



# **BRACKETS SOP**

(Standard Operating Procedure)

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# Standard Operating Procedure (SOP) for Bowling Brackets Management

## Introduction

Welcome to the Bowling Brackets Standard Operating Procedure (SOP). This document provides a comprehensive guide to the processes and policies governing the management of brackets at USBC's long-duration tournaments – the USBC Open and Women's Championships. Our goal is to ensure a transparent, efficient and consistent experience for all participants. By outlining detailed steps and responsibilities, we aim to maintain high standards of accuracy, fairness and customer satisfaction. Whether you're a participant, staff member or manager, this SOP serves as a resource to help navigate every aspect of the bracket process.

## Purpose and Scope

- **Purpose:** This SOP provides a comprehensive guide for managing brackets at USBC's long-duration tournaments (Open and Women's Championships), focusing on transparency, efficiency and consistency.
- **Scope:** Covers sales, accuracy checks, adjustments, scoring, payouts, reconciliation and long-term product closeout for brackets management.

## Definitions and Acronyms

- **Brackets:** Tournament sub-competitions that group participants in smaller competitive pools.
- **Rollovers:** Transfer of funds to other brackets when a bracket does not fill.
- **USBC:** United States Bowling Congress.
- **POS:** Point of Sale system.

## Roles and Responsibilities

- **Cashier:** Processes customer purchases and ensures accurate entry.
- **Brackets Staff:** Handles sales checks, adjustments and results posting.
- **Team Lead/Manager:** Supervises operations, corrects errors and approves adjustments.
- **Tournament Director:** Oversees the entire process and resolves escalated issues.

## Required Tools and Systems

- Sales Forms
- Refund Forms
- Method of Payment Systems (cash, card, etc.)
- Brackets Software
- Scoring System
- Monitors for Results Display

## Process Overview

Management of brackets involves sales processing, accuracy checks, handling adjustments, pulling scores, payouts, reconciliation and long-term closeouts.

## Detailed Step-by-Step Procedure

### 1. SALES PROCESS

*To enter a customer's purchase requests into the bracket system.*

Materials/Tools:

- Sales Forms
- Method of Payment(s)
- Brackets Software

Steps:

- 1) The bowler fills out a sales form and brings the form to the cashier to be processed.
- 2) The staff member will verify that the information submitted on the form matches the information in the system.
  - a. Name(s) match.
  - b. Address is current.
  - c. Membership number is correct.
  - d. Verify age (only if purchasing age-restricted products).
  - e. Verify average (for division-based products).
- 3) The staff member will ask the bowler what they would like to do in the event a product does not fill. They will have the option to roll to another product or receive a refund.
  - a. The request will be notated on the sales form as "Roll" or "Refund."
  - b. The staff member will only roll products authorized by the bowler.
  - c. If a product is rolled, the bowler will be notified, and a new receipt will be provided.
  - d. Refunds are automatically processed by the system and will be available for pick up at the designated payout location.
- 4) The staff member will enter the sale and provide the bowler with a receipt.
  - a. A cash sale generates a receipt slip.
  - b. A credit or debit sale produces an emailed receipt.
  - c. All sales are offered a duplicate of the sales form as a receipt.

### 2. SALES ACCURACY CHECKS

*To verify the sales entered by the staff match the customer's request (on the sales form).*

Materials/Tools:

- Brackets Software (POS)
- Customer Sales Form
- Sales Detail Report

### **First Check**

- 1) A Sales Detail Report is generated from the bracket system for the squad by lane and position number.
- 2) Using the Sales Detail Report and a copy of the customer's sales form, the staff performs a detailed crosscheck (making sure the customer's request matches the system input).
  - a. Any errors will be circled and written to the side for what it should have been.
  - b. The team lead or manager will then make corrections to the system and write "Corrected by (initials)" on the detail report.
  - c. A new receipt is printed out with an explanation of what was changed and taken to the bowler.

### **Second Check**

- 1) All the steps in the first check are repeated, but performed by the team lead or manager.
- 2) Any errors or missed sales will be corrected, and new receipts will be provided to the bowler for their records.
- 3) Once all crosschecks have been completed, the forms are scanned and stored for reference as needed.

### **3. ADJUSTMENTS**

*To address/process any changes that need to be made in the system prior to the completion of a squad. Rollovers, dropouts, refunds and protests are examples of an action that might prompt a change.*

Materials/Tools:

- Customer Sales Form
- Refund Form (if eligible)
- Brackets Software
- Method of Payment(s)

### **Rollovers**

If there are not enough bowlers to make a bracket, a rollover is an option where the tournament staff will transfer the money into another bracket. A bracket requires at least seven bowlers (one bowler would receive a bye in the first round in this instance). Eight bowlers make one complete bracket. Six bowlers or less would result in a roll or refund.

- 1) If there is a rollover, the process is to void the original sale(s).
  - a. When voiding, the team lead or manager will verify the correct method of payment and cashier before voiding the sale.
- 2) After voiding the sale, a new sale will be entered with the new bracket input.
- 3) A new receipt will be printed out and given to the bowler with their new brackets listed on the receipt.

## **Refunds**

Reasons for a refund vary; examples include an insufficient number of players to fill a bracket, injury withdrawal, excessive downtime (malfunctions). All refunds are at the discretion of tournament management.

- 1) Insufficient Number of Players
  - a. The system will automatically process unfilled bracket refunds.
  - b. Refunds will be available for pick up at the designated payout location (casino or on-site).
- 2) Injury Withdrawal – A bowler drops out due to a medical concern.
  - a. The manager on duty will notify the bracket office to process a refund for medical.
  - b. A staff member will pull the bowler's sales form.
  - c. A staff member will void the sale from the system.
  - d. A staff member will fill out a payment request form.
  - e. A staff member will bring the payout request form to the manager for signature.
  - f. A staff member will bring the payout request form to the customer for signature.
  - g. The customer is paid (if a cash sale) or given a refund receipt (if the sale was debit/credit).

## **Protests**

USBC and tournament rules allow competitors to challenge (protest) scoring or other rulings made during competition. Rulings related to scoring may impact the bracket results. A written protest must be submitted.

- 1) A staff member from center desk will notify the manager on duty and the brackets staff.
- 2) The protest will be handled by the staff/manager in accordance with USBC rules.
- 3) Once the manager on duty has made a determination, the brackets staff will be notified.
- 4) Any adjustment(s) that may be required because of the determination will be completed prior to closing the squad and processing the results.

## **4. PULLING SCORES**

*To determine the winners of each bracket, produce any documents necessary for payout and post the results.*

Materials/Tools:

- Bracket Software (POS)
- Telephone
- Bracket Results Monitors

## **Pre-Closeout**

- 1) A staff member from center desk will notify the brackets staff that the lanes are closed (event is complete).
- 2) The brackets staff will check with center desk for any outstanding dropouts and/or protests that need to be processed.

- a. Scores cannot be pulled until all bowlers have completed the current event.
- b. Doubles and singles are a combined event, and scores are pulled after singles has been completed.

### **Closeout**

- 1) Randomized – This will randomize the bowlers into brackets.
  - a. Randomization is only done once by the staff.
  - b. Names are not visible during randomization.
  - c. Randomization is done by the bowler’s ID number.
  - d. If a system error occurs, the tournament director is immediately notified.
- 2) Get Scores – Scores are pulled from the scoring system into the brackets system.
  - a. If the scores do not automatically populate, manual entry may be required. If manual entry is required, the manager on duty is notified.
- 3) Get Winners – Organizes bowlers, based on score, into first and second place (names are not visible to the staff at this point in the process).
- 4) Signature Sheets – Lists all payouts for the squad.
  - a. The signature sheet is in alphabetical order with the last four digits of your USBC ID number.
  - b. It does not show what individual brackets you won money in during the event, just the full amount of the winnings.
- 5) Balance Sheet – Verified against the signature sheet for balancing.
- 6) Email the signature sheet to the casino (if being paid out by the casino).
  - a. A call to the casino is placed to verify that the signature sheets have been received.
  - b. We will notify them if there are any bowlers under the age of 21 and/or name issues.
  - c. When the casino confirms that the signature sheets have been received, bowlers will be able to pick up their winnings.
  - d. If not being paid out by the casino, signature sheets will be printed on-site.

### **Posting**

- 1) Bracket results will be posted to the monitors located in the designated area once it has been confirmed that the casino received the signature sheets or paid on-site.
- 2) If a bowler would like to see their results, there is a computer set up in a designated area with complete results.

## **5. BRACKET PAYOUT**

*The point in which the competitors go collect bracket winnings.*

Materials:

- Valid Government-Issued ID Card
- USBC Membership Card
- Signature Sheets

## **Daily Products**

- 1) Bowlers will go to the designated payout location (casino or on-site) to pick up their winnings.
  - a. Valid government-issued ID and USBC membership cards are required.
- 2) Bowlers will be asked to sign the signature sheet to confirm receipt of payment.
  - a. Winners must collect their own funds. Payment to anyone other than the person on the sheet is not allowed.
- 3) If a bowler is under the age of 21, they will need to pick up their winnings at Bowler Services or the bracket office if the payout is at a casino.
- 4) Bowlers will have 72 hours to pick up their winnings.
  - a. Winnings of more than \$10 that are not picked up within 72 hours will be mailed by check at the end of the tournament.
  - b. Winnings of \$10 or less that are not picked up within 72 hours will be donated to USBC philanthropic efforts: Bowl for the Cure, Bowlers to Veterans Link, Special Olympics and International Bowling Museum and Hall of Fame.

## **6. RECONCILIATION**

*To summarize and report brackets financials by squad and facilitate payout (casino or on-site) reimbursement.*

Materials/Tools:

- Signature Sheets
- Reconciliation Sheet
- Bracket Software

Steps:

- 1) Once the 72-hour window has passed, the casino (if applicable) returns the signature sheets to USBC.
- 2) The bracket staff reviews the sheets to:
  - a. Identify unpaid winners and categorize them into either a post-tournament payout (prize check) or charity donation (\$10 or less – funds donated).
  - b. Verify the amount paid by the casino and report the figures to USBC for casino reimbursement.

## **7. LONG-TERM PRODUCT CLOSEOUT**

*To determine the long-term bracket cashers, post the results and provide payment data for prize check disbursement.*

Materials/Tools:

- Bracket Database
- Registration Database

## **Vendor Notification**

- 1) Notification that sales are closed from USBC brackets personnel to vendor.
- 2) Copy brackets database from production to the vendor's local working database.



- 3) Copy the registration database to a local working database.
  - a. This is a read-only copy of the registration database used for unconnected score and entry verification. Additional coordination may be required to ensure that fresh data is available to properly close long-term products. In general, we use national ID numbers to verify entries. National IDs do not frequently change in the course of a tournament year and are the primary entrant identifier, but other information like scores, pinfalls, squad and division are needed to close long-term bracket products.

### **Closeout for Each Product**

- 1) Check the brackets data content for completeness and consistency.
  - a. Check the entrants.
  - b. Create the product entry table.
  - c. Confirm the correct scores and/or pinfall information.
  - d. Fix incomplete/inaccurate entries.
    - i. Verify the membership IDs.
    - ii. Verify complete scores.
    - iii. Verify complete pinfalls.
    - iv. Work with registration and brackets personnel to complete the verification.
    - v. Iterate the process until it is complete.
- 2) Create the preliminary results (can be elevated to final pending subsequent auditing steps).
  - a. Create the payout schedule.
  - b. For products that require it, adjust the product payout parameters.
    - i. Coordinate with HQ staff members on payouts.
    - ii. Set the payout amounts.
  - c. For products that require it, complete the randomization.
    - i. Long-term products requiring randomization:
      1. Mystery Doubles
        - a. Regular Division
        - b. Standard Division
        - c. Classified Division
      2. Play-the-Field Brackets
        - a. Regular Team
        - b. Regular Doubles
        - c. Regular Singles
        - d. Regular REVERSE Team
        - e. Regular REVERSE Doubles
        - f. Regular REVERSE Singles
        - g. Standard Team
        - h. Standard Doubles
        - i. Standard Singles
        - j. Standard REVERSE Team
        - k. Standard REVERSE Doubles
        - l. Standard REVERSE Singles
        - m. Classified Team
        - n. Classified Doubles
        - o. Classified Singles
        - p. Classified REVERSE Team

- q. Classified REVERSE Doubles
  - r. Classified REVERSE Singles
  - s. 50+ Team
  - t. 50+ Doubles
  - u. 50+ Singles
  - v. 50+ REVERSE Team
  - w. 50+ REVERSE Doubles
  - x. 50+ REVERSE Singles
  - y. 60+ Team
  - z. 60+ Doubles
  - aa. 60+ Singles
  - bb. 60+ REVERSE Team
  - cc. 60+ REVERSE Doubles
  - dd. 60+ REVERSE Singles
3. Super Brackets
    - a. Super \$5K
    - b. Super \$2K - Regular
    - c. Super \$2K - Standard
    - d. Super \$2K - Classified
    - e. Super \$2K - 50+
    - f. Super \$2K - 60+
  - ii. Long-term products requiring NO randomization:
    1. Mega Jackpots
      - a. Team Entrants
      - b. Doubles Entrants
      - c. Singles Entrants
      - d. Double Entry Refunds
    2. Super Side Pots
      - a. Regular Team
      - b. Regular Doubles
      - c. Regular Singles
      - d. Standard Team
      - e. Standard Doubles
      - f. Standard Singles
      - g. Classified Team
      - h. Classified Doubles
      - i. Classified Singles
      - j. 50+ Team
      - k. 60+ Team
- 3) Print the reports.
    - a. Verify the report content.
  - 4) Create an accounting payout CSV for every product.
  - 5) Combine payout CSVs into the consolidated accounting payout CSV.

### **Specific Product Group Closeout Actions**

- 1) Long-term products requiring randomization:
  - a. Mystery Doubles (OC and WC)
    - i. Verify the total entry count and payout schedule.
    - ii. Establish the divisional payout amounts.
    - iii. Verify the doubles scores.
    - iv. Create randomized pairings.

- v. Get a verified ranking for each division.
- vi. Create the reports.
- vii. Create the payout merge CSV.
- viii. Update the audit totals.
- b. Play-the-Field Brackets (OC and WC)
  - i. Verify the total entry count and payout total.
  - ii. Establish the divisional payout amounts.
  - iii. Verify divisional scores.
  - iv. Create randomized brackets.
  - v. Create the reports.
  - vi. Create the payout merge CSV.
  - vii. Verify the contents in the brackets.
- c. Super Brackets (OC and WC)
  - i. Verify the total entry count and payout total.
  - ii. Establish the divisional payout amounts.
  - iii. Verify product entrant scores.
  - iv. Verify entrant score completeness.
  - v. Create randomized brackets
  - vi. Create the reports.
  - vii. Create the payout merge CSV.
  - viii. Verify the contents in the brackets.
- 2) Long-term products requiring NO randomization:
  - a. Mega Jackpots (OC)
    - i. Verify the total entry count and payout total.
    - ii. Establish the payout amounts.
    - iii. Verify product entrant scores and pinfalls.
    - iv. Verify entrant score completeness.
    - v. Create the results.
    - vi. Create the reports.
    - vii. Create the payout merge CSV.
    - viii. Verify the payout balance.
  - b. 3-6-9 Jackpot (WC)
    - i. Verify the total entry count and payout total.
    - ii. Establish the payout amounts.
    - iii. Verify product entrant scores and pinfalls.
    - iv. Verify entrant score completeness.
    - v. Create the results.
    - vi. Create the reports.
    - vii. Create the payout merge CSV.
    - viii. Verify the payout balance.
  - c. Super Side Pots (OC and WC)
    - i. Verify the total entry count and payout total.
    - ii. Establish the payout amounts.
    - iii. Verify product entrant scores.
    - iv. Verify entrant score completeness.
    - v. Create the results.
    - vi. Create the reports.
    - vii. Create the payout merge CSV.
    - viii. Verify the payout balance.
  - d. Mulligans (WC)
    - i. Verify the total entry count and payout total.
    - ii. Establish the payout amounts.

- iii. Verify product entrant scores.
- iv. Verify entrant score completeness.
- v. Create the results.
- vi. Create the reports.
- vii. Create the payout merge CSV.
- viii. Verify the payout balance.

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***Changes due to disqualifications, re-rating or division changes for randomized products may require the results for the affected product to be re-randomized, reports to be re-run and merge files to be recreated.***

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## Compliance and Controls

- 1) All products will create customer-facing reports at the same time as the accounting payouts merge.
- 2) The payout merge and the customer PDFs will be placed in a time-stamped folder.
- 3) The time-stamped folder will be placed on the FTP server.
- 4) Included in the payout merge and PDFs will be an audit file containing payouts and scores (and pinfalls for the Jackpot products).
- 5) The audit file and reports must be verified by HQ staff members to match the payout merge.
- 6) HQ staff members are also expected to carefully and completely review the PDF reports for accuracy and completeness.
- 7) HQ staff members must also conduct trial and final balances for each product using the audit files provided.
- 8) Auditable copies of the reports and spreadsheets must be kept on the FTP server once they are provided to HQ.

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***It is expected that adherence to a "drop-dead" date for changes to any product payouts, entries or results must be maintained. Every effort must be made to complete modifications to product entries that result in a re-run of a product at which point entries will close, modifications will cease to be possible and results will be final. It is expected that no customer-facing reports will be made available until all HQ verification has been completed.***

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The vendor will complete the same auditing steps as above prior to releasing the time-stamped results for each product.

## Error Handling and Exceptions

In the event an error occurs in the pulling scores process (determining winners), which requires correction, including the repeating of a step (pushing a button a second time), the following actions will be taken:

- The brackets team member closing out the squad will notify the tournament director or designated manager on duty that an error in pulling scores process (determining winners) has occurred.
- Tournament management will authorize and supervise corrective measures.
- The error and corrective measures will be recorded in the Error/Exceptions Log.
- The bracket system administrator will be notified via email of the error.
- Tournament management will inform senior/executive management.

2025 Update: In 2024 and previously, a combined (merge) file was created with results for all products. It will no longer be possible to create one merge file for all products. Audit requirements require each product to be checked individually at HQ.

## **Document Retention and Recordkeeping**

All bracket documents are scanned by squad and retained a minimum of two years. The original bracket documents will be held for one tournament cycle before disposal (shredding).

## **Review and Updates**

This process will be reviewed annually between USBC contractors and USBC tournament leadership to ensure that all proper processes are followed and determine if updates are needed at that time.