Legal Policies & Policy Groups - An Overview

Every organization has policies, or waivers, families must agree to prior to attending classes or using their facility. We recommend you consult with your insurance carrier or legal counsel to determine if the policies you create cover your business needs and how often the policies need to be updated.

Depending on your organization, and the programs offered, you may need to create specific policies for classes, summer camps, travel leagues, team competitions, etc. in addition to default general policies.

Jackrabbit Policies are easy to set up and give you great flexibility!

⭐ Create an unlimited number of policies and update as needed.

⭐ Policy Groups are created from individual policies and assigned to classes.

⭐ New customers can agree to your policies when they register using the **Online Registration** form.

⭐ Customers can be automatically prompted to reagree to the policies in the **Parent Portal**.

⭐ The **User Activity Report** reflects User actions taken for both policies and policy groups.

These steps will help guide you through the process to create and manage the legal policies for your organization.

Step 1 - Create a New Policy	The *Policy* tab is located under the *Gear* icon > *Settings > Policies. O*n the *Policy* tab, you create and edit individual policies, add brief descriptions (optional), see if a policy has been assigned to a policy group, and review previous versions. Once individual policies are created, move to *Step 2* to add Policies to Policy Groups.

Step 2 - **Create a Policy Group**	The *Policy Groups* tab is located under the *Gear* icon > *Settings* > *Policies* > *Policy Groups.* On the *Policy Groups* (tab), you can create a policy group and use the row menu ⋮ to edit and remove groups. Optionally, you can select a basic or default policy group that customers need to agree to when there is *no class enrollment.* Proceed to *Step 3* to assign the Policy Groups to classes.
Step 3 - **Assign Policy Groups to Classes**	Once you have created individual policies and added them to a policy group, it's time to assign the group of policies to a class. Policy groups can be added to an individual class or multiple classes. For multiple classes, go to the *Classes* menu > *All Classes*, filter the classes as needed, and add the policy groups. Add a policy group to a single class using the *Policies* tab in the *Class* record.
Step 4 - **Select Parent Portal Setting**	Go to the *Gear* icon > *Settings* > *Parent Portal* > *Settings* (tab) > *Class Enrollment Settings* section. Check the box for *Require policy agreement for each enrollment* if you want parents to agree to your policies for all class enrollments. If not, leave the box unchecked and they will be prompted to agree to any policies related to a new enrollment or policies that have been updated from the last policy agreement date. 🥕

We recommend you review and update your legal policies at least once a year! Parents will be prompted to reagree to any updated policies when they sign into the Parent Portal. Contact **Jackrabbit Support** if you need any help with your policies.

Expand each section for more information on Policies in Jackrabbit.

Expand/Collapse All

Policies & Policy Groups User Permissions

There is one User permission (Manage Policies) that defaults to on. This allows you full access to add and manage policies and policy groups.

The other User permission (View/Assign Policies) defaults to off, limiting a User's actions. When this permission is checked, a User can assign and/or remove policies to classes, however, they are unable

to change and add new policies.

Category		User Permission	Controls
Tools	☑	Manage Policies	Can manage policies and assign policy groups to classes.
Tools	☑	View/Assign Policies	User is limited to viewing policies & policy groups; assigning/removing policies groups to classes.

Policies in the Family Record

When students in a family are enrolled in classes, all the policies related to the family's classes are added to the *Family* record and are visible on the *Policies* tab.

Note: Inactive policies or policies that have been updated remain available for review, click the **Policy Agreement History** button in the *Family* record.

A family only needs to agree to a policy once even if the policy is assigned to multiple Policy Groups.

Policies and the Lead File

When a family is archived to the **Lead File** their Policy Agreement History is retained (not viewable). If a family is restored from the Lead file, the agreement history is not restored to the *Policies tab*, the information can be found in the *Family* record > *Misc* tab.

Go to the *Family* record > *Misc* tab > *View Registrations* button and the **Registrations/Policy Agreements** window will open. Click **View** to see the agreement details.

Frequently Asked Questions

Q. *Is there a quick way to find families that have* **NOT** *agreed to all the policy agreements?*

A. Yes! Go to the *Families* menu > *All Families* and use the filter drawer (*Open filters icon* ⛛). Search for *Policies, Agreements, Contracts & Messages > Policies: show families that have... Agreed to all active policies?* and select **No**. This will list all the families in the grid that have **not** agreed to your policies.

You can select additional filters to use for policy agreements.

Q. *How can I prompt my customers to reagree to policies annually?*

A. It's as easy as making an edit to a policy name or text! When you change a policy, customers are automatically prompted to reagree to that policy when they next log in to their Parent Portal. Consider putting the new 'term' for the policy in the name, e.g. Assumption of Risk 2022.

You also have the option to go to the *Policies* (tab) and **Require Reagreement** automatically in the Parent Portal.

Q. *If a student is waitlisted for a class in the Parent Portal does the parent have to agree to the class policies?*

A. Yes, the parent will be prompted to agree to the policies that are assigned to the class even if a student is placed on the waitlist.

A set of Default Policies for new organizations are created in the Quick Start Wizard. These include Assumption of Risk, Release of Liability, Medical Emergencies, and Payment Policy. These can be modified under the *Gear* icon > *Settings > Policies > Policies* tab at any time.