

# Step 2 - Create & Manage Policy Groups

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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 regarding 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 the individual policies to the 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. Select *None* if there are no policies to agree to when there is no class enrollment.

**POLICIES** **POLICY GROUPS**

ALL RECORDS >

Showing 5 of 5 Policy Groups

Organize your policies into Policy Groups and assign Policy Groups to classes so parents are required to agree to specific policies based on the enrolled class. Quickly assign Policy Groups to classes using [Classes > All Classes](#).

IS THERE A **DEFAULT POLICY GROUP** THAT PARENTS SHOULD AGREE TO, EVEN WHEN THERE IS NO CLASS ENROLLMENT?

Default Policies

Click to see the drop-down list of Policy Groups to choose from.

Drag a column header and drop it here to group by that column

	POLICY GROUP	POLICIES	CLASSES	LAST MODIFIED	BY
	<a href="#">Swim Classes</a>	4	<a href="#">50</a>	Wed, Nov 17, 2021 4:28 PM	hbarnhardt
	<a href="#">Summer Camps</a>	4	0	<a href="#">Fri, Oct 29, 2021 8:52 AM</a>	hbarnhardt
	<a href="#">Special Events</a>	3	0		hbarnhardt
	<a href="#">Default Policies</a>	4	<a href="#">57</a>		hbarnhardt
	<a href="#">Dance Classes</a>	2	<a href="#">4</a>	Fri, Oct 29, 2021 8:52 AM	hbarnhardt

The link indicates the number of classes the Policy Group is assigned to. Click the link to open a list (grid) of all the classes.

3. Click **Add New Policy Group** (icon) **+** to open a **New Policy Group** page.
  - o Enter the **Name** of the Policy Group.
4. 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.

5. Select an existing policy from the drop-down list or click **Create Policy** to add a new policy.
6. Select as many policies needed for the group you are creating.
7. Click **Add to Group**.
  - o Your Policy Group has been created.
8. Click **Save Policy Group**.
  - o Your Policy Group has been saved and will be listed in the Policy Groups (tab).
9. 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).

	POLICY GROUP	POLICIES	CLASSES	LAST MODIFIED	BY
	Swim Classes	4	50	Wed, Nov 17, 2021 4:28 PM	hbarnhardt
	Summer Camps	4	0	Fri, Oct 29, 2021 8:52 AM	hbarnhardt
	Sp		0	Fri, Oct 29, 2021 8:52 AM	hbarnhardt
	De		57	Fri, Oct 29, 2021 8:52 AM	hbarnhardt
	Da		4	Fri, Oct 29, 2021 8:52 AM	hbarnhardt

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:
  - o **Preview** - opens a preview window of the Policy Group. Use the links to view the individual policies.
  - o **Copy** - click and an exact duplicate of the Policy Group will be created and placed at the top of the grid.
  - o **Edit** - opens the **Edit Policy Group** window to make changes as needed.
  - o **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.



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

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