

Step 1 - Create & Manage Policies

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Be sure to check out the step-by-step Help Center article, [Legal Policies & Policy Groups - An Overview](#), before you move to **Step 1** of creating policies for your organization.

Legal policies, or waivers, are easy to create and manage in Jackrabbit. The settings are located under the *Gear* icon > *Settings* > *Policies*. After you finish creating individual policies, they will need to be assigned to Policy Groups. Policy Groups are then assigned to classes.

Jackrabbit makes it simple and provides you with the flexibility to set up and create as many policies as you need for your business.



We recommend you speak to your insurance carrier or legal counsel to determine what policies are needed for your organization.

Create a Policy

1. Go to the **Gear** (icon) > **Settings** > **Policies** (tab).
2. Click **Add New Policy** (icon) to open a **New Policy** page.
 - o Enter a unique Policy Name.
 - o Add a brief description of the policy (optional).
 - o Create the content of the policy in the composition window.
3. Click **Save Changes**. You will be brought back to the **Policies** (tab) and the new policy is at the top of the grid.

POLICY	DESCRIPTION	POLICY GROUPS	LAST MODIFIED	BY	PREVIOUS VERSIONS
Photography/Video Consent	Release of photos and video content	0	Mon, Nov 15, 2021 5:30 PM	lwall	0
Summer 2022 Policies	All Students in the Summer Program	0	Fri, Oct 29, 2021 12:45 PM	cb	1
Medical Emergencies	Authorization of medical attention	5	Tue, Oct 5, 2021 3:15 PM	cb	0
Payment Policies	Agreement to pay full tuition	5	Tue, Oct 5, 2021 3:13 PM	cb	0
Assume all risk and hold us harmless.	Assume all risk and hold us harmless.	4	Tue, Oct 5, 2021 3:11 PM	cb	1
Release from liability of injuries, loss or damage.	Release from liability of injuries, loss or damage.	3	Tue, Oct 5, 2021 3:10 PM	cb	0

4. Go to **Step 2 - Create and Manage Policy Groups**.






Save time and effort each time you open a Policies grid page to view your data! After you adjust and select your columns save the grid as a **Favorite**.

Edit a Policy

There are a few ways you can edit or modify an existing policy.

1. Go to the **Gear** (icon) > **Settings** > **Policies** (tab).
2. Click the Policy name to open the **Edit Policy** page and modify the Policy, or click the row menu  to take one of the following actions:
 - **Preview** - opens a preview window of the individual policy. You can print the policy from here.
 - **Copy** - select copy and an exact duplicate of the policy will be created and placed at the top of the grid.
 - **Edit** - opens the **Edit Policy** window to make changes as needed.
 - Jackrabbit checks to see if any parents have already agreed to the policy.
 - If no parents have ever agreed to the policy, the edited version remains the **CURRENT** version.
 - If any parents have agreed to the policy, the newly edited version becomes the **CURRENT** version. The previous version can be located in the *Previous Versions* column in the grid.
 - **Delete/Retire** - you will be presented with either a *Delete* or *Retire* option.

<p>If there are no family agreements related to a policy, the policy can be deleted.</p>	<p>Delete</p> <p>This policy has no family agreements associated with it and can be deleted.</p> <p>When you delete a policy, it is also deleted from any policy groups it is currently associated with.</p> <p><input type="button" value="CANCEL"/> <input type="button" value="DELETE"/></p>

If there are family agreements related to a policy, the policy will have to be retired and not deleted.

Retire

This policy has family agreements associated with it, so it should be retired rather than deleted.

By retiring the policy, all policy family agreement history is retained on a Family's Policies tab.

When you retire a policy, it is removed from all policy groups it is currently associated with.

CANCEL

RETIRE



Use the Print icon  to print the Policies listed in the grid or create a PDF.
