

Legal Policies & Policy Groups - An Overview

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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.
- ★ In the [Parent Portal](#) customers are automatically prompted to reagree each time a policy is updated.
- ★ 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	<p>The <i>Policy</i> tab is located under the <i>Gear</i> icon > <i>Settings</i> > <i>Policies</i>. On the <i>Policy</i> 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.</p> <p>Once individual policies are created, move to <i>Step 2</i> to add Policies to Policy Groups.</p>
Step 2 - Create a Policy	<p>The <i>Policy Groups</i> tab is located under the <i>Gear</i> icon > <i>Settings</i> > <i>Policies</i> > <i>Policy Groups</i>. On the <i>Policy Groups</i> (tab), you can create a policy group and use the row menu  to edit and remove groups.</p>

Group	<p>Optionally, you can select a basic or default policy group that customers need to agree to when there is <i>no class enrollment</i>.</p> <p>Proceed to <i>Step 3</i> to assign the Policy Groups to classes.</p>
Step 3 - Assign Policy Groups to Classes	<p>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.</p> <p>Policy groups can be added to an individual class or multiple classes. For multiple classes, go to the <i>Classes</i> menu > <i>All Classes</i>, filter the classes as needed, and add the policy groups. Add a policy group to a single class using the <i>Policies</i> tab in the <i>Class</i> record.</p>
Step 4 - Select Parent Portal Setting	<p>Go to the <i>Gear</i> icon > <i>Settings</i> > <i>Parent Portal</i> > <i>Settings</i> (tab) > <i>Class Enrollment Settings</i> section.</p> <p>Check the box for <i>Require policy agreement for each enrollment</i> 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.</p>

Expand each section for more information on Policies in Jackrabbit.

[Expand/Collapse All](#)

Policies & Policy Groups Permissions

There is one User permission to access and manage policies. This permission defaults to on, uncheck the permission to limit a User's ability to access policies.

Category		User Permission	Controls
Tools	<input checked="" type="checkbox"/>	Manage Policies	Can manage policies and assign policy 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.

Family: Ager

← RETURN **SAVE CHANGES** **DELETE**

Make Sale/Post Fees Payment/Credit Refund Statement Add Student Add Contact Archive Family Family Name Email **Policies (4)** Submit Absences Merge Family

Summary Contacts Classes Events Transactions Billing Info Misc Notes (0) Resources (1) **Policies (4)**

4 Active Policies

Sort Order: highest ranked first Show only policies that need agreement [POLICY AGREEMENT HISTORY](#)

Agreed on October 25, 2021 7:41 PM // by Holly Ager

Medical Emergencies

Classes: Ballet - Beg - F
Policy Groups: Dance Classes, Default Policies

[VIEW](#)

Agreed on October 25, 2021 7:41 PM // by Holly Ager

Release of Liability

Classes: Ballet - Beg - F
Policy Groups: Default Policies

[VIEW](#)

Needs Agreement!

Assumption of Risk

Classes: Ballet - Beg - F
Policy Groups: Default Policies

[VIEW](#)

Policies tab in the Family record indicates there are 4 Policies related to this family.

Click to open the Policy Agreement History for the family.

Indicates the family hasn't agreed to this specific policy.

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.



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.
