



# **School Year 2023-24** **NATIONAL SCHOLASTIC CHESS TOURNAMENT REGULATIONS**

**FOR USE IN THE FOLLOWING TOURNAMENTS:**

**THE US CHESS NATIONAL K-12 GRADE CHAMPIONSHIPS**

**US CHESS SUPERNATIONALS AND SPRING NATIONALS**  
INCLUDING: THE NATIONAL ELEMENTARY SCHOOL (K-6) CHAMPIONSHIPS,  
THE NATIONAL MIDDLE SCHOOL (K-8) CHESS CHAMPIONSHIP, AND  
THE NATIONAL HIGH SCHOOL (K-12) CHESS CHAMPIONSHIP

**US CHESS ONLINE NATIONAL SCHOLASTIC EVENTS**  
INCLUDING: THE ONLINE NATIONAL SCHOLASTIC QUICK CHESS CHAMPIONSHIPS

AND

**US CHESS YOUTH EVENTS**  
INCLUDING: THE U.S. JUNIOR CHESS CONGRESS, THE U.S. JUNIOR OPEN,  
THE ALL-GIRLS NATIONAL CHAMPIONSHIPS, AND  
THE NATIONAL YOUTH ACTION CHAMPIONSHIP

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SUBSTANTIVE CHANGES FROM THE SCHOOL YEAR 2022-23 EDITION  
ARE HIGHLIGHTED USING ~~STRIKE-THROUGH~~ AND YELLOW-SHADED TEXT

Yellow highlighting and ~~strike-through text~~ show changes made since last year's Regulations. In the Table of Contents, the shaded areas indicate places where substantive changes have been made.

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## **A NOTE TO USERS OF THESE NATIONAL SCHOLASTIC TOURNAMENT REGULATIONS**

Since the last edition of these regulations US Chess has seen significant re-growth of over-the-board play. The 2023-24 version of the *National Scholastic Chess Tournament Regulations* ('the Regulations') contains several changes from last year.

To call to your attention the substantive changes made since last year's Regulations we use **yellow highlighting** and ~~strike-through text~~ throughout the document.

Here is a summary of what has changed for 2023-24:

1. The Regulations now include references to the **US Chess Safe Play Guidelines** in the Introduction and in **Section 9**.
2. Procedures associated with *violations of the electronic device rules* have been substantially updated in **Section 13.5**. In particular, the range of penalties available to the tournament staff encourages consideration of a player's grade/age and experience and the circumstances of the violation.
3. In **Section 3.2**, *onsite and online entries are being strongly regulated* for the main event at the K12 Grade Nationals and the Spring Scholastic Nationals run directly by US Chess. More specifically, Section 3.2 stipulates for the main tournament that online registration will close at 11 a.m. on the Thursday before the tournament begins and that no entries will be taken onsite at Chess Control. Chess Control will take onsite entries only for side events.
4. Details associated with *Late Registration, Section Change Requests, and Bye Requests* have been updated in **Section 3.3**, with the subsection Section Change Requests (**3.3.2**) having been entirely re-written to include examples of the variety of possible section change requests. The Regulations also include *a new sub-section called "Reviewing Your Registration"* to strongly encourage players, parents, and coaches to review their or their players' registrations online before traveling to the tournament to avoid common problems seen at the national scholastic events such as Unrated players who have mistakenly entered a Championship Section, players with incorrect school codes, and players whose Bye Requests do not reflect their actual desires.
5. Procedures for *handling questions about Checkmate and Stalemate* have been updated in **Section 13.9**.
6. The *quantities of awards for class players and the rating ranges for those classes* for each grade from Pre-K through 12 has been updated in **Section 14.3**. A limited number of team trophies have been restored to Unrated sections.
7. **Appendix A-1**, covering Blitz, has been updated to clarify that games are played using "touch-move", not "clock-move." While this has been the standard practice for the past 3 years, we felt it important to emphasize the point as directly as possible.
8. Almost all the information on event site selection, logistics, etc. (formerly in Sections 3-10), *has been removed from the main text of the Regulations* and placed in **Appendix G-1**. This allows the main text of the Regulations to focus on topics of greatest interest to players, parents, coaches, and tournament staff.

Anyone who has questions or comments about these School Year 2023-24 Scholastic Regulations should not hesitate to contact the Scholastic Council for clarification. ***Do not wait until the week of a tournament*** to ask questions about your player's event registration, individual or team eligibility, team composition, or issues that could affect their participation in a national scholastic event. If you have a question while attending one of the scholastic national tournaments, please ***bring it to Chess Control***.

***Good Chess!!***

US Chess Scholastic Council

## 1 INTRODUCTION

### 1.1 Basic Principles

The US Chess Federation (US Chess) National Scholastic Chess Tournament Regulations are intended to fulfill the needs and expectations of players, coaches, and parents at our national scholastic events. These regulations are a reference to the special rules that govern these events, along with some suggestions to help the event run smoothly. They are designed to maintain, promote, preserve, and enhance the dignity and significance of, and fair play at, US Chess national scholastic events. These regulations supplement the 7<sup>th</sup> Edition of the US Chess Federation's *Official Rules of Chess* and carry the weight of history and hands-on experience. The US Chess Safe Play Guidelines also apply fully to every National Scholastic event. In instances where there are no existing regulations or rules, US Chess shall apply "common sense" to fairly address the situation. Proposed improvements to these regulations shall be referred to the US Chess Office and the Scholastic Council for consideration in the next scholastic chess year. Clarification or interpretations of the existing rules for the current scholastic chess year shall be referred to the US Chess office and the Scholastic Council. After all, the main principle of these regulations is this: *Our young players deserve the best!*

- 1.1.1 To foster consistency between state and national scholastic events, US Chess encourages state scholastic organizations to adopt these regulations for their state scholastic championships.

### 1.2 Event Names

The *Scholastic Regulations* cover several national scholastic chess events. The table below provides each event's official name as well as other names often used in the scholastic community.

Official Event Name	Other Common Names
<b>US Chess National K-12 Grade Championships</b>	K-12 Grades, K-12 Grade Nationals
<b>National Elementary School (K-6) Championships</b>	National Elementary Championships, Elementary Nationals, K-6 Nationals
<b>National Middle School (K-8) Championship</b>	National Middle School Championship Middle School Nationals, K-8 Nationals
<b>National High School (K-12) Championship</b>	National High School Championship, High School Nationals, K-12 Nationals
<b>Online National Scholastic Quick Chess Championships</b>	Online Quick Championships
<b>National Youth Action Championships</b>	National Youth Action, Youth Action
<b>U.S. Junior Chess Congress</b>	Junior Chess Congress, Chess Congress
<b>U.S. Junior Open</b>	Junior Open
<b>All-Girls National Championships</b>	All-Girls Nationals, All-Girls Championships, The All-Girls

### 1.3 US Chess Point of Contact

The US Chess Director of Events is the point of contact for questions about these regulations. The Director of Events can be reached at the US Chess Main Office, 314-661-9500. At tournaments being run by the US Chess staff, contact the Director of Events through Chess Control (see Appendix G-1, [Section 1.3.10](#)).

## 2 EVENT DATES

### 2.1 National Scholastic Events

- 2.1.1 Fall Nationals. The National K-12 Grade Championships:
- 2.1.1.1 Should be played between November 15 and December 15.
- 2.1.1.2 Must not be scheduled on Thanksgiving Day weekend.
- 2.1.2 SuperNationals & Spring Nationals. 2023 is not a SuperNationals year. Therefore, in 2023 the Spring national championship events—e.g., Elementary School (K-6), Middle School (K-8), and High School (K-12)—will be held on separate dates in different venues. The Spring Nationals:
- 2.1.2.1 Should be held between and to include the third weekend in March and the second weekend in May.
- 2.1.2.2 Must not be scheduled on Easter or Passover.
- 2.1.2.3 Try to avoid Daylight Savings Time weekend, as well as the test dates for the Scholastic Aptitude and Advanced Placement exams (High School only).



### 2.1.3 Online Scholastic National Quick Championships.

- 2.1.3.1 Should occur between mid-October and mid-November, at least three weeks before K-12 Grade Nationals.

### 2.1.4 All-Girls Nationals.

- 2.1.4.1 Must not conflict with the K-12 Grade Nationals, Online Scholastic National Quick Championships, Spring Nationals, or SuperNationals.

## 2.2 National Youth Events

- 2.2.1 National Youth Action: Should be held between November 1 and December 1, but not during the weekend Thanksgiving. US Chess will entertain other possible dates as part of bid proposals. A bidder's proposed event dates must be deconflicted with all other Scholastic National events.
- 2.2.2 U.S. Junior Chess Congress: Whenever possible.
- 2.2.3 U.S. Junior Open: Should be held in the summer.
- 2.2.4 Dates should not conflict with any other National Tournament and, if possible, they should not conflict with the North American Youth Chess Championships, the Pan-American Youth Festival, the World Youth Chess Championships, or the World Cadet Chess Championships.

## 3 ENTRY FEES & REGISTRATION

### 3.1 Hotel Check-in

- 3.1.1 Some hotels do not allow players under the age of 18 to check in to their hotel rooms without an adult. It is the responsibility of each individual player to ensure that local hotel check-in requirements are satisfied. US Chess and the organizer assume no responsibility in this regard.

### 3.2 Fees & Entry Deadlines

- 3.2.1 *(new for 2023-24)* Unless advertised otherwise in the official tournament announcements or the official tournament website, **online registration for the main tournament** at the National K-12 Grades, the National High School, the National Middle School, and the National Elementary Championships **will close at 11 a.m. on the Thursday before the main tournament begins.**
- 3.2.1.1 **Onsite entries for the main tournament are not allowed** and will not be accepted by Chess Control.
- 3.2.1.2 Entries only for "side events" (e.g., Blitz, Bughouse, Simuls, Family and Friends, etc.) will be taken onsite at Chess Control until the registration deadline for that particular event.
- 3.2.2 Entry fees shall be kept as economical as practical and set in accordance with the approved budget.
- 3.2.3 Early Entry deadline(s) should be used for each event. When practical, early entry deadline dates should be set to occur no sooner than one week after the date when US Chess is expected to publish the Rating Supplement to be used for the event. To comply with this requirement, organizers will discuss their proposed early entry dates with the US Chess Director of Events before advertising those dates in TLAs, event flyers, mass emails, and websites.

### 3.3 Late Registration, Section Change Requests, Bye Requests, and Reviewing Your Registration

#### 3.3.1 Late Registration (re-written for 2023-24):

- 3.3.1.1 A player entering after the entry cut-off time for Round 1 shall receive one Half-point Bye for the round unless the player requests to play and the request is approved by the Chief Tournament Director.
- 3.3.1.2 A player entering after the entry cut-off time for Round 2 shall receive two Half-point Byes unless the player requests to play in Round 2 and the request is approved by the Chief Tournament Director.
- 3.3.1.3 A player entering after Round 2 has begun shall receive two Half-point Byes for two of the missed rounds. The player is not eligible to request any additional Half-point Byes for the remainder of the tournament.

- 3.3.2 **Section Change Requests (re-written for 2023-24):** Player requests for a section change are subject to a fee and/or deadline. Any fees and/or deadlines applying to section changes will be clearly advertised on the tournament website. Players should make their section change requests as soon as possible. To encourage teams to properly form before the tournament, the following rules apply to section change requests **made after Round 1 has begun:**

- 3.3.2.1 For players who request to change sections after Round 1 has begun but **before Round 2:**

- Each player's eligibility for their requested section change will be screened by the tournament staff in accordance with [Section 4](#).
- A player moving from a Championship Section down to any other eligible section shall retain their Round 1 score.
- A player moving from an Under or Unrated section up to the Championship Section shall have their Round 1 score reduced by one-half point; losses shall not be adjusted.
- A player moving from one Under section to another shall have their Round 1 score adjusted, based on the upper rating limit of the new section. Here are some examples:

Original Section	New Section	Adjusted Score
K12U1900	K12U1600	Retain Round 1 score
K8U1400	K8U1700	Reduce Round 1 score by one-half point; losses are not adjusted
K6U1400	K5U1200	Retain Round 1 score
K6U1000	K5U1200	Reduce Round 1 score by one-half point; losses are not adjusted
K6U1000	K3U1000	Retain Round 1 score
K5U900	K3U1000	Reduce Round 1 score by one-half point; losses are not adjusted

- 3.3.2.2 If a player changes sections ***after Round 2***, then none of the player's points carry to the new section except their Round 1 score adjusted in accordance with Section 3.3.2.1 and the table above, as well as points earned due to player-requested or computer-generated Byes. When Byes are involved, no player may carry more than one total point of Byes to the gaining section.
- 3.3.2.3 If the need for a section change is caused by an error of the Tournament Staff or US Chess, then the Chief TD has the authority to decide how a player's points will carry to the gaining section.
- 3.3.2.4 In all situations, any games played shall remain as "rated games." The player's Tie-Break Points from the original section are not carried to the new section.
- 3.3.3 **Bye Requests.** Unless specified otherwise in the official Tournament Life Announcement and pre-Tournament information on the US Chess website, ***a player has the option to request up to 2 Half-Point Byes for any 2 rounds***, subject to the following stipulations:
- 3.3.3.1 If warranted by unusual circumstances, the Chief Tournament Director has the authority to grant a player a Half-Point Bye ***for any round, except the last round***.
- 3.3.3.2 Half-Point Byes and/or Zero-Point Byes can be requested during pre-Tournament Registration or at the tournament site. When at the tournament site, a player must ***go to Chess Control*** to make a new Bye request or change an existing Bye.
- 3.3.3.3 Changes to an existing Bye include retracting the Bye, moving the Bye to a different round, and changing the Half-Point Bye to a Zero-Point Bye. Changes to an existing Bye are subject to the deadlines listed in Sections 3.3.3.4 through 3.3.3.6 below.
- 3.3.3.4 Deadlines for ***requesting Half-Point Byes***: The Bye request must be received:
- ***For Round 1***—The deadline is 2 hours before the scheduled start for Round 1.
  - ***For all later rounds***—The deadline is 2 hours before the scheduled start for Round 2. After this deadline passes, the only change allowed to Half-Point Byes is to convert them to Zero-Point Byes (see 11.2.3.7).
- 3.3.3.5 ***Deadline for converting Half-Point Byes to Zero-Point Byes***: The deadline is before the scheduled start of the round for which the Bye has been requested.
- 3.3.3.6 ***Zero-Point Byes***: Zero-Point Byes are ***available for any round***, even when a player has already been granted 2 Half-Point Byes. The deadline is before the scheduled start time of that round.
- 3.3.4 **Review Your Registration (new for 2023-24)**.
- 3.3.4.1 Players (or their parents/coaches) are strongly advised to ***review their registrations online before the tournament*** to confirm their information is correct—such as section assignment, rating, entry, fees, US Chess membership, team information, Bye requests, etc. If any registration data needs to be changed, contact the tournament point of contact identified on the event website as soon as possible.
- 3.3.4.2 A complete list of the advance entries (pre-registered players) will be posted periodically on the tournament web page and will be updated regularly.



- 3.3.4.3 On the day of the tournament, players with registration problems should go to Chess Control as soon as possible to correct the error.
- 3.3.4.4 It is the responsibility of players and/or coaches to report corrected mistakes to Chess Control in a timely manner.
- 3.3.5 Rules specific to the tournament and side events will be available in advance of the event.

## 4 PLAYER ELIGIBILITY

### 4.1 General Eligibility

The following players are eligible:

- 4.1.1 Full-time students who are enrolled in school (public, private, home, or virtual) in the United States or its territories for the entire semester in which the event is held. ***US Chess strongly encourages players, parents or coaches who have questions about eligibility to contact the US Chess Director of Events by email or phone at least three weeks before the tournament.*** For “team” related aspects of this rule, see [Section 5.2](#). (See also footnote)<sup>1</sup>
- 4.1.2 U.S. citizens who are attending school abroad.
- 4.1.3 Home-schooled and virtual-schooled students who live in the United States or are U.S. citizens living abroad.

### 4.2 Age and Grade Eligibility

- 4.2.1 The ages for player age/grade eligibility shown in the table below apply ***as of September 1 for the School Year*** in which the tournament takes place. These age requirements are the ***upper limit for each grade***, including students who are home-schooled or virtual-schooled. Our national events are grade-based and require all players to play in a section that allows for their current grade. For example, a 5<sup>th</sup> Grader cannot be more than 11 years old. Similarly, a 9<sup>th</sup> Grader’s age cannot exceed 15.

Grade	Upper Age Limit	Grade	Upper Age Limit
Kindergarten	6 years old	7 <sup>th</sup> Grade	13 years old
1st Grade	7 years old	8 <sup>th</sup> Grade	14 years old
2nd Grade	8 years old	9 <sup>th</sup> Grade	15 years old
3rd Grade	9 years old	10 <sup>th</sup> Grade	16 years old
4th Grade	10 years old	11 <sup>th</sup> Grade	17 years old
5th Grade	11 years old	12 <sup>th</sup> Grade	18 years old
6th Grade	12 years old		

- 4.2.1.1 For example, a “K-8 Championship” section is open to all age-eligible players currently enrolled in Grades K through 8 (and Pre-K).
- 4.2.1.2 By comparison, a “Grade 2” or “Second Grade” section is open only to players currently enrolled in the 2<sup>nd</sup> Grade.
- 4.2.1.3 When sections are limited to a single grade, players who have “skipped” one or more grades must play in the grade in which they are enrolled in school—***they cannot play in the grade they skipped.***
- 4.2.2 A player has only one year of eligibility per grade level unless one of the following situations applies:
- 4.2.2.1 ***Pre-schoolers*** may play in the Kindergarten Section at the K-12 Grade Nationals, or in any “K-X” Section in other events. Pre-schoolers may continue to play as Kindergartners or in K-X sections in subsequent years until they start the first grade.
- 4.2.2.2 ***Players who repeat a grade*** in school may have a second year of eligibility in that grade if they remain age-eligible for that grade in accordance with the table above.
- 4.2.3 Eligibility for the age-based sections at All-Girls Nationals will be determined by players’ ages on January 1 of the year when the event is run.

### 4.3 Section Eligibility

- 4.3.1 For the Spring Nationals a player who scored 6 or more points in an Under Section of the previous year’s Spring Nationals or SuperNationals, and who is otherwise age/grade eligible for the same section this year, ***must play in a Section with a higher ~~grade or rating limit~~.*** For example, a player

<sup>1</sup> Contact the US Chess Director of Events at 314-661-9500. ***US Chess strongly recommends*** contacting us at least three weeks before a tournament starts AND before players, parents, and coaches commit their financial resources toward a tournament. We strongly advise against waiting to adjudicate a player’s eligibility on-site at a tournament.

who scored 6.0 in the K3U1000 Section of last year's Elementary School Nationals or SuperNationals, and who is age/grade eligible for that same section in the current school year, must now play in the K3 Championship or in a K5 or K6 section **with a higher rating limit.** ~~appropriate for the player's rating.~~

#### 4.4 Appeal of a Player's Eligibility

- 4.4.1 Any player 15 years of age or older, or an adult acting on behalf of a player of any age, may appeal another player's eligibility by filing the appeal on-site with Chess Control. ***Appeals must be filed before the start of Round 4 and must include supporting documentation*** to substantiate the appeal, as well as a ***good-faith deposit of \$200***. This deposit shall be returned by US Chess unless the Director of Events determines that the complaint is frivolous.
- 4.4.2 The appeal will be adjudicated by the Tournament Review Group (as defined in [Section 4.6.2.2](#)). Once rendered, the Group's decision is final.
- 4.4.3 Every reasonable effort will be made to adjudicate the complaint in a timely manner. On some occasions, however, the matter might have to be resolved after the tournament is over.

#### 4.5 Rating Supplements

- 4.5.1 **National K-12 Grades:** This tournament will use the current month's rating supplement, based on the start date for the event.
- 4.5.2 **Spring Nationals or SuperNationals:** When these events start ***before the 10<sup>th</sup> of the month***, the previous month's Rating Supplement will be used. When they start ***on or after the 10<sup>th</sup> of the month***, the current month's Rating Supplement will be used.

Event	Event Dates	Rating Supplement (RS)	RS Publication Date
<b>National K-12 Grades</b>	Dec 15 - 17, 2023	Dec 2023	Nov 16, 2023
<b>National High School (K-12)</b>	Apr 5 - 7, 2024	Mar 2024	Feb 22, 2024
<b>National Middle School (K-8)</b>	Apr 26 - 28, 2024	Apr 2024	Mar 21, 2024
<b>National Elementary (K-6)</b>	May 10 - 12, 2024	May 2024	Apr 18, 2024

- 4.5.3 For the K-12 Grades, Spring Nationals, and SuperNationals, the ratings used to determine section eligibility, pair players, and award prizes shall conform to the examples shown in the table below to help assure fair play. All ratings in the examples refer to players' Regular Over-the-Board (OTB) ratings and their Regular Online (ONL) ratings. Players identified through this process will be reviewed further by the Tournament Review Group (see [Section 4.6.2.2](#)) to determine whether use of a player's higher ONL rating is justified, based on the player's actual game history and activity over the past several months. (See Footnote 2.) **Note:** An "Established Rating" means a player has played more than 25 rated US Chess games; a "Provisional Rating" means a player has played between 4 and 25 rated games. "Regular" refers to games played at "slow" time controls.

Example OTB Rating	Example ONL Rating	Rating Used	Explanation
1550 Established Rating	1430 Established Rating	1550	OTB 1550 is higher than the ONL 1430
1550 Established Rating	1780 Established Rating	1780	ONL 1780 is > 200 points above the OTB 1550
1550 Established Rating	1900 Provisional Rating	1550	Established Ratings have priority over Provisional Ratings
1550 Provisional Rating	1250 Established Rating	1250	ONL 1250 is an Established Rating
1550 Provisional Rating	1430 Provisional Rating	1550	OTB 1550 is higher (OTB has priority if higher)
1550 Provisional Rating	1780 Provisional Rating	1780	Both ratings are Provisional, the ONL 1780 is > 200 points above the OTB 1550
Unrated (Player has no rating)	1250 Established Rating	1250	The Established rating has priority
Unrated (Player has no rating)	1250 Provisional Rating	1250	The Provisional rating has priority

#### 4.6 Other Rating Systems

- 4.6.1 When the US Chess main office receives other over-the-board (OTB) rating information during the event entry process, US Chess shall seriously consider, in the interest of fair play, and in consultation

2 This review focuses on players' ONL and OTB ratings and their corresponding game activity. The algorithm used by the Tournament Review Group (TRG) begins by identifying all players whose ONL Regular Ratings exceed their OTB Regular Ratings ***by more than 200 points***. The algorithm is intentionally designed to not distinguish between provisional and regular ratings so that the members of the TRG can manually review each player's OTB and ONL ratings and game activity.

with the Scholastic Council and the Ratings Committee, using this rating information to determine section and prize eligibility in accordance with US Chess rules 28D and 28E.

- 4.6.2 For the K-12 Grade Nationals, the Spring Nationals, the SuperNationals, and the All-Girls Nationals, players in all sections shall be **required to disclose at the time of registration whether they have one or more ratings in other OTB rating system(s).**

4.6.2.1 Other OTB rating systems include, but are not limited to, FIDE, foreign systems, the Northwest Scholastic Rating System (NWSRS), and ChessXpress (CXR).

4.6.2.2 **Tournament Review Group (TRG).** Authority for deciding whether and how ratings from any OTB system will be used resides with this 3-person group consisting of the US Chess Director of Events or Event Organizer, the Chief TD for the tournament, and the Scholastic Council Representative for the event. When necessary, the TRG shall consult with the US Chess Ratings Committee.

4.6.2.3 For the K-12 Grade Nationals, the Spring/SuperNationals, and the All-Girls Nationals, the tournament staff shall apply the calculations below to players entering any section of the tournament, and then use the higher of the US Chess or Adjusted Rating to: 1) validate or correct section eligibility, 2) pair players, and 3) determine their prize eligibility.

- Northwest Scholastic Rating System (NWSRS): If the player's NWSRS is:
  - ♦ Below 1400, subtract 200 points. *(See footnote)*<sup>3</sup>
  - ♦ From 1400 to 1499, subtract 100 points.
  - ♦ 1500 or above, subtract 50 points.
- CXR: No rating adjustment formula is necessary.
- Other Rating Systems: Other systems brought to the attention of US Chess shall be reviewed by the TRG using specifications in the Rules of Chess (28C, 28D and 28E) and guidance from the Ratings Committee.
- For any OTB rating system, if a player's rating source is US Chess, or if an OTB rating is judged by the TRG to not be representative of the player's current strength, then that player's current US Chess rating shall be used as given in the Rating Supplement for the event, not the rating listed in the other OTB system's database. *(See footnote)*<sup>4</sup>

4.6.2.4 To track other OTB ratings for each Spring National Scholastic Tournament, the US Chess Scholastic Council shall appoint one person as the OTB Database (OTB DB) Lead for each tournament. The OTB DB Lead's primary responsibilities are to:

- 1) Assist the US Chess Office, Director of Events, and Chief TD in tracking information on registered players who have disclosed their other OTB rating(s)
- 2) Research other common OTB rating systems to identify players who may have ratings in those systems
- 3) Notify the TRG members upon learning of players who have other OTB ratings
- 4) Provide recommendations to the TRG on how to handle each player's case

4.6.2.5 The database created by the OTB DB Lead will be used by the Tournament Staff (Chief TD and Back Room Chief) to ensure each player's rating is correctly listed in the pairings program for purposes of section eligibility, pairings, and prizes. For every other OTB system (e.g., NWSRS, FIDE) the OTB DB Lead shall create, where feasible, a product similar to the US Chess Rating Supplement used for the tournament. *(See footnote)*.<sup>5</sup>

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<sup>3</sup> **For example**, a 4<sup>th</sup> grade player with a US Chess Rating of 710 discloses during registration, or is discovered by US Chess to have, a NWSRS Rating of 1080 and enters the K5-U900 Section at the National Elementary School Championships. The player's NWSRS rating is less than 1400, so the Adjusted Rating is 1080 minus 200, or 880. Because the 880 Adjusted Rating is greater than the player's 710 US Chess Rating, the Adjusted Rating is used to declare the player "eligible" to compete in the K5-U900 section. **The rating of 880 also becomes the player's Assigned Rating for purposes of pairings and prize eligibility.** The Assigned Rating will be shown on the Wall Charts and Pairing Sheets **at the tournament** but are not listed online before the tournament.

<sup>4</sup> **For example**, consider a player in an Under section who has an established US Chess rating. If this player is found to have a performance rating in another system that is higher than the player's US Chess rating, but that rating represents a performance in comparatively few games (e.g., one tournament vs. dozens of US Chess-rated games), then the player's US Chess rating shall be used. This includes instances when "the other rating" may be more recent. **The decision about what rating to use is the responsibility of the Tournament Review Group as specified in Section 4.6.2.2.**

<sup>5</sup> **For example**, if the May 2024 Rating Supplement is used for the 2024 Elementary (K-6) Nationals, then the OTB DB Lead shall create an equivalent "May Rating Supplement" for each of the other OTB rating systems being used in the tournament.

- 4.6.2.6 Players who enter an Under or Unrated section, and do not disclose that they have another OTB rating, shall have their status in the event reviewed in accordance with US Chess Rules and the procedures outlined in [Section 4.6](#). This review can result in a broad array of actions that include, but are not limited to, no negative action being taken because the non-disclosure was truly an oversight; adjusting the player's rating within their current section; adjusting the player's rating and moving the player to an appropriate section of the tournament with or without any Byes or points; loss of team points; lack of eligibility for certain awards; or, expulsion from the tournament.
- 4.6.2.7 To ensure fair play, US Chess shall ***review the ratings and rating histories for the previous 12 months*** of all players entering any National Scholastic events run by US Chess. The authority to adjust a player's rating, or to move a player to a higher section, resides with the Tournament Review Group described in [Section 4.6.2.2](#) above. See also [Section 4.3 \(Section Eligibility\)](#).
- 4.6.2.8 In those instances when a player's US Chess rating, or adjusted rating (based on another OTB system), makes the player ineligible for the section s/he has entered, the US Chess Office will notify the player, parent, or coach (e.g., the person who sent in the entry) by email or phone within two calendar weeks from the day the entry was received in complete form. Entries received in the last two weeks before the tournament will be reviewed as rapidly as possible. Notification will summarize the issue and include recommendations on what section(s) the player is eligible to compete in. Players who wait to enter the tournament the week it begins may not learn about their section eligibility issues until they arrive at the tournament site.

#### 4.7 **Definition of an Unrated Player.**

An unrated player is a tournament participant who has no rating published in the US Chess Rating Supplement being used for the tournament. In accordance with [Section 4.6](#) and US Chess rule 28D, ***a player who has an OTB rating in another recognized rating system as described in Section 4.6 above probably will not be considered unrated*** for the purpose of prizes and sectioning, even when that same player has no US Chess rating. Accordingly, the Unrated Section in a US Chess National Scholastic Event is only for players who have no rating, ***as defined through this process of reviewing ratings in other systems.***

### 5 **TEAM REQUIREMENTS FOR NATIONAL SCHOLASTIC EVENTS**

#### 5.1 **Individual Tournament, Team Scoring**

***National Scholastic Events are individual Swiss System tournaments with team scoring.*** A student who does not qualify to represent a team under Sections 5.2, 5.3, or 5.4 can only compete as an individual.

#### 5.2 **Team Composition**

In National Scholastic Events (i.e., Spring Nationals, K-12 Grade Nationals, All-Girls Nationals, and Online Scholastic Nationals) a team is comprised of students who attend the same school. (For further clarification of player eligibility, see [Section 5.2.4](#).) (See footnote) <sup>6</sup>

- 5.2.1 A school is defined as an institution which is under one Head of School and serves one student body. A school may be part of one or more buildings, and on one or more campuses. A school must provide core curricular instruction as defined by state or local law or regulation. Schools with students on multiple campuses ***must seek prior approval from the US Chess Director of Events at least three weeks before the start date of the tournament*** to compete in a US Chess national scholastic event. (See footnote) <sup>7</sup>
- 5.2.1.1 A 'local public school' for a home schooled or virtual school student is defined as ***the public school the student would attend if attending public school***. For example, the local public school for a 3rd grade home schooled or virtual school student is the local public elementary school whose geographic footprint, as defined by the applicable local department of education authorities, encompasses the student's home residence address.
- 5.2.1.2 A 'public school district' is a grouping of public schools (most usually within a city or county but maybe a single school in a small city) recognized and designated as being a public school district

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The ratings listed in these products shall reflect player ratings dated as close as possible to the cut-off date for the US Chess May Rating Supplement.

<sup>6</sup> A school is NOT required to have a formal "chess club" or "chess team". Two or more players who attend the same school and are otherwise eligible to participate ***are considered "a team" automatically if they register using the same school name.***

<sup>7</sup> Also see Section 4 (Player Eligibility) or contact the US Chess Director of Events at 314-661-9500.



by that state's department of education. A 'local public school' is not the entire district but is the area that a single public school covers.

- 5.2.2 A student will be considered to attend a school if and only if he or she physically attends classes at that school and receives more than 50% of his or her core curricular instruction from that school.

5.2.2.1 **Pre-School players** are allowed to play for the school (public or private) they plan to attend once they reach Kindergarten age. Before traveling to a tournament, the parents, coach, or guardian of such a player shall obtain a "Letter of Authorization" signed by a senior administrator (e.g., Principal, Director, Vice-Principal, Assistant Director, School Master) of the school to document their players' eligibility to participate as part of a specific school's team. In this letter, the senior administrator shall verify that the player would attend the school if the player were old enough. The player, parents, coach, or guardian should bring this letter to the tournament and be ready to provide it to US Chess upon request by the tournament staff.

- 5.2.3 Each school may enter only one team per section.

- 5.2.4 **Team Eligibility for Transferring Players.** For US Chess National Scholastic Events paired as individual tournaments with team scoring (e.g., K-12 Grade Nationals, Spring Nationals, SuperNationals, etc.), a player must meet the following eligibility criteria for his/her performance to be counted toward their current school's team score.

5.2.4.1 The criteria below apply to students attending public, private, home and virtual schools.

5.2.4.2 **In the Fall.** For events held in the Fall (from August 1 to December 31), the player must have started at his/her new school no later than one week after the beginning of the new school's Fall semester. If the student's new school uses a Quarter-based or Trimester system, then the effective date for the player's eligibility is the 7<sup>th</sup> calendar day of the first quarter or trimester occurring after August 1<sup>st</sup>.

5.2.4.3 **In the Spring.** For events held in the Spring (January 1 to June 30), the player must have started at his/her new school no later than one week after the start of the new school's Spring semester. If the student's new school uses a Quarter-based or Trimester system, then the effective date for the player's eligibility is the 7<sup>th</sup> calendar day of the first quarter or trimester occurring after January 1<sup>st</sup>. If the first day of the first quarter or trimester of the Spring begins after February 1<sup>st</sup>, then the player must have started at the new school during the previous quarter or trimester.

5.2.4.4 A student who transfers from one school to another after the end of the applicable eligibility period **is not eligible to play as a member of the new school's team but is eligible to compete as an individual.** That player's event registration shall not contain any "team code," including the code of their previous school.

5.2.4.5 **US Chess strongly encourages** players, parents or coaches who have questions about team eligibility to contact the US Chess Director of Events by email or phone well in advance of the tournament.

### 5.3 **Home Schooled Students**

Teams may also be comprised of home-schooled students.

- 5.3.1 A **home-schooled student** is defined as a student who receives at least 50% of their curricular instruction at home, through a local home school cooperative, or through other methods of homeschooling allowable by state law.

- 5.3.2 Home schooled students have **three options** for participating on a scholastic team in US Chess National Scholastic Events:

5.3.2.1 A home-schooled student may represent his or her local public school when access to extracurricular activities at the school is permitted and **the student resides within the boundaries of the local public school as defined in Section 5.2.1.** Before traveling to a tournament, the parents, coach, or guardian of such a player shall **obtain a "Letter of Authorization" signed by a senior administrator** (e.g., Principal, Director, Vice-Principal, Assistant Director, School Master) of the school to document their players' authorization to participate as part of a specific school's team. The player, parents, coach, or guardian shall bring this letter to the tournament and be ready to provide it to US Chess upon request.

5.3.2.2 A home-schooled student may join with other home-schooled students **who reside within the boundary of the same local public school.** (See [Section 5.2.1.1](#) above).

5.3.2.3 Home school students who attend the same local home school cooperative may form a team. A home school cooperative must meet the definition of a school in [Section 5.2.1](#). Most importantly,

it must offer academic subjects and not be formed solely as a chess club for the purpose of competing.

5.3.2.4 Eligibility for Players in Events with Team Scoring. (See [Section 5.2.4](#) above.)

5.3.3 There may be more than one home school team per recognized public school district.

#### **5.4 Virtual School Students**

Teams may also be comprised of virtual school students.

5.4.1 Virtual school students are students who receive more than 50% of their ~~core~~ curricular instruction on-line, but not in the school building.

5.4.2 Virtual schooled students have **three options** for participating on a scholastic team in US Chess National Scholastic Events:

5.4.2.1 Virtual school students may play for their local public school in the same manner as home school students under the provisions of [Section 5.2.1.1](#).

5.4.2.2 Virtual school students enrolled through the public school system and **who live within the boundaries of their local public school** may form a team in the same manner as home school students under the provisions of [Section 5.2.1.2](#).

5.4.2.3 Students who attend the same virtual school, but do not live within the boundaries of their local public school, must seek prior approval from the US Chess Main Office as specified in [Section 5.2.1](#) before registering to compete as a team.

5.4.2.4 Eligibility for Events with Team Scoring. (See [Section 5.2.4](#) above.)

#### **5.5 Team Size**

5.5.1 A team must contain a minimum of two players to be eligible for team prizes.

5.5.2 There is no maximum number of players who may part of a team, but only the top 4 scores in any section count for team score in the **Spring Nationals and Online Scholastic Nationals**, and the top 3 scores in the K-12 **Grade Nationals, U.S. Junior Open, All-Girls Nationals, and Junior Chess Congress**.

#### **5.6 Other Specifications**

5.6.1 No club teams are allowed in National Scholastic events. (See [Section 6.2](#) below.)

5.6.2 Bonus points will not be added to team or individual scores. Points cannot be transferred between sections unless the player has changed sections as described in [Section 3.3.2](#).

5.6.3 The team's coach, the assigned school official, a responsible adult acting on behalf of the team, or the 'Team Captain' is responsible for assuring the team's players are properly registered and eligible to participate as members of the team. For teams formed below the High School level, US Chess very strongly recommends there be a responsible adult involved in player registration and eligibility.

5.6.4 US Chess Affiliate Membership is encouraged for all teams.

5.6.5 Anyone wanting to appeal the eligibility of a team's composition shall follow the procedures in [Section 4.4](#).

### **6 TEAM REQUIREMENTS FOR NATIONAL YOUTH EVENTS**

This Section describes Team requirements for National Youth events only—e.g., the U.S. Junior Chess Congress, the National Youth Action Championships, and the U.S. Junior Open. For Team Requirements that apply to other National Scholastic events, see [Section 5.2](#).

#### **6.1 Basic Team Composition**

Teams will represent chess clubs as defined in Section 14.2 below and consist of youth who:

6.1.1 Meet the age requirements defined in [Section 4.2](#)

6.1.2 Are members of the club represented.

6.1.3 Are residents of the United States.

#### **6.2 Chess Club Teams**

US Chess recognizes **two types of club teams** for National Youth events:

6.2.1 A **School Club** is a club whose team members meet in any brick-and-mortar school, home school, or virtual school. School club players shall be students who go to the same school and meet the attendance criteria of Section 6.2.4 below.



- 6.2.2 An **Outside Club** is a club who draws its players from different schools and whose players meet regularly as described in Section 6.2.4 below. Outside clubs may meet at any location.
- 6.2.3 A group of students who receive individual private lessons from the same coach **are not** a club.
- 6.2.4 Any student who desires to play for a School or Outside club must attend at least six regularly scheduled club meetings over a period of at least three months immediately preceding the tournament and must be verified by the club president or designated club official. A club team member cannot count more than two attendances for any seven consecutive days for purposes of this regulation.
  - 6.2.4.1 A student who attends both a School Club and an Outside Club is eligible to play for either club only in a National Youth event. However, the player may not change clubs once the tournament begins, even if the player meets all Section 6.2.4 attendance criteria for both clubs.
- 6.2.5 A club team must contain a minimum of three players to be eligible for team prizes.
- 6.2.6 There is no maximum number of players who may compete on a chess club team. For details about how many team members scores count toward a team's total score, see [Section 10.2](#) (Team Scoring).
- 6.2.7 Bonus points will not be added to team or individual scores. Points cannot be transferred between sections unless the player has changed sections. The section change must be authorized by the Chief TD for the tournament.
- 6.2.8 The Coach or designated adult accompanying the club team is responsible for assuring that all his or her players are properly registered and eligible to participate as members of the team.
- 6.2.9 US Chess encourages Club Teams to obtain Affiliate Memberships.
- 6.2.10 Anyone wanting to appeal the eligibility of a team's composition shall follow the procedures in [Section 4.4](#).

## **7 OPENING CEREMONY**

### **7.1 Ceremony Length**

- 7.1.1 The organizer will arrange a brief (maximum 15 minutes) but impressive Opening Ceremony, a half hour prior to the start of the first round.
- 7.1.2 The organizer will arrange for a US Chess representative to be present who, along with the organizer, will welcome all participants and guests. Local dignitaries (mayor, county executive, congressmen, school superintendent, etc.) will be invited to attend as well as the press. Experience has shown that local officials have a strong interest in participating in such ceremonies.
- 7.1.3 While they may not always be able to attend, an invitation to the US Chess President and US Chess Executive Director to participate in the Opening and/or Closing Ceremonies should be formally extended.
- 7.1.4 Official proclamations from the mayors, county executives, and governors are often obtainable. These proclamations may welcome visiting teams and even designate a "chess week." The presentation of the national anthem is strongly encouraged.

## **8 AWARDS CEREMONY**

The organizer is responsible for one or more awards ceremonies in keeping with the stature of a national championship.

### **8.1 Ceremony Length**

The ceremony should last no longer than an hour and a half.

### **8.2 Number of Awards Presented**

- 8.2.1 The number of awards being presented on stage in each section shall be included in the Tournament Newsletter, and (if possible) also in the Tournament Program.
- 8.2.2 Place awards not being presented on stage will be announced before handing out the place awards during the ceremony. For example, if the Team awards for a section are 1<sup>st</sup>-15<sup>th</sup> place, but only 1<sup>st</sup>-10<sup>th</sup> are being presented on stage, then the Announcer shall announce the players who won the 11<sup>th</sup>-15<sup>th</sup> place awards before handing out the 1<sup>st</sup>-10<sup>th</sup> Team awards.
- 8.2.3 The list of prize winners should be posted as soon as possible. Award lists shall be posted sufficiently ahead of the awards ceremony to allow for errors to be brought to the attention of the Tournament Director and to allow corrections to be made. If corrections are made, the awards lists shall be re-posted as soon as possible and before the awards ceremony.

### 8.3 Awards Presentation

- 8.3.1 The order of the awards presentation should be announced at the beginning of the ceremony.
- 8.3.2 It is recommended that a senior representative from US Chess, the Chief Tournament Director and/or the US Chess Scholastic Council representative (when present) announce prize winners. A minimum of three assistants should be available to hand out awards.
- 8.3.3 Awards should be displayed in awarding order (this saves time and prevents mistakes and confusion).
- 8.3.4 Award winners shall be called to the stage in an orderly fashion for awards presentation. Walk them across the stage and read their names.
- 8.3.5 The scores of winners should be mentioned, and ties acknowledged.
- 8.3.6 Individual and team award presentations will be from lowest to highest place.
- 8.3.7 A separate area for photography should be provided for players. This area should be located far enough away from the stage to not disrupt the ongoing awards presentation. If available, it is recommended that a US Chess banner be available as a background.

## 9 SAFE PLAY

The US Chess Safe Play Guidelines apply fully to all US Chess National Scholastic Events.

## 10 TOURNAMENT FORMAT

Any deviations from the specifications of this section must be reviewed by the US Chess Scholastic Council's representative and approved by the US Chess Executive Board before event advertising begins.

### 10.1 Pairings

- 10.1.1 National Scholastic events are individual tournaments with team scoring. Accordingly, they are ***paired as individual Swiss System tournaments***, with individual scores added to create team scores.
  - 10.1.1.1 If a ***Championship section has more than  $2^{(N+1)}$  players*** where "N" is the number of rounds, the Chief TD will consider using accelerated pairings (e.g., 6 rounds with more than 128 players, 7 rounds with more than 256 players, or 9 rounds with more than 1,024 players).
  - 10.1.1.2 Accelerated pairings will not be used to pair players in Unrated or Under sections.
- 10.1.2 **Pairing Players from the Same State.** Pairings will NOT be adjusted to avoid players from the same state being paired against one another in any round.
- 10.1.3 **Pairing Players from the Same Team.** Players from the same team will NOT be paired against one another in any round except in the following situation:
  - 10.1.3.1 In the last 2 rounds of a scholastic national event of at least 6 rounds, players with a plus 3 score or higher may be paired against a teammate if no other reasonable pairing can be made. Examples of unreasonable pairings include, but are not limited to:
    - A player receiving the same color in 3 consecutive games except in the final round.
    - A player being paired outside the player's score group if a pairing within the player's score group is possible.

### 10.2 Team Scoring

A team's final score is determined by adding the scores of the top scoring players from the same school as follows:

- 10.2.1 Top 4 players: All Spring Nationals, the National Youth Action Championships, and the new Online National Scholastic Quick Championships.
- 10.2.2 Top 3 players: K-12 Grade Nationals, U.S. Junior Open, All-Girls Nationals, and Junior Chess Congress.

### 10.3 Sectioning

Sections at the Spring Nationals and SuperNationals, shall be organized as follows:

- 10.3.1 High School (K-12) Nationals:
  - K-12 Championship
  - And the following non-championship sections: K12U1900, K12U1600, K12U1200, K12U800, and K12Unrated
- 10.3.2 Middle School (K-8) Nationals:
  - K-8 Championship

- And the following non-championship sections: K8U1700, K8U1400, K8U1100, K8U900, K8U700, and K8Unrated

10.3.3 **Elementary (K-6) Nationals:**

- K-6 Championship, K-5 Championship, K-3 Championship and K-1 Championship
- And the following non-championship Sections: K6U1400, K6U1000, K6Unrated, K5U1200, K5U900, K3U1000, K3U700, K3Unrated, and K1U500&Unrated

10.3.4 **Note:** In the Spring Nationals, Unrated Players may enter only in the Championship or Unrated sections, except as noted in the K-1 Under500/Unrated Section. (For the definition of an Unrated Player, see [Section 4.7.](#))

**10.4 K-12 Grade Nationals**

There will be one section for each grade: K through 12. **Pre-K players play in the Kindergarten Section.**

**10.5 National Youth Action Championships**

Four Sections: High School (K-12), Middle School (K-8), Elementary (K-6), and Primary (K-3). These sections may be changed by the Organizer when approved as part of their winning bid by the Director of National Events in consultation with the Scholastic Council.

**10.6 Online National Scholastic Quick Championships**

10.6.1 Four Sections: High School (K-12), Middle School (K-8), Elementary School (K-6), and Primary School (K-3).

10.6.2 These sections may be changed by the Organizer when approved by the US Chess Director of Events as part of a winning bid in consultation with the Scholastic Council.

**10.7 Junior Chess Congress**

Eight Sections: Ages 6 and under, 8 and under, 10 and under, 12 and under, 14 and under, 16 and under, 18 and under, and 20 and under. These sections may be changed by the Organizer when approved as part of their winning bid by the Director of Events in consultation with the Scholastic Council.

**10.8 All-Girls Nationals**

Six Sections: Under age 8, Under 10, Under 12, Under 14, Under 16, and Under 18. These sections may be changed by the Organizer when approved as part of their winning bid by the Director of Events in consultation with the Scholastic Council.

**10.9 U.S. Junior Open**

Three Sections: Under age 21, under 15, and under 11. These sections may be changed by the Organizer when approved as part of their winning bid by the Director of Events in consultation with the Scholastic Council.

**10.10 Start Times (Round Times)**

10.10.1 **SuperNationals:** Please consult the Tournament Life Announcement for this event, the tournament program book, and other informational materials handed out or posted at the tournament by US Chess.

10.10.2 **Spring Nationals and K-12 Grade Nationals:** All sections, including Under and Unrated Sections as shown below. **Note that the K-1 sections may have different start times (round times).**

- Rounds 1-2: Friday 1 pm & 6 pm
- Rounds 3-4-5: Saturday 9 am, 1:30 pm, & 6 pm
- Rounds 6-7: Sunday 9 am & 1:30 pm

10.10.3 **National Bughouse Championship** (at SuperNationals and all Spring Nationals)

- 6 Rounds, with Round 1 on Thursday at 11:00 am and subsequent rounds held as soon as possible after the previous round. (See also [Appendix B.](#))

10.10.4 **National Blitz Championship** (at SuperNationals and all Spring Nationals)

- 6 Rounds, with Round 1 on Thursday at 5 pm and subsequent rounds held as soon as possible after the previous round. The minimum team size is 2 players, and the maximum number of players' scores that count toward Blitz Team awards is the top 4 scores. (See [Appendix A.](#))

10.10.5 **K-12 Grade Nationals**

10.10.5.1 See Round Times listed in Section 10.10.2 above.

10.10.5.2 **Bughouse:** Thursday at 11 am with 5 rounds of 2-game matches and all players in one section. This is *not a national championship event*, and the face plates on the winning team's two awards shall read "1<sup>st</sup> Place."

10.10.5.3 **Blitz:** Thursday at 5 pm with 6 rounds of 2-game matches in two sections—K-6 and K-12. The minimum team size is 2 players, and the maximum number of players' scores that count toward Blitz Team awards is the top 3 scores. This is *not a national championship event*, and the face plate on the winning team's award shall read "1<sup>st</sup> Place."

10.10.6 **Online National Scholastic Quick Championships** (all times are Eastern)

- Rounds 1-2-3-4: Saturday 12-noon, 2 pm, 4 pm, and 6 pm
- Rounds 5-6-7: Sunday 12-noon, 2 pm, and 4 pm

10.10.7 **National Youth Action Championships**

- Rounds 1-2-3-4-5: Saturday 10 am, 12-noon, 2 pm, 3:30 pm, and 5 pm
- Rounds 6-7-8-9: Sunday 10 am, 12-noon, 2 pm, and 3:30 pm

10.10.8 **Junior Chess Congress**

- Rounds 1-2-3: Saturday 10 am, 2 pm, 6 pm
- Rounds 4-5: Sunday 9 am & 1 pm
- The Organizer may propose different start times for each round when approved as part of their winning bid by the Director of Events in consultation with the Scholastic Council.

10.10.9 **U.S. Junior Open & All-Girls Nationals:** Round times to be determined by the organizers.

## 10.11 **Time Controls:**

10.11.1 **Spring Nationals, SuperNationals, and K-12 Grade Nationals:**

10.11.1.1 All Sections shall have a time control of Game/90, with a 10-second time delay. *(The time control in prior years had been Game/120, delay 5.)*

10.11.1.2 In all sections the US Chess Rule 11D (two extra minutes for illegal moves or touch-move violations) will not be imposed before either player has fewer than 60 minutes remaining on their clock.

10.11.2 **Online National Scholastic Quick Chess Championships:** All 7 rounds at Game/20 + 5 seconds

10.11.3 **National Youth Action Championships:** All rounds at Game/30, with 5-second time delay.

10.11.4 **Junior Chess Congress & All-Girls Nationals:** Game/90, with 10-second time delay. The Organizer may propose a longer or shorter time control as part of their bid.

10.11.5 **U.S. Junior Open:** Game/120, with 5-second time delay. The Organizer may propose a longer or shorter time control as part of their bid.

## 11 **CHESS NOTATION**

### 11.1 **Requirements**

11.1.1 All players *must use the official scoresheets provided by the tournament* to record the moves during their games. Organizers will make available a downloadable version of the official scoresheet so players can practice before the tournament. Players *may not* use their personal score books or other notation devices. (For authorized exceptions see [Section 11.2](#).)

11.1.2 The recognized forms of notation are algebraic and descriptive.

11.1.3 **Chess notation is required** in the following over-the-board events and sections:

Tournament	Section	Required?	
National Elementary School (K-6) Championships and SuperNationals	K-1 Under 500 & Unrated		No
	K-1 Championship		No
	K-3 Unrated, K-3 Under 700, and K-3 Under 1000		No
	K-3 Championship	Yes	
	K-5 Under 900, K-5 Under 1200, and K-5 Championship	Yes	
	K-6 Unrated, K-6 Under 1000, K-6 Under 1400, and K-6 Championship	Yes	
National Middle School (K-8) Championship and SuperNationals	All sections	Yes	

Tournament	Section	Required?	
National High School (K-12) Championship and SuperNationals	All sections	Yes	
National K-12 Grade Championships	Kindergarten through Grade 2		No
	Grades 3 through Grade 12	Yes	
National Youth Action Championships	All Sections	Yes	
All-Girls National Championships	Age Under 8		No
	Age Under 10, Age Under 12, Age Under 14, Age Under 16, and Age Under 18	Yes	
Junior Chess Congress	Age 6 & under and Age 8 & under		No
	Age 10 & under, Age 12 & under, Age 14 & under, Age 16 & under, Age 18 & under, Age 20 & under	Yes	
US Junior Open	Age under 11, Age under 15, and Age under 21	Yes	

11.1.4 **Rule 15A** from the US Chess Rules of Chess, requiring players to move before notating their move during over-the-board play, ***shall be enforced for all players*** in National Scholastic tournaments. This specification does not apply to any online national scholastic tournament.

11.1.4.1 **The variation to Rule 15A** from the US Chess Rules of Chess, permitting players to notate their move before moving, ***shall be allowed*** for the following sections of National Scholastic tournaments:

- K-12 Grade Nationals: Kindergarten, 1<sup>st</sup> Grade, 2<sup>nd</sup> Grade.
- K-6 Elementary Nationals: All K-1 sections (including K-1 Championship), and all K-3 non-championship sections.
- All-Girls Nationals: Under 8 Section.

11.1.5 At all times during a game, both players shall keep their notation sheets, booklets, or programs on the tabletop, so they are clearly visible to the opponent and tournament staff.

11.1.6 In sections where notation is optional, players may notate by using only (a) an official scoresheet provided by the organizer, or (b) an alternative method approved as an individual accommodation by the Director of Events.

11.1.7 A section's notation requirements pertain to all players within it. For example, if a first grader chooses to play in a K-8 section, she or he must abide by the notation requirements of that section regardless of her or his grade.

## 11.2 **Exceptions.**

The following exceptions apply:

11.2.1 Players with special circumstances who need to use an alternative means of score keeping.

11.2.1.1 Accommodation under this section of the Regulations requires prior approval from the US Chess Director of Events.

11.2.1.2 US Chess strongly encourages players seeking accommodation under this section of the Regulations to contact the Director of Events ***at least three weeks before the tournament***. This allows time for the request, submission, and review of supporting documentation to US Chess, if needed.

11.2.1.3 Late registrants seeking this accommodation should still contact the Director of Events before the event or ask for the Director of Events at Chess Control upon arrival at the site.

## 12 **TIE-BREAKS AND SCORING ADJUSTMENTS**

Tie-breaks are used to determine the order of awards.

### 12.1 **Calculating Tie-Breaks**

12.1.1 Computer programs are used to determine pairings, standings, and tie-breaks for all national scholastic events.

12.1.2 If tie-breaks are done by hand, they should be calculated at the end of the next-to-last-round. Careful preparation for manually calculating tie-breaks is necessary, even when using a computer.

### 12.2 **Players tied for 1<sup>st</sup> Place**

12.2.1 **All** players tied for first place are considered co-winners, but awards will be presented based on tie-breaks. (See Section 12.3 below.)



- 12.2.2 In the K-12 Grade Championships, the All-Girls Nationals, and the new Online National Scholastic Quick Championships, all section winners and co-winners shall be designated **National Champion**.
- 12.2.3 In the Spring Nationals and SuperNationals, ***only the winners and co-winners*** of a Championship Section shall be designated **National Champion**. Players who win an Under or Unrated Section shall be referred to as “1<sup>st</sup> Place Winners”, **NOT** as National Champions. (See also [Section 14.1.1.](#))

### 12.3 Order of Tie-Breaks

- 12.3.1 When individual scores are equal, the following order of tie-break systems will be used to determine individual awards:
- |                    |                      |
|--------------------|----------------------|
| 1. Modified Median | 4. Sonnenborn-Berger |
| 2. Median          | 5. Cumulative        |
| 3. Solkoff         | 6. Coin Flip         |
- 12.3.2 When team scores are equal, the following order of tie-break systems will be used to determine team awards:
- |                            |                     |
|----------------------------|---------------------|
| 1. Total Individual Median | 4. Total Cumulative |
| 2. Total Solkoff           | 5. Coin Flip        |
| 3. Total Sonnenborn-Berger |                     |

### 12.4 Scoring Adjustments for Opponents of a Disqualified Player

If a player is disqualified during or after an event, the results of the disqualified player’s opponents will be adjusted as follows:

- 12.4.1 If two or more rounds remain, all opponents of the disqualified player will receive a win by forfeit, unless they defeated the disqualified player, in which case they will retain a rated win.
- 12.4.2 If there is one round remaining, or if the tournament has concluded:
- 12.4.2.1 The last opponent of the disqualified player will receive a win by forfeit.
- 12.4.2.2 Opponents who lost to the disqualified player will receive a half-point bye.
- 12.4.2.3 Opponents who drew the disqualified player will receive a win by forfeit.
- 12.4.2.4 Opponents who defeated the disqualified player will receive a rated win.
- 12.4.3 A disqualified player’s score may not contribute to the player’s team score.

## 13 CONDUCT OF THE TOURNAMENT

### 13.1 Playing Area Setup Considerations for Over-the-Board (OTB) Events

- 13.1.1 The top boards should be roped off to highlight the top contestants and to prevent congestion. Some events have highlighted these boards by isolating them in a central area.
- 13.1.2 The use of demonstration boards, internet transmission, or closed-circuit TV to display the top boards is recommended. If closed circuit TV is used, place the monitors in a separate room.
- 13.1.3 To ensure silent playing conditions, access to the tournament room(s) is limited to the players, tournament staff, and media approved by US Chess. US Chess current practice is NOT to allow spectators in the Playing Hall while games are in progress.
- 13.1.4 The K-1 section of the K-6 Elementary Nationals must be closed to everyone except the players and tournament staff (always be prepared to restrict access when necessary). The organizer will provide a “parent waiting area” immediately adjacent and connected to the K-1 Playing Room. The organizer also will install measures to account for all K-1 players (e.g., nametags or wristbands), escorting them to/from bathrooms using volunteers (not a player’s parents), and handing off each player to their parent / guardian / coach after his/her game finishes.
- 13.1.5 In the interest of player security, all national events with elementary sections shall have specific “Player Exits” designated and marked by the tournament staff, based on the physical layout of the Playing Hall and the venue. Players are required to use these exits when leaving the playing floor. Players who use unauthorized exits are subject to questioning by tournament staff.
- 13.1.6 **When deemed appropriate by the US Chess Director of Events or the Event Organizer, a designated Parent Waiting Area (PWA) may ~~shall~~ be set up in a space outside or adjacent to the Playing Room, or in a part of the Playing Room that is far away from the players.** The PWA is where parents and other responsible adults can meet players who have finished their games. Adults may remain in this area from the start of the round until their players games are completed. At US Chess national scholastic events, the K-1 Section follows its own special procedures.



- 13.1.6.1 The PWA is NOT a spectator area.
- 13.1.6.2 Parents who think they have observed a Tournament Director engage a player they know shall refrain from contacting the tournament staff to inquire about **the engagement, because this behavior distracts the TDs from their assigned duties.**
- 13.1.6.3 When the PWA is inside the Playing Hall, persons in the PWA ***may not use any electronic devices*** (cell phones, tablets, laptops, walkie-talkies, etc.). Persons violating this rule will be warned first, and then may be asked to leave the PWA after repeated offenses during a round.

### **13.2 Announcements and Personal Photography**

- 13.2.1 Except in the event of an emergency, announcements may be made only before the start of each round.
- 13.2.2 US Chess practice is to not allow anyone on the playing floor once the round begins other than the players. Anyone wanting to take photographs of their players must do so before the start of a round and before the time when the tournament staff asks non-players to leave the Playing Hall.

### **13.3 Event Staff and Pairing Lists for Teams**

- 13.3.1 ***Event Staff:*** Relatives and coaches of players are not allowed to serve as TDs or Score Keepers in sections where their players participate.
- 13.3.2 A list of pairings by team should be provided to coaches as soon as possible before the start of each round. These lists usually are kept at Chess Control. All players from the team should be listed alphabetically regardless of section.

### **13.4 Game Result Slips**

- 13.4.1 The organizer will provide Game Result Slips for each section in the tournament. The use of different color slips for each section (or different sections in the same room) is a preferred practice.
- 13.4.2 The Game Result Slip will contain places for both players to print their name, school, section, round of play, grade in school, indicate the result, and sign the result. It also will provide a place for the TD to sign or place his/her initials.
- 13.4.3 Players must fill out and sign the Result Slip indicating the result of the game. A TD will pick up the form at the board. No player shall exit the Playing Room with the Game Result Slip for their game. Parents or coaches who discover that their player has a Result Slip should immediately go to Chess Control and turn in the Result Slip.
- 13.4.4 The Chief TD and Section Chiefs will ensure all Floor TDs are briefed on the requirement to record game issues and player claims on the backside of the game result slip to support the claims process.

### **13.5 Electronic Devices, including Cell Phones**

*(This entire section is new for 2023-24.)*

- 13.5.1 Electronic Devices are defined as cell phones, smart watches, tablets, computers, or any other device capable of chess analysis and/or communication with another device and/or person. See [Section 11.2](#) for rules concerning use of Electronic Notation Devices by players with special circumstances.
- 13.5.2 **Before the Start of the Game.** While entering the Playing Hall and checking their board numbers to find their pairings, players may use their electronic devices. However, before the start of the round, players ***must turn off all their electronic devices*** and either store them in a bag or place them face-up on the table. While face-up on the table, devices must be off—not on and in vibrate, silent, or airplane mode.
- 13.5.3 **When the Game Begins.** Once the round starts, players' devices must remain in their stored location or face-up on the table for the duration of the game.
- 13.5.4 **During the Game.** While games are in progress, players in the Playing Hall may not attempt to use their electronic devices or have them on their persons in any manner. Devices may not be taken to the bathroom or outside the Playing Hall.
- 13.5.5 **After the Game.** When a player's game is over, the player may collect the player's devices from the table or leave them in the player's bag. However, the player is ***not permitted to turn on*** or use the devices in any manner ***before the player has completely exited the Playing Hall***. Prohibited behavior includes (but is not limited to) taking photos of scoresheets, sending texts, and placing calls.
- 13.5.6 **Penalties for Electronic-Device Violations.**
  - 13.5.6.1 ***Situations with Mandatory Penalties.***

- 13.5.6.1.1 A player who uses an electronic device to obtain information and/or communicate while the player's game is in progress shall lose the game.
- 13.5.6.1.2 A player who leaves the Playing Hall or enters the bathroom with an electronic device on the player's person while the player's game is in progress shall lose the game—regardless of whether the device is on or off.
- 13.5.6.1.3 A player whose electronic device rings, vibrates, or interrupts a game in any way shall be penalized as follows:
- The player answers the device and/or processes what it is communicating: loss of game.
  - The player does not answer the device and/or does not process what it is communicating: loss of 30 minutes or 50% of remaining time, whichever is less. (Turning the device off without answering it and/or without processing what it is communicating will result in this less severe penalty.) Second offense during the same round: loss of game.
- 13.5.6.1.4 Use of device after the player's game is over but before the player has exited the Playing Hall in any round before the final round:
- Loss of 30 minutes in the next round, when the situation is clearly disruptive to other players, or
  - Loss of 10 minutes in the next round, when the behavior is not substantially disruptive to other players.
- 13.5.6.1.5 Use of device after the player's game is over but before the player has exited the Playing Hall in the final round:
- Loss of 1 point from the first tiebreak in the final standings, when the situation is clearly disruptive to other players, or
  - A warning, when the behavior is not substantially disruptive to other players.

#### 13.5.6.2 ***Situations with Discretionary Penalties.***

The scenarios below provide the TD with a choice of which of two possible penalties to impose. When deciding how to rule in these cases, the Section Chief shall consider the details of the violation, including (but not necessarily limited to) the player's grade/age, section (Championship, Under, or Unrated), and score. Violations in a Championship section are more likely to result in the more severe penalty.

- 13.5.6.2.1 While a player's game is in progress, possession of an electronic device that is on but is clearly not being used or that is off (*unless, in either situation, the device is taken to the bathroom or outside the Playing Hall, in which case 13.5.6.1.2 applies*): Two possible penalties:
- Loss of game, or
  - Loss of 30 minutes or 50% of remaining time, whichever is less.
- 13.5.6.2.2 If there is sufficient concern about fair play and/or if there are repeat violations, then the player's game may be forfeited and/or the player may be disqualified.

#### 13.5.7 **Exceptions**

- 13.5.7.1 If the organizer designates a specific location in the Playing Hall near the entrance/exit for players to use electronic devices, then upon completion of the player's game a player may use the player's device in the designated area to contact a parent or chaperone. The communication must be limited to arranging a pickup or merely informing the parent or chaperone that the game is over. Loud and/or disruptive behavior in this area can warrant a penalty.
- 13.5.7.2 If an emergency affecting a player occurs during a round, then the player may ask a TD for permission to use the player's device. If approved, use of the device must occur in the TD's presence.
- 13.5.7.3 Players with special circumstances shall follow the procedures in [Section 11.2](#).

### 13.6 **Media**

- 13.6.1 US Chess press have unrestricted access to the Playing Hall.
- 13.6.2 All other media desiring access to the Playing Hall or any aspect of the tournament must have the approval of the US Chess Director of Events. US Chess does not control media policies of the host facility.

- 13.6.3 Media requesting entry to the Playing Hall, but lacking appropriate access credentials, shall be sent to Chess Control by the Chief TD or Chief of the Floor.

### **13.7 Players Who Have Ongoing Games**

- 13.7.1 During their games, players should remain at their boards or in the Playing Room silently observing adjacent games within their Section.
- 13.7.2 A player with an active game may not leave the Playing Room except to travel to and from the authorized bathroom.
- 13.7.2.1 When going to the bathroom, players must leave their official scoresheet at their board.
- 13.7.2.2 When a “*Players Only*” bathroom is designated by the tournament staff, it is the only bathroom players shall use while their games are in progress. Players who use another bathroom can expect to be questioned by tournament staff.
- 13.7.2.3 After a player’s game ends, that player may no longer use the Players Only bathroom.
- 13.7.3 Players who need to leave the Playing Room during play for an extended period (more than 10 minutes) will inform one of the TDs in their Section before leaving the playing area. Players who have gone from the playing area for an unusual length of time should expect to be questioned by the tournament staff when they return to the board.
- 13.7.4 Exceptions include medical emergencies.
- 13.7.5 **Players whose games are complete are considered spectators** and must leave the tournament room immediately. Players are not allowed to re-enter the tournament room to check on a teammate or for any other reason without the express permission of a tournament director. Players who think they forgot their chess bag, scorebook, cell phone, coat, jacket, purse (etc.) in the Playing Hall should first go to Chess Control and get instructions from the tournament staff.

### **13.8 Contact between Players**

- 13.8.1 Except for a medical emergency, a player whose game is in progress shall not have contact with anyone without first getting permission from a Tournament Director. Players have a heightened sensitivity towards any behavior that has an appearance of cheating. A good practice is for players to treat friends and teammates as strangers—avoiding any interaction while their games are in progress. Having a nearly silent Playing Hall minimizes distractions.

### **13.9 Answering Questions or Addressing Uncertainty about Checkmate or Stalemate**

- 13.9.1 **(Revised for 2023-24)** When a player asks a TD whether a position on the board is checkmate or stalemate, the TD will ensure the clock is paused and then ask both players, “What do you think?”
- If both players agree, the result is confirmed regardless of the position on the board.
  - If one player expresses uncertainty, the TD will instruct the player whose turn it is to start the clock and make a move.
  - If a legal move is played, the game shall continue.
  - If the players conclude that no legal move is possible, the TD further asks, “Is the King in check?”
  - Depending on the answer, the TD rules checkmate or stalemate.

## **14 TROPHIES & AWARDS**

### **14.1 General Specifications & Principles**

- 14.1.1 Only players and teams who win, or are tied for, 1<sup>st</sup> place ***in a Championship Section*** of the event shall be designated as “National Champion” or “National Co-Champion.” Players and teams who win 1<sup>st</sup> place in any Under or Unrated section shall not be recognized by US Chess as National Champions and it is inappropriate for those players or teams to describe themselves as such.
- 14.1.2 Players can win only one individual award. Place awards take precedence over all other awards.
- 14.1.3 Award size, looks, weight and quality should display the prestige and importance of a National Chess Championship event.
- 14.1.4 The Director of Events, in consultation with the Scholastic Council, may use alternative awards **(such as medals)** in place of trophies for individual winners.

### **14.2 Sizes and Face Plates for Trophies**

- 14.2.1 **Championship Sections**. If trophies are awarded, trophy sizes for Individuals and Teams in each Championship Section will be the same. Trophy sizes will be graduated from a **minimum** of 48" in

height (for first place) down to a **minimum** of 24" (for the lowest place). The face plates for winning individuals and teams will bear the words "National Champion."

- 14.2.2 **Non-Championship Sections.** If trophies are awarded, Team and Individual trophies in Non-Championship sections shall be no taller than 32" in height down to a minimum of 14" for the lowest place. Tied-for and Rating class trophies shall be smaller than the lowest place trophies. The face plates for first-place individual and team awards in the non-championship sections will bear the words "1<sup>st</sup> Place." **They shall not use the word "Champion" or "Champions,"** which are reserved only for the face plates of the top trophies in the Championship sections.

### 14.3 Quantities of Awards

- 14.3.1 In the Spring National Scholastic tournaments, including SuperNationals, US Chess shall present awards to the Championship and Non-Championship sections as listed below:
- 14.3.1.1 Championship Sections: A minimum of 1 individual award per 10 players and a minimum of 1 team award per 15 players, based on average attendance in the two previous years. In addition to the team award, individual plaques to 4 players and the coach to each of the top 5 teams.
- 14.3.1.2 Under Sections: A minimum of 1 individual award per 15 players and a minimum of 1 team award per 20 players, based on average attendance in the two previous years. In addition to the team award, individual plaques to 4 players and the coach of the first-place team. These plaques shall be at least one-quarter (25%) smaller than the plaques awarded to the players and coaches in the Championship sections.
- 14.3.1.3 Unrated-only Sections: A minimum of 1 individual award per 15 players and **up to (but not more than) 5 team awards**, based on average attendance in the two previous years. **No individual plaques to a team.**
- 14.3.1.4 Where new sections are involved and there is no history, the Director of Events will work with the Scholastic Council to identify appropriate quantities of individual and team awards.
- 14.3.2 Awards for the **top 3 places** shall be presented in each of the following class sections:
- 14.3.2.1 High School (K-12) Nationals:
- K-12 Championship Section: 1900-1999, 1800-1899, 1700-1799, 1600-1699, 1500-1599, 1400-1499, Under 1400, and Unrated
- 14.3.2.2 Middle School (K-8) Nationals:
- K-8 Championship Section: 1700-1799, 1600-1699, 1500-1599, 1400-1499, 1300-1399, 1200-1299, Under 1200, and Unrated
- 14.3.2.3 Elementary (K-6) Nationals:
- K-6 Championship Section: 1400-1499, 1300-1399, 1200-1299, 1100-1199, 1000-1099, Under 1000, and Unrated
  - K-5 Championship Section: Same class awards as K-6 Championship
  - K-3 Championship Section: 1100-1199, 1000-1099, 900-999, 800-899, Under 800, and Unrated
- 14.3.2.4 Bughouse National Championship
- High School (K-12) Nationals: K-12 section only
  - Middle School (K-8) Nationals: K-8 section only
  - Elementary (K-6) Nationals: K-6 section only
  - SuperNationals: Sections for K-12, K-8, and K-6
- 14.3.2.5 Blitz National Championship
- High School Nationals: K-12 section only
  - Middle School (K-8) Nationals: K-8 section only
  - Elementary (K-6) Nationals: Sections for K-6 and K-3
  - SuperNationals: Sections for K-12, K-8, K-6, and K-3
- 14.3.3 **(Revised for 2023-24)** Each grade level of the **K-12 Grade Nationals: Top 10 individuals** and **Top 5 teams** per 100 players in each section (averaged over the past two years), plus the following Class Awards:

Grades	Class Awards by Grade – Top 3 Players by Class			
<b>9<sup>th</sup> - 12<sup>th</sup></b>	1600-1899	1300-1599	1000-1299	Under 1000
<b>6<sup>th</sup> - 8<sup>th</sup></b>	1400-1699	1100-1399	800-1099	Under 800
<b>4<sup>th</sup> - 5<sup>th</sup></b>	1100-1399	800-1099	600-799	Under 600

Grades	Class Awards by Grade – Top 3 Players by Class			
	1000-1199	800-999	600-799	Under 600
2 <sup>nd</sup> - 3 <sup>rd</sup>	1000-1199	800-999	600-799	Under 600
Pre-K, K & 1 <sup>st</sup>	800-999	600-799	400-599	Under 400

- 14.3.4 Each section of the **National Youth Action Championships**: 10 individual and 5 team awards per 100 players in each section, based on the average attendance in the past two years; plus, plaques for 4 players and 1 coach for each of the top 5 teams.
- 14.3.5 Each age group of the **Junior Chess Congress**: Top 10 individual finishers in each section and top 5 teams.
- 14.3.6 **Online National Scholastic Quick Championships**. To be separately determined and published as part of the rules for this event.
- 14.3.7 In addition to the minimum number of awards listed above, extra awards should be presented based on the following calculation: Add the total number of players who have participated in each section over the last two years and divide the average number by 6. These awards should be presented only in the case that the final number exceeds the minimum requirement. These additional awards may be allocated to those tied with place award winners.
- 14.3.8 Ribbons and certificates for each participant have been used effectively at over-the-board events. Such items need no ceremonies and shall be distributed to participants as deemed appropriate by the Chief TD or each Section Chief. Organizers should be aware that tangible awards of some nature are recommended for the enhancement of national scholastic events. Plans for awards should be included in the bid and in advance publicity for the event.
- 14.3.9 Special awards (gender specific awards, etc.) are prohibited. Grade-based awards are prohibited at all Spring Nationals.
- 14.3.10 Organizers shall not accept donations of extra awards without the approval of US Chess.
- 14.3.11 For Side Events held as part of a national scholastic tournament the minimum awards will be equal to the minimum offered in the Championship Section. See Appendices A and B for specific information on the Blitz and Bughouse events.

## **15 SCHOLASTIC MEETING AND OTHER MEETINGS**

### **15.1 Scholastic Meeting**

- 15.1.1 The Director of Events will schedule a Scholastic Meeting at every US Chess National Scholastic Event. This meeting usually occurs 15-30 minutes after the start of one of the rounds of play and is led by the tournament's US Chess Scholastic Representative or the Organizer. Senior staff from US Chess frequently attend. This meeting should last no longer than one hour.
- 15.1.2 The purpose of the meeting is to discuss the tournament and any scholastic chess topics. This meeting is not the place to raise issues about your specific player's game results.

### **15.2 Other Meetings**

- 15.2.1 Additional meetings and seminars are common at US Chess National Scholastic events. Examples include, but are not limited to: Grandmaster Simultaneous Exhibition, Book Signings, and Lectures; discussions on Women's Chess and/or International Youth Chess; US Chess Executive Director's "Open Door", etc.
- 15.2.2 All meetings must be approved by the Director of Events or Organizer in time for them to be printed in the event Program Book.

## **16 INTERNET COVERAGE AND SPECIAL CONSIDERATIONS**

### **16.1 Before the Tournament**

- 16.1.1 ***At least four months before the tournament***, US Chess or the organizer will provide a dedicated "Event Home Page" for each National Scholastic Tournament. The page will have essential information about the event (e.g., event-specific rules, lodging instructions and locations, registration fees and instructions, sectioning, awards, etc.). The home page also will contain links to make lodging arrangements and to enter the tournament. To find the home page for a scholastic national tournament, go to [www.uschess.org](http://www.uschess.org), scroll to the bottom of the home page, and click on the "National Events Calendar" link.
- 16.1.2 The Event Home Page will have links to the list of advance entries (pre-registered players) showing each player's name, school, grade in school, section entered, and Bye requests.



- 16.1.3 When possible, the Event Home Page will include a PDF or on-line edition of the official Event Program that participants can download or print.

## **16.2 During the Tournament**

- 16.2.1 After the event begins, US Chess or the Organizer will add links on the Event Home Page enabling players easy access the pairings, results, and standings for all sections throughout the tournament.
- 16.2.2 When pairings are posted on-line, players, parents and coaches must remember that the “Official Pairings” are those pairings posted near or inside the Playing Area. There are occasions when the on-line pairings are different. When this occurs, the pairings posted near or inside the Playing Hall have precedence.
- 16.2.3 For each round, the tournament staff shall, at a minimum, post on-line the next round’s pairings and the current standings. In addition, for the last 3 rounds of the tournament, the event staff also will post a Wall Chart online, sorted in pairing number sequence and showing each player’s total score, round-by-round result, and color history. Because Wall Charts for sections can be extensive, they will only be printed and posted on-site at the discretion of the Organizer or Chief Tournament Director.

## **16.3 After the Tournament**

- 16.3.1 US Chess or the Organizer will update the Event Home Page and include links to pages containing the Official Results.
- 16.3.2 US Chess or the Organizer also may provide links to one or more Post-Event Surveys being used to gather information from participants.

## **16.4 Recommended Special Considerations**

- 16.4.1 Provide a large map of the United States, with the number of players from each state indicated on the map.
- 16.4.2 Provide coaches with a copy of the US Chess tournament cross-table as soon as it is available online.
- 16.4.3 Organized activities for players add to the attractiveness of these events. Such activities, including simultaneous exhibitions or lectures by famous players, are recommended.
- 16.4.4 It is strongly recommended that side events (blitz tournaments, etc.) be completed on the day before the start of a national scholastic event.

## **17 SUPERNATIONALS**

### **17.1 Definition & Specifications**

- 17.1.1 A SuperNationals is a concurrent, co-located, single tournament that includes all three Spring Nationals.
- 17.1.2 SuperNationals shall follow all specifications in the previous sections of these regulations in addition to the regulations in this section.
- 17.1.3 SuperNationals may be held no more frequently than every four years. The first SuperNationals was held in 1997. The next SuperNationals (“SN VIII”) will be held in May 2025. SN VII was scheduled for 2021 but was cancelled due to COVID-19 restrictions.

## **18 REGULATIONS FOR ONLINE NATIONAL SCHOLASTIC TOURNAMENTS**

**Purpose:** This new section of the Scholastic Regulations is NOT rules for the new Online National Scholastic Quick Championships—those rules will be separately published. Rather, this section supplements the *Scholastic Regulations* and the 7th Edition of the *US Chess Official Rules of Chess*, especially Chapter 10: “Rules for Online Tournaments and Matches”. This section provides rules to help organizers create ONLINE events. The regulations detailed below are based on more than a year of practical experience running multiple large online scholastic tournaments at state- and national-levels using a variety of online chess-playing platforms—with and without the aid of remote monitoring video capabilities. Situations not covered directly by this section, other parts of the Scholastic Regulations, or the Official Rules of Chess should be brought to the attention of the Scholastic Council.

### **18.1 Event Dates and Tournament Format**

- 18.1.1 Scheduling Considerations.
- 18.1.1.1 If an online event is a replacement for an over-the-board (OTB) tournament, then the organizer should make every effort to schedule it for the same weekend when the OTB event would have been held.
- 18.1.1.2 The dates of the events shall be coordinated with the US Chess Office.



**18.1.2 Tournament Format.**

- 18.1.2.1 The format for an online tournament is not required to be identical to the OTB version of the event. But, in general, the number of rounds should be kept the same.
- 18.1.2.2 In a similar way, the time control traditionally used for the OTB version of the event can be kept the same or shortened as the organizer sees fit; however, the organizer also must consider the prestige and tradition of the OTB National Event.

**18.2 Chess Platform****18.2.1 Selection.**

- 18.2.1.1 Selecting the appropriate platform for any Online National Scholastic event is one of the most important decisions the organizer makes.
- 18.2.1.2 Considerations include, but are not limited to:
  - Whether the platform allows the use of ‘manual’ pairings submitted by the tournament staff.
  - The tournament staff’s experience and familiarity with the chosen platform.
  - What hardware is required by event participants.
  - The platform’s compatibility with various methods for remotely monitoring players.

**18.2.2 Endorsed Fair Play Algorithm.**

- 18.2.2.1 All Online National Scholastic events will be held on platforms with fair play algorithms endorsed by US Chess.

**18.3 Organizers’ Responsibilities****18.3.1 Requirements.** All online national scholastic events must meet at least one of the two following conditions:

- 18.3.1.1 If the event is organized directly by US Chess, the Director of Events will work with the Scholastic Council to develop and publish event-specific rules and guidelines.
- 18.3.1.2 If the event is organized by an organizer awarded the event through a US Chess bidding process, then the organizer shall work through the US Chess Director of Events with the Scholastic Council to set event-specific rules and guidelines.

**18.3.2 Contract with the Platform Vendor.**

- 18.3.2.1 The business contract between the organizer and the platform is the responsibility of the organizer.
- 18.3.2.2 When US Chess is the organizer, the US Chess Director of Events will make the contract with the platform vendor.

**18.3.3 Event Name.**

- 18.3.3.1 The proposed name of the event shall be approved by the Director of Events.
- 18.3.3.2 Events proposed as a “National Championship” must be approved by the US Chess Executive Board.

**18.3.4 Registration Process.**

- 18.3.4.1 US Chess will provide the registration system for online national scholastic events that are organized directly by US Chess.
- 18.3.4.2 For events awarded to an organizer external to US Chess the organizer is responsible for the event registration process unless the terms of the awarded bid state otherwise.
- 18.3.4.3 Organizers should require players to certify that all information presented on their entry form is true and correct. Incorrect or false information may result in a player being ruled ineligible to play.

**18.3.5 Event Rules.** The rules to be used for the tournament shall be published no later than the date registration opens for the event. This includes rules governing start times (round times), time controls, permitted playing devices.**18.3.6 Player Usernames and Passwords.**

- 18.3.6.1 Players are required to use the username they provided during registration or as assigned by the tournament.
- 18.3.6.2 Players who change or forget their username and/or password may not be able to play in the tournament.
- 18.3.6.3 The organizer should maintain a list of all authorized usernames and provide a process for players to recover their password.

- 18.3.7 Optional Opening Ceremony. The organizer may choose to have an online opening ceremony. Such a ceremony, however, is not designed to answer questions or address technical issues—the priority is to begin the first round on time.

#### **18.4 Organizing Team/ Staffing**

- 18.4.1 Chief Tournament Director. The Chief TD must:
- 18.4.1.1 Be acceptable to US Chess.
  - 18.4.1.2 Be certified as a National Tournament Director.
  - 18.4.1.3 Have strong experience:
    - Directing online events.
    - Using the platform chosen for the tournament.
    - In fair play methods for reviewing games and the overall event's results.
- 18.4.2 Number of TDs. The ratio of players to TDs will greatly depend on the event requirements (e.g., camera monitoring, chat platform, etc.). In general, every 25-30 camera views require one online TD.

#### **18.5 Player Eligibility**

- 18.5.1 US Chess and Platform Membership.
- 18.5.1.1 Players must be members in good standing with the US Chess Federation.
  - 18.5.1.2 Player also must be in good standing with the platform vendor contracted for the tournament. US Chess cannot mandate that a player be allowed to play on a platform if the player has been banned by the platform vendor.
- 18.5.2 Organizer's and/or Chief TD's Rights. The organizer and/or Chief TD reserve the right to rule a player as ineligible or disqualified if:
- 18.5.2.1 A player has a fair play violation on any platform endorsed by US Chess.
  - 18.5.2.2 The platform vendor for the tournament informs the organizer or Chief TD during the event that a player has committed a fair play violation.
  - 18.5.2.3 A player is determined by the organizer / chief TD to have violated fair play after completion of post-event analysis in accordance with Chapter 10 of the *US Chess Official Rules of Chess* and the specific rules for the tournament.

#### **18.6 Players' Equipment to Play in the Event**

All aspects of the player's technical setup are the responsibility of the player, not of US Chess.

- 18.6.1 Computer or Tablet.
- 18.6.1.1 Some platforms do not allow players to use a tablet computer.
  - 18.6.1.2 When the event rules specify remote monitoring by video camera or screen sharing, the player's computer shall be capable of fulfilling the camera and/or screen sharing requirements without interrupting the player's game screen.
  - 18.6.1.3 Use of any additional electronic device is prohibited except for webcam monitoring. Special considerations, such as dual monitors, physical chessboards, headphones, or headsets (etc.) must be approved by the Chief TD or the conditions for their use specified in the instructions for the tournament.
  - 18.6.1.4 Once a player starts his/her game on one device, the player should NOT try to open the game on a second window or on another electronic device. These activities risk confusing the chess platform, are likely to disrupt play, and usually trigger the chess platform's fair play detection procedures (because the platform senses the second device and interprets it as a violation of fair play).
  - 18.6.1.5 While a player's game is in progress no other electronic devices may be used by the player that can calculate moves, receive moves, or send moves. This rule does not apply to a player's cellphone when it is being used solely as one of the tournament's required remote monitoring devices.
  - 18.6.1.6 Cell phones are not authorized as playing devices, no exceptions.
- 18.6.2 Internet Connection.
- 18.6.2.1 All players need a reliable internet connection. US Chess recommends a high-speed internet connection with an upload capability of at least 2 megabits per second (Mbps).
  - 18.6.2.2 An unreliable or slow internet connection and/or technical setup errors might result in a loss or forfeit loss of a game.

18.6.2.3 The tournament instructions shall provide clear guidance:

- On the most likely platform and internet glitches that may affect a player. For example, what to do if a player experiences an unintentional interruption in a game.
- For players who fail to log in to the playing and/or game monitoring platform in a timely manner.
- On the consequences of disconnections from the playing and/or game monitoring platform that cannot be attributed to a fault of the platform or player's internet service (e.g., intentional disconnections).

18.6.2.4 Players who lose a rated game by disconnection are deemed to have withdrawn from the tournament.

## **18.7 Team Requirements for Online National Scholastic Events**

18.7.1 The organizer shall work with the chess platform vendor to implement the same team pairing restrictions specified in [Section 10](#).

## **18.8 Communications with Event Participants**

18.8.1 Before the Event.

18.8.1.1 Organizers are strongly encouraged to hold several town-hall meetings to inform players, parents, responsible adults, and coaches about the specifics of the tournament—and to give attendees opportunities for Q&A.

18.8.1.2 The organizer must provide rules, setup specifications, guidelines, and directions to players in advance.

18.8.2 During the Event.

18.8.2.1 The organizer shall arrange for and provide a clear means of communication between players and TDs throughout the tournament.

18.8.2.2 The organizer shall have a separate line of communication between parents and Chess Control or a Help Desk to handle any requests during the event.

18.8.2.3 Live streaming and/or online coverage of the tournament are great ways to get the general public interested in and involved with national chess championships. However, when these options are used the organizer and Chief TD need to integrate measures in their event rules that prohibit players from viewing these streams while their games are in progress.

## **18.9 Ratings for Sectioning, Pairings, and Prize Eligibility**

18.9.1 Ratings to Use.

18.9.1.1 US Chess Ratings must be used for pairing purposes except as specified in [Section 4.6](#) (Other Rating Systems). Any pairing method that does not use these ratings is not acceptable to be used at a National Online Youth/Scholastic Event.

18.9.1.2 Organizers are encouraged to use the highest of a player's over-the-board Regular, Quick, Online Regular, and Online Quick rating. The time control being used for the tournament will dictate whether to use regular, quick, or both.

18.9.1.3 For players without US Chess ratings, or whose US Chess ratings reflect prolonged periods of inactivity, ratings from other rating systems may be used as described in [Section 4.6](#). A more current US Chess rating is preferred except in cases where the number of games in the other rating system is a far better indicator of the player's current strength.

18.9.2 Unrated Players. (See [Section 4.7](#).)

18.9.3 Bye Requests and Withdrawals.

18.9.3.1 Organizers shall carefully consider and outline the player's ability to request byes during the tournament. This should be clearly written into the rules for the event along with the deadlines for requesting byes.

18.9.3.2 Clear instructions are needed on what channel and notification method players should use if/when they want to withdraw.

## **18.10 Chess Notation**

18.10.1 Notation is not required for online tournaments because all platforms record both players' moves.

18.10.2 Players are allowed to write their moves (in order to "stay in shape" for over-the-board play). If the players are monitored via webcam, the notation sheet must be visible on the camera and tournament directors must have a clear view of what the player is doing.

- 18.10.3 The moves given by the platform are the official moves made by the player. A player cannot use his/her notation sheet to initiate a claim.

### **18.11 Tie Breaks**

- 18.11.1 Tie breaks will be determined in accordance with [Section 12](#), or the separate rules published for the tournament.

### **18.12 Playing Conditions for the Players**

- 18.12.1 During their games, players must be alone in a quiet room with no background noise. Players may be penalized for violating this rule.
- 18.12.2 Before games begin, players and parents shall remove all other electronic devices from the Playing Room.

### **18.13 Scoring of Forfeited or Disconnected Games**

- 18.13.1 When a Player Fails to Log-In.
- 18.13.1.1 A player who does not log-in for a scheduled round within the specified minutes after the start of the round shall lose the game by forfeit. Event instructions shall specify the length of the “forfeit time.”
- 18.13.1.2 A player forfeited due to failure to log-in will be dropped from the remainder of the tournament unless the player notifies the tournament staff (in accordance with the event instructions) and expresses a desire to stay in the tournament.
- 18.13.2 When Neither Player Makes a Move
- 18.13.2.1 If both players are logged-in but have not made at least one move, the game will be declared a forfeit loss for the absent player. Ratings will not be impacted.
- 18.13.2.2 The absent player will be dropped from the remainder of the tournament unless the player notifies the tournament staff (in accordance with the event instructions) and expresses a desire to stay in the tournament.
- 18.13.3 When Both Players Have Made At Least One Move
- 18.13.3.1 If both players have made at least one move and the game ends because of a disconnection, then the game will be rated.
- 18.13.3.2 The disconnected player will be removed from the remainder of the tournament unless the player notifies the tournament staff (in accordance with the event instructions) and expresses a desire to stay in the tournament.
- 18.13.4 Event organizers shall provide instructions on what players removed from the tournament should do if they wish to be paired for subsequent rounds.

### **18.14 Fair Play Monitoring**

- 18.14.1 Organizers must have a complete fair play monitoring process in place during and after their event. The procedures chosen may be a function of the size of the event and the number of tournament directors required to implement the procedures.
- 18.14.1.1 During play, the ideal process is to integrate capabilities for remote monitoring of all players by the tournament staff (e.g., Zoom). In addition, most game platform vendors can provide fair play analysis during games. The Chief TD and/or organizer shall meet with the platform vendor before the tournament to understand and discuss the procedures the platform uses to detect fair play issues during games-in-progress. This group also shall discuss how issues will be brought to the attention of the tournament staff and how the tournament staff shall handle them.
- 18.14.1.2 After the tournament the Chief TD or organizer can work with the platform vendor to perform a more thorough analysis of all games as well as any suspect games. Refer to Chapter 10 in the *US Chess Official Rules of Chess* for more guidance.
- 18.14.2 Remote Monitoring Using Video Technology.
- 18.14.2.1 When the tournament plans to use remote monitoring capabilities the event instructions or rules must clearly ***specify the minimum hardware and software requirements of all players***. These instructions may include:
- Name of the video platform (e.g., Zoom or a similar capability).
  - Required camera views (e.g., a facial view and a second view of the player and his/her device from a 45-degree angle behind the player).
  - Audio settings (e.g., should players be muted or unmuted while playing their games).

- How to communicate with or respond to the tournament staff.
- How to share screen.
- Any breakout room scenarios.
- Procedures players must follow for use of the bathroom.

18.14.3 Recommended Video Monitoring Requirements. Experience has shown that the following two-camera setup works well.

18.14.3.1 **Side-view or Rear-view Camera.** This camera is positioned to provide a view of the player and his/her playing device. The camera is placed at approximately a 45-degree angle to the left or right rear of the player and elevated to at least the same height as the player's desktop. The view must show the player's upper body, arms, head, and playing device's screen. All of these elements must be visible simultaneously in the video stream. Players may use a cell phone or a separate webcam to provide this view. Players should ensure this camera uses a continuous source of power and does not rely on battery power alone, to avoid interruptions in the camera's video feed, resulting from a loss of battery power.

18.14.3.2 **Front-view Camera.** Provides a head-on view of the player and enables easier communication between the player and the TD. The view of the player must include the player's chest from the armpits to the top of the head.

- If the player's computer has a built-in webcam, it should be used.
- A separate webcam is an acceptable option if the computer does not have a built-in camera, or it does not work.
- A tablet can be used as a front-view camera only if the player is playing on a separate device (a computer or an additional tablet).

### **18.15 Penalties during the Event**

18.15.1 A start-of-the-round forfeit/no-show time must be specified in the rules for the tournament. This can be shorter than in a traditional OTB tournament (e.g., 15 or 20 minutes in a Game/45 or Game/60 online event). For time controls shorter than Game/20 (increment or delay) we do not recommend a forfeit time or no-show time.

18.15.2 The Chief TD may impose penalties for prolonged or repeated disconnections. These penalties should be made clear in the rules for the event.

18.15.3 The organizer and Chief TD reserve the right to remove a player from the tournament and make an adjustment to the scores of the players and her/his opponents. For the proper adjustment of scores, refer to [Section 12.4](#).

### **18.16 Trophies and Awards**

18.16.1 Results are not official until the fair play process has been completed, which may take up to several weeks.

18.16.2 In lieu of an official Awards Ceremony, Organizers should consider a post-event celebration of all the individual and team accomplishments. This also can showcase the Sponsors, Tournament Directors, and volunteers who made the event possible.

18.16.3 The organizer should offer awards similar to OTB National Scholastic/Youth Events. In addition, the organizer should arrange for any awards earned to be shipped directly to the players.

*////////// End of the main text, Appendices begin on the next page //////////*

**APPENDIX A: NATIONAL SCHOLASTIC BLITZ CHAMPIONSHIP REGULATIONS***(Last updated August 2022)*

- A1.0 It is highly encouraged to have a Blitz Tournament as a side event at all National Scholastic events. However, ***the only Blitz Tournaments that will be considered as National Scholastic Championships will be those associated with the Spring Nationals.***
- A2.0 The rules to be used for a National Scholastic Blitz event (Appendix A-1) shall be displayed on the US Chess website with a link to the Blitz Rules on the home page for the main tournament.
- A3.0 Tournament Format
- A3.1 Sections will be divided as follows:
- **High School (K-12) Nationals:** K-12 Championship
  - **Middle School (K-8) Nationals:** K-8 Championships
  - **Elementary (K-6) Nationals:** K-6 Championship and K-3 Championship
  - **SuperNationals:** K-12 Championship, K-8 Championship, K-6 Championship, and K-3 Championship
  - **Grade (K-12) Nationals:** K-12 Championship and K-6 Championship (these are not national championship side events)
- A3.2 Pairings will be made using the higher of each player's over-the-board (OTB) US Chess Regular and Blitz ratings, as listed in the Rating Supplement used for the main tournament. Established OTB ratings take precedence over provisional ratings. If a player has neither a US Chess Regular rating, nor a US Chess Blitz rating, but has a rating in another OTB rating system or the US Chess Online Rating system, then the Chief TD has the option to follow procedures specified in 28D and 28E of the Rules of Chess to assign the player a rating. If a player receives an assigned rating, it will be used for pairings and prize eligibility. See Scholastic Regs 12.4-5 for full details.
- A3.3 The tournament will be a 6-round double-Swiss tournament.
- A3.4 The time control is Game/5, delay 0—except at Grade (K-12) Nationals, where the time control is Game/3, increment 2.
- A3.5 Registration is to be online (when available) and also allowed on-site up to 4:00 pm local time on the tournament day. Players in line at 4:00 pm will be allowed to register. Additional entrants might be allowed at the discretion of the Chief TD and Tournament Organizer.
- A3.6 Round 1 shall begin at 5:00 pm local time on Thursday, with subsequent rounds held as soon as possible after the end of the previous round.
- A3.7 No round shall begin after 9:30 pm.
- A4.0 The individual and team awards for the Championship Section, as explained in A3.1 above, shall be the same as in the Championship Section for that Spring National. Other sections will have the number of awards that are deemed necessary, based on projected attendance.



**APPENDIX A-1: US CHESS SCHOLASTIC BLITZ RULES***(Last updated September 1, 2023)*

1. Format: 4 or 5-round double-Swiss tournament. Time control is Game/5, delay 0.
  - a. One “round” of Blitz chess consists of 2 games: one played with the White pieces, the other played with the Black pieces (and vice-versa for the opponent). In the first game, White goes to the player listed as WHITE on the pairing sheet.
  - b. Each player must complete all his/her moves within the time control specified above.
2. **Blitz will be played using Touch-Move rules, not “Clock-Move.”** Therefore, if a player touches one piece, then moves another and presses the clock, the opponent may press the player’s clock to force the player to move the piece touched or may stop the clock to claim a violation. A penalty may be assessed.
3. The current edition of the Official Rules of Chess and the current online edition of “Rulebook Changes” shall be used to resolve any situation not covered by these Scholastic Blitz Rules. National Scholastic Blitz tournaments will use US Chess Official Rules of Chess – Chapter 11: Blitz Rules with the following exceptions:
  - a. Each player is responsible for coming to the game with a clock. If neither player has a clock, then both players will receive a forfeit loss for both games. All players are required to know how to operate their clock and how to make any changes to the clock that may be necessary during a game.
  - b. Only a TD may determine if a clock is defective and change the clock once the game begins.
  - c. Each player must press the clock button with the same hand used to move the pieces. This rule also applies to castling and capturing. Moving with one hand and pressing the clock with the other hand is not allowed.
  - d. At the start of the event, the TD may state the direction the clocks are to face. The player with the Black pieces then chooses which side of the table on which to sit.
  - e. Pressing the clock:
    - 1) Except for pressing the clock button or straightening the clock, neither player should touch the clock.
    - 2) If a player knocks over the clock, the opponent gets one minute added to the opponent’s clock.
    - 3) If a player’s clock does not start, the opponent may try to start it, by pressing the player’s clock button. However, if this procedure is unsuccessful, the opponent should signal for a TD.
    - 4) After moving, each player must always be allowed to press the player’s clock.
    - 5) Neither player should keep a hand on (or hovering over) the clock.
  - f. Knocking over a piece:
    - 1) It is unsportsmanlike conduct to knock over a piece and then press the clock.
    - 2) The first offense will result in a warning from the TD. A second offense will result in one minute being added to the opponent’s clock. A third offense will result in the loss of the game.
    - 3) A player will not lose a game on time if the player’s opponent knocks over a piece and presses the clock without picking it up. The player will receive an additional minute to continue the game.
  - g. In case of a dispute, either player may stop the clock to summon a TD. In any unclear situation, the TD will consider the testimony of both players and any reliable witnesses before the TD renders a decision. If a player wishes to appeal the decision of a TD, the player must first appeal to the Section Chief. Then, if necessary, the player may appeal to the Floor Chief TD, whose decision in all cases is final.
  - h. Excessive banging of pieces or clock will not be tolerated. The offending player may be penalized with loss of time.

**APPENDIX B: US CHESS SCHOLASTIC BUGHOUSE REGULATIONS***(Last updated September 2021)*

- B1.0 It is highly encouraged to have a Bughouse Tournament as a side event at all National Scholastic events. However, ***the only Bughouse Tournament that will be considered as a National Scholastic Championship will be the bughouse event associated with the Spring Nationals.***
- B2.0 Tournament Format
- B2.1 Bughouse Rules. See Appendix B-1 on the next page.
- B2.2 The tournament will begin at 11:00am on Thursday, with subsequent rounds held as soon as possible after the previous round ends. Please refer to the official tournament announcement for the cut-off time for Bughouse entries.
- B2.3 All entries are to be onsite on Wednesday evening and Thursday morning, with registration stopping at 10:00am. Contestants in line at 10 am will be allowed to register. Additional entrants may be allowed at the discretion of the Chief TD and Tournament Organizer. Please refer to the official tournament announcement for the Round 1 start time.
- B2.4 The rules to be followed for a National Scholastic Bughouse tournament (Appendix B-1) shall be displayed at an appropriate easy-to-find location on the US Chess website.
- B3.0 The team awards for the Championship Section, as explained in B2.1 above, shall be the same as in the Championship Section for that Spring National. Other sections will have the number of awards that are deemed necessary, based on projected attendance.

**APPENDIX B-1: US CHESS SCHOLASTIC BUGHOUSE RULES***(Last updated September 2021)*

1. Teams are composed of two players. No substitutions are allowed.
2. Each team match consists of two games, one for each player, against the other team.
3. Each team decides which player is to play white and which player is to play black in each game of the two-game match.
4. The time control is Game in five minutes, with no delay (G/5; d/0)
5. Each player is responsible for providing a clock. If players in an individual game do not have a clock, both players receive a forfeit loss for that game.
6. **The game is clock-move.** A move is not completed until the opponent's clock has been started.
7. Each match is concluded as soon as one of the players on a team wins the game.
8. **Illegal moves lose if they are properly claimed.**
  - a. If an opponent makes a move and starts the opponent's clock, the player forfeits the right to claim that illegal move.
  - b. Before play begins, both players should inspect the position of the pieces and the setting of the clock since once each side has made a move all claims for correcting either are null and void. The only exception is if a clock is set for over five minutes, then the tournament director (TD) may reduce the time, accordingly.
  - c. Illegal moves unnoticed by both players cannot be corrected afterwards, nor can they become the basis for later making an illegal move claim. If the King and Queen are set up incorrectly when the game begins, then the player may castle short on the Queen side and long on the King side. Once each side has made a move, incorrect setups must stay.
9. When a piece is captured, it is passed to the partner only after the move is completed.
10. A player has the option of either moving one of the pieces on his board or placing on the board a piece received from the partner.
  - a. A captured piece may be placed on any unoccupied square on the board, with the exception that a pawn may not be placed on the first or last rank.
  - b. Pieces may be placed to create check or checkmate.
  - c. If a player promotes a pawn, the pawn must be left on the board and the player must clearly indicate to the opponent to what piece the pawn is being promoted. The promoted pawn will be laid on its side to indicate that it is a promoted pawn. A promoted pawn, which has been captured, reverts to a pawn and not the promoted piece.
11. A player may not attempt to hide pieces captured by either player in the team. The first attempt will result in a warning and the second attempt will result in forfeiture of the game.
12. **Partners may verbally communicate throughout the game.** It is legal to make move suggestions to partners. It is illegal, and grounds for forfeiting the game or the match, if a player physically moves one of their partner's pieces.
13. Each player must press the clock button with the same hand used to move the pieces, except that a player may use both hands during castling. When capturing, only one hand may be used. The first infraction will result in a warning, the second in a one-minute penalty and the third will result in forfeit of game.
14. Players should not touch the clock except for pushing the button after making a move or to straighten it.
  - a. If a player knocks the clock over, the opponent gets one minute added to his/her clock.

- b. If the opponent's clock does not start, a player may start the opponent's clock re-start his/her side. Call the TD if this procedure is unsatisfactory.
  - c. Each player must always be allowed to press the clock after a move is made. Players should not keep their hands on or hover over the clock.
15. **Defining a win.** A game is won by the player:
- a. Who has mated the opponent's king. When on move, a player may wait until the partner supplies a piece that accomplishes check or checkmate provided the player's time does not run out.
  - b. Whose opponent resigns.
  - c. Whose opponent's flag falls at any time before the game has otherwise ended, provided the players point it out and stop the clock while his own flag is still up. An illegal move does not negate a player's right to claim a win on time provided the claimant does so before the opponent's claim of an illegal move. If the claims are simultaneous, the player who made the illegal move loses.
  - d. Who, after an illegal move by the opponent, captures the king or stops the clock and makes the claim.
16. **Defining a draw.** A game is a draw:
- a. By agreement between the teams only during the game.
  - b. If both flags are down and no claim has been made, unless either side delivers checkmate before the flag-fall is noticed. Announcing the properly delivered checkmate nullifies any subsequent fall-flag claims.
17. If a player displaces one or more pieces, he shall replace them on his own time. If necessary, the player may start the opponent's **clock** without making a move to ensure the culprit uses his own time. It is unsportsmanlike conduct to knock over pieces and press the clock. The first offense will result in a warning unless this causes the opponent's flag to fall, in which case the opponent will get an extra minute added. For the second offense the opponent will get an extra minute added to his clock. The third offense will result in forfeiting the game. The TD may administer other penalties for subsequent similar infractions in the event, to include expelling the offending player.
18. In case of a dispute, either player may stop the clock and summon a TD. In any unclear situation, the TD will consider the testimony of both players and the testimony of any unbiased and reliable witnesses before rendering a decision. A player may appeal a TD decision to the Section Chief then, if necessary, to the Floor Chief whose decision is final.
19. The TD shall not pick up any clock, except in case of a dispute.
20. Anyone not involved in the game may not speak about or otherwise interfere in a game. If someone (a spectator or another player) interferes—e.g., by calling attention to a flag-fall or an illegal move—the TD may cancel the game and rule that a new game be played, and the TD may expel the offending person(s) from the Playing Room. Calling flag-falls, illegal moves, etc., is the responsibility of the players. TDs will not do so.
21. Only a TD may rule that a clock is defective and authorize a clock change.
22. Excessive banging of pieces or clock will not be tolerated, and the offending player may be penalized with loss of time.
23. Insufficient losing chances claims cannot be made in Bughouse games.
24. The current edition of the Official Rules of Chess and the current online edition of "Rulebook Changes" shall be used to resolve any situation not covered by these Scholastic Bughouse Rules.

**APPENDIX C: FAMILY AND FRIENDS TOURNAMENT***(Last updated August 2022)*

To incorporate families (including siblings) and friends into side events at the National Scholastic Championships, the Organizer is encouraged to conduct a “Family and Friends Tournament” (F&F). The F&F event is open to anyone not participating in the National Scholastic Championships. The format, schedule and prize fund shall be at the discretion of the Organizer. Entry fee, prize fund, and start times (round times) should be published in the TLA, tournament webpage, and tournament program booklet. Prizes in the F&F tournament shall not be more valuable than prizes in the main event.:



**APPENDIX D: GUIDE FOR SPECTATOR CONDUCT**

*(Last updated September 2021)*

***NOTE:*** *Current US Chess practice is NOT to allow spectators to observe games in progress at over-the-board national scholastic events organized by US Chess. However, if a national scholastic event is awarded by bid to an organizer who wishes to permit spectators, this exception must be highlighted on the site evaluation checklist for the bid or in the bidder's narrative. Appendix E is retained to provide guidance to such organizers, as well as others.*

1. **Who is a spectator?** A Spectator is anyone **inside the Playing Room who is observing the games in progress or who is waiting in the authorized Spectator Area or Seating Area** for a game to finish. Coaches and event participants whose games are finished also are spectators.
2. **Unacceptable Conduct.** Spectators ***WILL NOT:***
  - a) Stand in front of or make eye contact with the player whose game you are observing.
  - b) **Use or talk on a cell phone, laptop computer, tablet, walkie-talkie, or any electronic communication device anywhere in the Playing Room.** This prohibition includes the Spectator Area and the Seating Area. (See Appendix G.)
  - c) Camp out at one game.
  - d) Make faces, gestures, or convey in any visible way your opinion of a game you are watching.
  - e) Discuss opinions of a game being observed, not even if you are whispering.
  - f) **Speak with any player at or away from the board while their game is in progress.**
  - g) Assume the role of Tournament Director (TD) and intervene for any reason such as pointing out illegal moves, etc.
  - h) Make any noise, such as opening a bag of potato chips, within earshot of a game in progress.
  - i) Discuss a game at its conclusion if other games are being played in the vicinity, and do NOT analyze a game at a board in the tournament room.
  - j) Take pictures after the first ten minutes when using flash or a camera with an audible shutter.
  - k) Take pictures at any time from a location which makes you an obvious distraction to the players.
  - l) Attempt to enforce rules yourself.
  - m) Discuss instances of cheating or rules violations with the perpetrators.
  - n) **Stand in front of the doors** to the Playing Hall or open them to look inside. During times when the Chief TD has asked for the doors to be closed, PLEASE HELP US KEEP THEM CLOSED.
  - o) Criticize a player, team, or persons involved with the tournament at any time or in any manner that can be interpreted as disruptive, unsportsmanlike, or hostile.
3. **Permissible Conduct.** Spectators shall:
  - a) Report instances of cheating or rule violations by players or other spectators to the TD staff, ***as long as this process does not disrupt the conduct of the tournament.***
  - b) Comply with any requests or instructions issued by members of the tournament staff.

**Spectators who abuse this guide for conduct may be told by the Tournament Staff to leave the Playing Hall for at least 15 minutes during the current round or longer for repeat offenses.**

***This guide shall be prominently posted at multiple locations in the venue.***

**APPENDIX E: APPROVED ELECTRONIC NOTATION DEVICES***(Last updated September 2021)***Introduction:**

This Appendix applies to **players with special circumstances** who are approved by the Director of Events or Chief Tournament Director to use an electronic notation device (END) as an alternative means of score keeping during over-the-board events. **The only ENDs allowed** are those certified by US Chess for tournament use or a device provided by the Tournament Staff. (For a list of approved devices please visit <http://www.uschess.org/docs/gov/reports/eScoresheets/CertificationGuidelines.pdf>.)

A player who owns an END is responsible for setting and operating the device according to the instructions below.

**END Owners will:**

1. Set the device in the appropriate mode for recording moves.
2. Turn off or disable any setting(s) that could alert the player to any illegal moves.
3. **Make the move on the board before recording the move on the device.**
4. Keep the END **on the table in plain view** of the opponent at all times during the game. A player will not at any time hold his/her END below the level of the tabletop or in their lap.
5. Touch the END only when recording moves.
6. Never input “variations” in the END at any time during a game.
7. If asked by the opponent to see the END for the purpose of entering missing moves on their official scoresheet, the player will set his/her END mode to algebraic (or the appropriate mode that allows the opponent to see all previous moves) and turn the END around so the opponent can view the display screen. The END will remain on the table at all times.
8. Never take the END with them if they leave the board while the game is still in progress, including trips to the bathroom.
9. Be ready to take written notation if the END malfunctions (if notation is required during game play in this section). If the END malfunctions, the player shall begin notation with the next move and fill-in missing moves when the player is on move by borrowing the opponent’s scoresheet or END.
10. Summon a TD when questions arise.

**Opponents:**

1. May ask the player who owns the END to show them the device, explain its use, and ensure it is correctly set for game play for this tournament.
2. May not ask the device owner to take written notation instead of using their END.
3. May ask the device owner to see the player’s END for the purpose of entering missing moves on their own scoresheet. When this occurs, the END will remain on the table.
4. Shall summon a TD when questions arise.

**Coaches/Parents:**

1. Are strongly encouraged to assist their players in understanding proper tournament etiquette regarding ENDs before tournament play begins.
2. Should, before the start of a game, summon a TD when questions arise.

**Tournament Directors:**

1. Should check a player’s END to verify it is correctly set when requested to do so by either player.

**APPENDIX F: THE NATIONAL STATE INVITATIONAL TOURNAMENTS***(Last updated September 2021)*

US Chess typically schedules the National State Invitationals concurrently with the start of the U.S. Open each year (e.g., a window spanning the last quarter of July through Aug 15<sup>th</sup>). These events usually last 3 days. Each of the 52 State Chapters may nominate one player to participate in each Invitational, with the state playing host to the US Open being offered one additional nominee to help address any Invitationals with an otherwise odd number of players.

The National State Invitationals fall within the purview of the National State Invitationals Committee, not the Scholastic Council. However, to benefit the scholastic audience reading these Scholastic Regulations, the Scholastic Council uses this Appendix to call attention to the significance of the Invitationals to the national scholastic community. Most, but not all, of the Invitationals are scholastic national championships.

Below are links to the Information and Rules pages for each of the National State Invitationals. If one or more of these links does not function, go to [www.uschess.org](http://www.uschess.org) and scroll down to the bottom of the home page and select the link to “*National Events Calendar*.”

- [John T. Irwin National Tournament of Senior \(50+\) State Champions](#)
- [GM Arnold Denker National Tournament of High School \(9-12\) State Champions](#)
- [WIM Ruth Haring National Tournament of Girls \(K-12\) State Champions](#)
- [Dewain Barber National Tournament of Middle School \(6-8\) State Champions](#)
- [John D. Rockefeller III National Tournament of Elementary School \(K-5\) State Champions](#)
- GM Maurice Ashley National Tournament of K-3 State Champions (to be added by 2025, link TBD)
- Paul Morphy National Tournament of K-1 State Champions (to be added by 2026, link TBD)

## **APPENDIX G-1: SITE SELECTION, LOGISTICS, AND EVENT PLANNING**

### **19 SITE SELECTION AND CHARACTERISTICS**

#### **19.1 Tournament Proposals**

US Chess and the Scholastic Council will review the proposals for the following tournaments: National Elementary School (K-6) Championships, National Middle School (K-8) Championship, National High School (K-12) Championship, National Youth Action Championships, the National K-12 Grade Championships, and the new Online National Scholastic Quick Championships. US Chess will solicit interest in site selection and then negotiate with the local organizer details of the proposed tournament. The Scholastic Council will be part of the final selection process. Expressions of interest by affiliates are indeed welcome, since in all cases US Chess wishes to partner with a local organization(s) for local arrangements (e.g., securing local TDs), in coordination (and agreement) with US Chess. However, site selection and all contracting for these events will be handled by US Chess.

- 19.1.1 Whenever US Chess is the organizer the US Chess main office shall be responsible for all details listed herein as the organizer.
- 19.1.2 Many chess tournaments and chess activities are organized under the name “US Chess” or “US Chess Federation,” yet are managed fully by other organizations and/or individuals. Such organizations may enter into contracts for facilities, goods, services, etc., though US Chess must approve these contracts first. Such organizations are not representatives of US Chess management, they are independent contractors.
- 19.1.3 For any national scholastic event for which US Chess is ***actively soliciting bids*** (e.g., the bid is live), the Scholastic Council and Committee are prohibited from answering questions raised by prospective offerors. During an open bidding period, such questions may be answered only by the Director of Events or his/her designated representative.

#### **19.2 Quality and Site Selection**

- 19.2.1 Our primary concern is assuring the quality of scholastic national event.
- 19.2.2 US Chess will make every reasonable effort to rotate these events geographically from year to year.
- 19.2.3 Acceptable sites include, but are not limited to, hotels with convention facilities, schools, colleges, and convention centers.
- 19.2.4 All tournament-related playing and meeting space proposals must be approved by US Chess before they are signed.

#### **19.3 Site Characteristics**

- 19.3.1 The Playing Hall must allow for a minimum of 25 sq. ft. of usable space per player. The top 20 boards of all Championship sections, except for primary grades, should have no more than two boards per six-foot or eight-foot table. Bids must include a Playing Area able to accommodate the maximum number of expected players.
- 19.3.2 US Chess practice is to strongly discourage spectators at national scholastic events.
- 19.3.3 The site should have a large Skittles Area that is at least half the size of the Playing Hall(s). The Skittles Area should be in the immediate vicinity of the playing site, indoors, and easily accessible from the Playing Room. It is recommended the Skittles Area be 3/4 of the size of the playing area(s).
- 19.3.4 Team Rooms (especially for the Elementary (K-6) Nationals and Middle School (K-8) Nationals) should be available for teams needing a more private area to instruct and counsel their players. Teams should expect to pay reasonable charges for the use of such space. When possible, Team Rooms should be under the same roof as the Playing Hall or in a building connected directly to it. The US Chess Main Office or the Event Organizer will advertise Team Room availability, pricing, request, and allocation procedures well in advance of the event.
- 19.3.5 Toilet facilities must be adequate for large numbers of youngsters and must be inspected, cleaned and maintained every hour during rounds. Restrooms for players only should be easily accessible to the Playing Room.
- 19.3.6 Water should be provided in the Playing Area(s) and maintained every hour during rounds.
- 19.3.7 Pictures and descriptions of the tournament site, including size, lighting, available sanitary facilities, or any physical equipment available should be included with each contract.

- 19.3.8 A map of the area should be available showing inexpensive restaurants and attractions near the site. This should be done on the website site and available on paper at Chess Control.
- 19.3.9 For the National Middle School (K-8) and National Elementary School (K-6) tournaments, a “Play Area” should be provided that allows the young children an acceptable area to run and play.
- 19.3.10 A centrally located information booth (Chess Control) shall be provided near the Playing Area, or on the primary route players will take to and from the Playing Area. Chess Control shall:
  - 19.3.10.1 Be a one-stop-shop where players, coaches and parents can enter the tournament, change sections, check the status of their registration, and ask general questions about the event.
  - 19.3.10.2 Provide participants with directions to local restaurants, transportation, interesting sites, and other non-tournament information.
  - 19.3.10.3 Provide a message center where families and players can receive emergency information. This message center should have a pre-advertised phone number and/or email address.
  - 19.3.10.4 Serve as the central location for Lost and Found.
- 19.3.11 There should be food available on site that is priced comparably to fast food. There should be ample food services available so the anticipated participants can be fed within a two-hour period. Food vendors should be open at least 60 minutes before the first round starts each day and close no earlier than 60 minutes before the last round is scheduled to end.
- 19.3.12 The site must be handicapped accessible.
- 19.3.13 It is recommended that a photographer be available throughout the tournament.
- 19.3.14 Ample signage should be on display at numerous locations throughout the facility a minimum of twelve hours prior to the first scheduled event of the tournament.

#### **19.4 Site Security**

- 19.4.1 The organizer should work with the host facility staff to ensure appropriate security arrangements are in place for the event.
- 19.4.2 If the host facility does not get involved in security matters, the organizer needs to contact the local police department and discuss the event with them.

#### **19.5 Health Matters**

- 19.5.1 All teams should be encouraged to leave a local phone number and/or hotel room number with tournament personnel so they can be contacted in case of emergency.
- 19.5.2 No alcohol or tobacco products are to be allowed in any hotel or convention space which is contracted for the event.
- 19.5.3 For all tournaments where the anticipated attendance is above 1,000 the organizer must supply trained medical personnel on site.

### **20 LODGING**

#### **20.1 Cost**

- 20.1.1 Lodging should be inexpensive and accessible to the playing site.
- 20.1.2 A single price for 1-4 people per room should be negotiated.
- 20.1.3 If the hotel(s) is providing the playing site, the cost of meeting space should be directly related to the total number of room-nights sold (such as on a sliding scale). Free meeting space is generally negotiable with most hotels.
- 20.1.4 If the hotel(s) is not providing the playing site, the hotel(s) contract(s) may be structured to provide the tournament a rebate of \$3 to \$10 per room night sold to help defray playing site and other tournament costs. Rebates are considered tournament income. When US Chess is not the organizer, any amount higher than \$10 per night may not be accepted without the prior written consent of the US Chess main office.
- 20.1.5 The organizer should provide, at least 6 months before the start of the event, a list of all recommended hotels, rates, addresses, phone numbers, distance from playing site, and contact information on the US Chess website.

### **21 TRANSPORTATION**

Organizers should ensure the availability of transportation between the headquarters hotel and nearest commercial airport, railroad, and bus terminals and shuttle service between playing site and headquarters



hotel if they are beyond walking distance of each other. All such travel arrangements should be publicized at least six months in advance for the benefit of players, coaches, and parents.

## **22 FINANCES**

### **22.1 Contracts**

- 22.1.1 All contracts must be approved and signed by US Chess when US Chess is undertaking full management responsibility for the event.
- 22.1.2 When a local organizer is undertaking full management responsibility, US Chess need only review and approve the contract, though it need not be a signatory thereon, as the local organizer is acting as an independent contractor and is fully responsible and liable for all activities or actions pursuant to the contract.

### **22.2 Responsibilities**

- 22.2.1 When US Chess is not the principal organizer, the local organizer is contractually responsible for the execution of these regulations (with US Chess oversight) before, during and after the tournament.
- 22.2.2 US Chess will provide financial statements from previous events to the organizer upon request.
- 22.2.3 US Chess's share of the profits from national scholastic events will go to US Chess. Tournament income includes, but is not limited to, entry fees, book and equipment sales, food and beverage sales, sale of chess pieces and boards used in the tournament, advertising income, fees paid by promoters and exhibitors, hotel room night rebates, team room rentals, rebates, etc.
- 22.2.4 US Chess will negotiate an agreement with the local organizer, which will define roles, responsibilities, and the financial arrangements between the two parties. The financial arrangements may be a share of the profits, a per-head fee, or some combination thereof.

## **23 FOOD & EQUIPMENT VENDORS**

US Chess has the right of first refusal to sell chess books, chess equipment, T-shirts, commemorative boards and sets and other chess paraphernalia at any US Chess national event. All outside vendors must be approved by US Chess, including concessions.

## **24 STAFFING**

### **24.1 Chief Tournament Director**

The Chief TD for all national scholastic events must be certified at the National Tournament Director level. Additionally, the Chief TD must have strong experience in administering large scholastic events, especially those using computer pairing programs. The Chief TD must be acceptable to US Chess.

### **24.2 Number of TDs**

The Chief TD and/or organizer is responsible for appointing an adequate number of certified assistant TDs to help administer each event. The organizer should not serve on the directing staff.

- 24.2.1 A minimum of four TDs, including the Chief TD should be on staff. These TDs should have strong knowledge of computers and computer pairings, as they are expected to generate pairings, standings, team results, etc., round by round, as well as, to handle inevitable problems.
- 24.2.2 Each event must have a Chief Floor TD ("Floor Chief") with enough assistants.
  - 24.2.2.1 The ratio of TDs to players at over-the-board events should be as follows:
    - Grades 9-12: 1 TD per 100 players
    - Grades 7-8: 1 TD per 75 players
    - Grades K-6: 1 TD per 50 players
  - 24.2.2.2 Each Floor TD should begin the tournament by having responsibility to support one specific Section Chief. As the round progresses, the Section Chief or Floor Chief can re-assign Floor TDs to other sections, based on the number of remaining games. Floor TDs are not "released" from the Playing Hall until relieved of their responsibilities for the round by their Section Chief or the Floor Chief.
  - 24.2.2.3 Floor TDs will handle disputes and make rulings. Players are allowed to appeal rulings under the specifications of US Chess Rule 21H. **The best time for a player to appeal a ruling is immediately after the TD makes the initial ruling.** Waiting for several more moves, or until after the game ends, tends to complicate the appeals process. Appeals are to be made first to the Section Chief TD, then the Chief Floor TD, and then the Chief TD. Appeals above the Chief TD will be made

to a Special Referee appointed to cover the tournament by the Director of Events. If a Special Referee is consulted, the decision of the Special Referee is final for the purpose of the event but may be overruled later if the player appeals to the US Chess Federation under US Chess Rule 21L.

- 24.2.2.4 During play, a minimum of two experienced Floor TDs should be present in large tournament rooms and one Floor TD in small tournament rooms.
- 24.2.2.5 All staff should wear identification stating their name and duty. The TD certification level should be listed on the nametag.
- 24.2.2.6 For National Scholastic events organized and run by US Chess, all tournament staff shall receive a Background Check before hiring. Persons who refuse this check will not be hired by US Chess.

### **24.3 Compensation**

The TD staff is expected to be appropriately compensated. Such compensation should include, but is not limited to, lodging and free food. Each TD should be compensated enough to at least cover any reasonable transportation costs.

## **25 BACK ROOM & AUTOMATION REQUIREMENTS**

### **25.1 Back Room**

The computer room (e.g., the “Back Room”) should be assembled at least one day before the tournament to make sure there are no problems.

### **25.2 Printers**

- 25.2.1 Fast inkjet or laser printers are preferred.
- 25.2.2 At least one computer and printer shall be available for non-pairing/technical purposes by authorized staff.

### **25.3 Computers.**

- 25.3.1 The large size of these events necessitates pairing by computer. A list of approved computer programs may be obtained from US Chess.
- 25.3.2 If any computer equipment is acquired or donated for the tournament, such equipment will be considered assets of the tournament. Assets may not be disposed of without the express consent of US Chess.

## **26 PUBLICITY**

### **26.1 Importance**

Publicity is an important part of attracting new participants to National Scholastic events. Many scholastic chess programs are not aware of the existence of US Chess’s slate of national scholastic chess championship events. Organizers should include plans for publicity in their proposals. The organizer should coordinate with the US Chess main office to produce press releases and publicity for the event.

### **26.2 Announcements / Press Releases**

- 26.2.1 These events will be announced in *Chess Life*, *Chess Life Kids*, and online TLAs.
- 26.2.2 Flyers advertising National Scholastic and Youth events will be mailed to all US Chess affiliates except prison affiliates.
- 26.2.3 Organizers should arrange publicity with local news media, prior to, during, and immediately after these events.
- 26.2.4 The organizer should prepare a press release listing major winners immediately upon conclusion of the tournament. Ideally, this release should be available during the awards ceremony.

### **26.3 Program Book**

A tournament program book should be prepared with the following components:

- 26.3.1 Schedule of events (e.g., the start times [round times] for each round and for “side events”)
- 26.3.2 Specific rules for the tournament (e.g., rules that supplement the official **Rules of Chess** and these **Scholastic Regulations**)
- 26.3.3 List of past winners
- 26.3.4 List of Prizes and Awards
- 26.3.5 List of tournament directors and key event staff

- 26.3.6 Information about local restaurants and attractions.
- 26.3.7 The location, time, and sequence of events for the Awards Ceremony.
- 26.3.8 Instructions for “early pickup” of awards after the last round.
- 26.3.9 Player procedures and acceptable conduct for players, coaches, and parents.
- 26.3.10 *(Optional)* Scoresheets for each round of play

## **APPENDIX G-2: FORMS**

*(Last updated September 2021)*

### **National Tournament Proposal**

Please note: The High School (K-12) Nationals, Middle School (K-8) Nationals, Elementary School (K-6) Nationals, K-12 Grade Nationals, and SuperNationals are organized by the US Chess Director of Events and are not bid out to other organizers.

<b>Tournament Name:</b>			Start Date:	
			End Date:	
Sponsoring Affiliate Name:			Affiliate ID:	
Name of Organizer:			US Chess ID:	
Organizer's POC Info.	Home:	Work:	Email:	
Chief Tournament Director:			US Chess ID:	
Chief TD's POC Info.	Home:	Work:	Email:	
Name of Venue (site):			Sq. Ft. (Playing + Skittles):	
City & State:			Phone:	
Name of Venue POC:			Email:	
<b>Venue Costs:</b>	All Playing Rooms: \$		All Skittles Areas: \$	
	All Team Rooms: \$		Tournament Office(s): \$	
	Chess Control: \$		All Tables & Chairs: \$	
	All Staging: \$		All Audio/Visual: \$	
	Other: \$		Other: \$	
Name of Primary Lodging Hotel:			Phone:	
Primary Hotel Room Rates:	Single: \$	Dbl: \$	Trpl: \$	Qd: \$
Name of Primary Hotel POC:			Email:	
Name of Secondary Lodging Hotel #1:			Phone:	
Secondary Hotel #1 Rates:	Single: \$	Dbl: \$	Trpl: \$	Qd: \$
Name of Secondary Hotel #1 POC:			Email:	
Name of Secondary Lodging Hotel #2:			Phone:	
Secondary Hotel #2 Rates:	Single: \$	Dbl: \$	Trpl: \$	Qd: \$
Name of Secondary Hotel #2 POC:			Email:	
Name of Secondary Lodging Hotel #3:			Phone:	
Secondary Hotel #3 Rates:	Single: \$	Dbl: \$	Trpl: \$	Qd: \$
Name of Secondary Hotel #3 POC:			Email:	

## Event History & Experience of Organizer and Chief TD

Area History of National and Large non-National Events		
Event Name:	Year:	Total # Players:
Event Name:	Year:	Total # Players:
Event Name:	Year:	Total # Players:
Event Name:	Year:	Total # Players:

Organizer's Experience Organizing Events of Similar Size and Format (at least 3 preferred)		
Event Name:	Year:	Total # Players:
Event Name:	Year:	Total # Players:
Event Name:	Year:	Total # Players:
Event Name:	Year:	Total # Players:

Chief TD's Experience as Chief for Events of Similar Size and Format (at least 3 preferred)		
Event Name:	Year:	Total # Players:
Event Name:	Year:	Total # Players:
Event Name:	Year:	Total # Players:
Event Name:	Year:	Total # Players:

**Prize Distribution:** *List and describe any prizes to be awarded other than those listed in these National Scholastic Regulations.*



## PLANNING BUDGET

### Projected Expenses Worksheet

Category	Remarks	Projected Cost
Administrative Supplies		\$
Advertising		\$
Audio Visual Equipment		\$
Commemorative boards & sets		\$
Computer / printer rental		\$
Computer / printer supplies		\$
Event Insurance		\$
Event T-Shirts for Staff		\$
Photocopier rental		\$
Photocopier supplies		\$
Playing Site / Venue Rental Costs		\$
Phones / Internet / WiFi		\$
Staging / Lighting		\$
Tables & Chairs		\$
Paramedic / Medical Staff		\$
Venue / Site Security		\$
All Taxes charged by Venue		\$
Postage		\$
Shipping costs		\$
Program for the Event		\$
Score Sheets (if provided)		\$
Organizer's Fee		\$
Total TD Fees		\$
Trophies/Awards (Main Event)		\$
Trophies/Awards (all Side Events)		\$
US Chess Rating Fees		\$
FIDE Rating Fees		\$
Miscellaneous		\$
Other:		\$
Other:		\$
Other:		\$
Other:		\$
Other:		\$
Other:		\$
<b>TOTAL Projected Expenses:</b>		<b>\$</b>

### **Projected Income Worksheet**

<b>Category</b>	<b>Remarks</b>		<b>Projected Cost</b>
Sale of Commemorative Sets/Boards			\$
Tournament Program Advertising			\$
Revenue-share with Bookstore			\$
Revenue share with Equipment Vendor			\$
Revenue share with Food vendor(s)			\$
Revenue share with T-Shirt vendor			\$
Other Revenue sharing:			\$
Other Revenue sharing:			\$
Other Revenue sharing:			\$
All Event Sponsorships			\$
All Donations			\$
Other Income			\$
Other Income			\$
Other Income			\$
Other Income			\$
Entry Fee (Early #1, Main Tournament)	Cost Per:	# entries:	\$
Entry Fee (Early #2, Main Tournament)	Cost Per:	# entries:	\$
Entry Fee (On-Site, Main Tournament)	Cost Per:	# entries:	\$
Entry Fee (Early #1, All Side Events)	Cost Per:	# entries:	\$
Entry Fee (Early #2, All Side Events)	Cost Per:	# entries:	\$
Entry Fee (On-site, All Side Events)	Cost Per:	# entries:	\$
<b>TOTAL Projected Income:</b>			<b>\$</b>

### **Budget Summary**

<b>Category</b>	<b>Remarks</b>	<b>Amount</b>
Expenses		\$
Income		\$
Profit / Loss	Income minus expenses	\$

## SITE EVALUATION CHECKLIST *(page 1 of 2)*

Criteria	Remarks	Yes	No
<b><u>Location</u></b>			
In a safe area			
Accessible to public transportation			
Accessible to persons with special circumstances			
Adequate places for patrons to eat outside the playing site/location			
<b><u>Playing Site</u></b>			
No cost for playing site, based on hotel occupancy			
Available 24-hours a day			
Has minimum required sq. ft. per player			
Adequate lighting throughout Playing Rooms			
Enough tables and chairs			
Adequate climate control for the season			
Playing Floor carpeted or there is other sound cushioning material			
Frequent water service provided			
Room setup is free or included in site fees			
Venue capable of feeding players on site at times that support the event schedule			
Adequate number of restrooms for number of players and event attendees			
Player-only restrooms able to be created			
Large Skittles area(s) available			
Securable room for use as Event Main Office			
Separate Analysis Room available			
Separate Room available to host other meetings that are part of this event			
Securable Room(s) for vendors			
Large and accessible Registration area to use as Chess Control			
Photocopier available			
Outside contractors allowed			
Spectators allowed access to the Floor			
Adequate area for spectators (only when spectators are access to the Floor)			
Medical staff (provided by hotel or from an outside vendor)			
Free Internet Access for attendees			

## SITE EVALUATION CHECKLIST *(page 2 of 2)*

Criteria	Remarks	Yes	No
<b><u>Playing Site Arrangements</u></b>			
Venue staff easily accessible during event			
Venue staff can provide a post-event report			
Venue contract enclosed			
<b><u>Hotel Guest Rooms (Primary Hotel)</u></b>			
At or near the playing site			
Adequate block of rooms available			
Adequate block of rooms reserved			
Reduced room rates for attendees			
Hotel rebates per room night area available			
Guests responsible for own room charges			
Complimentary Rooms available			
Complimentary Suites available			
Recreational facilities available			
Free WiFi for hotel guests			
Hotel contract enclosed, if separate from Venue contract			
<b><u>Hotel Guest Rooms (Secondary Hotel #1)</u></b>			
Near the playing site	Walking Distance:      Walking Time:		
Shuttle service to/from Venue			
Adequate block of rooms available			
Adequate block of rooms reserved			
Reduced room rates for attendees			
Hotel rebates per room night area available			
Guests responsible for own room charges			
Complimentary Rooms available			
Complimentary Suites available			
Recreational facilities available			
Free WiFi for hotel guests			
Hotel contract enclosed, if separate from Venue contract			

*Continues on next page ...*

**PROPOSAL AGREEMENT WITH US CHESS**

I _____ agree to fulfill the terms of this proposal and to abide by the US Chess National Tournament Regulations. As the organizer, I will make every effort to ensure the integrity and success of this event:
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[ ]	We request that US Chess provide concessions for this event.
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[ ]	We request that other concessionaire options be discussed.
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Signature:		Date:
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[ ]	Playing site agreement included.
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[ ]	Hotel agreement(s) included.
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[ ]	Hotel brochure(s) included.
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[ ]	Draft playing area diagram included.
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