
<input type="checkbox"/>	[Redacted]	- 1	Denied	N/A	Nj Admin	03/31/2026 9:07 ...	04/16/2026
<input type="checkbox"/>	[Redacted]	+ 1	Denied	N/A	Nj Admin	03/31/2026 9:07 ...	04/16/2026
<input type="checkbox"/>	[Redacted]	+ 3	Denied	N/A	Nj Admin	03/31/2026 9:07 ...	04/16/2026

Select All
 Adjustment Recommended
 Applied
 Denied
 Expired
 Notified
 Pending
 No Adjustment Recommended
 Ineligible

< 20 Scores
 Not Home Club
 < 3 Scores (NH)
 Withdrawn H.I.
 Existing Pending Review
 Existing Modified Golfer

Details
 Details
 Details
 Details
 Details
 Details
 pages (6 items)

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(Fig. - Handicap Results Grid)

- **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.)
 - **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 10-day expiry).
 - **Applied:** Recommendation was applied by the club.
 - **Denied:** Recommendation was denied by the club.
 - **Notified:** **Only applicable for Notify Path** - Recommended notifications were sent to golfer.
 - **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.

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