Step 2 - Create & Manage Policy Groups

After you have completed **Step 1 - Create & Manage Policies**, it's time to move to **Step 2**, where you'll assign the policies you created in **Step 1** to Policy Groups. Individual policies can be assigned to one or more Policy Groups, as needed.
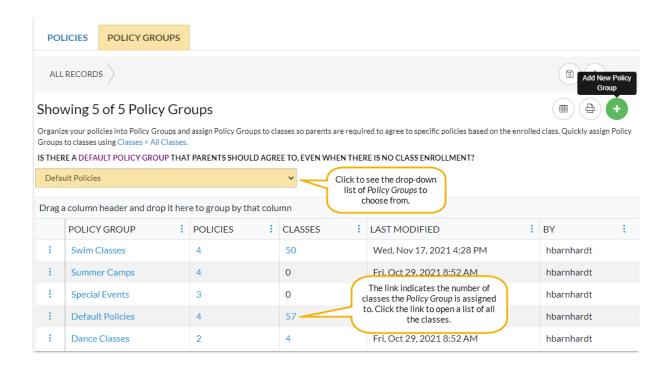
Things to note about Policy Groups:

- ⭐ Create up to 30 Policy Groups.
- ⭐ Policy Groups can be created to require parental agreement even without enrollment.
- ⭐ Reorder the Policies within a Policy Group using the *drag-and-drop* method in the grid.
- ⭐ Update and remove groups as often as needed.
- ⭐ A Policy Group name is limited to 60 characters.

Create a Policy Group

Follow these instructions to create a Policy Group and add individual policies to that group:

1. Go to the **Gear** (icon) > **Settings** > **Policies** > **Policy Groups** (tab).
2. Select a **Default Policy Group** from the drop-down menu for parents to agree to, even when there is no enrollment.
   - Families who log in to their Parent Portal with no class enrollments will be *required* to agree to the Default Policy Group.
   - Families enrolled in classes with Policy Groups assigned to the class will be *required* to agree to the assigned Policy Groups.
3. Select **None** if there are no policies to agree to when there is no class enrollment.
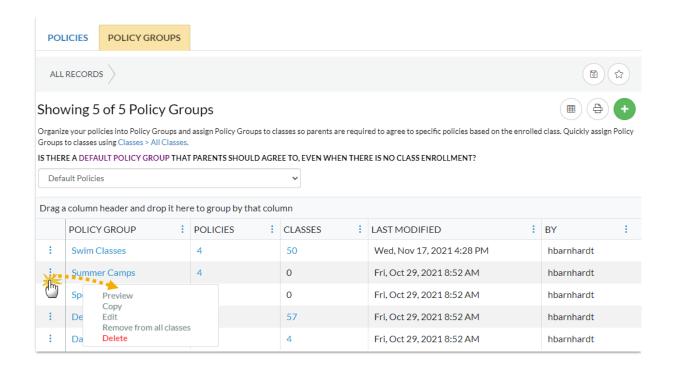
4. Click **Add New Policy Group** (icon) ➕ to open a **New Policy Group** page.
   - Enter the **Name** of the Policy Group.
5. Click **Add a Policy to this group** (icon) ➕ to open the **Add policies** window. Start typing in the *Select existing policies...* field and the individual policies you previously created will populate in the drop-down list.
6. Select an existing policy from the drop-down list or click **Create Policy** to add a new policy.
7. Select as many policies as needed for the group you are creating.
8. Click **Add to Group**.
   - Your Policy Group has been created.
9. Click **Save Policy Group.**
   - Your Policy Group has been saved and will be listed in the Policy Groups (tab).
10. Go to **Step 3 - Assign Policy Groups to Classes**

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 Group

1. Go to the **Gear** (icon) > **Settings** > **Policies** > **Policy Groups** (tab).
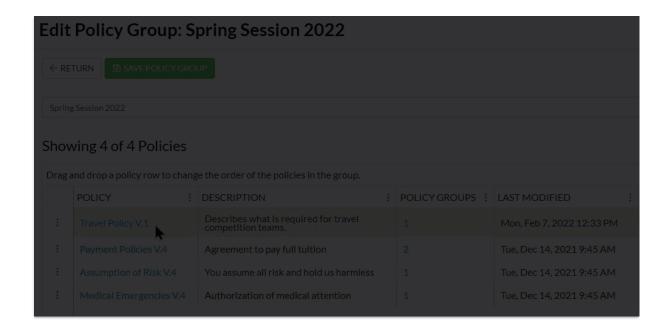
2. Click a Policy Group name to open the **Edit Policy Group** page and modify the Policy Group, or click the row ⋮ menu to take one of the following actions:

   - **Preview** - opens a preview window of the Policy Group. Use the links to view the individual policies.
   - **Copy** - click and an exact duplicate of the Policy Group will be created and placed at the top of the grid.
   - **Edit** - opens the **Edit Policy Group** window to make changes as needed.
   - **Remove from all classes** - if the Policy Group is assigned to any classes, it will be removed.
   - **Delete** - this will delete the Policy Group, however, the individual policies will not be deleted. *Note:* A Policy Group can't be deleted if it is assigned to a class regardless of the class status.

3. Click **Add New Policy Group** (icon) ⊕ to add a **New Policy Group** to the list.

Reorder Policies in a Policy Group

If you want to reorder the Policies after you have added them to a Policy Group, use the drag and drop ✛ icon to move the Policies from one position to another.

1. Go to the **Gear** (icon) > **Settings** > **Policies** > **Policy Groups** (tab).
2. Click the Policy Group that needs to be reordered. This opens the **Edit Policy Group** page.
3. Click the Policy name and immediately drag it up or down to reorder it.

Edit Policy Group: Spring Session 2022

← RETURN   💾 SAVE POLICY GROUP

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Showing 4 of 4 Policies

Drag and drop a policy row to change the order of the policies in the group.

	POLICY	DESCRIPTION	POLICY GROUPS	LAST MODIFIED	
⋮	Travel Policy V.1	Describes what is required for travel competition teams.	1	Mon, Feb 7, 2022 12:33 PM	
⋮	Payment Policies V.4	Agreement to pay full tuition	2	Tue, Dec 14, 2021 9:45 AM	
⋮	Assumption of Risk V.4	You assume all risk and hold us harmless	1	Tue, Dec 14, 2021 9:45 AM	
⋮	Medical Emergencies V.4	Authorization of medical attention	1	Tue, Dec 14, 2021 9:45 AM	

4. Click **Save Policy Group** when done.

Use the Print icon 🖶 to print the Policy Groups listed in the grid or create a PDF.