

# Create & Manage Policy Groups

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After you have **created your policies**, it's time to assign them 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.

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

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