

Legal Policies & Policy Groups - An Overview


Every organization has policies, or waivers, families must agree to prior to attending classes or using their facility. We recommend you consult with your insurance carrier or legal counsel to determine if the policies you create cover your business needs and how often the policies need to be updated.

Depending on your organization, and the programs offered, you may need to create specific policies for classes, summer camps, travel leagues, team competitions, etc. in addition to default general policies.

Jackrabbit Policies are easy to set up and give you great flexibility!

- ★ Create an unlimited number of policies and update them as needed.
- ★ Policy Groups are created from individual policies and assigned to classes.
- ★ New customers can agree to your policies when they register using the [Online Registration](#) form.
- ★ Customers can be automatically prompted to reagree to the policies in the [Parent Portal](#).
- ★ The [User Activity Report](#) reflects User actions taken for both policies and policy groups.

These steps will help guide you through the process of creating and managing the legal policies for your organization.

<p>Step 1 - Create a New Policy</p>	<p>The <i>Policy</i> tab is located under the <i>Gear</i> icon > <i>Settings</i> > <i>Policies</i>. On the <i>Policy</i> tab, you create and edit individual policies, add brief descriptions (optional), see if a policy has been assigned to a policy group, and review previous versions.</p> <p>Once individual policies are created, move to <i>Step 2</i> to add Policies to Policy Groups.</p>
<p>Step 2 - Create a Policy Group</p>	<p>The <i>Policy Groups</i> tab is located under the <i>Gear</i> icon > <i>Settings</i> > <i>Policies</i> > <i>Policy Groups</i>. On the <i>Policy Groups</i> (tab), you can create a policy group and use the row menu  to edit and remove groups.</p> <p>Optionally, you can select a basic or default policy group that customers need to agree to when there is <i>no class enrollment</i>.</p> <p>Proceed to <i>Step 3</i> to assign the Policy Groups to classes.</p>
<p>Step 3 - Assign Policy Groups to Classes</p>	<p>Once you have created individual policies and added them to a policy group, it's time to assign the group of policies to a class.</p> <p>Policy groups can be added to an individual class or multiple classes. For multiple classes, go to the <i>Classes</i> menu > <i>All Classes</i>, filter the classes as needed, and add the policy groups. Add a policy group to a single class using the <i>Policies</i> tab in the <i>Class</i> record.</p>
<p>Step 4 - Select Parent Portal Setting</p>	<p>The <i>Parent Portal</i> setting is located under the <i>Gear</i> icon > <i>Settings</i> > <i>Parent Portal</i> > <i>Settings</i> (tab) > <i>Class Enrollment Settings</i> section.</p> <p>Check the box for <i>Require policy agreement for each enrollment</i> if you want parents to agree to your policies for all class enrollments. If not, leave the box unchecked and they will be prompted to agree to any policies related to a new enrollment or policies that have been updated from the last policy agreement date.</p>



We recommend you review and update your legal policies at least once a year! Parents will be prompted to reagree to any updated policies when they sign into the Parent Portal. Contact [Jackrabbit Support](#) if you need any help with your policies.

⌵ Policies & Policy Groups User Permissions

Expand/Collapse
All

⌵ Policies in the Family Record

⌵ Policies and the Lead File

⌵ Frequently Asked Questions



A set of Default Policies is added to each Jackrabbit database when it is created; these include Assumption of Risk, Release of Liability, Medical Emergencies, and Payment Policy. They are created to help you get started and can be modified under the *Gear* icon > *Settings* > *Policies* > *Policies* tab at any time.
