

# Legal Policies and the Parent Portal

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The Parent Portal is a great way for your customers to agree to your legal policies or renew their agreement to your current policies. With customers agreeing to policies online, you have the ability to access the last agreement date for each family, as well as a copy of the agreement with the date and time stamp. This eliminates the need to keep paper-signed agreements!

Jackrabbit captures your customer's agreement and stores it. **Note:** Registration information is stored in Jackrabbit for up to 5 years. There is a fee to retrieve records older than 5 years.

Having your customers renew their agreements at least annually and more if needed is recommended. This ensures you have current e-signatures on file to fulfill the requirements of the [Electronic Signatures in Global and National Commerce Act \(E-Sign Act\)](#), which recognizes consent in the form of digital approval.

To create or manage your policies go to the *Gear (icon) > Settings > Policies (tab)*. See our Help article [Legal Policies & Policy Groups](#) for more information.

Whenever a **NEW** customer registers online coming in via the Online Registration Form, your current legal policies are displayed at the bottom of the registration form and they **must** agree to each one by checking the boxes and typing their full name, which Jackrabbit stores in the *Family* record > *Policies* (tab) for easy access.

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## Agree to Policy Agreements

There are some circumstances where you may need to have **EXISTING** customers renew their agreement to your policies:

- When you first begin with Jackrabbit and have your existing customers imported, you should have them log in to their Parent Portal to agree to your policies so that it is captured and stored.
- When you use the Quick Registration feature, where your staff completes the registration directly in Jackrabbit, you can require that the customers use the Parent Portal to provide their agreements.
- If you update your policies or add new policies, your families will be required to renew their agreements in the Parent Portal.
- It is recommended to have your customers renew their agreements at least annually and more if needed.

Use the *More* icon > *Require Reagreement* to create a duplicate updated version that will automatically prompt families to reagree to your policies in the Parent Portal.

When a parent logs in to the Parent Portal and has not agreed to your policies they will immediately be presented with the *Policy Agreement Required* alert letting them know they need to accept the policy agreements.

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| <b>Policy Agreement Required</b> <ul style="list-style-type: none"><li>Click <b>Read &amp; Agree</b></li></ul>  |   |
| When a parent clicks the link <b>Read &amp; Agree</b> they are taken to the <i>Policies</i> tab (this can also be accessed from the <i>Billing &amp; Payments</i> link in the top menu or from the sidebar menu > <i>Account</i> ). | <ul style="list-style-type: none"><li>Click <b>Read Policy</b> and a pop-up window will display the agreement text for the policy.</li><li>Click <b>Print</b> to print the policy and <b>Cancel</b> to close the window.</li><li>Click <i>I have read &amp; agree to this policy</i> toggle right until it's blue to agree to a policy.</li></ul> |
| <b>Policy Confirmation</b><br>When all policies have been agreed to, a confirmation that the policies are now up to date will briefly display.  |   |

## View Policy Agreements

### In the Parent Portal

From the right sidebar menu, the parent is able to view their agreement from the sidebar menu > *Messages*. It will have a *Subject of Agreement* and a *Type of Registration*.

### Notification by Email

Email notification of the policy agreements signed by parents in the Parent Portal is sent to the

contact email in the Family record. In addition, a message is posted in the Parent Portal and can be accessed from the right-hand menu at the top of the portal under Messages.

A notification of the policy agreements can be emailed to your organization if the *Updates to Policies* setting has been checked. When selected the email will be sent to the address designated as the "Reply to" and "Send Alert to" Email Address(es) in your Portal Settings (Gear icon > Settings > Parent Portal > Settings tab > Communication).

For organizations with multiple locations, you can choose to have the system use the applicable email based on your Locations (Gear icon > Settings > General > Notifications > Use Location Email Address is set to "Yes").

### View In Jackrabbit - Family Record

In the *Family record > Policies tab* you can see the latest policies (if they were agreed to or need to be agreed to), the agreement date, the classes the policy is related to, and which Policy Group the policy is in.

Use the Policy Agreement History button to see the history of agreements for the family.

Additionally, in the *Family record > Misc tab*, click **View Registrations**. Locate the agreement and use the **View** link to see the details.

### Parent Portal Log

The **Parent Portal Log** (*Families menu > Family Reports > Parent Portal Log*) will also list information relating to policy agreements.

## Send Families an Email Request to Agree to Policies

You can quickly email all families that need to agree to your policies.

1. Go to the **Families** (menu) > **All Families**.
2. Use the **Open filters** (icon) > **Policies, Agreements, Contracts & Messages**.
  - Set **Agreed to all Active Policies?** to **No**.
3. Click **Apply**. The families that have not agreed to your policies will populate in the grid.
4. Click the **Send a message** (icon) and select **Send Email**.
5. Select **Primary Contacts** and **Billing Contacts** and deselect all others.
6. Click **NEXT: ADD'L SETTINGS**.
  - Click the toggle to *include* people who have opted out of mass emails.

- Select additional recipients to receive the email when applicable\*.
- Choose who to send replies to\*.

*\*Drop-down email addresses are located under the User ID (Gear icon> Settings > General > User IDs > Manage Users).*

7. Click **NEXT: COMPOSER** to create the email. Include a link to your Parent Portal in the email to make it easy for the parents to log into their portals and agree.
8. Click **Preview List**, choose to **Send Now** or **Send Later**.

Refer to [Email Families](#) for additional details.

*Jackrabbit abides by the Electronic Signatures Act signed in 2000 which considers online submissions binding. Read more about the [ESIGN Act in Wikipedia](#). We recommend that you confirm procedures with your insurance agent and attorney. The email notification with time and date stamp falls under the criteria of this Electronic Signatures Act and allows you to consider Online Registrations and Portal agreements binding.*

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