England Golf

World Handicap System (WHS) Platform

Club User Guide

Version 4.0

September 2021

Introduction

This user guide provides additional information to support club handicap committees using the England Golf World Handicap System (WHS) Platform.

The WHS Platform provides golf clubs with direct access into the central system for handicap and member management.

Who Should Read This Document?

This document is aimed primarily at committees and officials within golf clubs responsible for handicapping and administration of club membership.

Document Control

Version	Date	Reason for Change	Approved By
1.0	12.10.20	First Issue	GH
2.0	15.1.21	Process Updates	GH
3.0	22.06.21	Additions and updates	GH
4.0	July 2021	Additions and digital updates	GH

Change Description

Version	Item	Reason for Change
2.0	Registering for Platform	Update on information required
	All Sections	Addition of Visual aids
	Adding an International Score	Additional information provided
	Adding a Member	Additional information provided
3.0	Resigning a player	Option to delete a duplicate
	Default markers	Tee marker options
	Unfinancial	Removal of this function
4.0	System updates – default markers	Review and inclusion of video links

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Video Support: Accessing the WHS Platform

Platform Registration

1. Follow the link provided in the email you have received, and you will reach a page asking you to Create an Account:

- Add in your contact email address;
- Click Submit.

2. You will then be sent an email (this can take a few minutes to arrive so please be patient). This email will be from the following domain - no-reply@golf.co.nz. If the email doesn't arrive in your inbox, please be sure to check your junk/spam folder.

3. You will receive a 6-digit code, which you will need to progress the registration.

4. Create a User ID and Password – keeping them safe for future use. **Note: do not use the following as your User ID:**

- An email address;
- Your Membership Number (this is used for access to the Player Portal);
- Generic terms such as, Handicaps, Manager, Professional (these may cause you login issues in future).

Logging in

Video Support: Logging in

To login you will need to use - http://org.whsplatform.englandgolf.org/

We recommend saving this to your favourites for ease of future use.

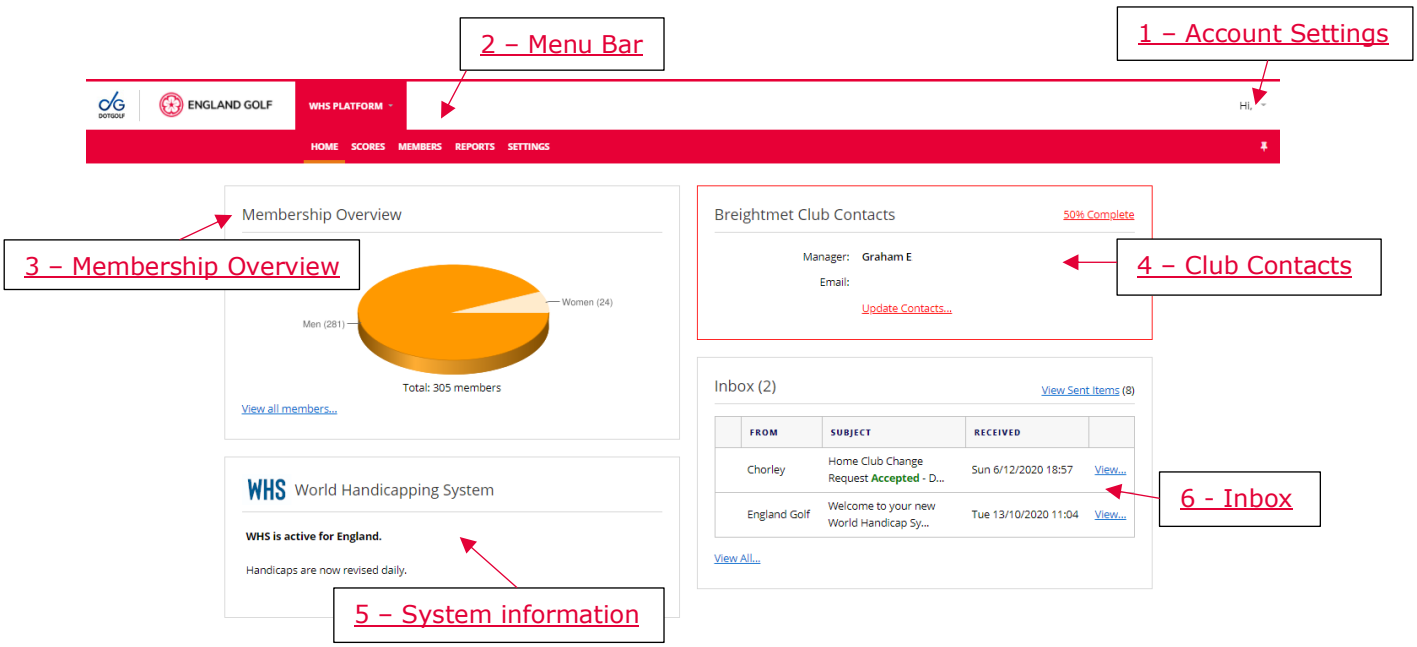
Enter the User ID and Password previously registered to access the platform.

Note: Should you forget your password, click forget password and enter your User ID or Email address and you will be sent a 6-digit reset code.

Home Page/Dashboard: Overview

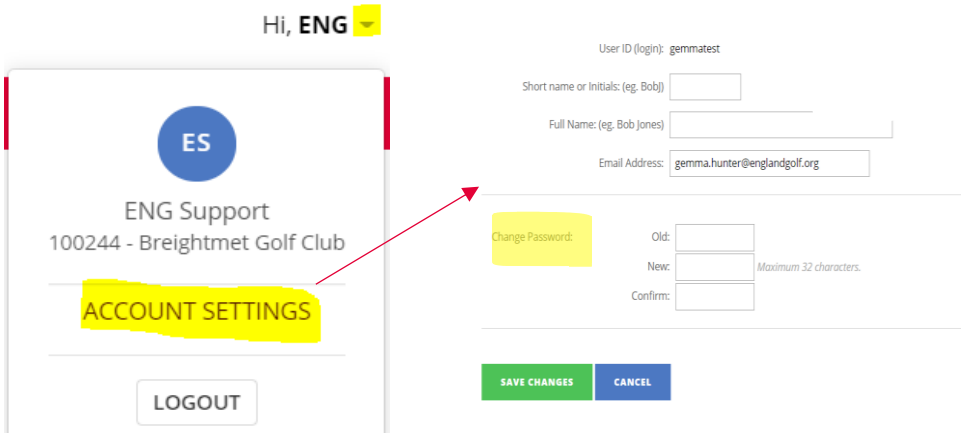
Video Support: Home Page Overview

What you will see…… the Home Screen/Dashboard:



1: Home Page: 'Account Settings'

User profile details, logout and change password setting option available here via the down arrow and 'Accounts Settings' button:

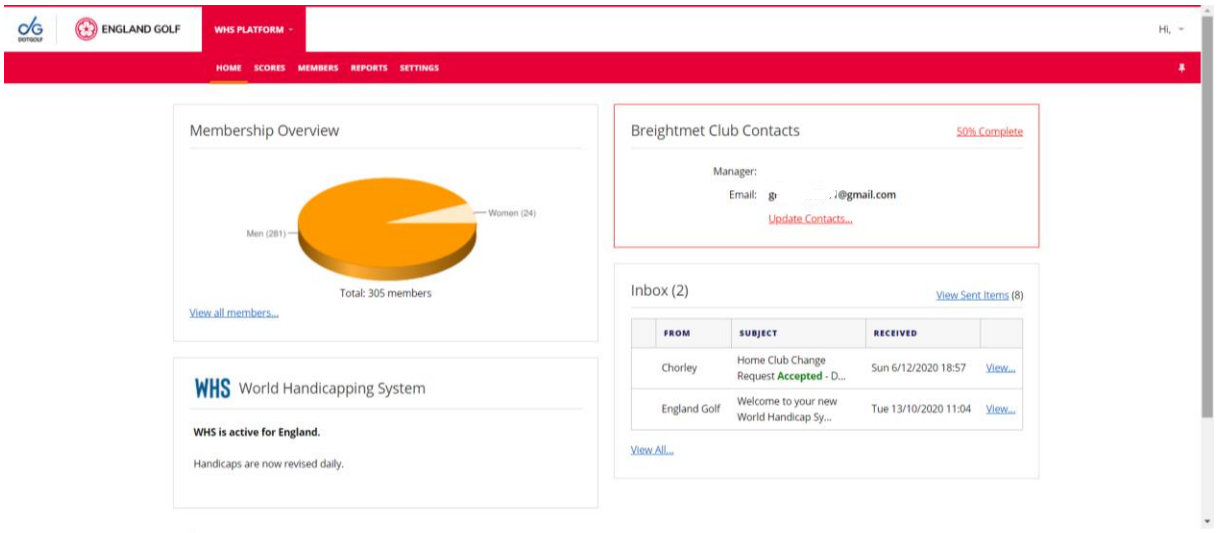


2: Home Page: 'WHS Platform' Menu Bar

There are five tabs / menu options which are: home, scores, members, reports, and settings with various functionality within each – as indicated in the previous page graphic.

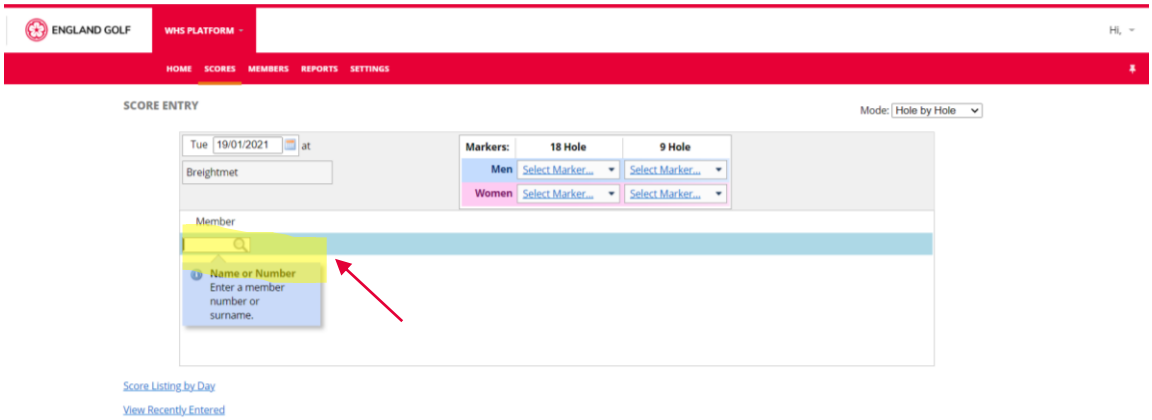
'Home'

This is your club home page / dashboard showing: club contacts (also available via 'Settings'), membership overview pie chart, updates regarding WHS and Inbox for all system generated notifications (member movements between clubs and tournament status requests).



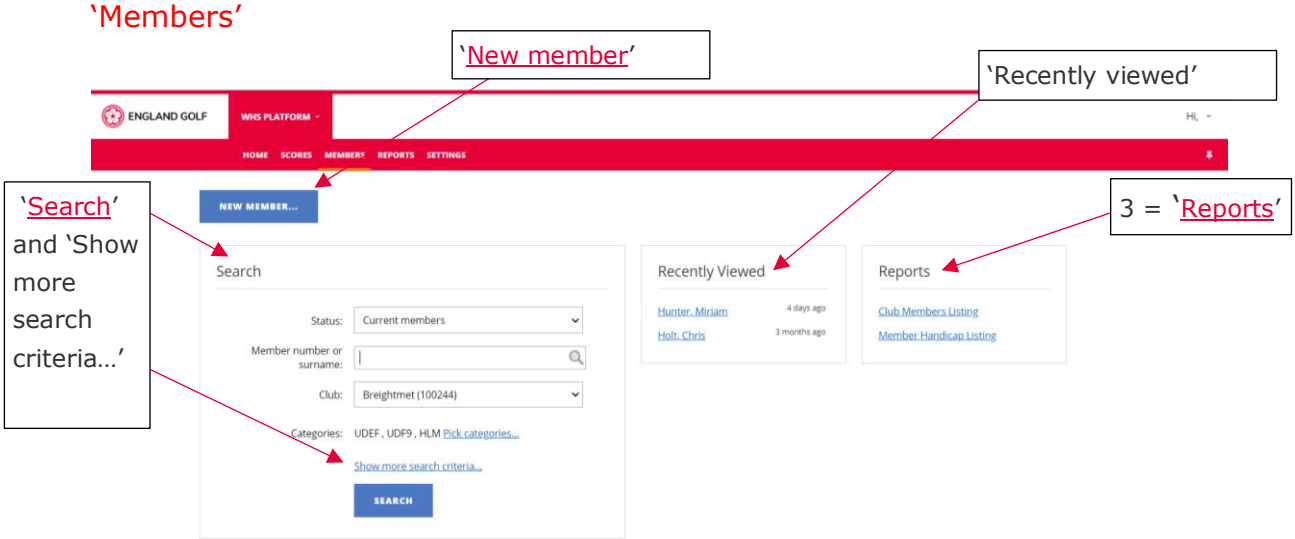
'Scores'

The scores tab allows for scores to be manually recorded (home and away scores – including international scores) – see 'Entering a score' for further details.



- Listing of scores by date and recently entered is available via the 'Score Listing by Day' and 'View Recently Entered' links on the scores tab as highlighted above.

'Members'

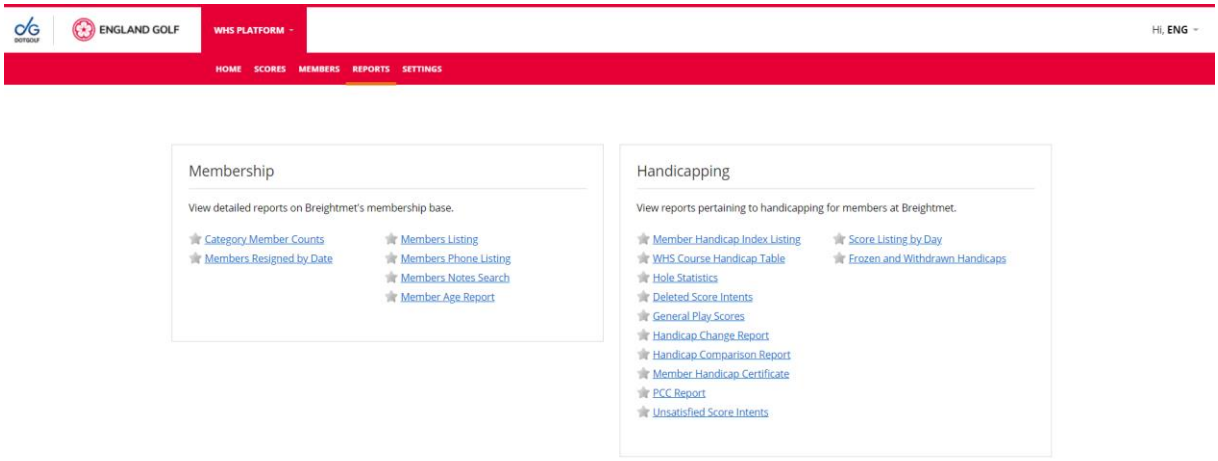


- Functionality to add a new member (see section New Members: Adding a Member for further details).

- Search area initially by membership number (formerly known as CDH id), or by 'last name, first name'. There is also an advanced search via 'Show more search criteria…'. (See section Existing Members: Searching for and Updating Members Information).
- Member 'Recently Viewed' (for quick access to a recently searched for member record) and 'Reports' are available links.

'Reports'

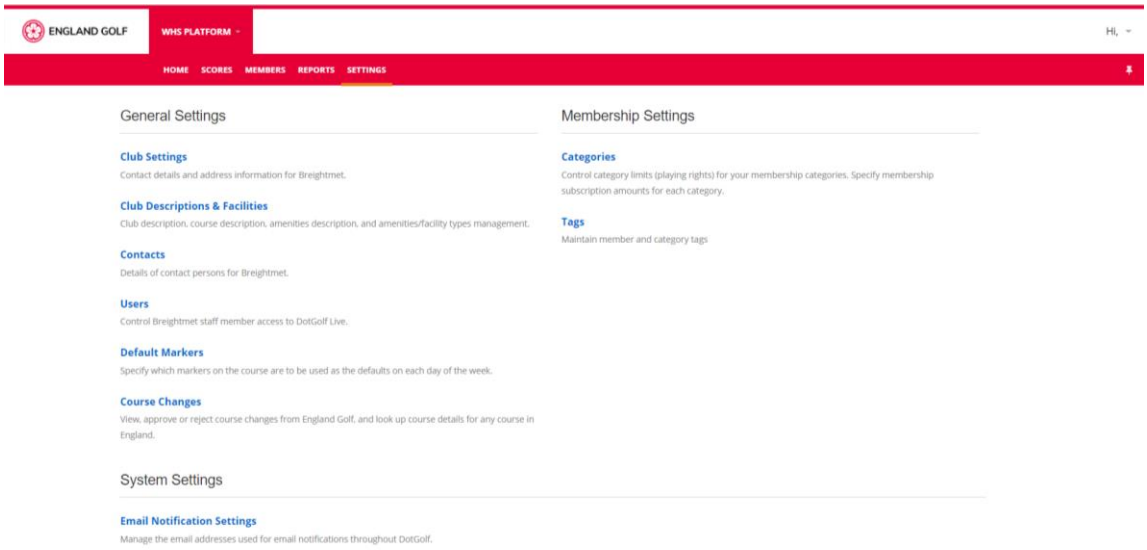
Two main types of reports are available, Membership & Handicapping:



- Comprehensive report functions available from both categories (see 'Reports' section for further details).

'Settings'

Access to all setting menus (see 'Settings' for further details):

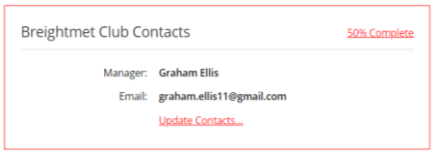


3: Home Page: 'Membership Overview'

A visual representation of members by gender:

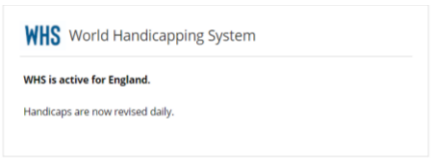
4: Home Page: 'Club Contacts'

Main contact is displayed with the option to 'Update Contacts…' (also available via 'Settings' tab):



5: Home Page: 'WHS System Information'

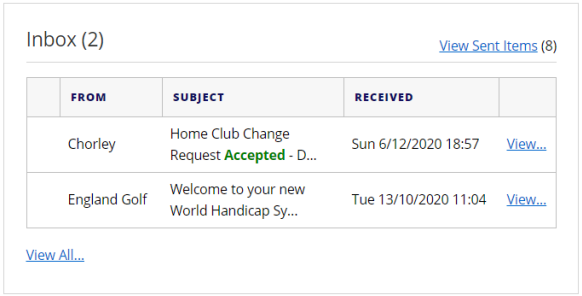
Displaying a WHS system status message from the WHS system:

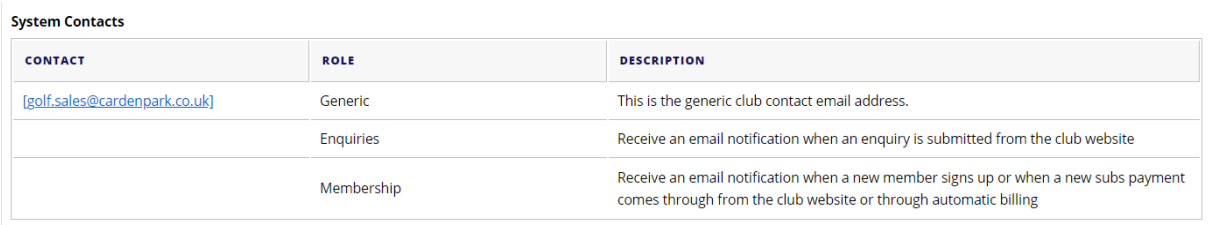


6: Home Page: Club 'Inbox'

All club/member inbox notifications (e.g. from England Golf, WHS system generated notifications, tournament status requests, or from other clubs) will appear here.

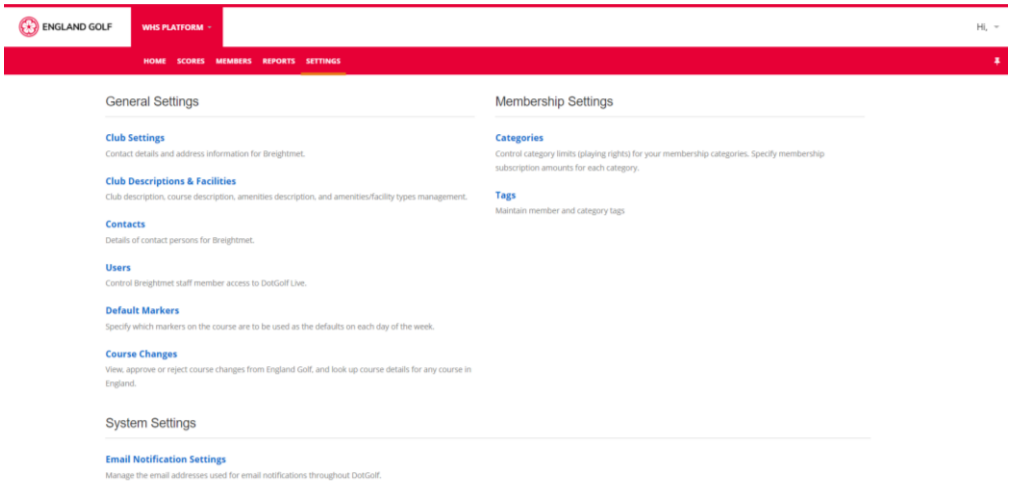
You can also select 'View All' to see complete list of inbox items or 'View Sent Items' via the relevant links:



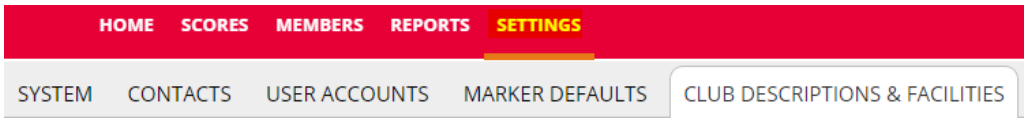


Settings: Overview

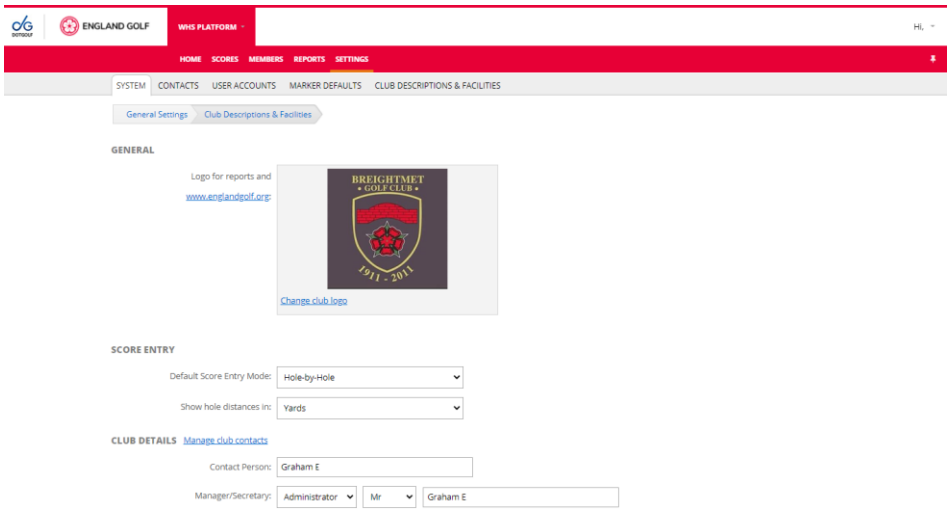
What you will see…… the Settings page shows three main categories: 'General Settings'; 'Membership Settings'; and 'System Settings' with links under each of them to access the relevant settings:



Selecting any of the links on the above main 'Settings' menu option will show grey sub-heading tabs 'System', 'Contact', 'User Accounts', 'Marker Defaults', and 'Club Description & Facilities' for quick access to these options. However, all options can also be accessed via the main 'Settings' menu option as highlighted on this screenshot:

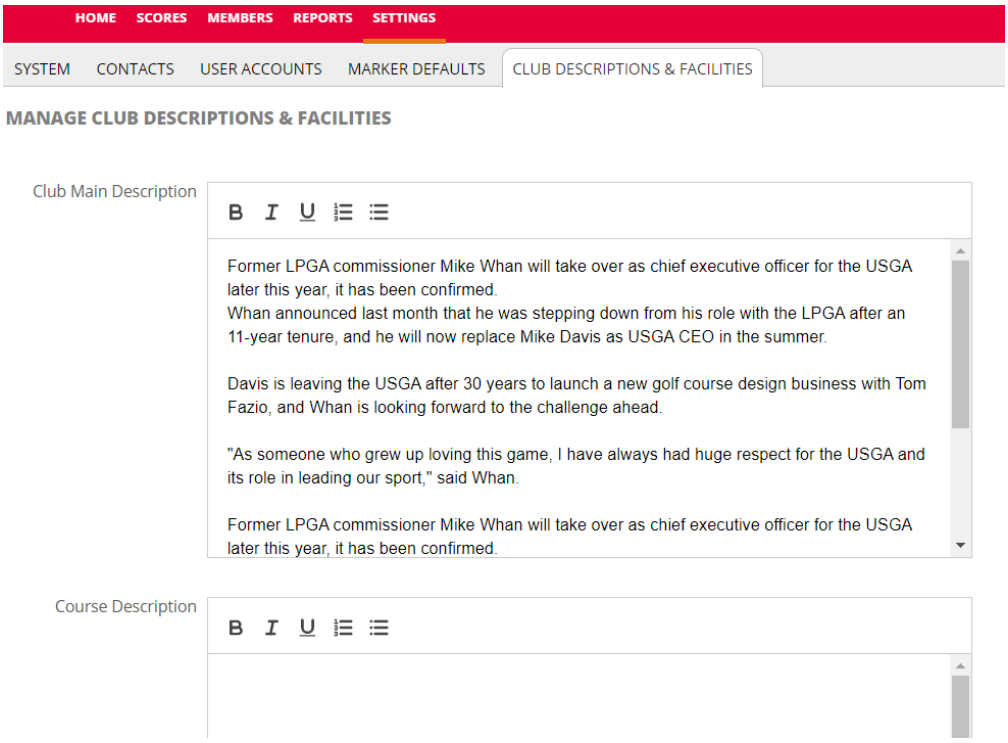


Settings: Club Settings / System - Updating or editing club information



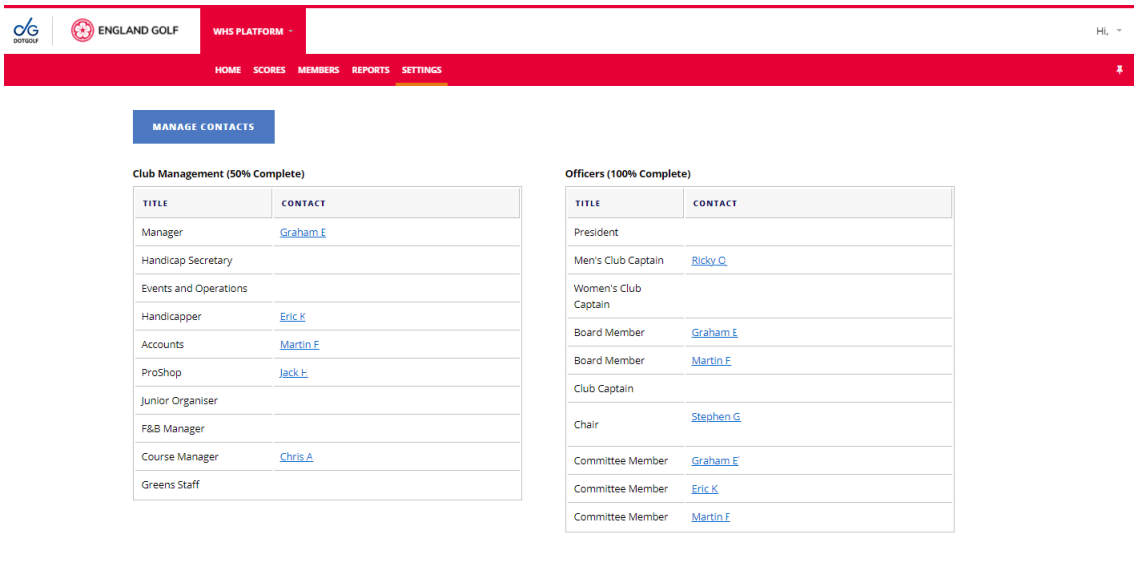
1. Select the ‘Settings’ menu option/tab.
2. Select ‘Club Settings’
   - The grey sub-heading tabs ‘General Settings’ and ‘Club Descriptions & Facilities’ can now be selected to allow the club to record further details such as a course & club descriptions, amenities, images, and facilities.
3. Add your club logo which is used to personalise reports and Handicap Certificates, note: PNG, JPG, TIF or BMP files are accepted.
4. Update Club Details: club main contact Name, club address, club phone number.
5. Click the ‘Save Changes’ button at the bottom of the page (or ‘Cancel’ to exit without saving).

Settings: Club Description & Facilities - Updating or editing club information



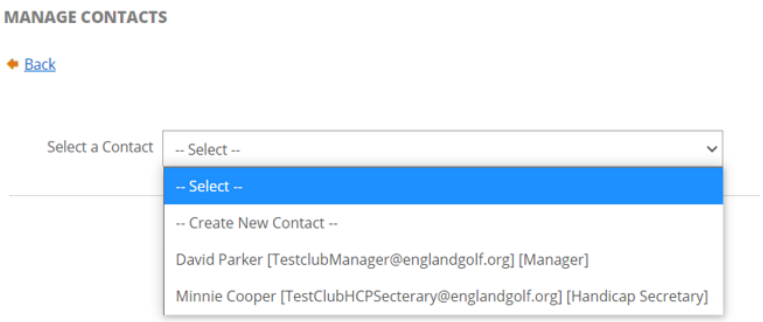
1. Select the ‘Settings’ menu option/tab.
2. Select ‘Club Descriptions & Facilities’
   - The grey sub-heading tabs ‘General Settings’ and ‘Club Descriptions & Facilities’ can now be selected to allow the club to record further details such as a course & club descriptions, amenities, images, and facilities.
3. Add your club, course, amenities descriptions logo along with facility types for your club.
4. Click the ‘Save Changes’ button at the bottom of the page (or ‘Cancel’ to exit without saving).

Settings: Contacts: Updating or editing Club contacts, staff, and officers

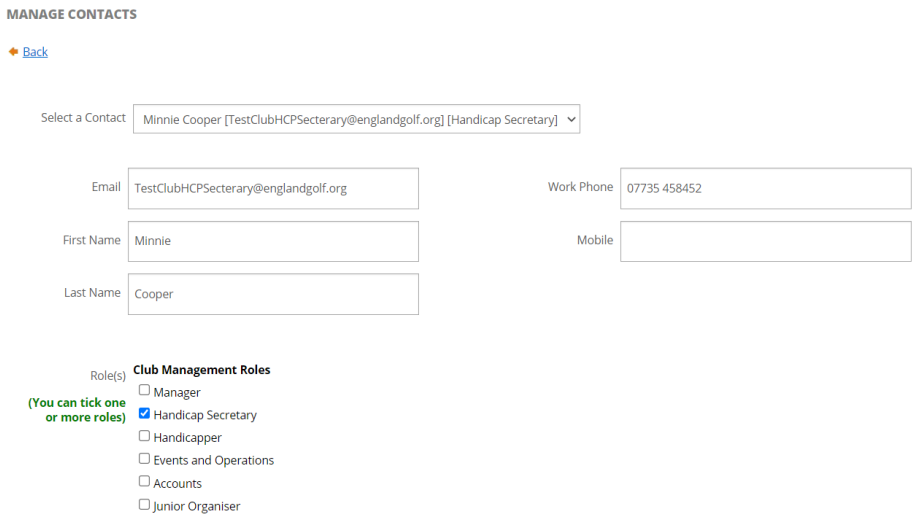


1. Select the ‘Settings’ menu option/tab.
2. Select ‘Contacts’.

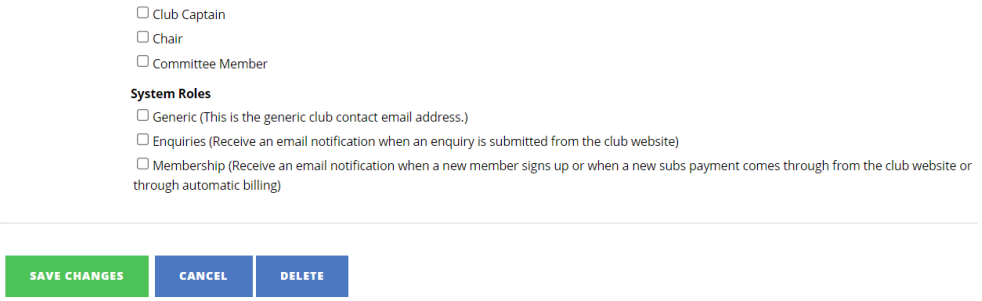
3. Select ‘Manage Contacts’ to update any of the contact information displayed or to add a new contact by selecting the relevant option from the drop-down list:



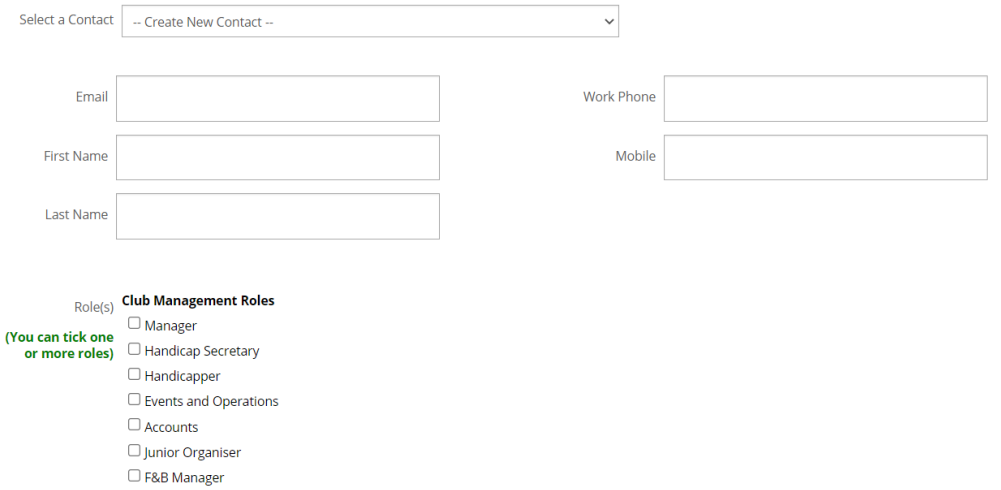
a. If an existing contact is selected you can then update the information as necessary, or delete the contact:



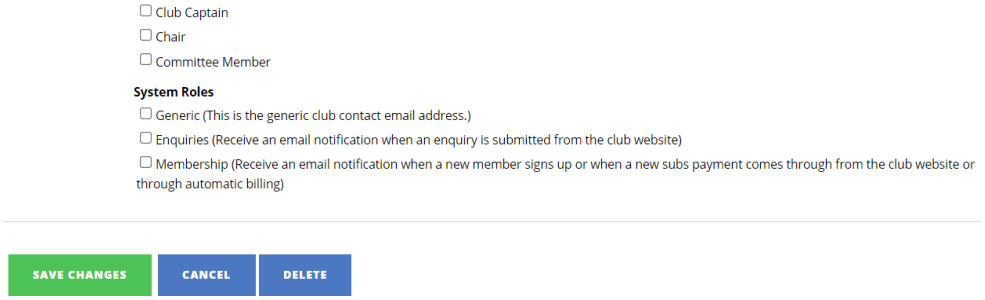
- select either ‘Save Changes’, ‘Cancel’, or ‘Delete’ at the bottom of the page:



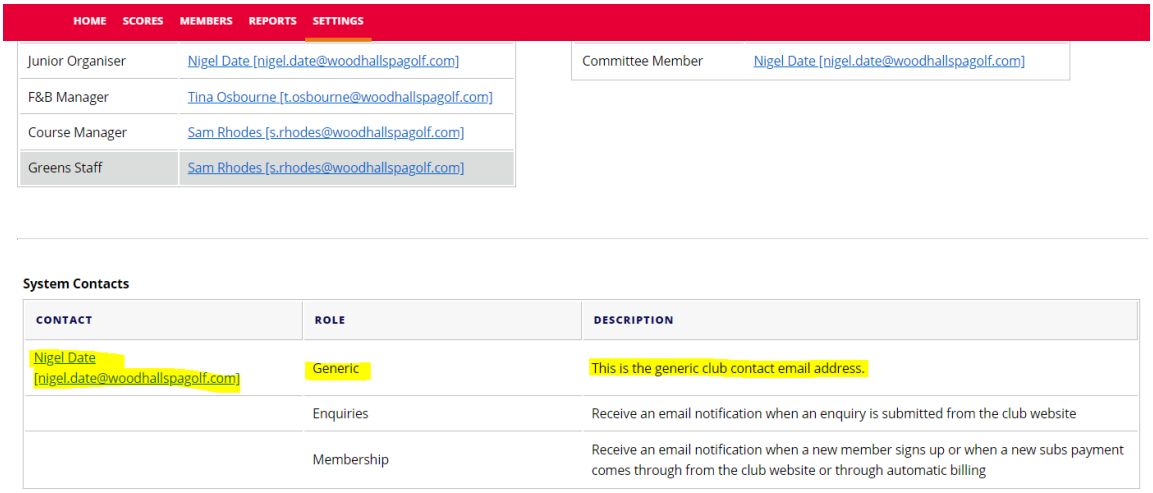
b. If ‘Create New Contact’ is selected you can then add the new contact information as necessary, or delete the contact:



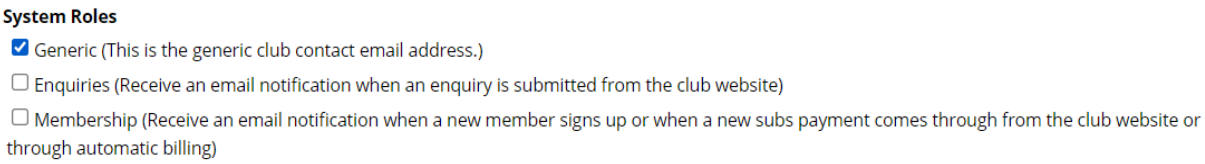
- select either ‘Save Changes’, ‘Cancel’, or ‘Delete’ at the bottom of the page:



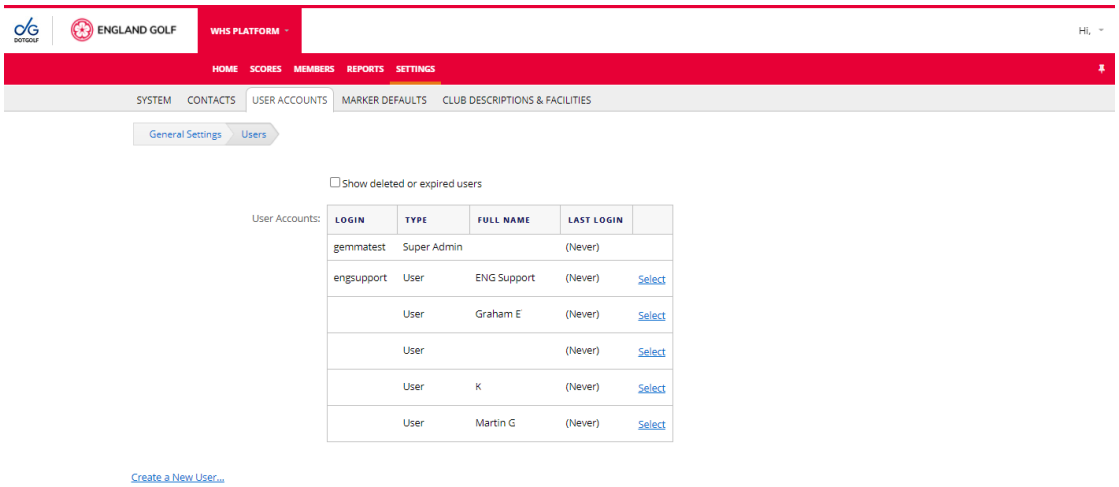
NOTE: at least one contact (preferably the Club Manager or Secretary) should have ‘Generic’ selected in System Roles – this is displayed at the bottom of the ‘Contacts’ page:



And is editable within the the contacts' settings via 'Manage Contacts' as per steps 1-3 above:



Settings: Users – Updating or Adding user accounts for platform access



1. Select the 'Settings' menu option/tab.

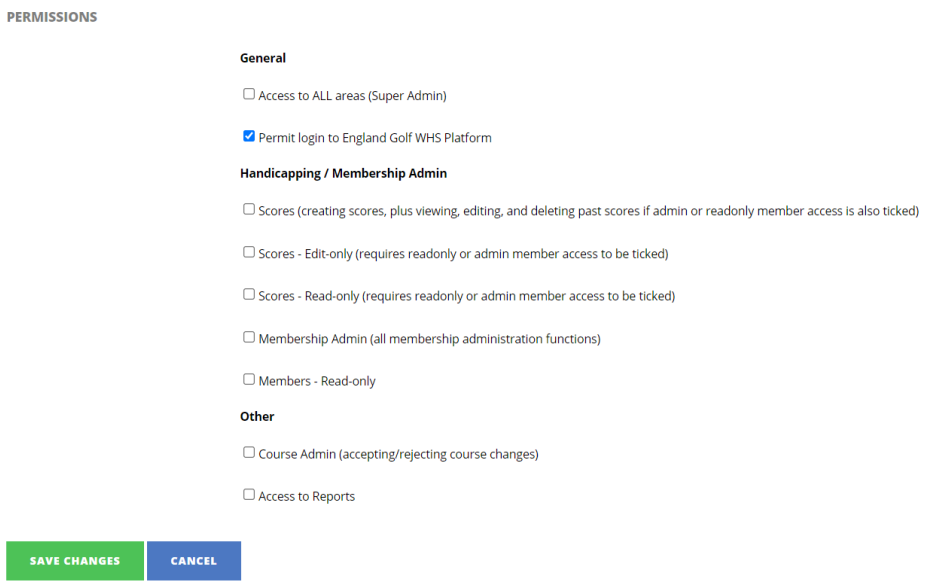
2. Select ‘Users’ to display current user accounts set up as per the screenshot above (and to ‘Show deleted or expired users’ click the tick box as shown above existing users).

3. To add a new user click ‘Create a New User’ **Note**: to edit an existing user account jump to step 7 below.

4. Complete all fields for the new user:

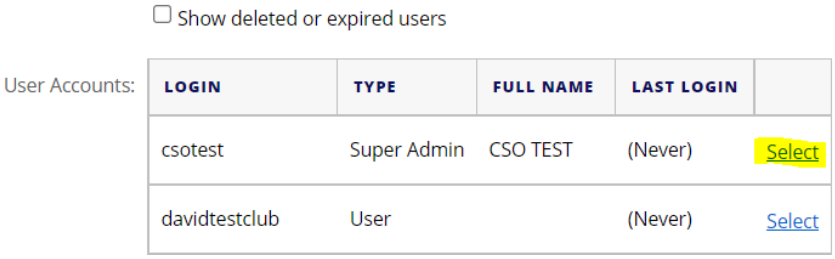
    - Add a ‘Login/User ID’ to be used at login as the ‘Username’ Note: Do not use membership number/CDH id as this could conflict with member account access;
    - Enter short name and full name in relevant fields;
    - Add Email Address;
    - Enter password in ‘New Password’ and ‘Confirm Password’ fields to be used at login;
    - Set ‘Account Expiry’ (default of ‘Never Expires’ is recommended);
    - Set Course Access if applicable (default of ‘All Courses’ is recommended).

5. Select relevant ‘Permissions’ according to the user’s role within the club:

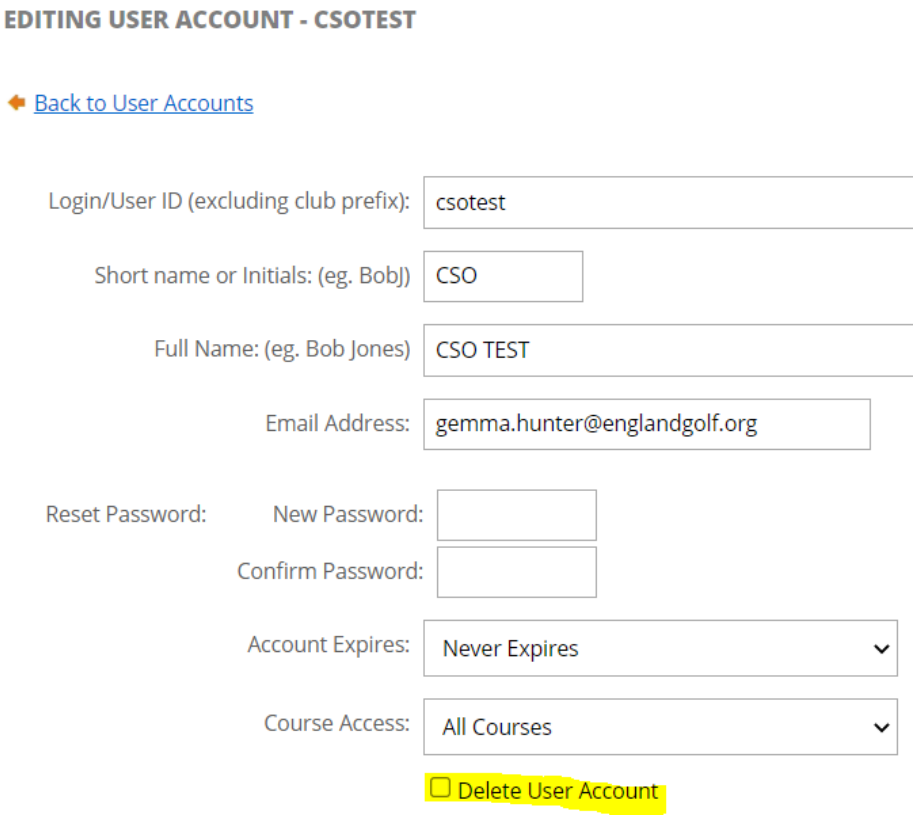


6. Click the 'Save Changes' button at the bottom of the page (or 'Cancel' to exit without saving).

7. To edit an existing user click 'Select' next to their details:



Edit the relevant information or tick the box 'Delete User Account' (as highlighted below) if access is no longer required for the user:

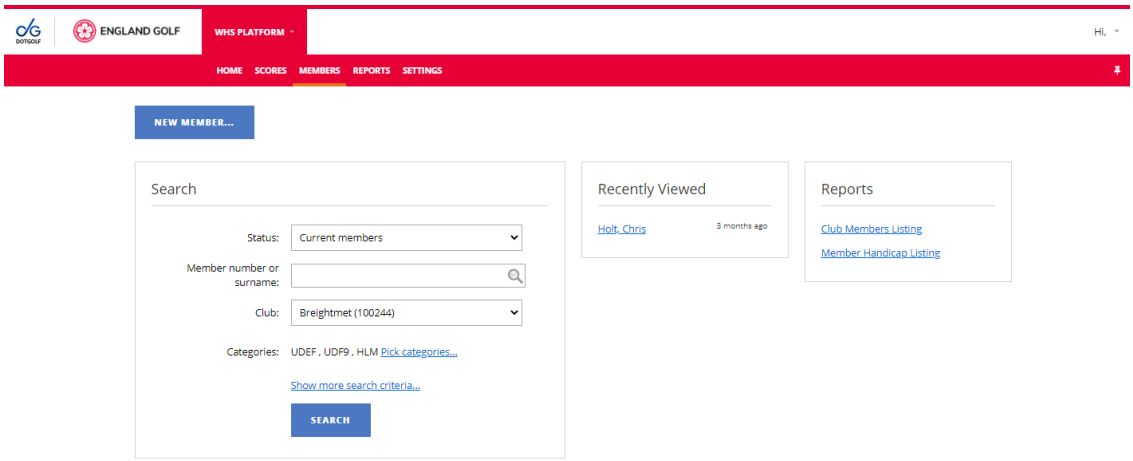


Click the 'Save Changes' button at the bottom of the page (or 'Cancel' to exit without saving).

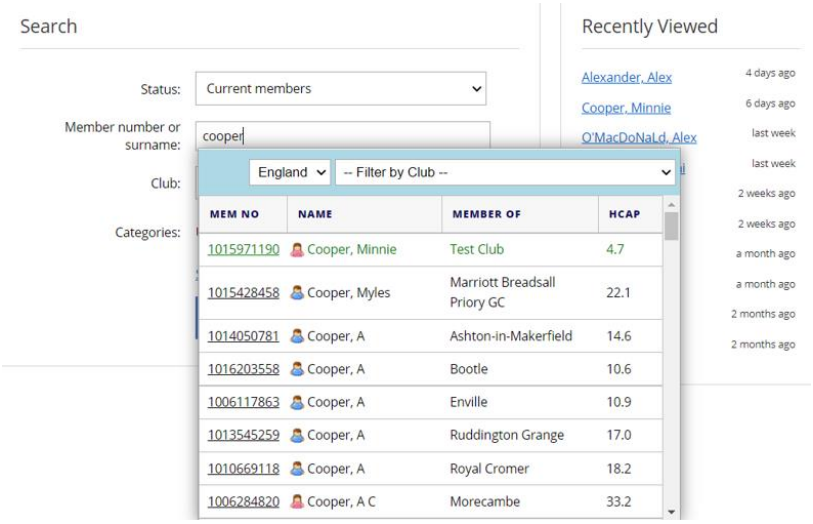
Members: Existing Members: Searching

Video Support: Members

Video Support: Members outside England (Wales/Ireland)

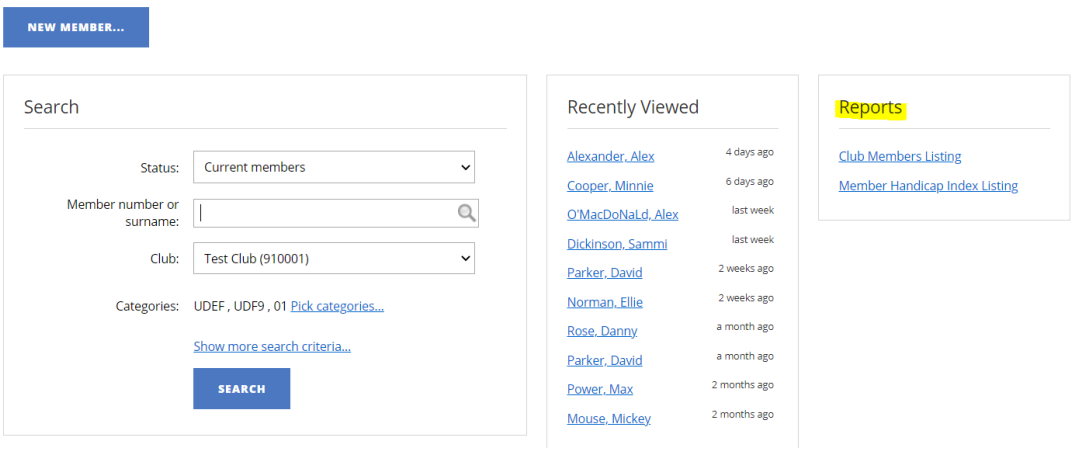


1. Select the 'Members' menu option/tab.
2. In the 'Search' box:
    a. Via the 'Status' drop-down box select the relevant option for searching: 'Current members', 'Resigned members' or 'Current and resigned members';
    b. Enter member number (formerly known as CDH id) or surname in the 'Member number or surname' field and select relevant member from the dropdown list of results:

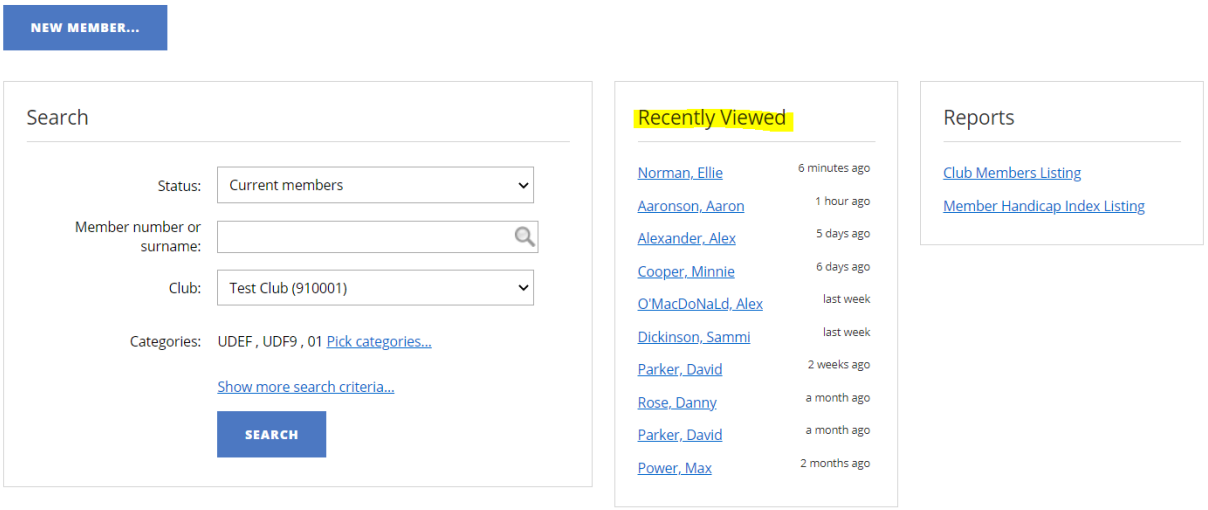


c. You can also search by club (default is your club) or 'All Clubs' from the 'Club' dropdown.

3. You can also generate a member listing from the reports section. This provides a full list of members, by Surname, you can click on the Membership Number to take you to their record:

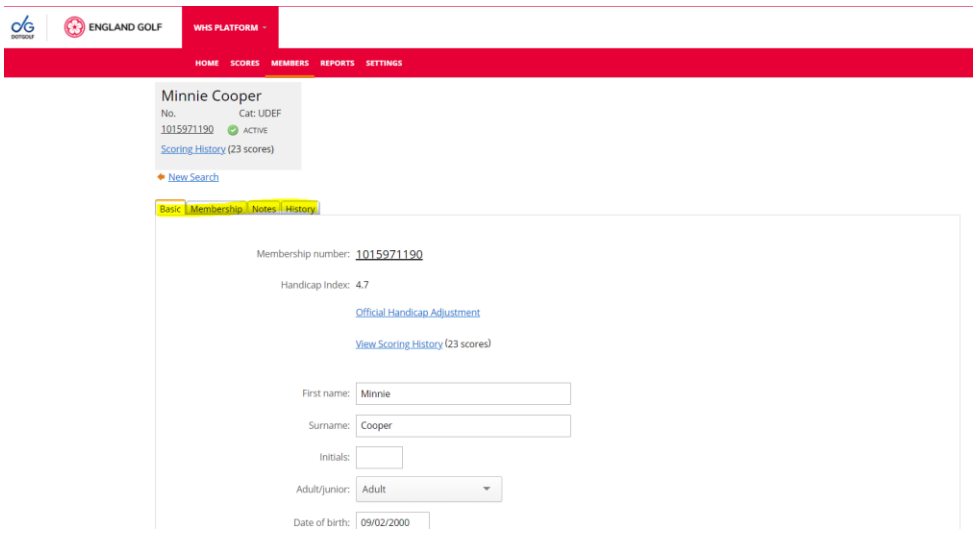


4. For quick access, you can see 'Recently Viewed' members via this area:

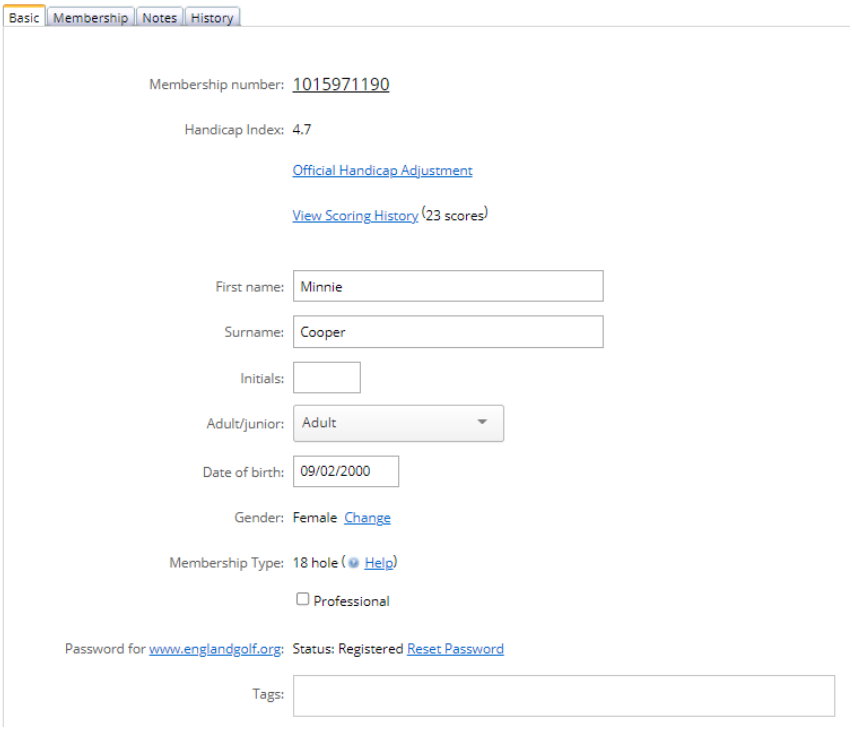


Members: Existing Members: Updating

Following the member search, within the member record there are four tabs / menu options which are: Basic; Membership; Notes; and History:



Members: Existing Members: Basic tab



Within the 'Basic' tab (as shown above) you can:

- View scoring history;
- Make an official handicap adjustment (see 'Making a Handicap Adjustment');
- Edit member's personal details (name, date of birth, address, email address, phone numbers, etc);
- Select the tick box if the member is a Professional;
- If the member requests it, you have the ability to reset the member's password for their My England Golf account/MyEG app (see 'Resetting password').

Additional notes:

- Please ensure the member's **Date of Birth** and **Email address** are accurately recorded as a minimum within the WHS platform, without this information the handicap index will not be activated for use and the member will be unable to

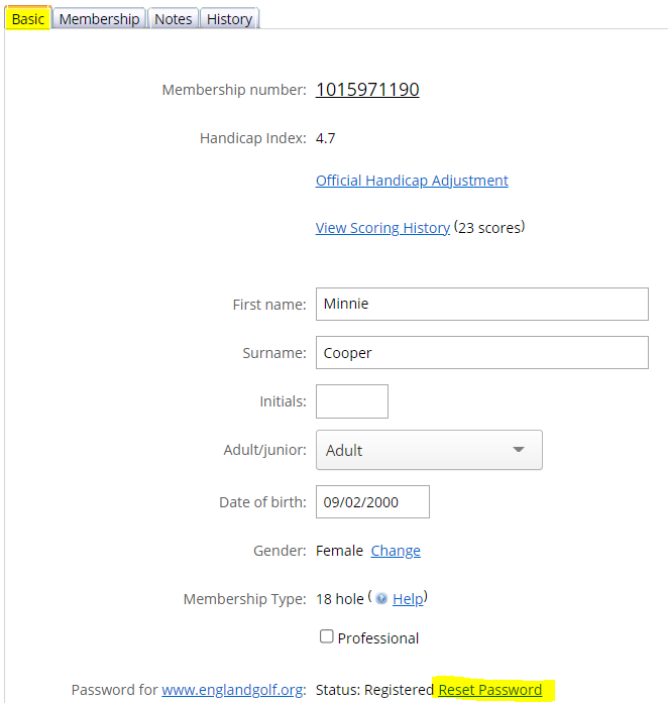
access their WHS My England Golf member account or MyEG app and any of their affiliation benefits.

- Membership Type should read - 18 hole.
- If 'Gender' is incorrect for the member select 'Change' next to the incorrect gender type and this will generate a change request process with the WHS technical support team for actioning (note: you will be contacted as part of the process).
- If any changes are made please select 'Save Changes' at the bottom of the page (or 'Cancel' to exit without saving):

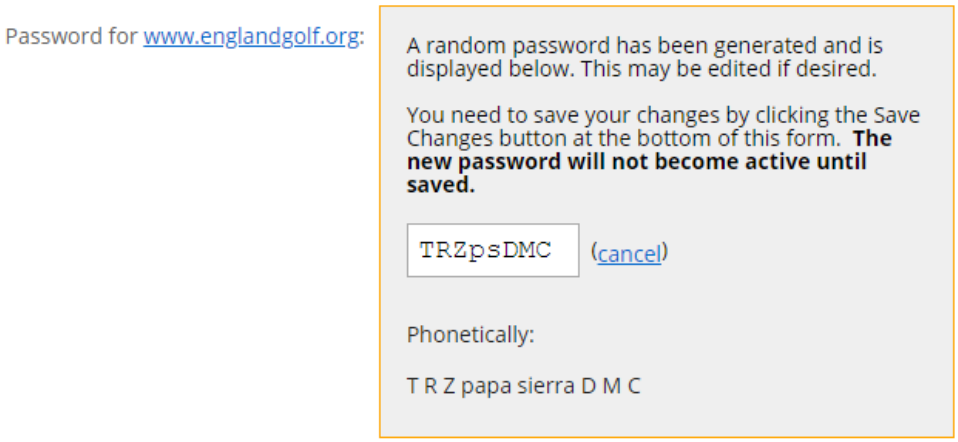
Members: Existing Members: Resetting password

If the member requests it, you have the ability to reset the member's password for their My England Golf account/MyEG app as follows:

1. Select 'Reset Password' within the member's Basic tab:



2. A text box will appear with a randomly generated password:

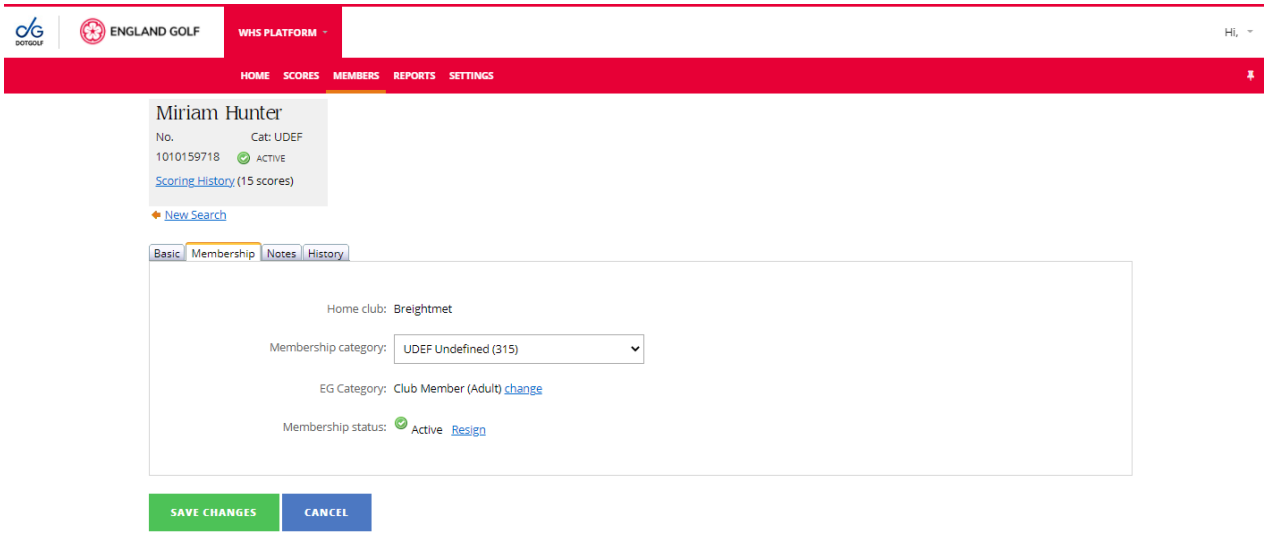


3. Selecting '(cancel)' within the above box will cancel the password reset and return to the original member basic information page with password unchanged.

4. If you want to keep the randomly generated password select 'Save Changes' at the bottom of the page:

5. If you want to enter a different password, for example one chosen by the member, you can overtype the random password with the alternative password and select 'Save Changes' at the bottom of the page:

Members: Existing Members: Membership tab

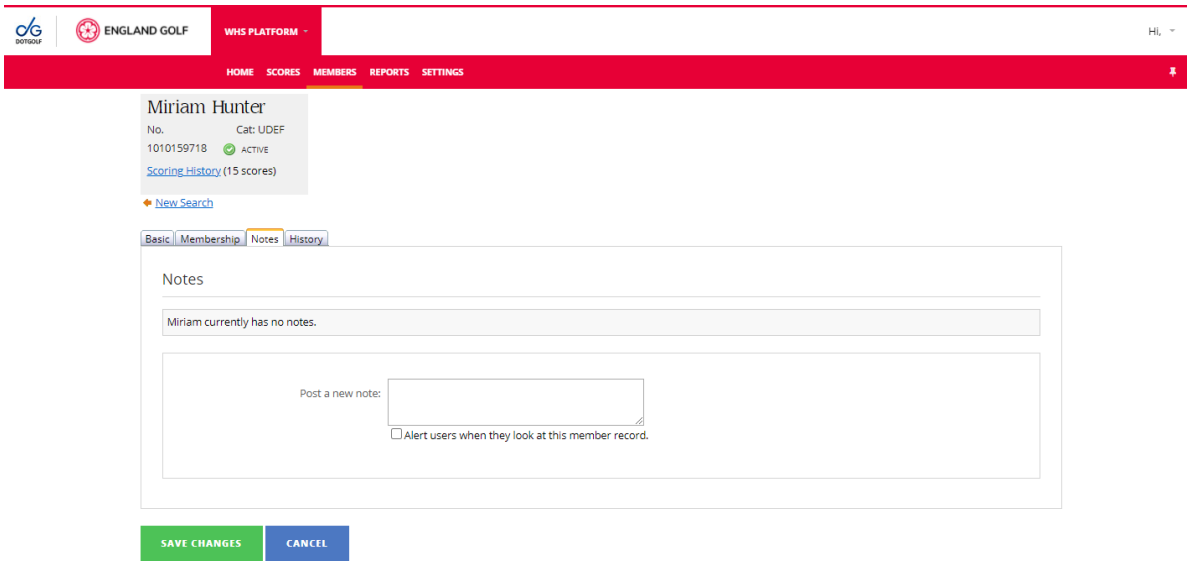


Within the 'Membership' tab (as shown above) you can:

- Edit Membership Category: if none are set up, members will default to 'UDEF (Undefined)' – see 'Adding A Club Membership Category' for further information;
- View EG Category – this will always be 'Club Member' (Adult or Junior);
- Resign a Member (this includes members who may have passed away) – see 'Resigning A Member' for further information.

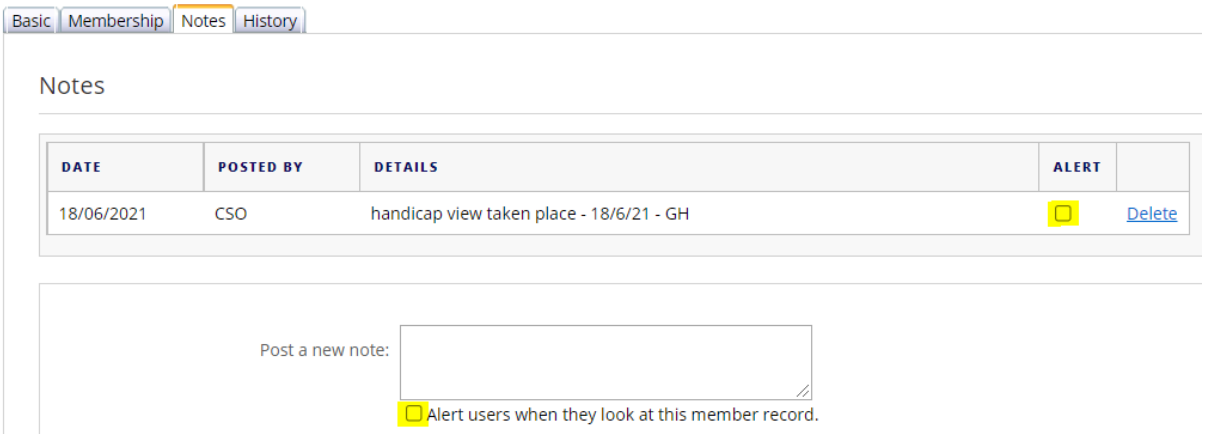
Note: if any changes are made select 'Save Changes' at the bottom of the page (or 'Cancel' to exit without saving):

Members: Existing Members: Notes tab



Within the 'Notes' tab (as shown above) you can:

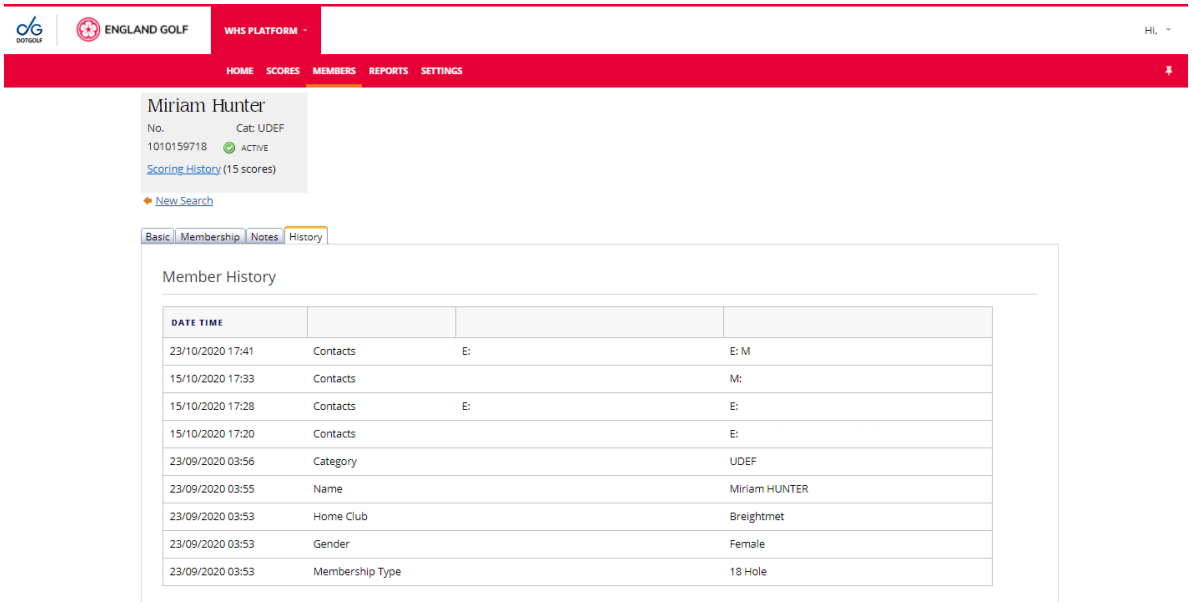
- View membership notes;
- Delete a membership note;
- Add a membership note – which you can make visible to other clubs by using the 'Alert' tick box as needed:



Note: if any changes are made select 'Save Changes' at the bottom of the

page (or 'Cancel' to exit without saving):

Members: Existing Members: History tab



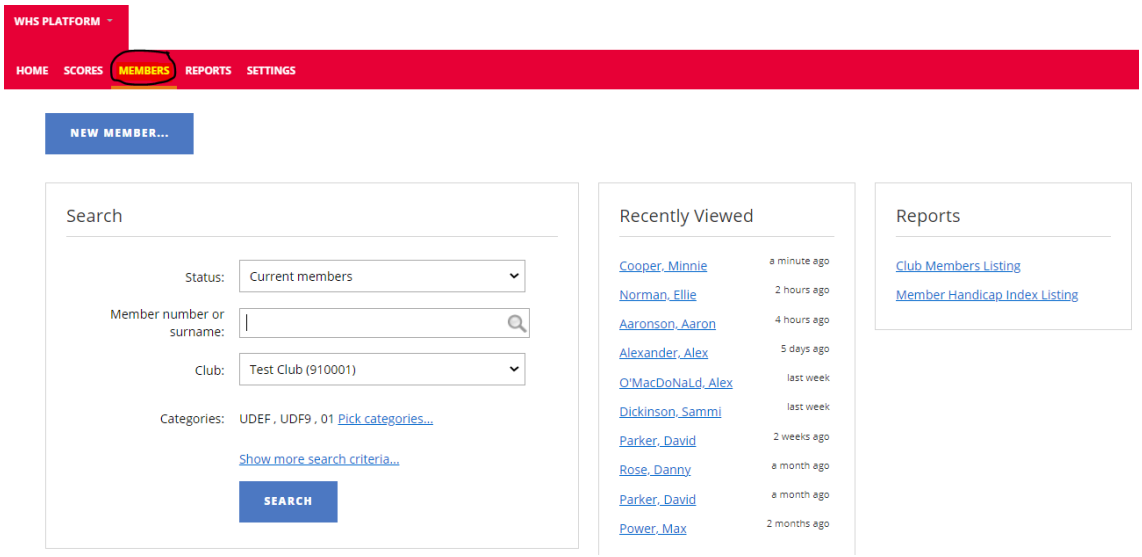
Within the 'History' tab (as shown above) you can view audit history for changes to the member's profile – and use the tick box 'Include User (if available)' to show the user or system responsible for the change.

New Members: Adding a Member (no membership number / new to Golf)

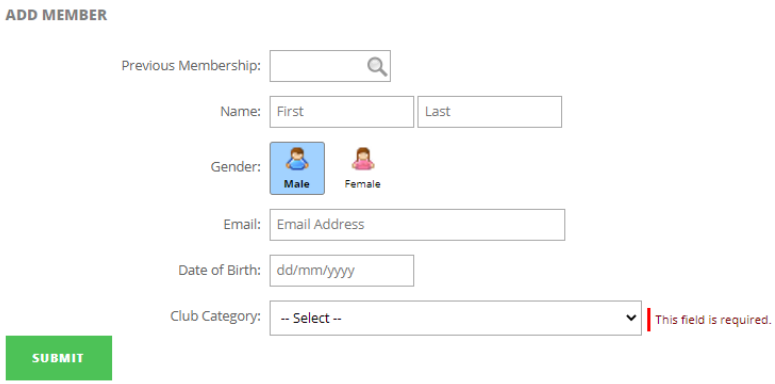
The following steps should be taken to add a member with no known previous membership number or is brand new to golf.

Note: for overseas members they will require an English record creating (as per below steps) and then any historical/overseas scores manually adding to their newly created record (see 'Adding an International Score'), until the global merger of all global systems has been implemented.

1. Select the ‘Members’ tab:



2. Select ‘New Member’ to take you to the ‘Add Member’ screen:



Note: If you have a possible membership number (formerly known as CHD id) you can enter it in the ‘Previous Membership’ field to search for it, if no matches are found continue with the following steps.

3. Complete all fields:

   a. Populate First and Last Name fields

   b. Select Gender

   c. Add email address

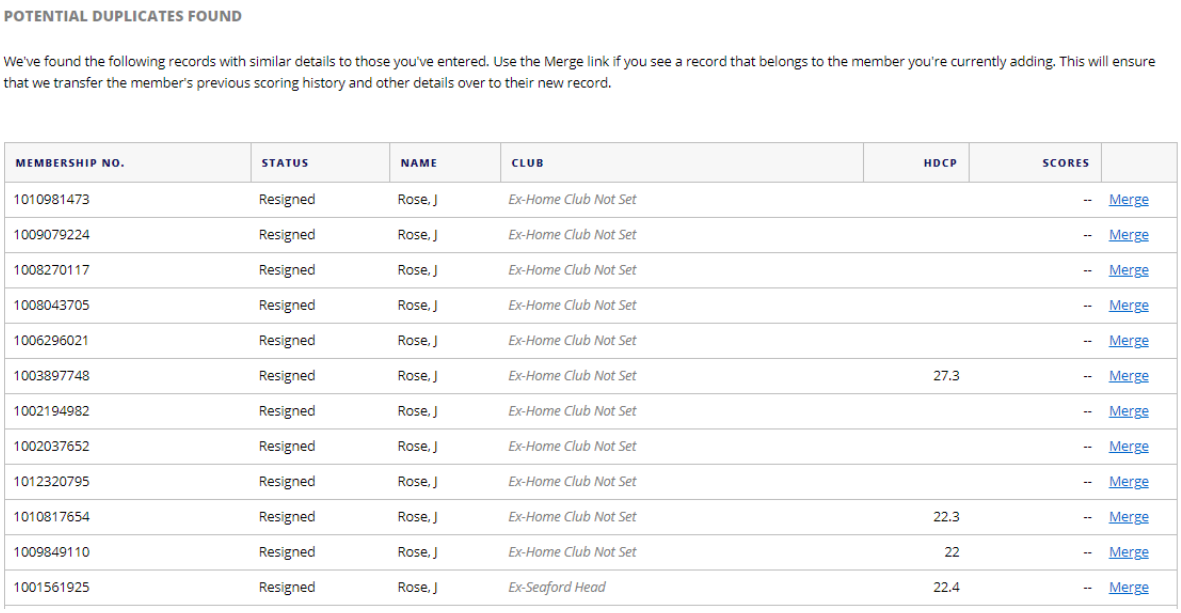
d. Enter Date of Birth (DOB)

e. Select Club Category - Unless you have set up additional categories use UDEF as a default (see 'Adding A Club Membership Category' for further information)

Additional notes:
Please ensure the member's **Date of Birth** and **Email address** are accurately recorded as a minimum within the WHS platform, without this information the handicap index will not be activated for use and the member will be unable to access their WHS My England Golf member account or MyEG app and any of their affiliation benefits.

4. Click 'Submit':

a. Should any of the information provided (name, email address, DOB) match a player already in the system you will be shown the 'potential duplicates' that already exist within the WHS system with a membership number. You then have the ability to use the existing membership number by clicking 'Merge' next to the relevant 'duplicate' as shown below (this avoids any new membership numbers being created where a membership number/member record already exists):



POTENTIAL DUPLICATES FOUND

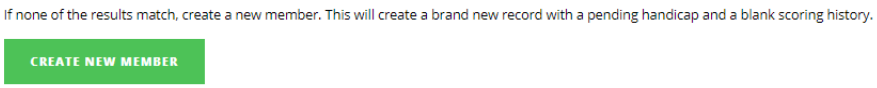
We've found the following records with similar details to those you've entered. Use the Merge link if you see a record that belongs to the member you're currently adding. This will ensure that we transfer the member's previous scoring history and other details over to their new record.

MEMBERSHIP NO.	STATUS	NAME	CLUB	HDCP	SCORES	
1010981473	Resigned	Rose, J	*Ex-Home Club Not Set*		--	Merge
1009079224	Resigned	Rose, J	*Ex-Home Club Not Set*		--	Merge
1008270117	Resigned	Rose, J	*Ex-Home Club Not Set*		--	Merge
1008043705	Resigned	Rose, J	*Ex-Home Club Not Set*		--	Merge
1006296021	Resigned	Rose, J	*Ex-Home Club Not Set*		--	Merge
1003897748	Resigned	Rose, J	*Ex-Home Club Not Set*	27.3	--	Merge
1002194982	Resigned	Rose, J	*Ex-Home Club Not Set*		--	Merge
1002037652	Resigned	Rose, J	*Ex-Home Club Not Set*		--	Merge
1012320795	Resigned	Rose, J	*Ex-Home Club Not Set*		--	Merge
1010817654	Resigned	Rose, J	*Ex-Home Club Not Set*	22.3	--	Merge
1009849110	Resigned	Rose, J	*Ex-Home Club Not Set*	22	--	Merge
1001561925	Resigned	Rose, J	*Ex-Seaford Head*	22.4	--	Merge

Note: This will ensure the existing membership number (formerly known as

CDH id) can be used by the member rather than creating a new (duplicate) record for the member.

b. If there is no match on the data provided you can select 'Create New Member' at the bottom of the screen:



Note: This will create a membership number (formerly known as CDH id) for the member.

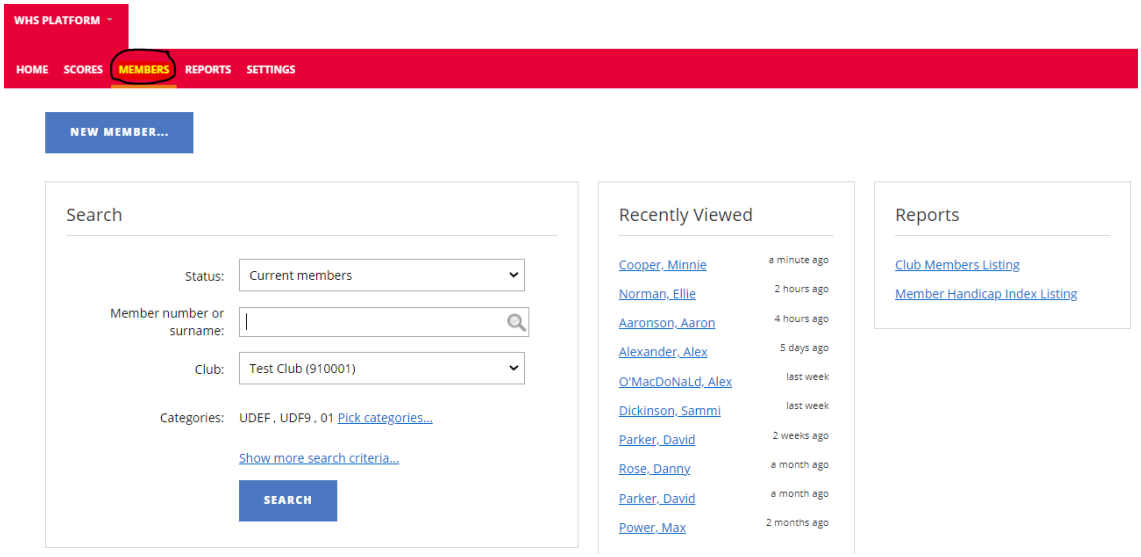
5. Member is now free to start adding scores to generate a handicap index.

New Members: Adding a Member (change of home club / adding a participant to the club membership list)

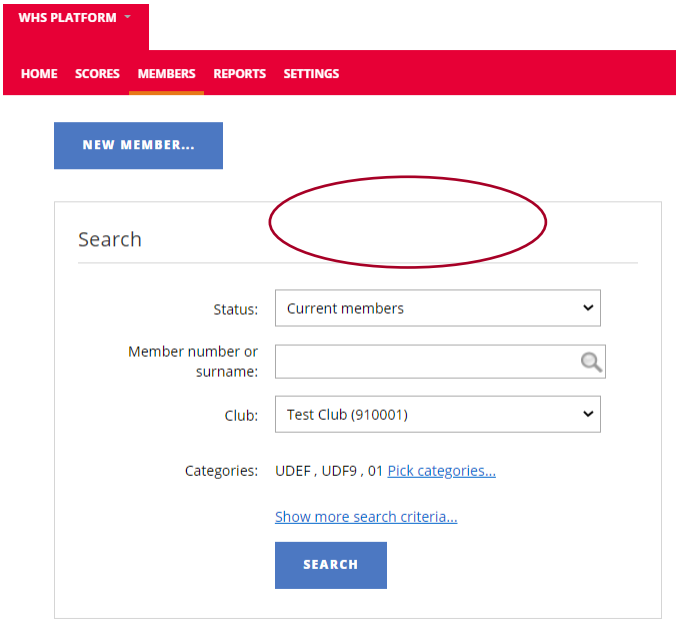
The following steps should be taken to add a member to your club membership list (i.e. adding as a home club or secondary club member) who already has a membership number including those with Welsh or Irish numbers.

Note: for overseas members they will require an English record creating (as per 'New Members: Adding a Member (with no membership number / new to Golf') and then any historical/overseas scores manually adding to their newly created record (see 'Adding an International Score'), until the global merger of all global systems has been implemented.

1. Select the 'Members' tab:



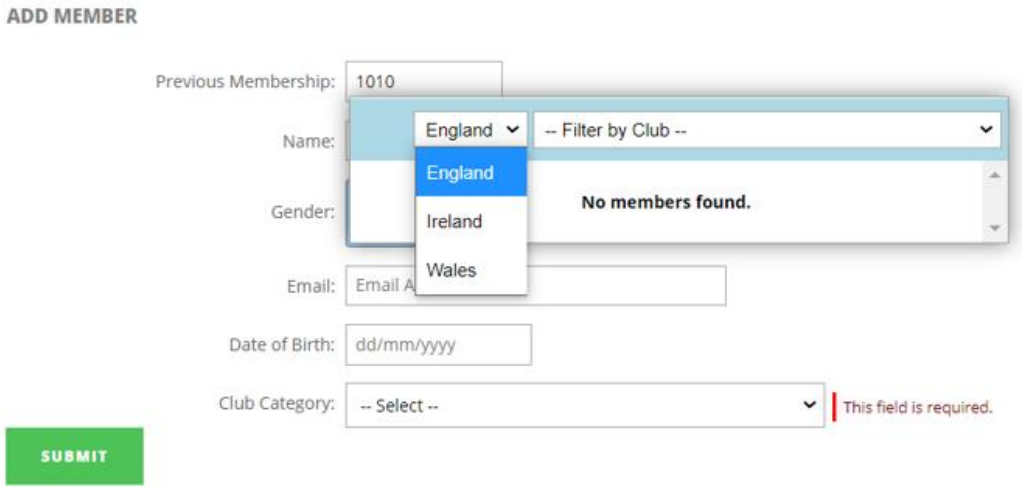
2. Enter the membership number or surname in the 'Membership number or surname' search field and click on the spyglass search icon:



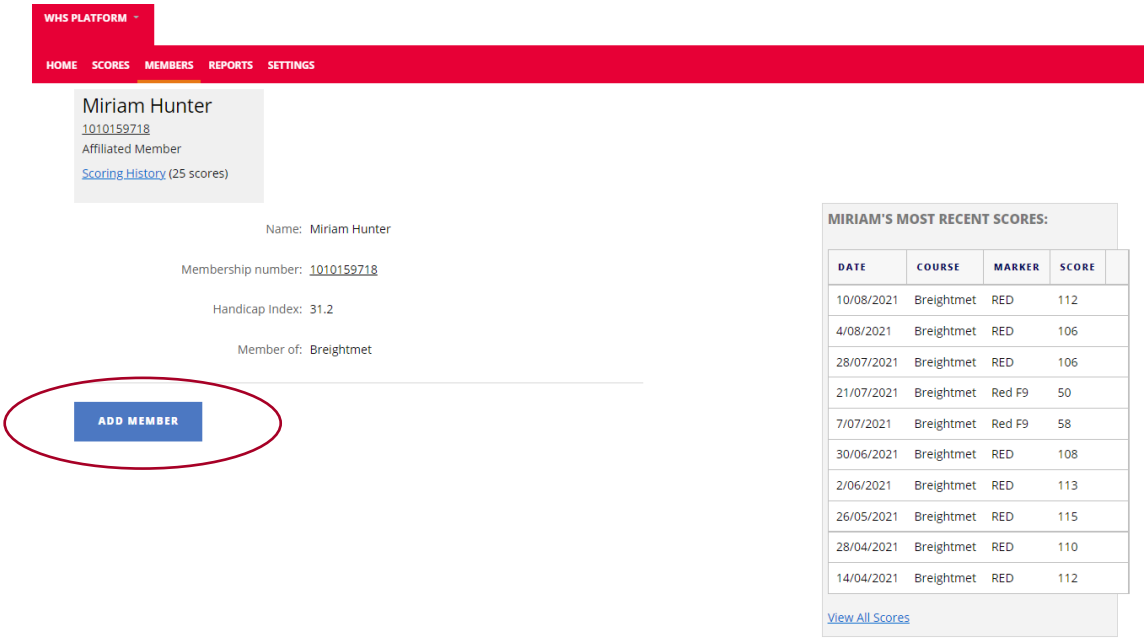
Notes:

- try searching by name and change the search status to 'Current and Resigned members' to check if the member is a 'Resigned member' and if so, you can reinstate them;
- you can filter the search by club from the 'Filter by Club drop down menu;

- when using a Welsh or Irish ID number ensure the correct country is selected from the country dropdown box as highlighted below in green: the system will create an English membership number (formerly known as CDH id) which will allow scores to be posted to the original Welsh/Irish record:

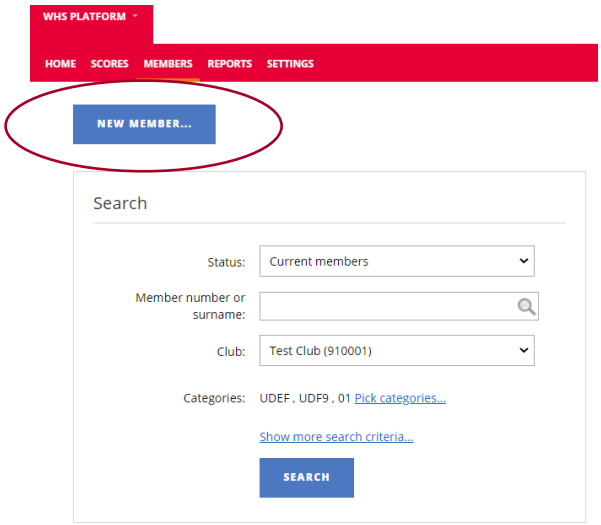


3. From the list of results displayed click on the member you wish to add to your club membership and their record will be displayed, where you can now click 'Add Member':



Note: If no matching records are found you will need to use the 'New Member' button to add the member (see New Members: Adding a Member (with no

membership number / new to Golf)'):



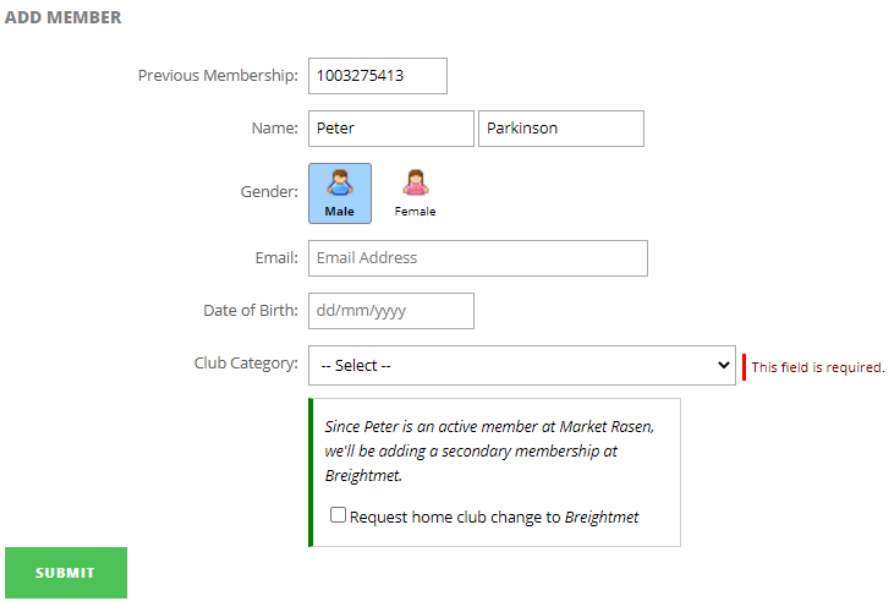
4. On the 'Add Member' screen you must now enter the following member's information:

   - Email address;
   - Date of Birth;
   - Select Club Category - Unless you have set up additional categories use UDEF as a default (see 'Adding A Club Membership Category' for further information).

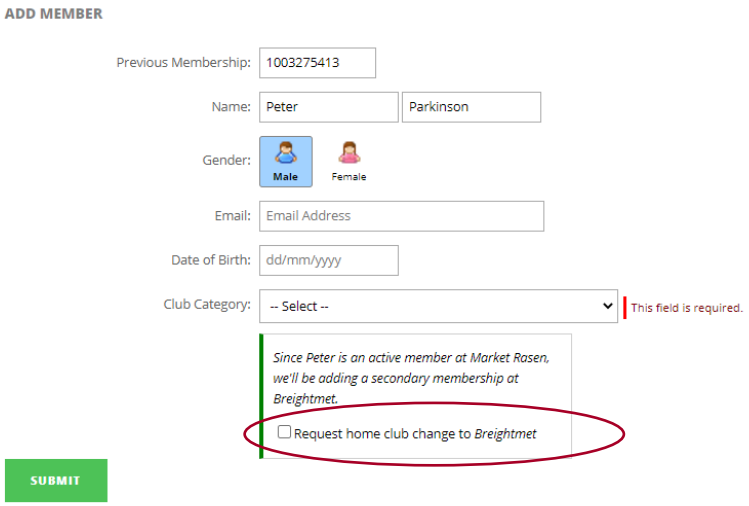
   Additional notes:
   Please ensure the member's **Date of Birth** and **Email address** are accurately recorded as a minimum, without this information the handicap index will not be activated for use and the member will be unable to access their My England Golf member account or MyEG app and any of their affiliation benefits.

5. If the player is already a member at another club, the default option will be to add the member as a secondary member (formally an away player) of your

club:



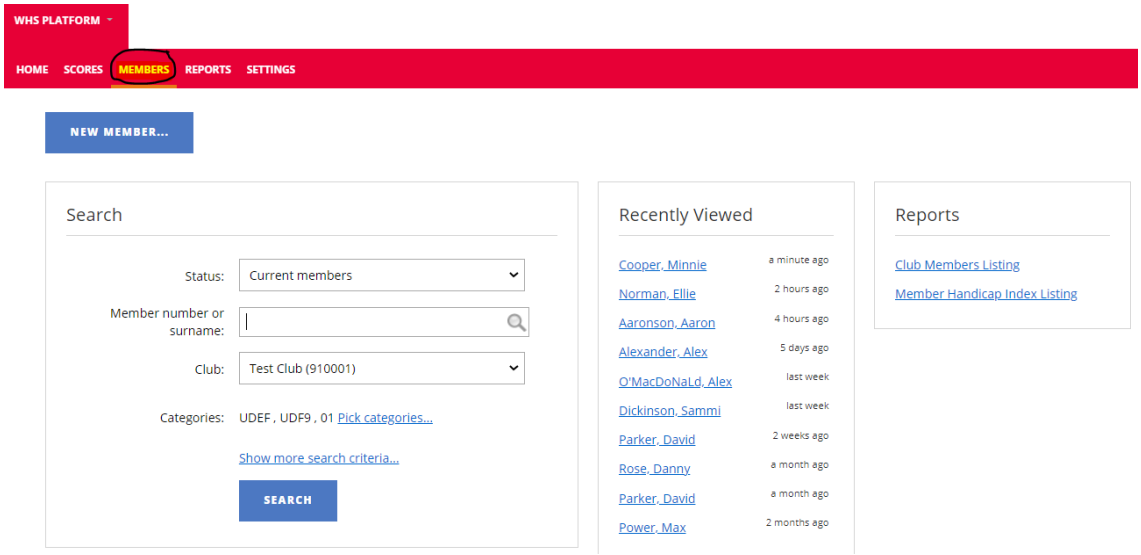
6. If you want to make your club the member's home club you need to click the 'Request home club change…' tick box which will send a home club change request to the members' current home club for them to accept before the members' record reflects your club as their home club (see Notifications for further information):



7. Click on the 'Submit' button to save the changes.

Resigning A Member / Marking Member as Deceased

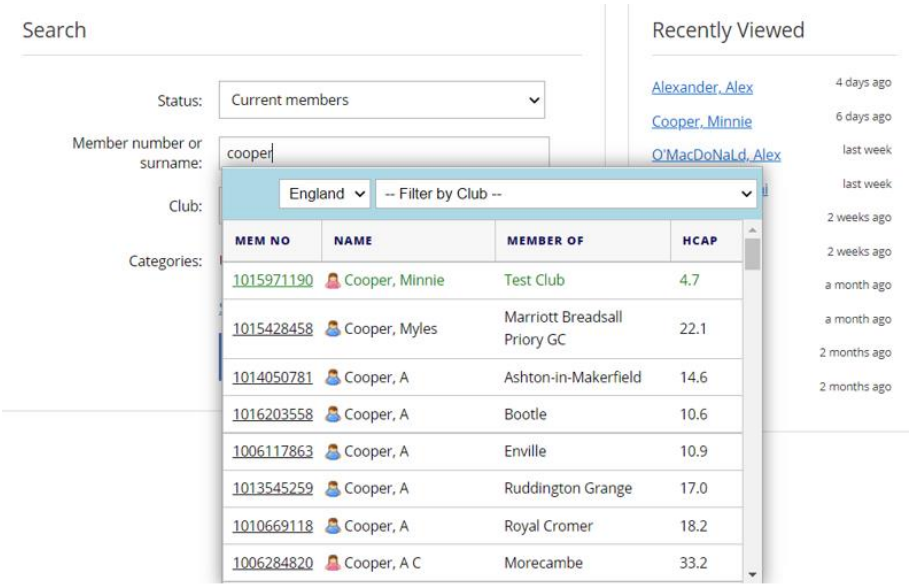
1. Select the 'Members' menu option/tab:



2. In the 'Search' box:

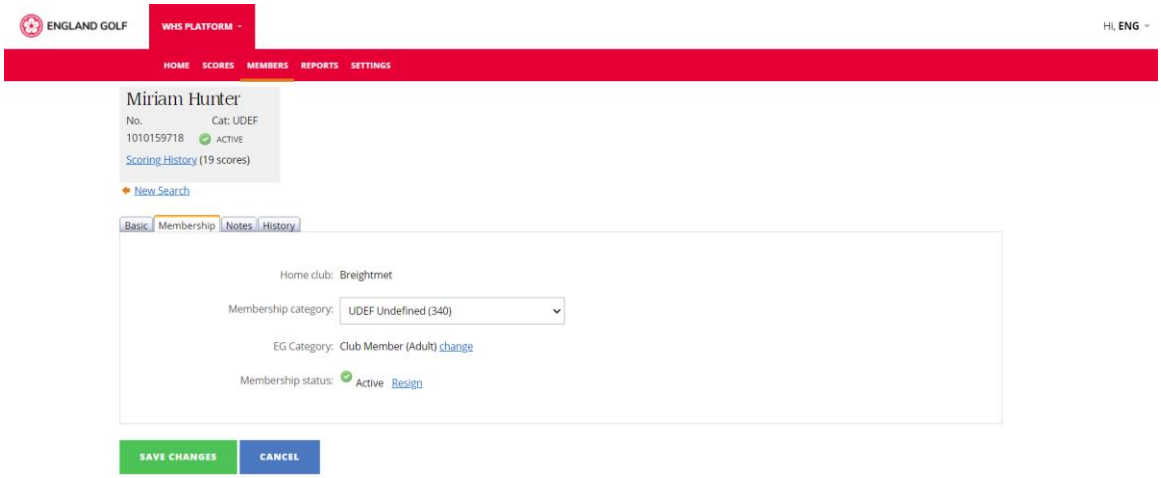
   a. Via the 'Status' drop-down box select the relevant option for searching: 'Current members', 'Resigned members' or 'Current and resigned members';

   b. Enter member number (formerly known as CDH id) or surname in the 'Member number or surname' field and select relevant member from the dropdown list of results:



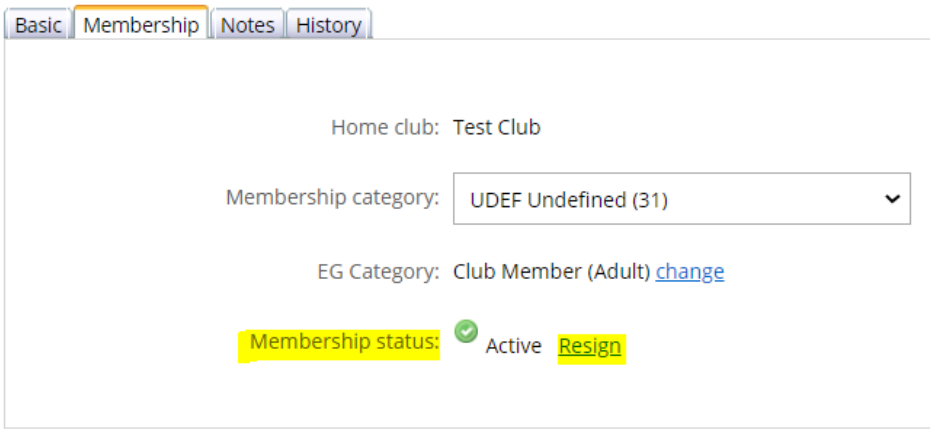
c. Select relevant club (default is your club), or 'All Clubs' from the 'Club' dropdown for a full system wide search.

3. Within the member record select the 'Membership' tab:

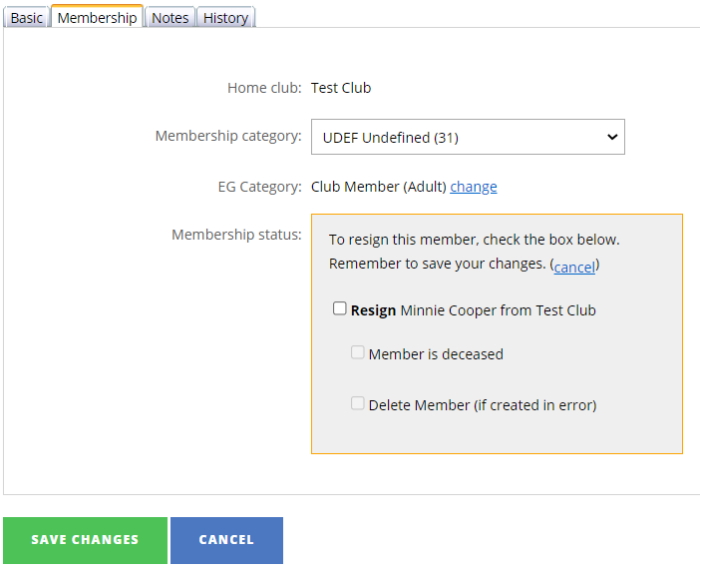


4. Select 'Resign' under membership status to resign the member (this includes members who may have passed away or for any duplicate records created in

error):



5. A message box will appear with various 'resign' options to select from.:



- Tick the 'Resign' tick box to resign the member from your club if the member has left or wishes to move clubs. Once the member is resigned, they remain in the system without any attachment to a club.

You can also select from the following options where appropriate:

- Tick the 'Member is deceased' tick box if you have been advised the member has passed away. **Note:** Ensure email address is also removed from this member's records on both the platform and the club systems

to ensure any email communications cannot inadvertently be sent to the member.

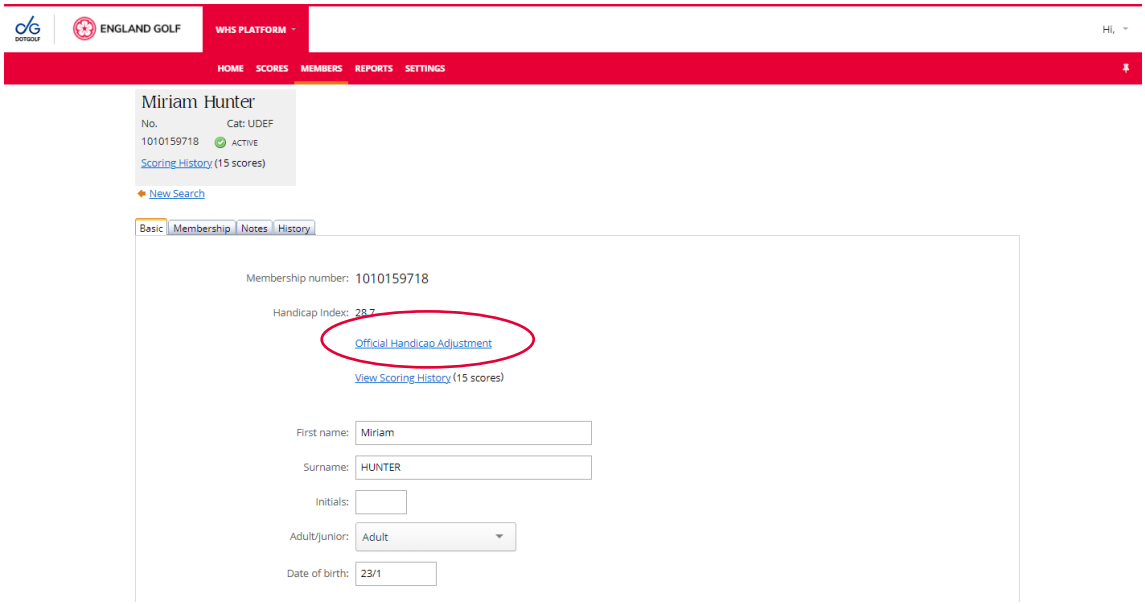
- Tick the 'Delete Member (if created in error)' tick box for identified duplicate member records.

6. Click 'Save Changes' at the bottom of the page (or 'Cancel' to exit without saving).

Making a Handicap Adjustment

Video Support: Handicap Adjustments

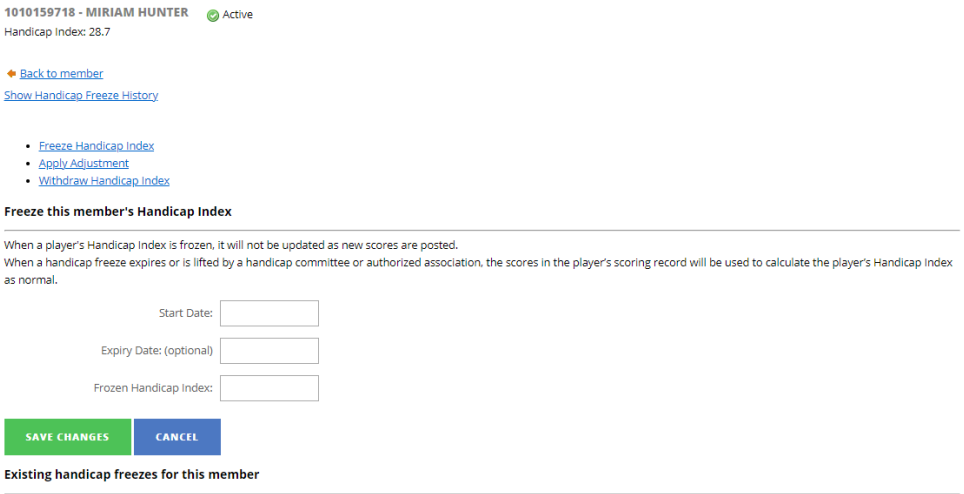
1. Select the 'Members' menu option/tab.
2. Search for Member (see Members: Existing Members: Searching).
3. Within the Member record, in the 'Basic' tab – click 'Official Handicap Adjustment':



The 'Handicap Adjustment' options available are:

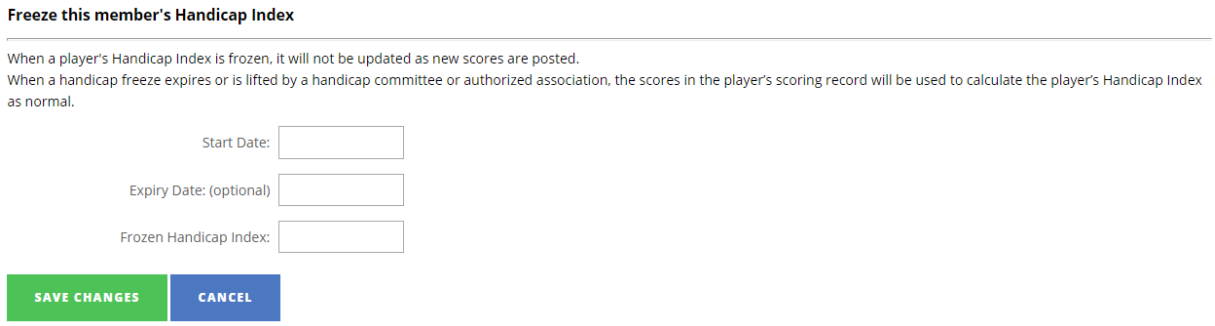
- **Freeze Handicap Index** - When a player's handicap index is frozen, it will not be updated as new scores are posted. (See 'Freeze Handicap Index');
- **Apply Adjustment** - Manual handicap index adjustments are applied to each of the most recent 20 score differentials in the scoring record from when they are created.
  They may be used to adjust a player's handicap index to better reflect the player's demonstrated ability;
- **Withdraw Handicap Index** - A member's handicap index should be withdrawn if they deliberately or repeatedly fail to comply with the player's responsibilities under the Rules of Handicapping (see Appendix A).

Handicap Adjustment: Freeze Handicap Index



1. Before deciding to freeze a member's handicap index, please ensure that you have conducted a review of the members handicap index as outlined in Rule 7.1a (i) of the Rules of Handicapping (https://www.englandgolf.org/download/england-golf-rules-of-handicapping/).
2. The member must be informed that the index is to be frozen, giving them opportunity to respond.
3. You must enter start and expiry date in the relevant fields.

4. You must set the level to which the handicap index is to be frozen:

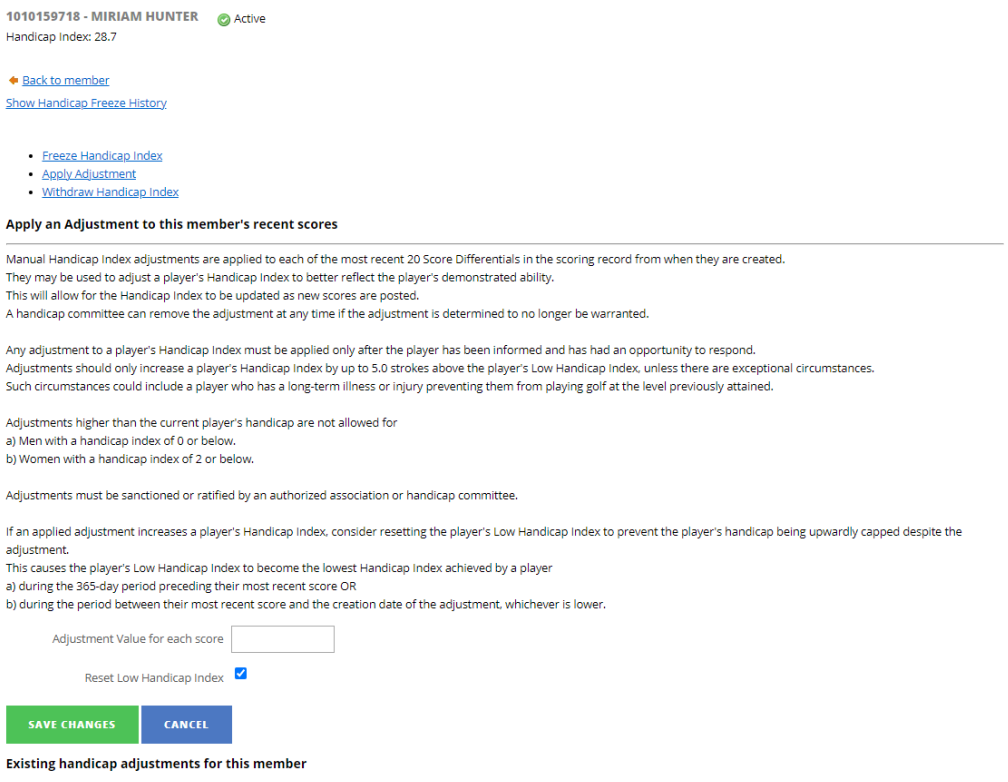


5. On expiry of the time period, the handicap index will be recalculated using the most recent scores in the member's record.

6. The handicap committee can remove the freeze at any time.

7. Save changes by clicking 'Save Changes' at the bottom of the page (or 'Cancel' to exit without saving).

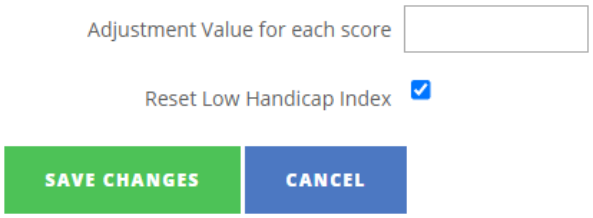
Handicap Adjustment: Apply Adjustment



1. Before deciding to apply a handicap adjustment to a member's handicap index, please ensure that you have conducted a review of the members handicap index as outlined on Rule 7.1a (i) of the Rules of Handicapping (https://www.englandgolf.org/download/england-golf-rules-of-handicapping/).

2. Enter an 'Adjustment Value for each score' which will apply an adjustment to the last 20 scores within the member's record.

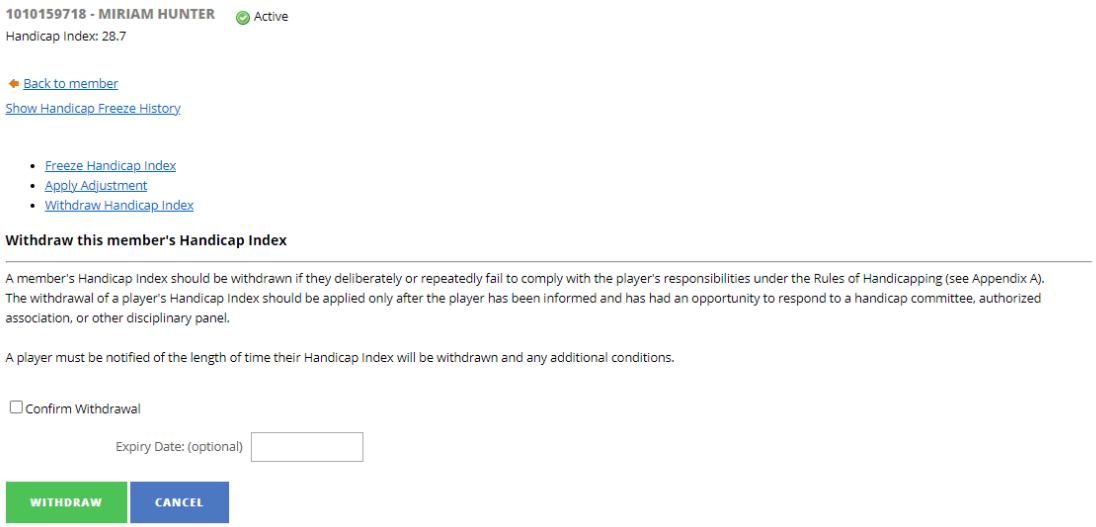
3. When applying an adjustment, we recommend that you also reset the player's Low Index by ticking the 'Reset Low Handicap Index' tick box:



4. Handicaps can only be adjusted -/+ 5, any larger adjustments will need to be approved by the county through the platform (clubs will need to liaise with their County Handicap Advisor in this instance).

5. Save changes by clicking 'Save Changes' at the bottom of the page (or 'Cancel' to exit without saving).

Handicap Adjustment: Withdraw Handicap Index

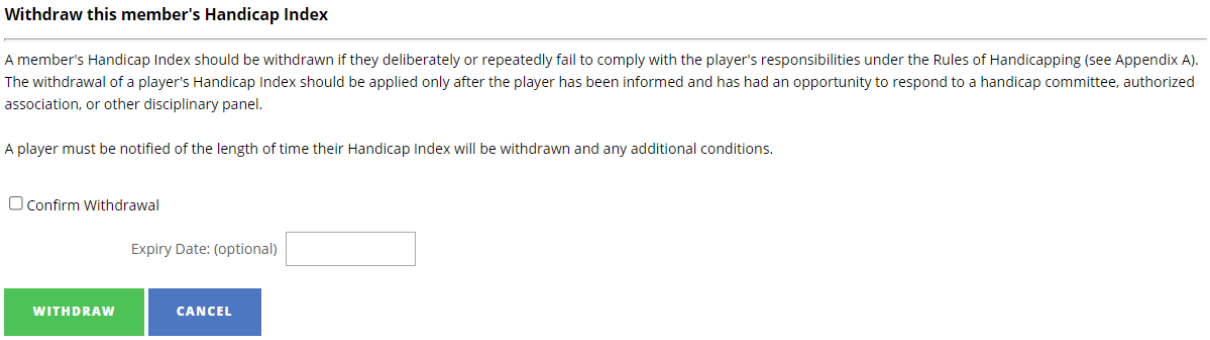


1. A member's handicap index should be withdrawn if they deliberately or repeatedly fail to comply with the player's responsibilities under the Rules of Handicapping (see Appendix A of the Rules of Handicapping: https://www.englandgolf.org/download/england-golf-rules-of-handicapping/).

2. Members must be informed and allowed to respond, offered the opportunity to appeal before this is actioned.

3. Select the tick box 'Confirm Withdrawal'.

4. A time period must be defined by entering a date in the 'Expiry Date' entry field:



5. Click 'Withdraw' at the bottom of the page to confirm the handicap index withdrawal (or 'Cancel' to exit without saving).

Entering a score

Video Support: Adding a Score for a member (at home)

Video Support: Adding Scores for Members (Away within England)

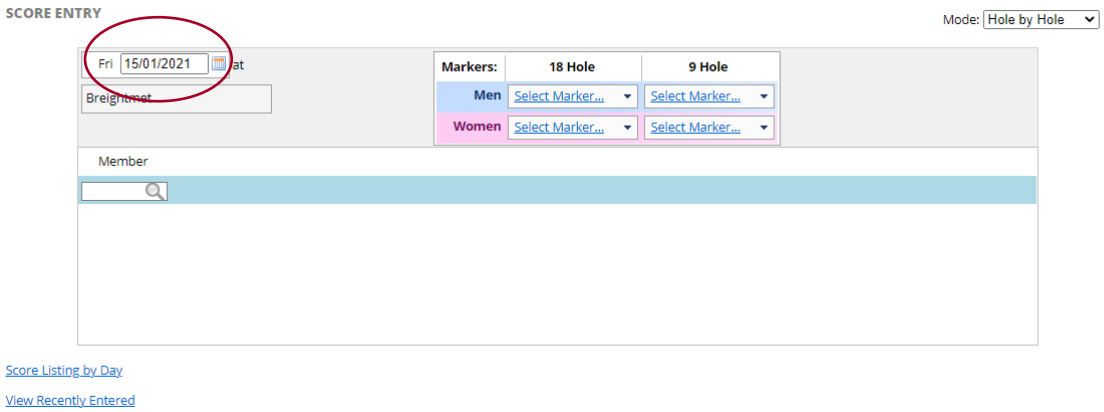
Video Support: Adding an International Score

Video Support: Entering a score for a visitor

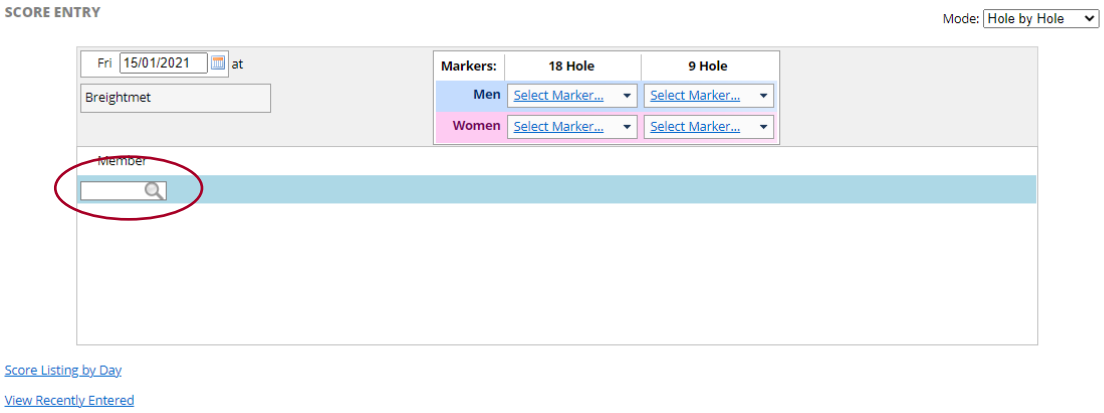
The same process below is to be used for the recording of home and away scores for members and visitors.

For scores that have not been previously added or is a late inclusion in the record.

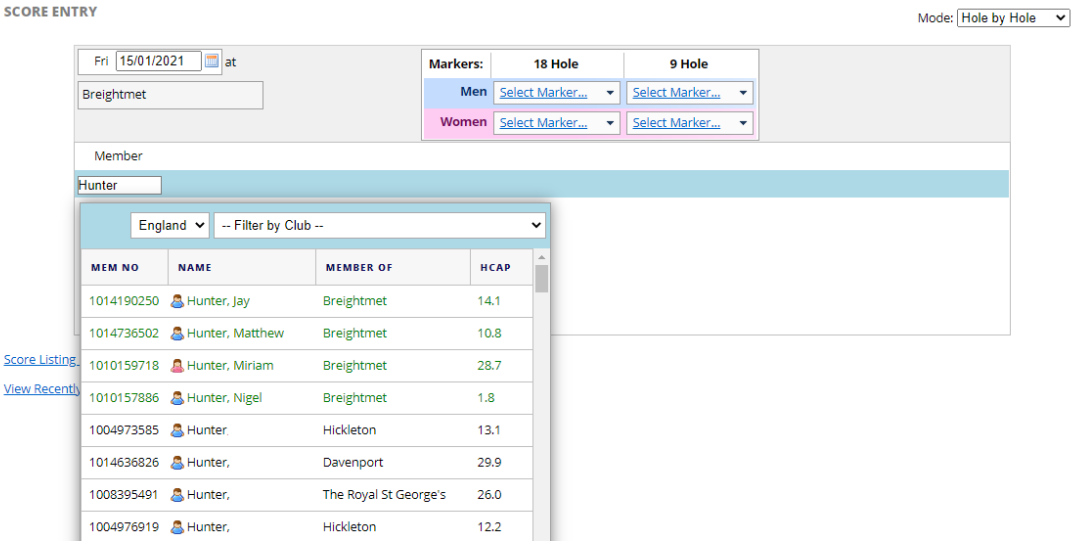
1. Select the 'Scores' menu option/tab.
2. On the 'Score Entry' screen, the date will default to today's date but can be changed by clicking on the calendar icon to bring up a calendar for you to select the correct date for the score:



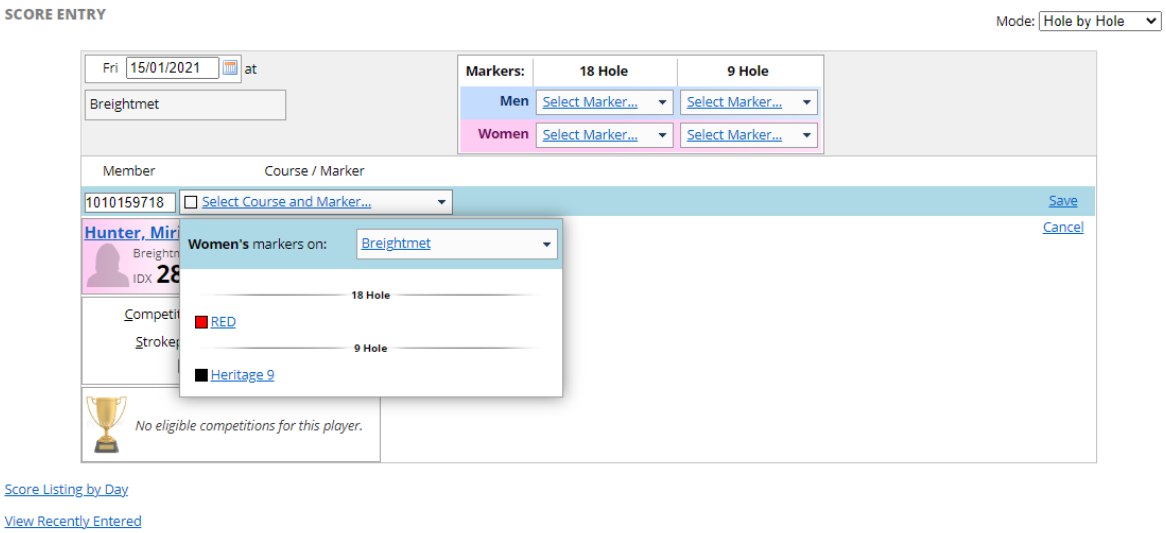
3. In ‘Member’ search field, enter membership number or surname:



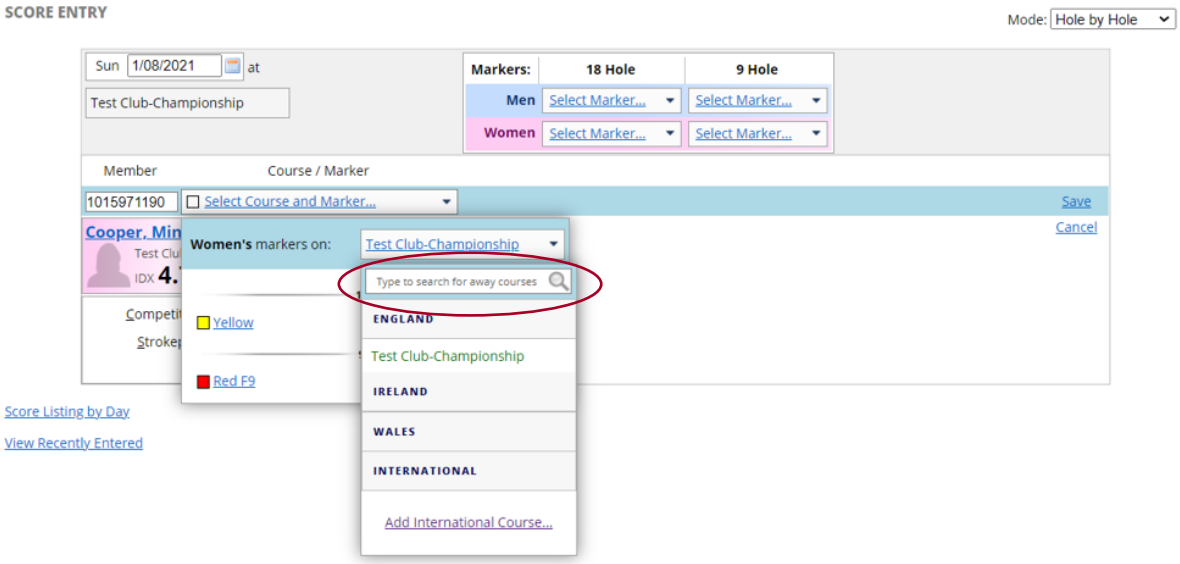
4. Select the required member record from the list by clicking on it:



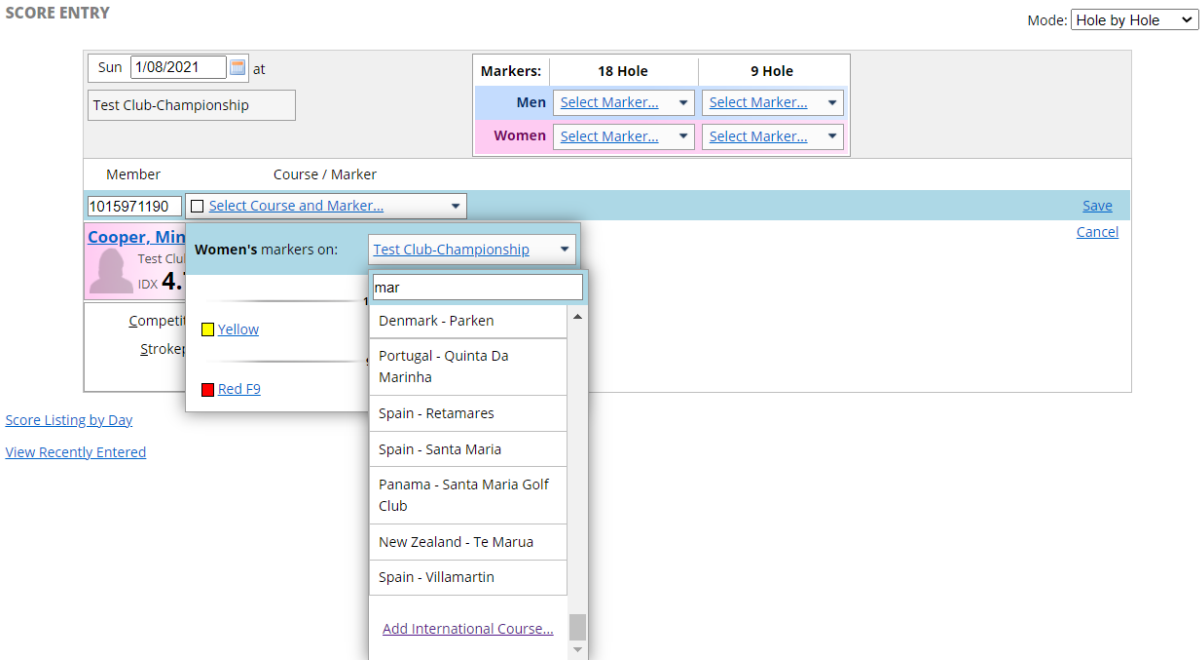
5. Select the ‘Course / Marker’ from the dropdown list. Note: the ‘Select Course and Marker’ drop down list will default to those set up for your club:



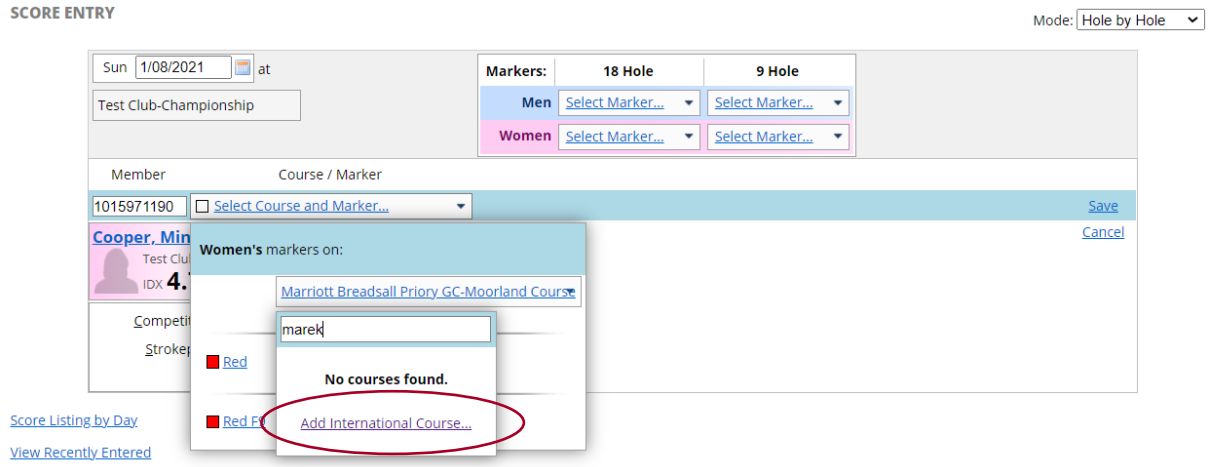
a. If you need to change the club to an away/overseas club type the club's name into the 'Type to search for away courses' entry field. Note: the more you type the better your search results:



b. Courses in England will appear first in the list, followed by courses from overseas, so you will need to scroll the dropdown list to locate the required course:



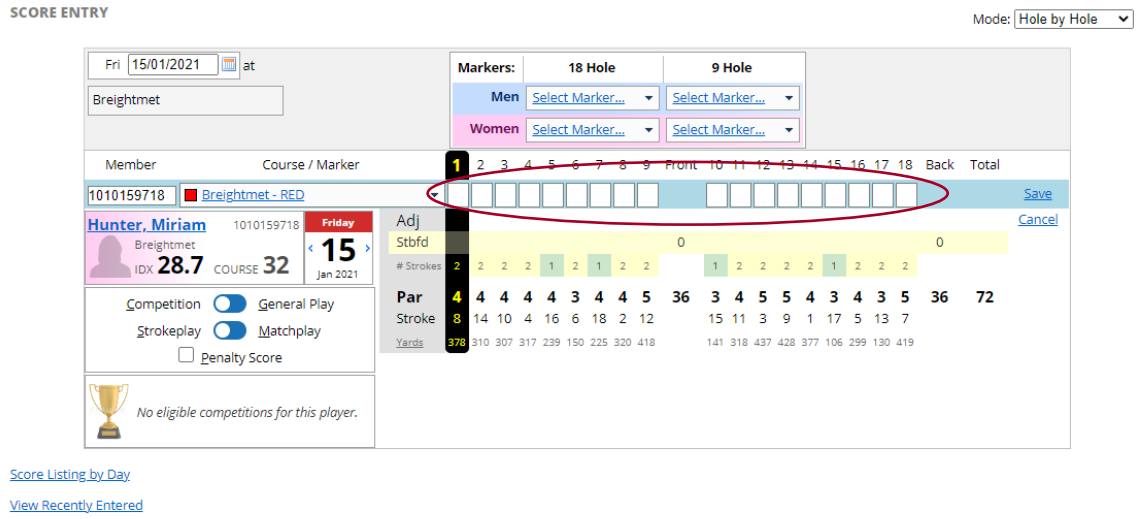
c. Note: if the required course is not in the dropdown list and is a courses from outside England it will need to be added as an overseas course via the 'Add International Course' option (see Entering an overseas/international score):



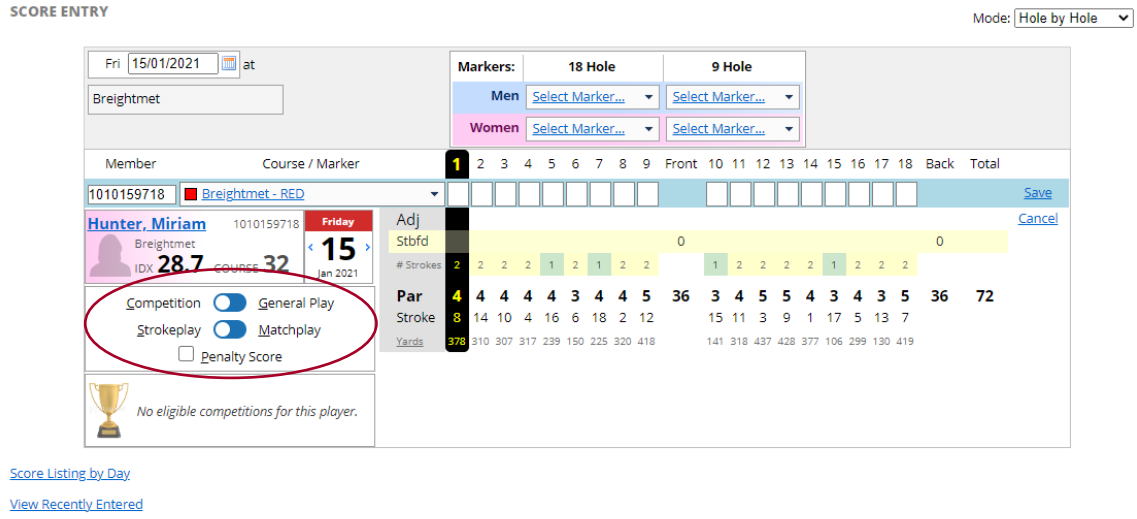
6. Select the required 'Marker' (tee set used).

7. Record each hole-by-hole score for holes played. (Once 10 scores have been inputted the 'Auto Complete' option is available and, if selected, adds relevant

default values for these un-played holes.):

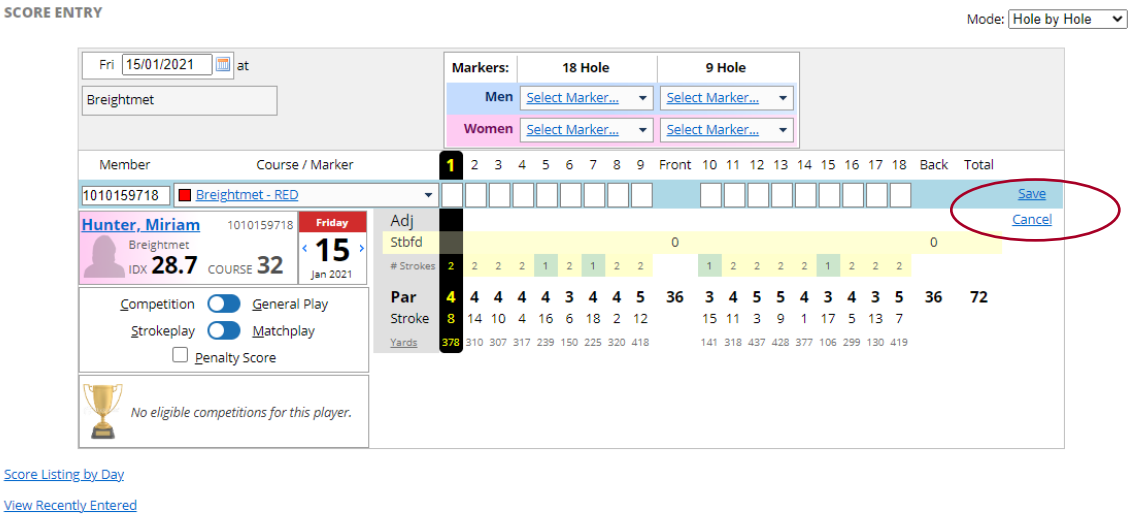


8. Set relevant Score types:



- Select Round type (Competition / General Play score)
- Select the format of play (Strokeplay/Matchplay) (Medal/Stableford/Par)
- Tick Penalty Score tick box if necessary (see Penalty Score Guidance here https://www.englandgolf.org/wp-content/uploads/2021/09/Penalty-Scores-Branded.pdf)

9. Click ‘Save’ to save the score and add it to the members’ scoring record:

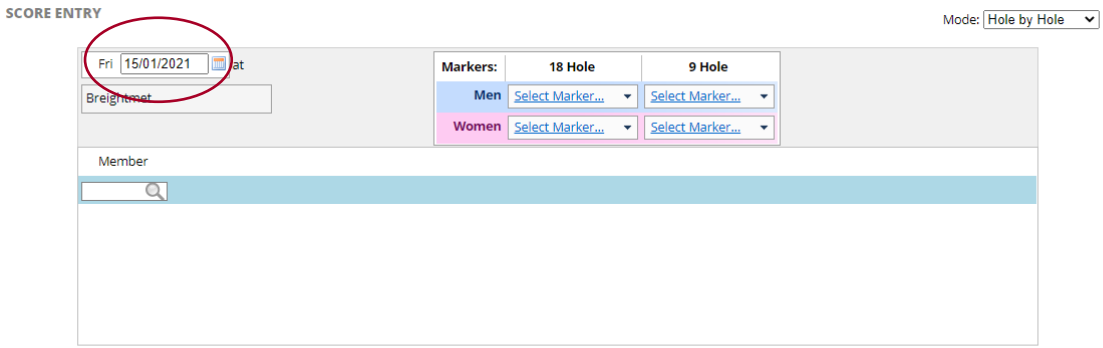


Note: an error is created for any abnormal scores relative to the current handicap index. This is a double check prior to the score being submitted to the system.

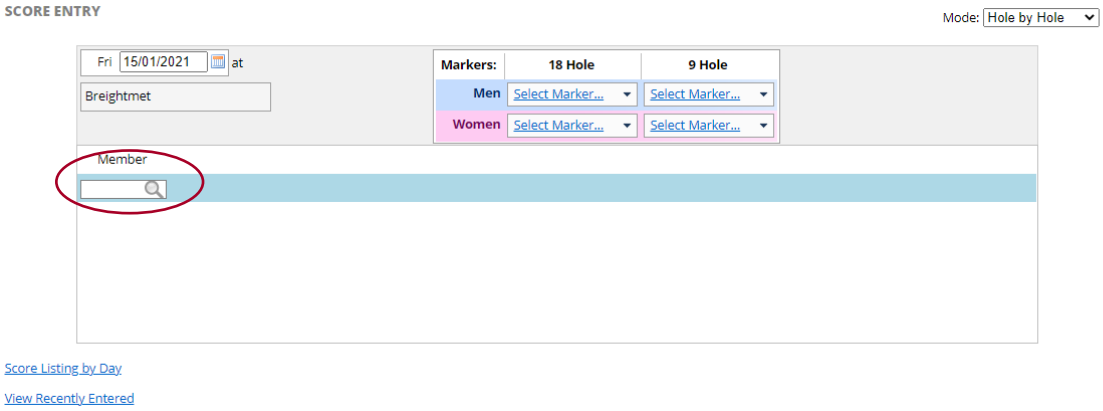
If an error in the record is noticed, this can be rectified via the ‘edit’ option for that score within the members’ scoring history.

Entering an overseas/international score

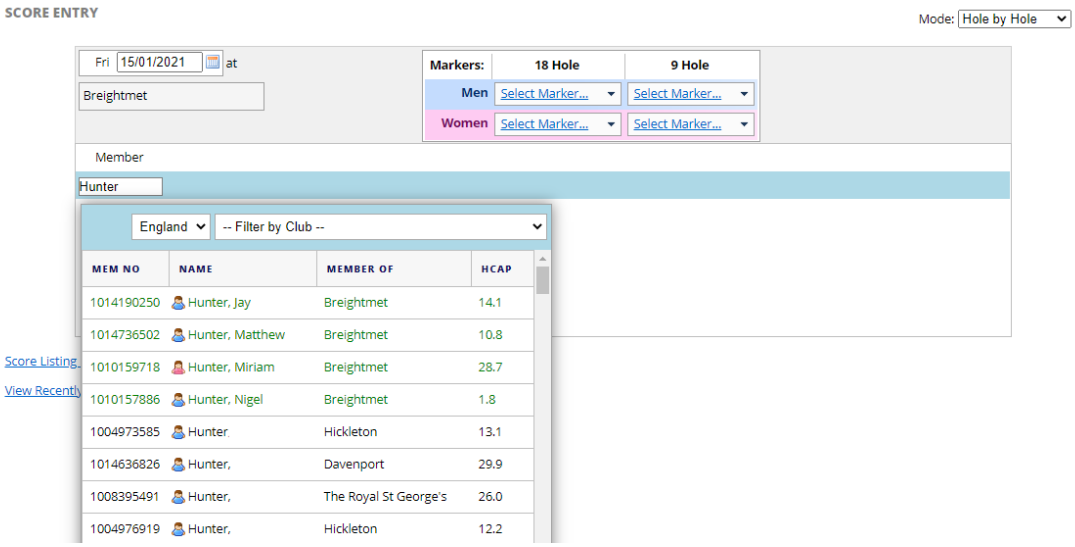
1. Select the ‘Scores’ menu option/tab.
2. On the ‘Score Entry’ screen, the date will default to today’s date but can be changed by clicking on the calendar icon to bring up a calendar for you to select the correct date for the score:



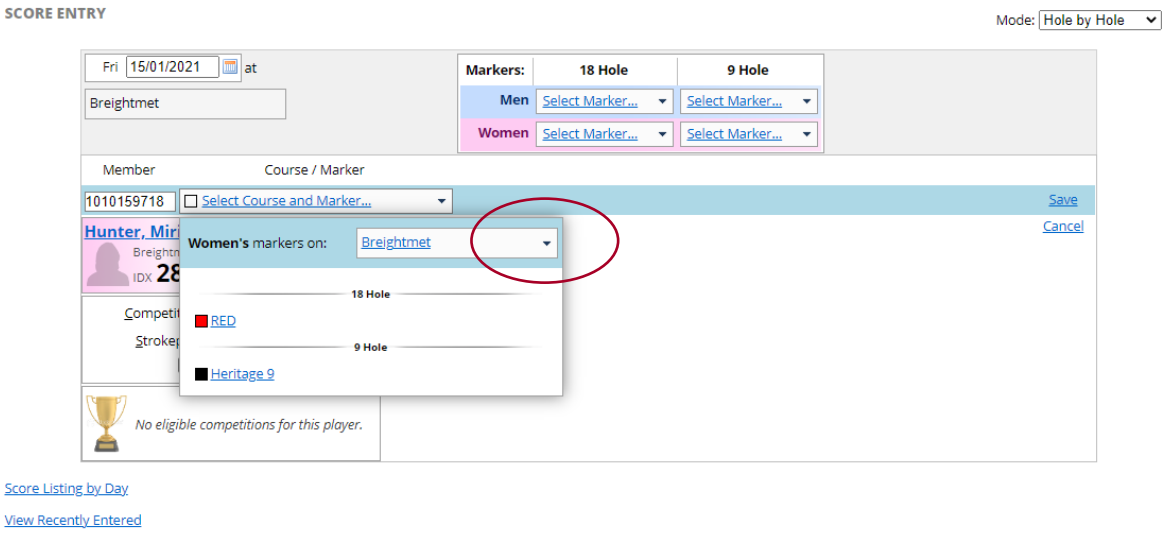
3. In 'Member' search field, enter membership number or surname:



4. Select the required member record from the list by clicking on it:

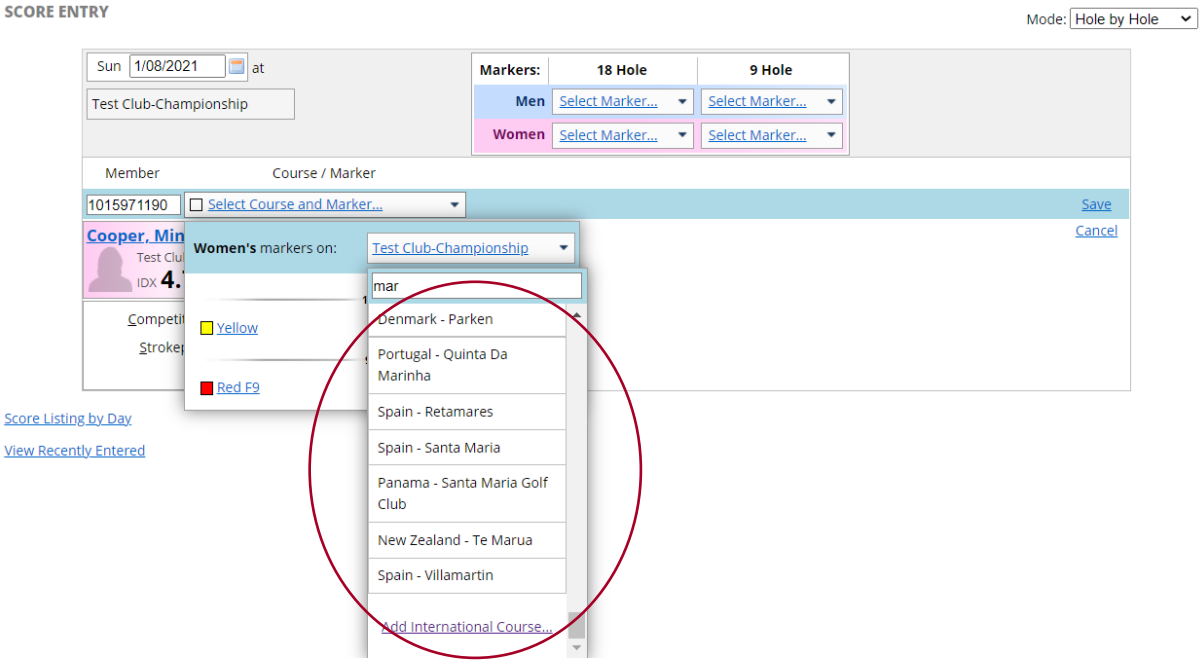


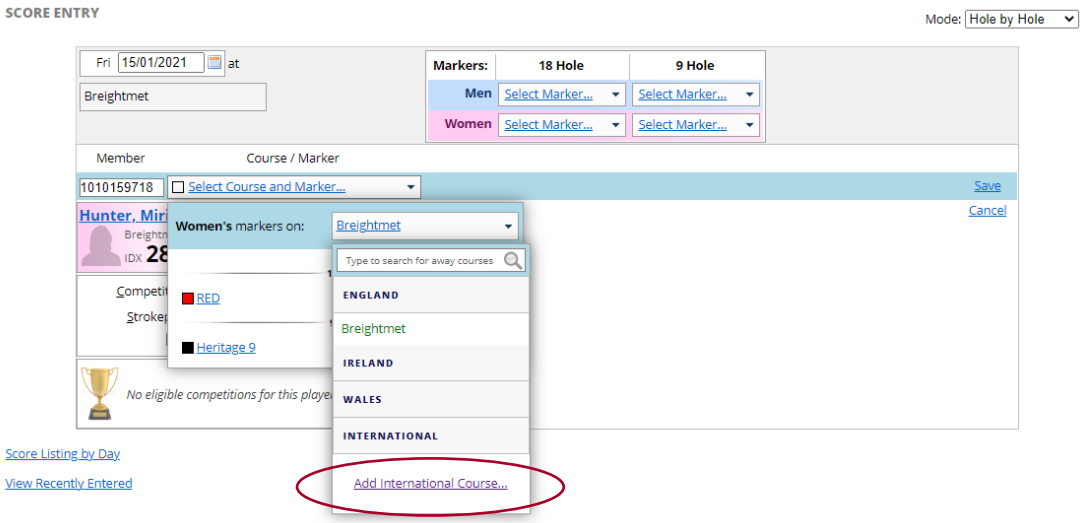
5. Select the arrow in the dropdown list for ‘markers’ (Note: the ‘Select Course and Marker’ drop down list will default to those set up for your club):



6. Courses in England appear first in the list, followed by courses from overseas, so you will need to scroll the dropdown list to locate the required course.

7. If the required course is not in the dropdown list and is a course from outside England it will need to be added as an overseas course via the ‘Add International Course’ option:

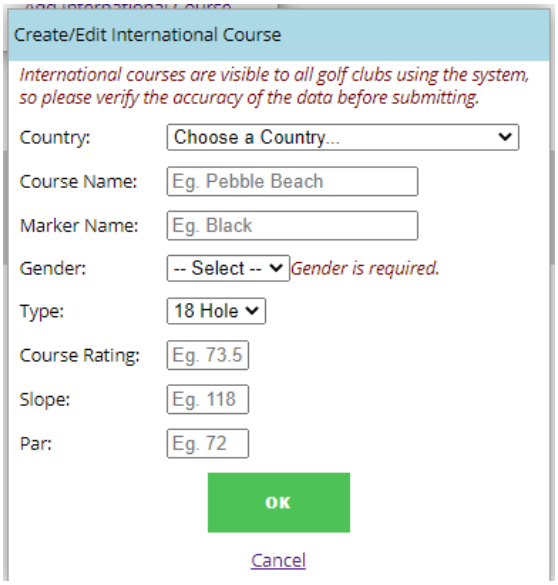




8. Within the 'Create/Edit International Course' box, select the country from the dropdown list and enter the information in the entry fields:

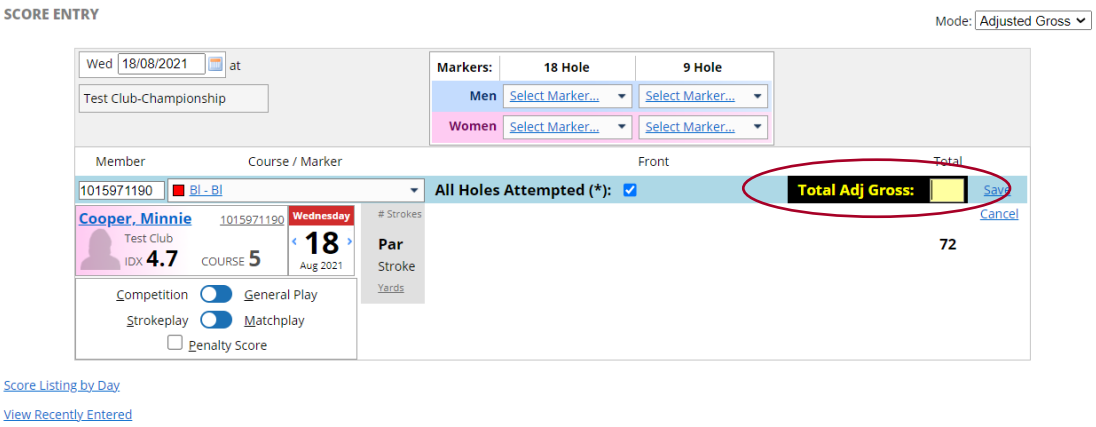
    - Country round was played in
    - Course Name
    - Marker Name (Tee Name)
    - Gender (this will default to the gender of the member whose score is being added)
    - 9/18 hole
    - Course Rating*
    - Slope Rating*
    - Course Par*

    *All the above detail can be obtained from the USGA course rating database (available here: http://ncrdb.usga.org/), from the host club website, or directly from the scorecard.



9. Click OK on the 'Create/Edit International Course' box.

10. Add Adjusted Gross Score:

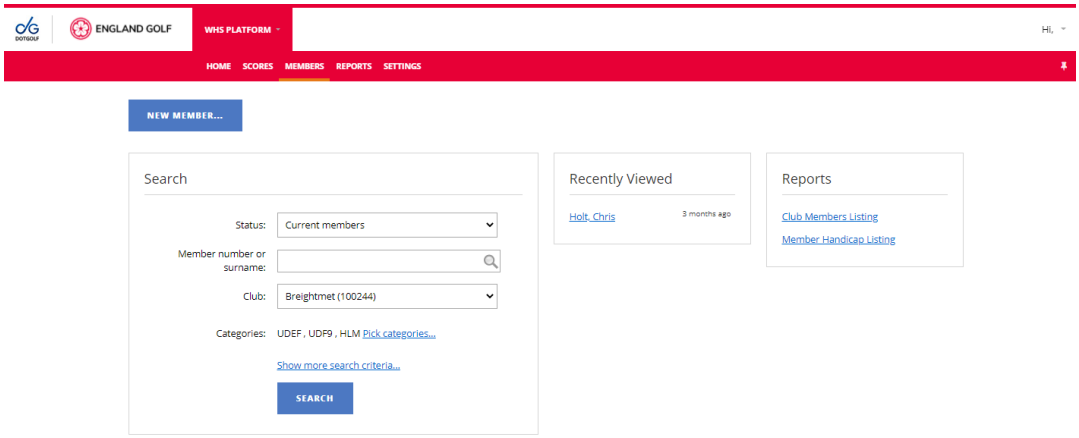


11. Click 'Save' to save the score and add it to the members' scoring record.

Viewing a Member's scoring record

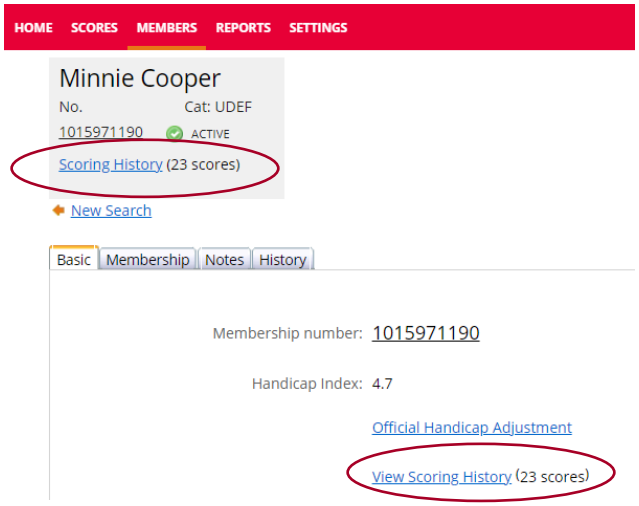
Video Support: Viewing a Member's scoring record

1. Select the 'Members' menu option/tab:



2. Search for member (see Members: Existing Members: Searching)

3. Member's 'Scoring History' can be selected by clicking the link either via the member overview area or via the basic tab:



4. Scoring record displayed (most recent score first):

23 scores found:

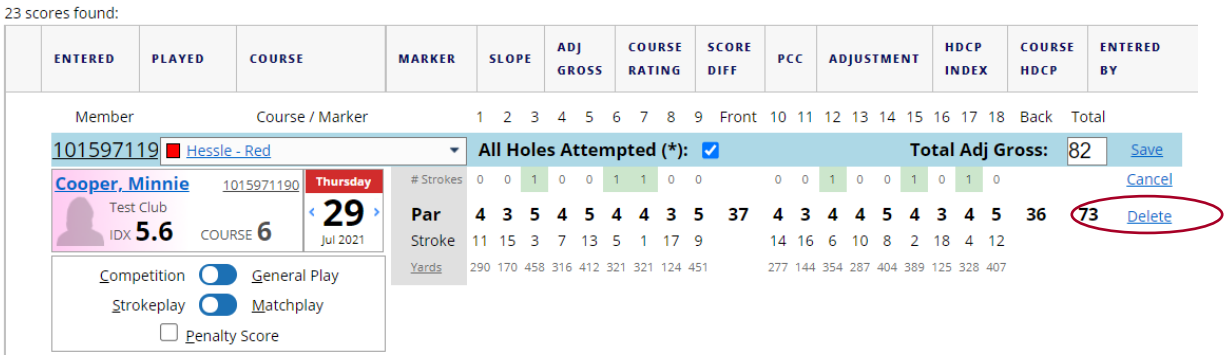
	ENTERED	PLAYED	COURSE	MARKER	SLOPE	ADJ GROSS	COURSE RATING	SCORE DIFF	PCC	ADJUSTMENT	HDCP INDEX	COURSE HDCP	ENTERED BY		
1	29/07/2021	29/07/2021	Hessle	Red	129	82	73.7	7.3 ★	0		4.9	6	CSO	C	Edit
3	28/07/2021	28/07/2021	Test Club	red	124	74	68.9	4.6 ★	0		5.6	6	CSO	C	Edit
4	28/07/2021	28/07/2021	Rockliffe Hall	Red B9	129	40 ●	37.2	5.8 ★	0		5.6	4	CSO	C	Edit
2	29/07/2021	28/07/2021	Test Club	red	124	72	68.9	2.8 ★	0		6.0	7	CSO	C	Edit
5	20/07/2021	20/07/2021	Test Club	Red F9	124	37 ●	34.2	7.3 ★	0	1.3	5.5	1	Test Club	G	Edit
6	14/07/2021	8/07/2021	Rhos-on-Sea	Red	119	80	71.5	9.4	0	1.3	4.9	5	ENG	C	Edit
7	26/07/2021	5/07/2021	Quinta De Lago	Red	122	72	72.6	-1.3 ★	--	-0.7	9.5	10	CSO	C	Edit
8	5/07/2021	3/07/2021	Test Club	Red F9	124	42 ●	34.2	11.7	0	-0.7	8.8	3	CSO	G	Edit
9	24/06/2021	24/06/2021	Woodhall Spa-Bracken	Red	128	84	71.9	10.0	0	-0.7	9.7	11	CSO	C	Edit

- Scores used in the handicap index calculation are highlighted and indicated by a yellow star.
- 9-hole scores marked with a blue dot.
- C indicates a Competition score.
- G indicates a General Play Score.
- P indicates a Penalty Score.

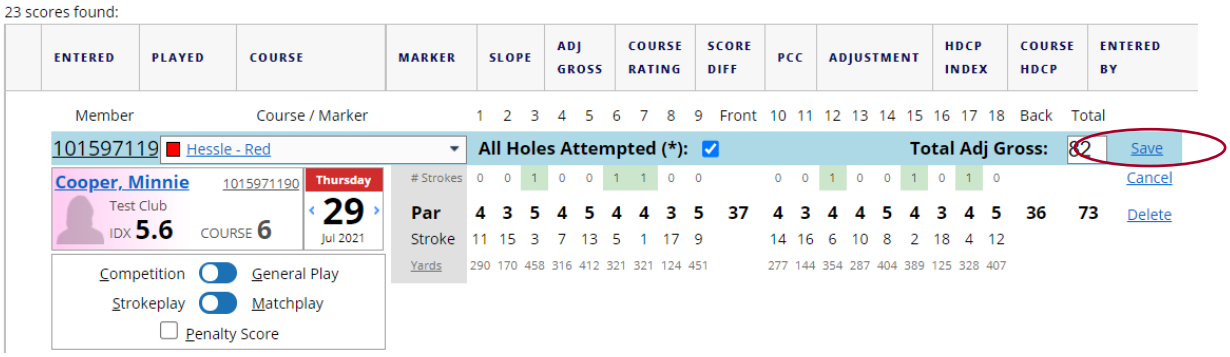
Editing or Deleting a Members' score

1. Follow Viewing a Member's scoring record to access the member's scoring history.
2. Should you wish to edit a score click 'Edit' next to the relevant score and depending on how the score was entered you will have the option to edit the hole-by-hole score or the Adj Gross Score.
3. Should you wish to delete a score you will first need to select edit next to the score and then click delete. **Note:** Please take care when deleting a score as

once delete is clicked the score is removed and cannot be recovered.



4. Ensure you click Save if you have made any changes:



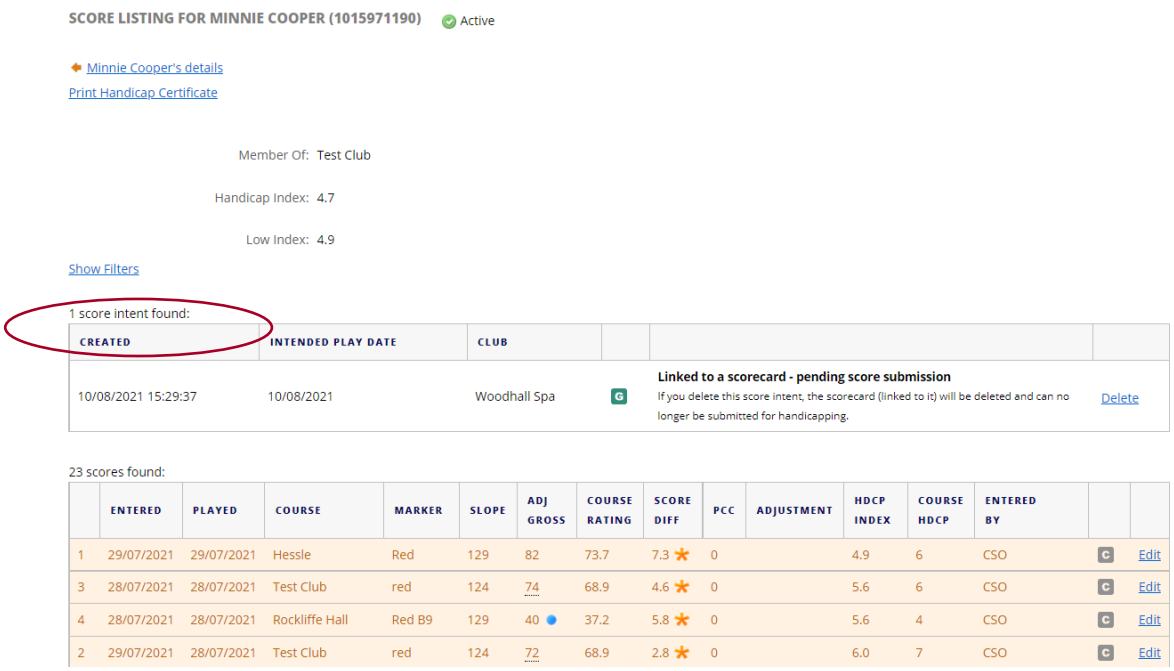
Viewing or Deleting a Members' score intent

Score intents can also be accessed via various reports, please see Reports: Unsatisfied Score Intents and Reports: Deleted Score Intents for further information.

To view score intents via the member's scoring history:

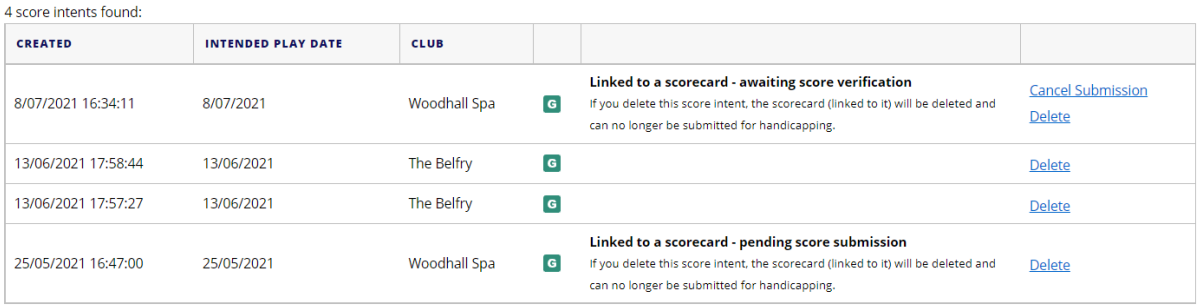
1. Follow Viewing a Member's scoring record to access the member's scoring history.

2. Any score intents will be displayed above the scoring history:



3. The score intent will show date 'Created', 'Intended play date', the 'Club' the score intent was created at, and 'G' for general play.

4. Here is a guide to any text next to a score intent:



   a. 'Linked to a scorecard – pending score submission' means the scorecard has been created via the MyEG app and has not yet been submitted.

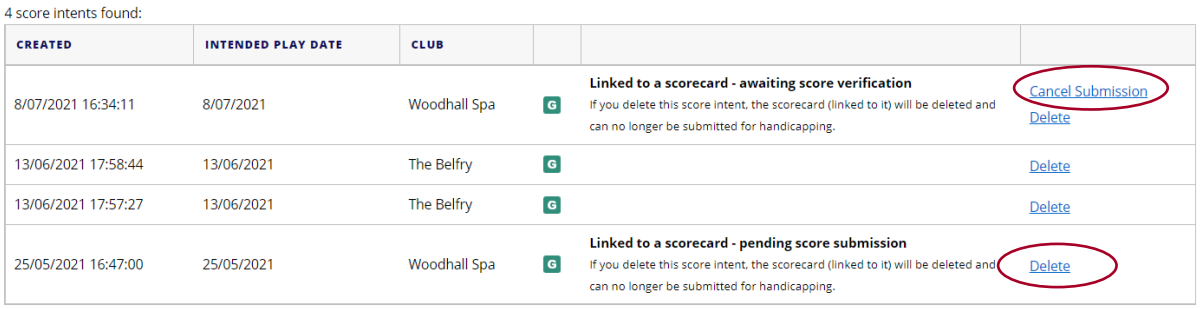
   b. 'Linked to a scorecard – awaiting score verification' means the scorecard has been submitted via the MyEG app and has not yet been verified/attested.

   c. No text next to the scorecards means the scorecard has been created by a club system/other non EG app/PSI/etc.

5. Here is a guide to any edit options next to a score intent:

   a. Delete: You can 'Delete' any score intent via the delete link next to the score. **Note:** this will delete the scorecard from the member's scoring history, and it will no longer be available to submit/edit later or add to the player's scoring history. When 'Delete' is selected the scorecard is deleted from the members' 'Enter Score' area of the MyEG app. Any deleted score intents can be viewed in the report: Reports: Deleted Score Intents.

   b. Cancel: You can 'Cancel Submission' of a score intent which states 'Linked to a scorecard – awaiting score verification' for example if the member has selected the incorrect attester or the attester is unable to access the MyEG app to verify the score. When 'Cancel Submission' is selected the scorecard is returned as an active scorecard to the members' 'Enter Score' area of the MyEG app for the member to correct and re-submit the scorecard for verification/attestation. Any unsatisfied score intents can be viewed in the report: Reports: Unsatisfied Score Intents.

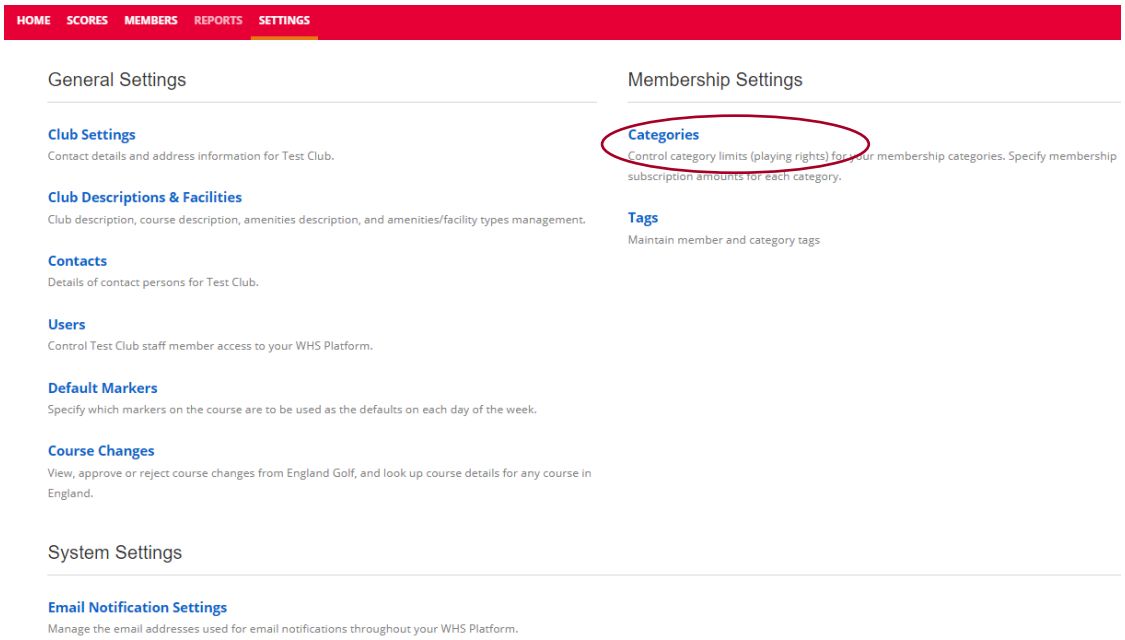

4 score intents found:

CREATED	INTENDED PLAY DATE	CLUB			
8/07/2021 16:34:11	8/07/2021	Woodhall Spa	G	**Linked to a scorecard - awaiting score verification** If you delete this score intent, the scorecard (linked to it) will be deleted and can no longer be submitted for handicapping.	Cancel Submission Delete
13/06/2021 17:58:44	13/06/2021	The Belfry	G		Delete
13/06/2021 17:57:27	13/06/2021	The Belfry	G		Delete
25/05/2021 16:47:00	25/05/2021	Woodhall Spa	G	**Linked to a scorecard - pending score submission** If you delete this score intent, the scorecard (linked to it) will be deleted and can no longer be submitted for handicapping.	Delete

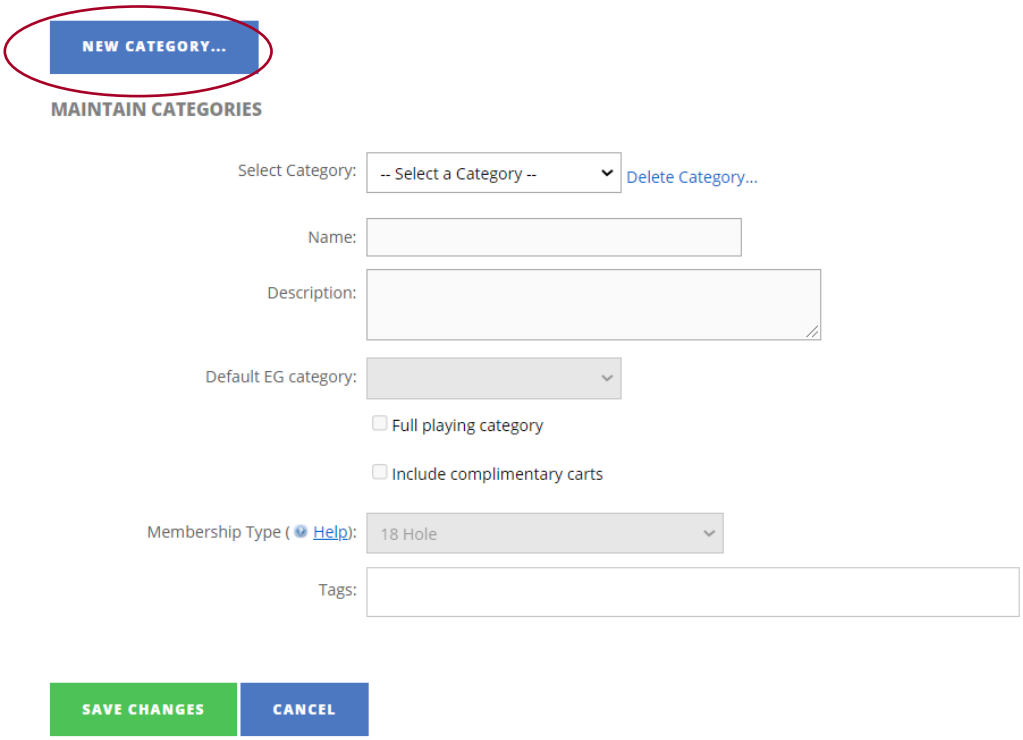
Adding A Club Membership Category

1. Select the 'Settings' menu option/tab.

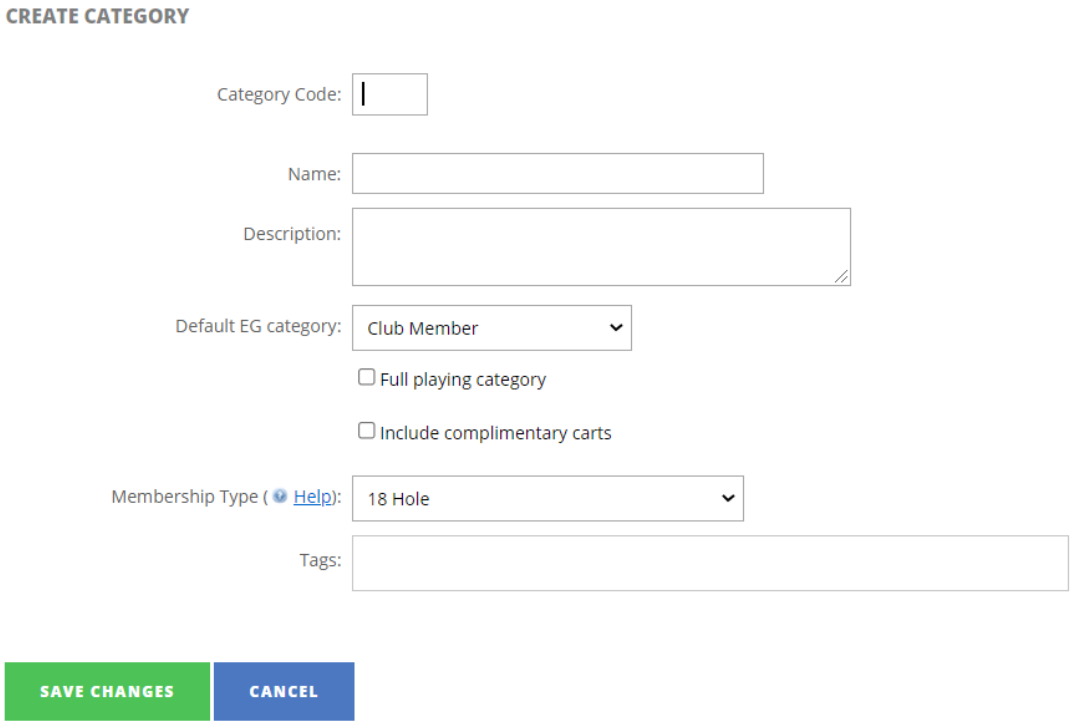
2. Under ‘Membership Settings’, select ‘Categories’:



3. Click the ‘New Category’ button:



4. Complete all fields on the 'Create Category' page:



- Add Category Code
- Name
- Brief Description
- EG Category (leave as 'Club Member' which is the default option)
- Membership type: select 9 or 18 hole from the dropdown box
- Tags (optional)

5. Save changes by clicking 'Save Changes' at the bottom of the page (or 'Cancel' to exit without saving).

Settings: Default Markers (tee sets in the 'Settings' menu)

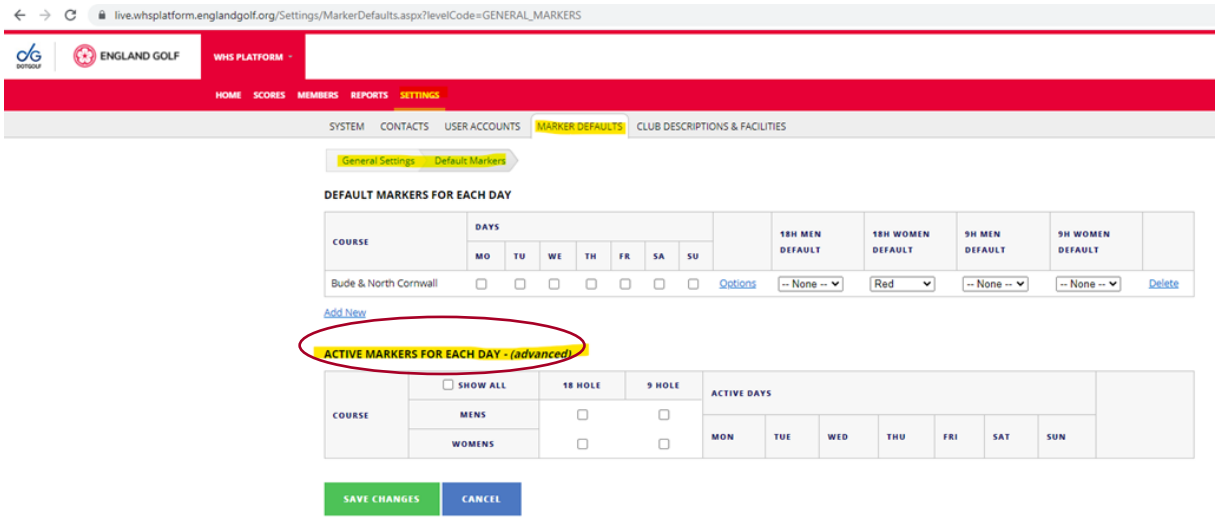
Note: check all your tee sets are set up via 'Default markers', only then will golfers be able to submit a scorecard for them via the MyEG app.

1. Select the 'Settings' menu option/tab.

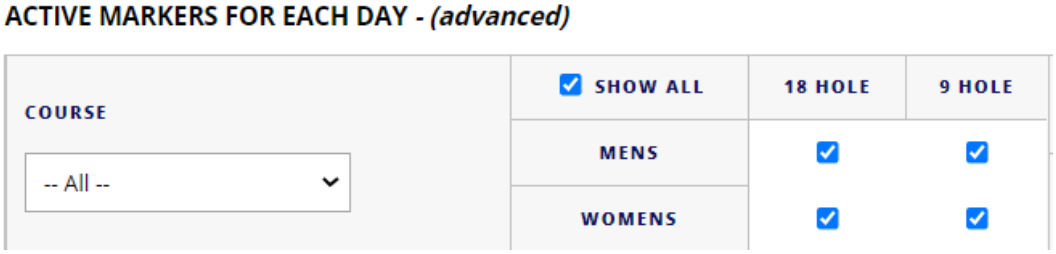
2. Under 'General Settings', select 'Default Markers'.

3. **Note:** Ignore the top section 'Default Markers for each day' as this is NOT live and does not control the active markers (i.e. it does not select which markers are available for app scorecards download).

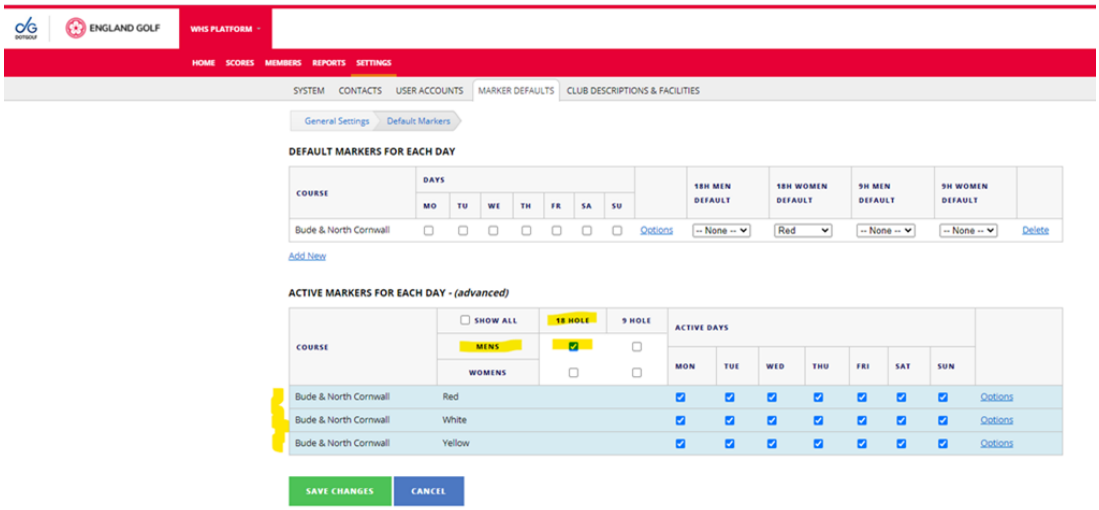
4. Go to '**ACTIVE MARKERS FOR EACH DAY - *(advanced)*'**:



5. The 'Show all' tick box is selected as default and you can select/de-select options in 'MENS', 'WOMENS', 18 Hole, or 9 Hole using the checkboxes to display the list of relevant active markers. Note: 'MENS' markers are displayed shaded light blue and 'WOMENS' markers a light red:



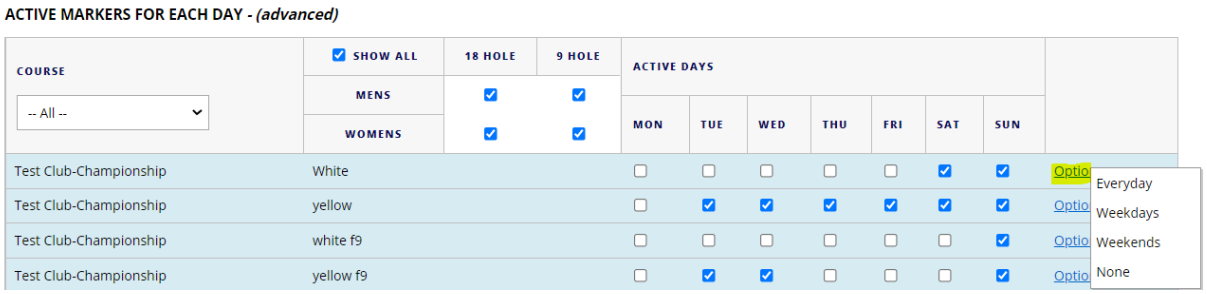
Example 1: Using the tick boxes to display only 'MENS' and '18 Hole' shows:



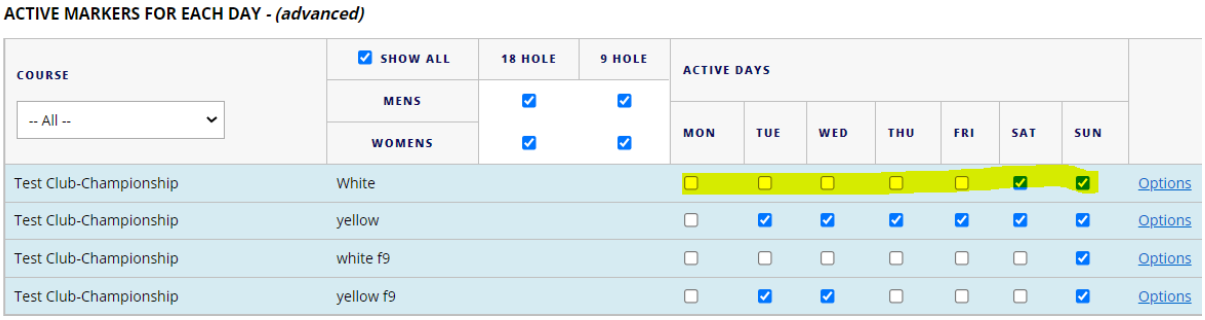
Example 2: Using the tick boxes to 'Show all' displays:

6. **Note**: all markers are set to be active every day as default unless/until they are unchecked.

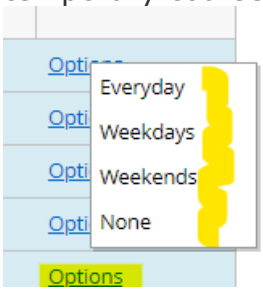
7. a. Clicking 'Options' next to the marker displays four standard selections: Everyday (this is the default); Weekdays; Weekends; and None (selecting this will mean the marker is never active):



b. Alternatively, each marker can be checked or unchecked by day to give the desired availability (as highlighted below):



Note: to remove a marker from being available for app scorecard download permanently or for an extended period select 'None'. This might be useful for temporary courses e.g. Winter specific layouts:



c. Example: In the first five lines below the top four markers are set using the standard selections (Everyday, Weekdays, Weekends, and None); the fifth marker is shown using the self-select for 'Mon', 'Wed', 'Fri' only.

ENGLAND GOLF

ACTIVE MARKERS FOR EACH DAY - *(advanced)*

COURSE	SHOW ALL / MENS / WOMENS	18 HOLE	9 HOLE	ACTIVE DAYS MON	TUE	WED	THU	FRI	SAT	SUN	
Bude & North Cornwall	Red	☑	☑	☑	☑	☑	☑	☑	☑	☑	Opti
Bude & North Cornwall	White	☑	☑	☑	☑	☑	☑	☑	☐	☐	Opti
Bude & North Cornwall	Yellow	☑	☑	☐	☐	☐	☐	☐	☑	☑	Opti
Bude & North Cornwall	White B9	☑	☑	☐	☐	☐	☐	☐	☐	☐	Opti
Bude & North Cornwall	White F9	☑	☑	☑	☐	☑	☐	☑	☐	☐	Options
Bude & North Cornwall	Yellow B9	☑	☑	☑	☑	☑	☑	☑	☑	☑	Options
Bude & North Cornwall	Yellow F9	☑	☑	☑	☑	☑	☑	☑	☑	☑	Options
Bude & North Cornwall	Red	☑	☑	☑	☑	☑	☑	☑	☑	☑	Options
Bude & North Cornwall	White	☑	☑	☑	☑	☑	☑	☑	☑	☑	Options
Bude & North Cornwall	Yellow	☑	☑	☑	☑	☑	☑	☑	☑	☑	Options
Bude & North Cornwall	Red B9	☑	☑	☑	☑	☑	☑	☑	☑	☑	Options
Bude & North Cornwall	Red F9	☑	☑	☑	☑	☑	☑	☑	☑	☑	Options

Everyday
Weekdays
Weekends
None

SAVE CHANGES CANCEL

Change of credentials/ISV's

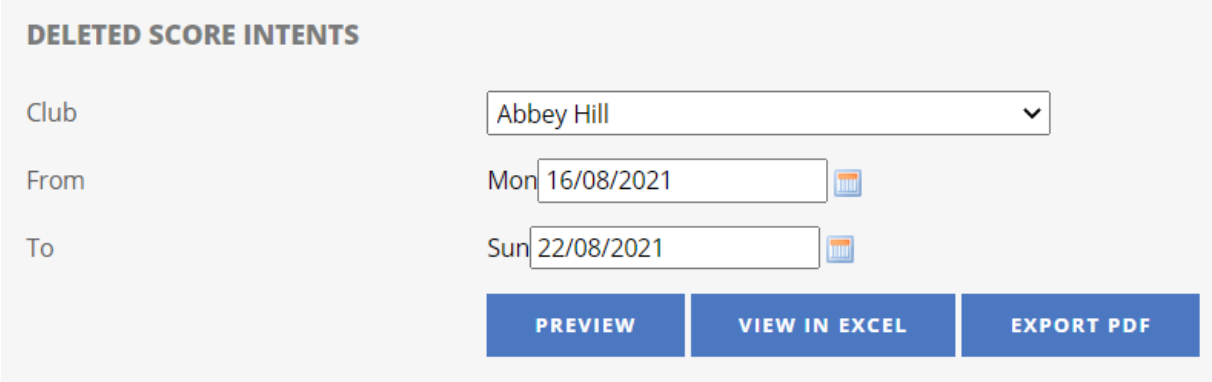
Should a golf club wish to change their competition software provider, any change must be communicated with England Golf, via the relevant change form **(CR004)** here: https://www.englandgolf.org/handicapping/club-resources/#changerequest, completing section 1 & 2 only.

This ensures that the appointed software provider can communicate with the WHS portal, and a formal credentials request is required in advance of any change date (at least 14 days in advance).

Any request must be completed and returned by a senior person (manager/secretary) at the club. Any request from a software provider directly (ISV), will be ignored and not processed.

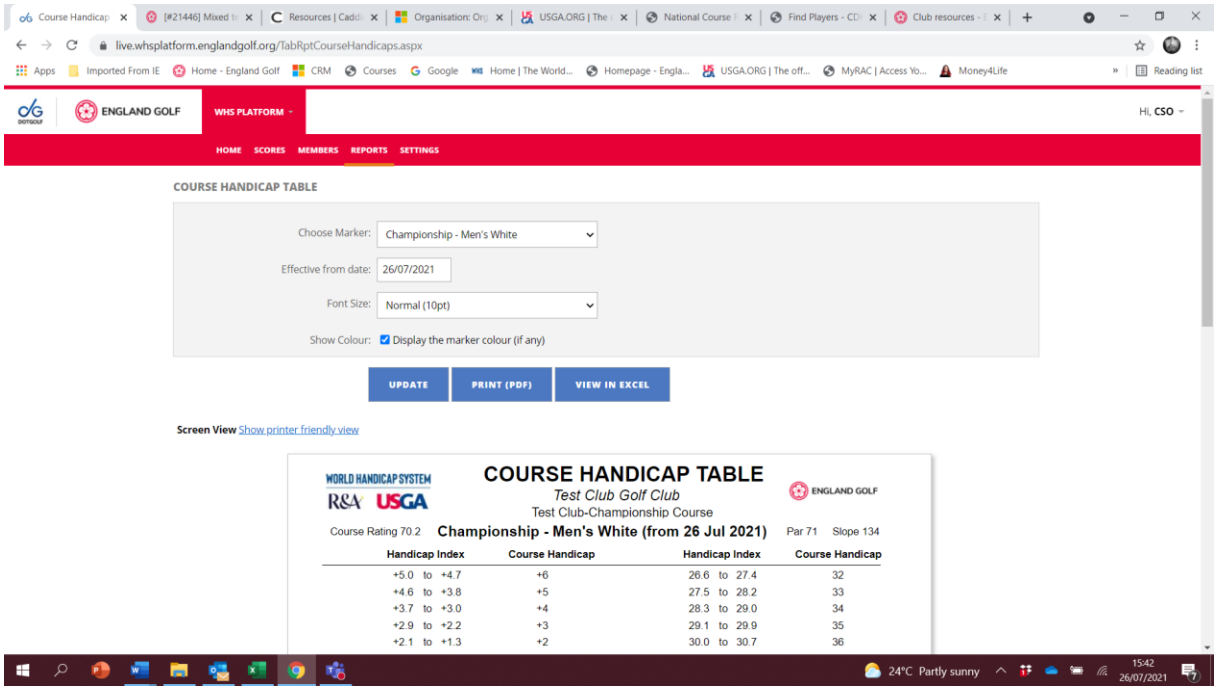
Reports

1. Select the 'Settings' menu option/tab.
2. The three report categories are:
    - Membership
    - Handicapping
    - Courses
3. Select any report from under each heading.
4. You will then have three report viewing options: 'Previews' (will display the data on screen), 'View in Excel' or 'Export PDF':



Reports: Course handicap table

These tables are compiled via the tee data within the WHS portal for each club and can be located within the handicaps reports 'WHS Course Handicap reports. There are then a series of drop dropdowns and settings that can be configured – see image below.



Reports: Unsatisfied Score Intents

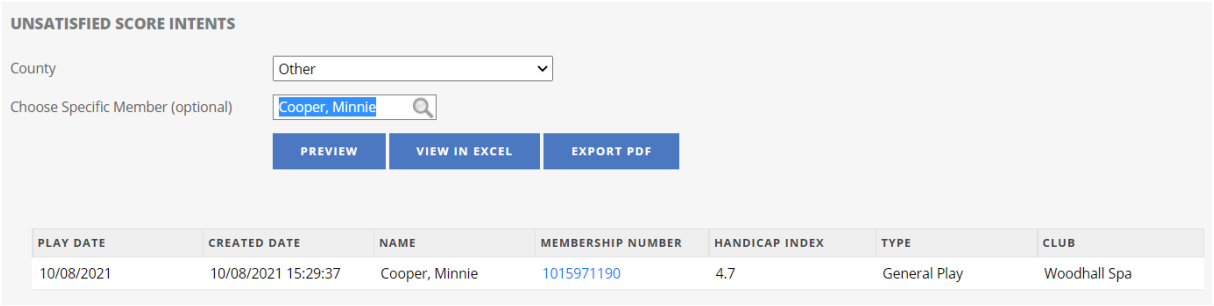
The 'Unsatisfied Score Intents' report displays details of score intents that have been declared but no score returned.

Example: This member has '4 score intents found' on their scoring history – so this member will be listed on the report:

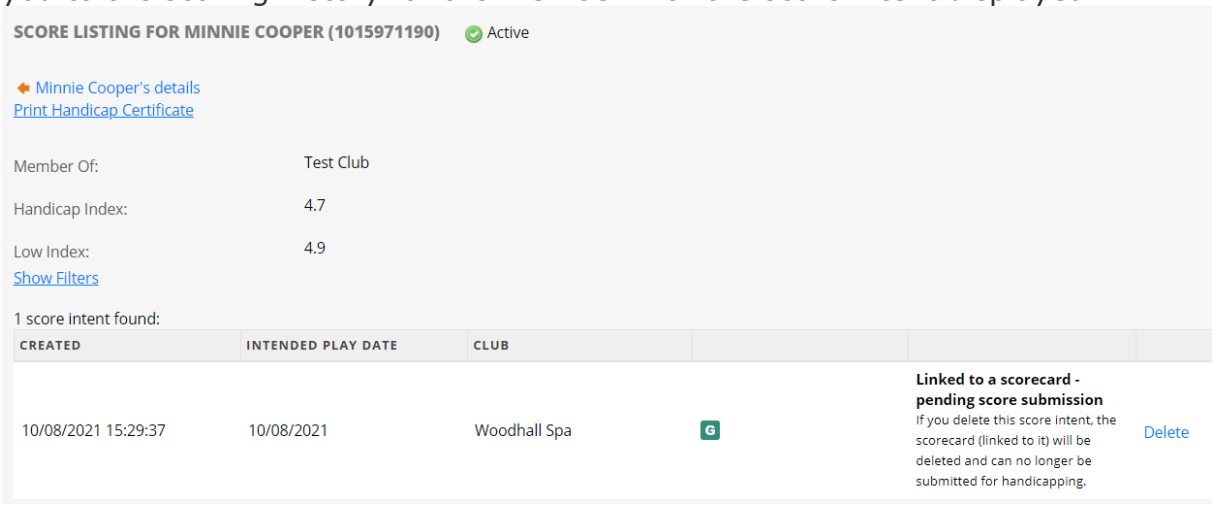
4 score intents found:

CREATED	INTENDED PLAY DATE	CLUB			
8/07/2021 16:34:11	8/07/2021	Woodhall Spa	G	**Linked to a scorecard - awaiting score verification** If you delete this score intent, the scorecard (linked to it) will be deleted and can no longer be submitted for handicapping.	Cancel Submission Delete
13/06/2021 17:58:44	13/06/2021	The Belfry	G		Delete
13/06/2021 17:57:27	13/06/2021	The Belfry	G		Delete
25/05/2021 16:47:00	25/05/2021	Woodhall Spa	G	**Linked to a scorecard - pending score submission** If you delete this score intent, the scorecard (linked to it) will be deleted and can no longer be submitted for handicapping.	Delete

The reports can be configured over specific date ranges, or by a specific member. The report displays the time, date, and venue of the intent. See image below:



Clicking on the membership number (above) within the report preview will take you to the scoring history for the member with the score intent displayed:

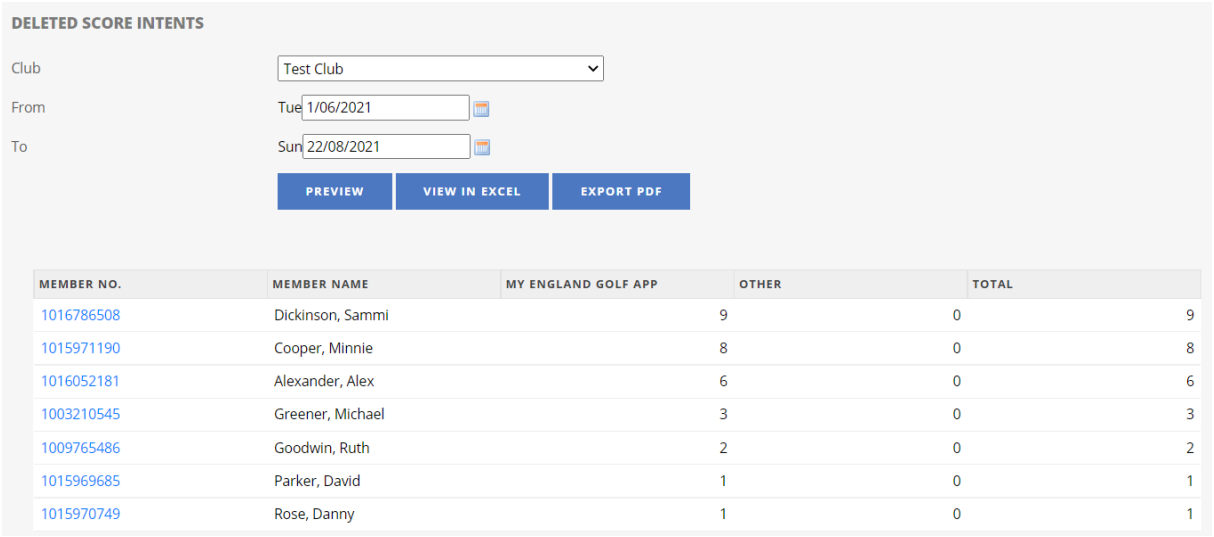


Note: see Viewing or Deleting a Members' score intent for further information.

Reports: Deleted Score Intents

The 'Deleted Score Intents' report displays details of score intents that have been deleted.

The reports can be configured over specific date ranges, or by a specific member. The report displays the membership number, member name, whether the score was submitted via the MyEG app or other, along with total deleted score intents. time, date, and venue of the intent. See image below:



DELETED SCORE INTENTS

Club: Test Club

From: Tue 1/06/2021

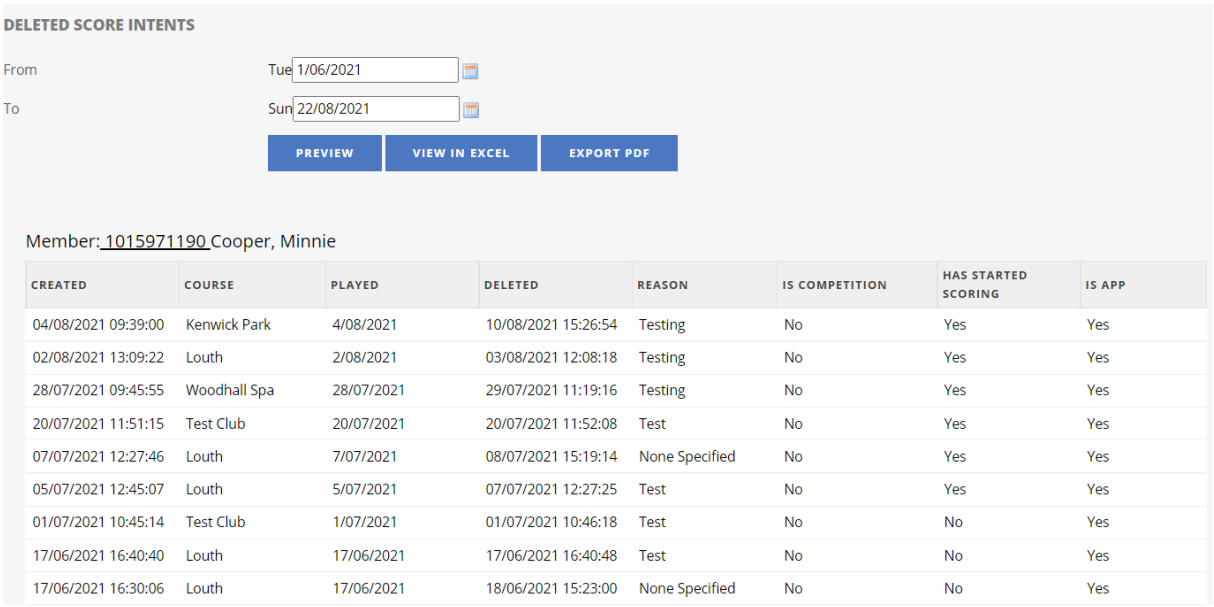
To: Sun 22/08/2021

PREVIEW | VIEW IN EXCEL | EXPORT PDF

MEMBER NO.	MEMBER NAME	MY ENGLAND GOLF APP	OTHER	TOTAL
1016786508	Dickinson, Sammi	9	0	9
1015971190	Cooper, Minnie	8	0	8
1016052181	Alexander, Alex	6	0	6
1003210545	Greener, Michael	3	0	3
1009765486	Goodwin, Ruth	2	0	2
1015969685	Parker, David	1	0	1
1015970749	Rose, Danny	1	0	1

Clicking on the membership number (above) within the report preview will take you to the list of deleted score intents which also shows further information:

- date/time scorecard was 'Created' and 'Deleted';
- date round was 'Played';
- 'Reason' for deleting the scorecard as entered if the scorecard was created/deleted via the MyEG app. Note: if reason is 'None Specified' this means the club has deleted the score intent;
- 'Is competition';
- 'Has Started Scoring';
  'Is App' for if the scorecard was created via the MyEG app:



DELETED SCORE INTENTS

From: Tue 1/06/2021

To: Sun 22/08/2021

PREVIEW | VIEW IN EXCEL | EXPORT PDF

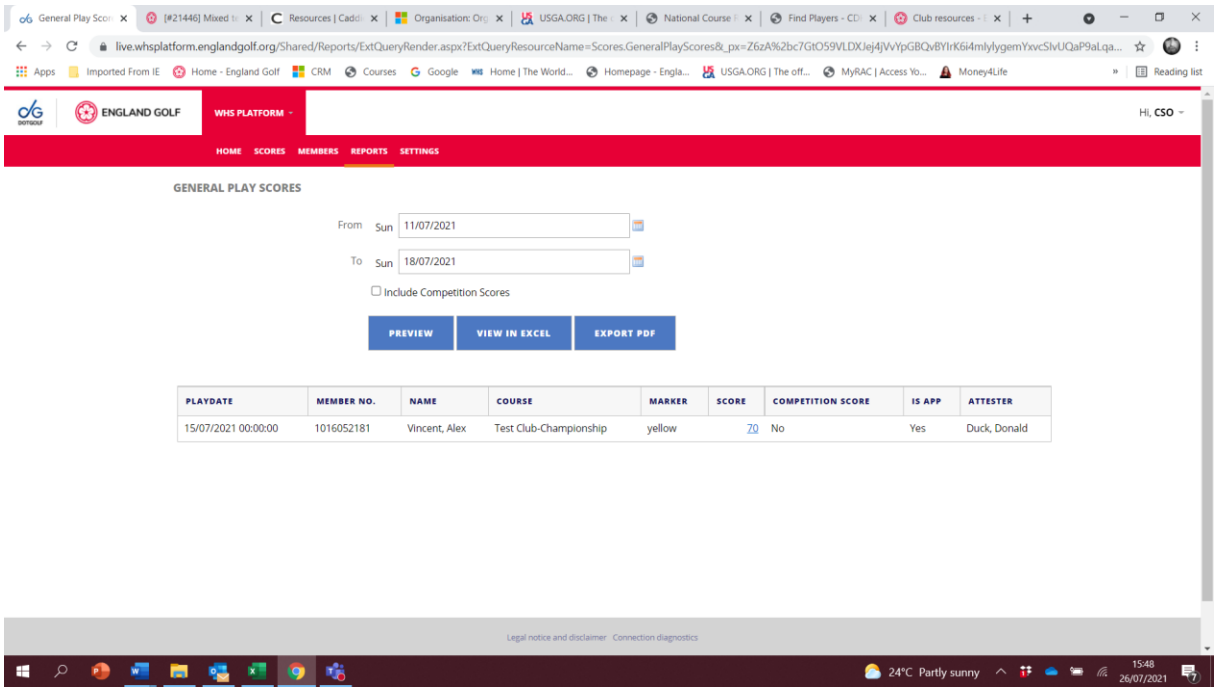
Member: 1015971190 Cooper, Minnie

CREATED	COURSE	PLAYED	DELETED	REASON	IS COMPETITION	HAS STARTED SCORING	IS APP
04/08/2021 09:39:00	Kenwick Park	4/08/2021	10/08/2021 15:26:54	Testing	No	Yes	Yes
02/08/2021 13:09:22	Louth	2/08/2021	03/08/2021 12:08:18	Testing	No	Yes	Yes
28/07/2021 09:45:55	Woodhall Spa	28/07/2021	29/07/2021 11:19:16	Testing	No	Yes	Yes
20/07/2021 11:51:15	Test Club	20/07/2021	20/07/2021 11:52:08	Test	No	Yes	Yes
07/07/2021 12:27:46	Louth	7/07/2021	08/07/2021 15:19:14	None Specified	No	Yes	Yes
05/07/2021 12:45:07	Louth	5/07/2021	07/07/2021 12:27:25	Test	No	Yes	Yes
01/07/2021 10:45:14	Test Club	1/07/2021	01/07/2021 10:46:18	Test	No	No	Yes
17/06/2021 16:40:40	Louth	17/06/2021	17/06/2021 16:40:48	Test	No	No	Yes
17/06/2021 16:30:06	Louth	17/06/2021	18/06/2021 15:23:00	None Specified	No	No	Yes

Note: the above information is to aid club's decision making as to whether scoring integrity has been abused by a member.

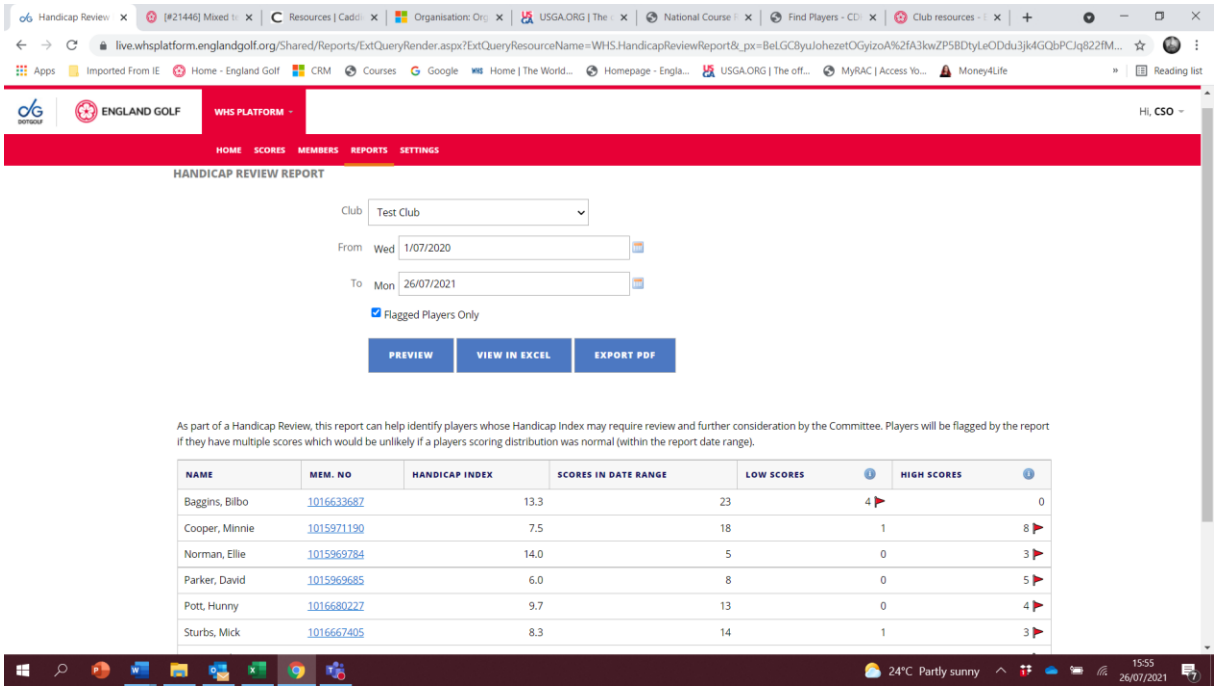
Reports: General Play Scores

This report displays all the general play scores submitted to WHS. The attester's name is the player who formally approved the score, via the England Golf app. Any score with no attester name listed, will have been approved by third-party app/software.



Reports: Handicap Review Report

This report provides detail over specific date dates of players who are outside of any normal scoring – showing unusual distribution of scores.



Further Help – WHS Platform

1. Additional support can be provided by sending an email to WHS.Support@englandgolf.org;

2. Please provide your club's name and contact number;

3. A description of the issue/additional help required;

4. Please allow 48 hours for a response;

5. If the issue is regarding the Rules of Handicapping, please see Further Help - Rules of Handicapping below.

Further Help – Changes to Tee Data within the WHS Portal

Should a club wish to add or remove tee data, update yardages, change Stroke Index values, apply for slope and rating values (formal, provisional, or temporary), or change their ISV competition software provider. Please follow this link for the relevant processes and CRXXX forms

https://www.englandgolf.org/handicapping/club-resources/#changerequest. On receipt of the relevant documentation, the team will support any required changes - https://www.englandgolf.org/handicapping/club-resources/.

Further Help - Rules of Handicapping

Should you have any questions regarding the application of the Rules of Handicapping, please contact your County Handicap Advisor.

Additional guidance can be found here:

- Rules of Handicapping: https://www.englandgolf.org/wp-content/uploads/2020/08/England-Golf-Rules-of-Handicapping.pdf
- Guidance on the WHS Rules of Handicapping as applied within GB&I: https://www.englandgolf.org/wp-content/uploads/2020/09/Guidance-on-the-WHS-Rules-of-Handicapping-as-applied-within-GBI.pdf

Further Help – World Handicap System

Club resources can be located here: https://www.englandgolf.org/handicapping/club-resources/.

If further assistance is needed, the agreed communication hierarchy to be followed for queries is as follows: