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Procedures on the Rules of Handicapping in Portugal – Appendix P

Portuguese Golf Federation
2020

WORLD HANDICAP SYSTEM

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2020 Portuguese Golf Federation



The Procedures on the Rules of Handicap in Portugal – Appendix P are an addition to the implementation of the World Handicap System, in Portugal. All references and definitions (in *italic*) refer to the Rules of Handicapping – Portuguese Golf Federation Edition (2020).

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1 - Authorization and Administration

In Portugal, the *Portuguese Golf Federation (FPG)* is the *Authorized Association* with exclusive rights to use and administer the World Handicap System.

The Handicap and Course Rating Committee (HCRC) of the *FPG* ensures administration of the World Handicap System, by delegation of the Executive Board of the *FPG*, in accordance with the parameters set by the respective terms of reference.

1.1 Authorization to use the World Handicap System

Authorization to use the *Rules of Handicapping* can be given to:

(i) *A Golf Club*

A *golf club* affiliated to the *FPG*, subject to satisfying the requirements for having delegated authority to manage the *Handicap Index* of those *members* who have designated it to be their *Home Club*.

(ii) *An Institutional Member*

An entity, affiliated as an Institutional Member of the *FPG*, may be authorised to use parts of the World Handicap System and have delegated responsibilities, as set out by a specific agreement. (See Appendix Institutional Members.)

Note:

A Regional Golf Association does not have delegated rights and responsibilities within the World Handicap System.

(See Rule 1.)

1.2 Handicapping Authority Delegated to a Golf Club

A player's *Home Club* is responsible for ensuring the player's *Handicap Index* is managed in accordance with the *Rules of Handicapping*. The *Home Club* is the *Golf Club* of which the player is a *member* and through which the player is affiliated in the *FPG*.

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(i) Requirements for Handicapping Authority

To have delegated authority to manage the *Handicap Index* of those *members* who have designated it to be their *Home Club*, a *Golf Club* affiliated in the *FPG* must fulfil all admission and financial responsibilities with the *FPG* and, additionally, satisfy the following requirements:

Handicap Committee Requirements Checklist for Handicapping Authority	
Handicap Committee	Establish a <i>Handicap Committee</i> , with a minimum of 3 members, affiliated in the <i>FPG</i> , one of whom is the President and notify the <i>FPG</i> of any updates.
	Comply with the <i>Rules of Handicapping</i> , the regulations of the <i>FPG</i> and any requests of information, audit and correction.
	Establish internal terms of reference for the <i>Handicap Committee</i> .
	Inform the email address for contact with the <i>Handicap Committee</i> and notify the <i>FPG</i> of any updates.
Learn the Rules of Handicapping	Receive training and undergo an examination on handicapping and on the software for registration, handicaps and scoring.
Educate Others	Promote education on the World Handicap System in the <i>Golf Club</i> .
Software & Records	Have a computer able to use the software supplied by the <i>FPG</i> .
	Register players' data in the software supplied by the <i>FPG</i> .
	Use and access the software supplied by the <i>FPG</i> in a diligent and responsible fashion.
	Safeguard the confidentiality of data and <i>scoring records</i> , in line with the General Data Protection Regulation (GDPR), the <i>FPG's</i> data confidentiality policies and the <i>Golf Club's</i> internal terms of reference.
	Regularly perform updates and backups of the database.
Scoring Records & Submission of Scores	<p>Ensure <i>acceptable scores</i> are posted on the players' <i>scoring record</i> as soon as possible, and preferably by the end of the day of play, by:</p> <ul style="list-style-type: none"> · directly submitting and posting the <i>acceptable scores</i>; · promoting players to promptly submit their <i>acceptable scores</i>; or · if applicable, ensuring the <i>Golf Course</i> or the Committee in charge of the competition submits the scores as soon as possible and preferably by the end of the day of play.

	Establish additional internal procedures for submission of <i>acceptable scores</i> in <i>general play</i> for those <i>members</i> who have designated the <i>Golf Club</i> as their <i>Home Club</i> .
	Keep scorecards for a period of two years, where applicable.
	Provide plenty of opportunities for <i>members</i> to submit <i>acceptable scores</i> and play together, both in organized competitions and in <i>general play</i> .
Committee Actions	Promptly perform handicapping procedures such as allotting, reviewing, adjusting the <i>Handicap Index</i> of a player, and applying a <i>penalty score</i> .
	Carefully handle internal technical handicapping enquiries.
Cooperation with Others	Supervise matters related to the <i>Rules of Handicapping</i> within the <i>Golf Club</i> :
	<ul style="list-style-type: none"> · coordinating with the Executive Board of the <i>Golf Club</i>, and accordingly to the <i>Handicap Committee</i> terms of reference; · safeguarding that other <i>Golf Club</i> committees, such as the Committee in charge of a competition or the course, or other authorized agents, where applicable, correctly use the <i>Rules of Handicapping</i>.

(See Appendix A.)

(ii) Assessment for Handicapping Authority

The assessment of a *Golf Club* regarding compliance with the requirements to have delegated handicapping authority, including training and examination, happens:

- With new requests or requests of reinstatement,
- When the President of the *Handicap Committee* of the *Golf Club* changes,
- Occasionally, due to regulatory changes and under conditions to be determined,
- Any time the HCRC of the *FPG* decides to audit and assess if a *Handicap Committee* is fulfilling their responsibilities.

(iii) Withdrawal of Handicapping Authority

The withdrawal of delegated handicapping authority to a *Golf Club* follows the procedures set out below:

- The inquiry procedure is conducted by the HCRC of the *FPG*,
- The *Golf Club* is informed of the inquiry and the *Handicap Committee* is given opportunity to respond, to receive additional training and to correct and improve procedures,

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- If the attempts for improvement are ignored or insufficient, the HCRC of the *FPG* then notifies the *Golf Club* of the decision to withdraw delegated handicapping authority,
- The withdrawal of delegated handicapping authority to a *Handicap Committee* can be subject to appeal by the *Golf Club*, to the Executive Board of the *FPG*.
 - The *Golf Club* must submit a notice of appeal to the Executive Board of the *FPG*, in writing, within 15 days after the *Handicap Committee* has been notified about the decision of suspension,
 - The appeal has an effect that is merely evaluative,
 - The decision by the Executive Board of the *FPG* is final and it is not subject to appeal.
- The information to players is published through Circular letter and the decision is put in effect through the national central handicap computation system,
- Where there is a disciplinary suspension of a *Golf Club* the disciplinary procedures set out on the Disciplinary Regulations of the *FPG* are followed.

1.3 Course Ratings and Golf Course Responsibilities

The following checklist illustrates the World Handicap System responsibilities relating to a *Golf Course*, within the Course Rating System. The *Golf Course* management, where applicable, should collaborate with the *Handicap Committee* and the Committee in charge of competitions to ensure that *acceptable scores* can be posted on organized competitions and on *general play*.

Golf Course Responsibilities Checklist	Handicap Committee (with Competitions Committee)	Golf Course Management
Have a verifiable course measurement for each set of tees, with a <i>Course Rating</i> and <i>Slope Rating</i> and over which authorized formats are to be played.		✓
Schedule the ratings with the HCRD of the <i>FPG</i> , according to the terms and rating conditions.		✓
Establish the <i>stroke Index</i> allocation in accordance with the <i>Rules of Handicapping</i> and notify the <i>FPG</i> of any updates.		✓
Establish <i>par</i> for each hole in accordance with the <i>Rules of Handicapping</i> and notify the <i>FPG</i> of any updates.		✓
Maintain the <i>Golf Course</i> in a manner consistent with the conditions presented when the <i>Course Rating</i> was conducted and be aware of those conditions for daily course set-up.		✓
Notify the <i>FPG</i> , before implementing any significant temporary and course permanent alterations, particularly length changes and introduction of penalty areas, that could affect issued <i>Course Ratings</i> and <i>Slope Ratings</i> . This applies for total differences above 100 metres for 18 holes and 50 metres for 9 holes.	✓	✓
Ensure that all <i>acceptable scores</i> are played from tees that have a <i>Course Rating</i> and <i>Slope Rating</i> , as defined within the Course Rating System.	✓	✓
Ensure the <i>Golf Course</i> is marked in accordance with the <i>Rules of Golf</i> .	✓	✓
Obtain approval from the <i>FPG</i> if requesting a suspension of <i>acceptable scores</i> submission due to exceptionally poor course conditions.	✓	✓
Display <i>Course Handicap</i> tables for each set of tees, for players' reference, with current <i>Course Rating</i> and <i>Slope Rating</i> at prominent place at the <i>Golf Course</i> .		✓
Ensure <i>Golf Course</i> signs and scorecard display the current measurements, <i>par</i> and <i>stroke index</i> values.	✓	✓
Make easily accessible the conversion of <i>Handicap Index</i> to <i>Course Handicap</i> and <i>Playing Handicap</i> through look-up tables, digital access or printed scorecards.	✓	✓

(See Appendix A.)

(i) Sets of Tees

When establishing sets of tees, a *Golf Course* should consider the different playing abilities of the players. Also, on the colour or designation used in each set of tees, association of gender or age should be avoided.

Notes:

1. Each set of tees is normally rated for both men and women.
2. Distances are displayed in metres.

(ii) Acceptability of Scores

The *active season* runs from January to December.

Preferred lies may be in operation for *acceptable scores* to be posted, in accordance with the *Rules of Golf*.

1.4 Cooperation between the Handicap Committee and the Committee in Charge of the Competitions

It is important that there is a good understanding between the *Handicap Committee* and the Committees in charge of competitions at a *Golf Club*, namely on matters such as:

- Establishing a schedule of events that caters to players of different abilities, offering all *members* the opportunity to submit *acceptable scores* for handicap purposes.
- Establishing the policies for Terms of Competition in matters relating to handicap. For example:
 - For eligibility purposes, the Terms of Competition:
 - May set limits for entry or use of the *Handicap Index* or *Playing Handicap* in competitions.
 - For *handicap allowances* and *Playing Handicap* purposes, the Terms of Competition:
 - Should determine applicable *handicap allowances* taking in consideration the recommended *handicap allowances*,
 - May adjust the *Playing Handicap* of an entrant and establish the terms for adjustment,
 - Should determine that the *Handicap Index* remains unchanged for the duration of a multi-round competition, taking in consideration the recommended procedure.

- Examining the results of competitions and taking any appropriate action, if needed.

(See Rule 7.)

1.5 Handicap Index Requirements

To obtain a *Handicap Index* in Portugal, a player must be affiliated to the *FPG*, by:

- Being a *member* of *Golf Club* affiliated with the *FPG* or,
- Being a direct *member* of the *FPG*, under the provisions set out within the *FPG's* Online Individual Registration (R.I.O) regulation. (See Appendix R.I.O.)

A player, who is affiliated in the *FPG* and is also a *member* of a *Golf Club* located in a different *jurisdiction*, is required to hold a *Handicap Index* issued through the *FPG*.

(See Rule 1.4.)

2 - Scores and Calculations

2.1 Handicap calculations

Handicap calculations are performed by the national central handicap computation service of the *FPG*.

- The most recently updated *Handicap Index* of a player affiliated in the *FPG* is available on the national central handicap computation system and digitally accessible in the platforms integrated with it.
- The submission of an *acceptable score* into the player's *scoring record* must be done using the software services supplied and authorized by the *FPG*, and according to the specified technical instructions.

The national central handicap computation service operates in Continental Portuguese time.

(See Rule 4.3.)

2.2 Registering Intent to Submit a Score in General Play

The pre-registration of intention to submit an *acceptable score* in *general play* for handicap purposes is done electronically. The player must ensure the following information is provided prior starting the round:

- Date and time of the round,
- Player's Identification,
- Marker's Identification,
- Course Identification (Course, set of tees and number of holes).

Where an *acceptable score* in *general play* is played in Portugal, the *FPG's* affiliation number must be used for identification of both the player and the marker.

The marker must be a person acceptable to the *Handicap Committee*, according to *FPG's* requirements.

The submission of an *acceptable score* in *general play* by a player with *Handicap Index* lower than 2.0, requires additional approval by the HCRC of the *FPG*.

The submission of an *acceptable score* in *general play* with a *Score Differential* lower than 2.0 and when that *Score Differential* is lower than the player's *Handicap Index*, requires additional approval by the HCRC of the *FPG*. (See Rule 2.1.)

2.3 Information Required for Scoring Record

An *acceptable score* for handicap purposes must be submitted on the form of hole-by-hole score.

Additionally, the player must ensure the following information is available or, where an *acceptable score* is played outside Portugal, is provided:

- Date and time of the round,
- *Course Rating* and *Slope Rating* for the set of tees played,
- *Par* and stroke index, hole-by-hole, and
- The *playing conditions calculation (PCC)*.

(See Rule 4.1.)

Where a player who is affiliated in the *FPG* is also a *member* of a *Golf Club* from a different *jurisdiction*, the player is required to return all *acceptable scores* to both *jurisdictions*.

- In Portugal, the player must submit the *scoring record* from outside Portugal to the *Home Club* in Portugal for scrutiny and update of the *scoring record* in Portugal.
- In this case, the *acceptable scores* can be posted, by the *Handicap Committee*, as hole-by-hole scores, *adjusted gross scores* or Stableford points.
- The *Handicap Index* used in Portugal is the *Handicap Index* registered on the national central handicap computation system, which is updated with all *acceptable scores* and applicable adjustments.

(See Rule 1.4.)

3 - Committee Actions

3.1 Allocating of a Handicap Index

Before the allocation of an initial *Handicap Index*, the *Home Club* should safeguard that the player has the adequate understanding and knowledge of the *Rules of Golf*. (See Rule 2.1.)

Before the allocation or reinstatement of a *Handicap Index* lower than 2.0, a *Handicap Committee* must propose and obtain written approval by the HCRC of the *FPG*. (See Rule 7.1.)

3.2 Adjusting a Handicap Index

The *Handicap Committee* of a player's *Home Club* has delegated responsibilities for allotting, reviewing, adjusting the *Handicap Index* of the player, and applying a *penalty score*.

(i) Administrative Procedure

When exercising those responsibilities, the *Handicap Committee* must:

- Ensure compliance with the legal administrative procedures in place,
- Follow the *Handicap Committee's* terms of reference,
- Make a record of the handicapping decision and the reasoning used,
- Make the player aware of and give the player the opportunity to contribute towards the *handicap review* process to the extent practicable,
- Publish the decision by putting it in effect through the national central handicap computation system.

Any adjustment to a player's *Handicap Index*, resulting from a handicap review to be applied to a *Handicap Index* lower than 2.0, must be ratified by the HCRC of the *FPG*.

Any adjustment to a player's *Handicap Index*, resulting from a *handicap review* to increase the *Handicap Index* by more than 5.0 strokes, must be ratified by the HCRC of the *FPG*.

(ii) Appeal Procedure

Decisions taken by the *Handicap Committee* regarding allotting, reviewing, adjusting the *Handicap Index* of the player, and applying a *penalty score* can be subject to appeal by the player, to the HCRC of the *FPG*.

Before submitting an appeal, a *member* should discuss the matter with the *Handicap Committee* at the *Home Club*.

The appeal to the HCRC of the *FPG* follows the procedures set out below:

- The player must submit a notice of appeal to the HCRC of the *FPG*, in writing, within 15 days after the *Handicap Index* has been updated,
- The appeal has an effect that is merely evaluative,
- The HCRC of the *FPG* has 8 working days to begin the inquiry and 15 working days to decide on the appeal,
- The decision of the HCRC of the *FPG* is final and it is not subject to appeal.

An adjustment to the *Playing Handicap* of an entrant within the Terms of Competition is not subject to appeal.

(See Rule 7.1.)

3.3 Withdrawing a Handicap Index

(i) Circumstances for withdrawal of *Handicap Index*

A player's *Handicap Index* is withdrawn under the following situations:

- a. For technical reasons related to the status of *member*:
 - When a player is no longer affiliated in the *FPG*,
 - When a player is no longer a *member* at the *Home Club*, including before a player's transfer to a new *Home Club* has been approved by the *FPG*,
 - Where the player's *Home Club* no longer has delegated handicapping authority to manage the *Handicap Index* of those *members* who have designated it to be their *Home Club*.

- b. For technical reasons related to the player's responsibilities within the *Rules of Handicapping*. The *Handicap Committee* of the player's *Home Club* should investigate the situations where there is reasonable evidence:
 - To question the content of the player's *scoring record*, such as incorrect or incomplete data,
 - That a player deliberately or repeatedly fails to comply with the player's responsibilities under the *Rules of Handicapping*,
 - That a player failed to submit a score(s) for the purpose of gaining an unfair advantage.

The player's *Handicap Index* can be preventively withdrawn by the HCRC of the *FPG* or the *Handicap Committee* of the player's *Home Club*.

c. For disciplinary reasons, which results in disciplinary suspension, the *Handicap Index* is automatically withdrawn by the *Home Club* or by the *FPG*.

(ii) Procedures and Appeal

a. Technical withdrawal related to status of member. A *Handicap Index* withdrawn for technical reasons, related to the status of *member*, is automatically reinstated once the status of *member* situation is corrected. It is not subject to appeal.

b. Technical withdrawal related to player's responsibilities. The withdrawal of a *Handicap Index* for technical reasons, related to the player's responsibilities within the *Rules of Handicapping*, aims to ascertain the correct *Handicap Index* of the player.

When exercising those responsibilities, the *Handicap Committee* of the player's *Home Club* must:

- Ensure compliance with the legal administrative procedures in place,
- Follow the *Handicap Committee's* terms of reference,
- Make a record of the handicap enquiry and the reasoning used,
- Inform the player of the enquiry and give the player the opportunity to respond,
- Notify the player of the length of time their *Handicap Index* will be withdrawn, based on the necessary period of time to obtain relevant information, and any additional conditions,
- Publish the decision by putting it in effect through the national central handicap computation system.

The withdrawal of a *Handicap Index* by the *Handicap Committee* of the player's *Home Club* can be subject to appeal by the player, to the HCRC of the *FPG*.

The appeal to the HCRC of the *FPG* follows the procedures set out below:

- The player must submit a notice of appeal to the HCRC of the *FPG*, in writing, within 15 days after the player has been notified,
- The appeal has an effect that is merely evaluative,
- The HCRC of the *FPG* has 8 working days to begin the inquiry and 15 working days to decide on the appeal,
- The decision of the HCRC of the *FPG* is final and it is not subject to appeal.

The *Handicap Index* is reinstated once the player's *Handicap Index* is adjusted or confirmed.

c. Disciplinary withdrawal. The disciplinary withdrawal of a *Handicap Index* follows the disciplinary procedures set out on the Disciplinary Regulations of the

FPG, or the *Home Club*.

The *Handicap Committee* of the player's *Home Club* should consider submitting a disciplinary complaint, in addition to any technical handicapping enquiries, if there is evidence of handicap infringements, namely in the following situations:

- A player who deliberately or repeatedly fails to comply with the player's responsibilities under the *Rules of Handicapping*,
- A player who repeatedly fails to submit scores in a timely manner or not submitting scores for the purpose of gaining an unfair advantage.

(See Rule 7.1.c)

The **Procedures on the Rules of Handicap in Portugal – Appendix P** are an addition to the implementation of the World Handicap System, in Portugal.



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