Legal Policies & Policy Groups - An Overview

Every organization has policies, or waivers, families must agree to prior to attending classes/appointments 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 or appointments in addition to default general policies. Jackrabbit Policies are easy to set up and give you great flexibility!

- Create and manage unlimited policies and organize them into Policy Groups assigned to classes and appointments.
- Prompt agreement or reagreement automatically when families register online using the **Online Registration** form or access the **Parent Portal**.
- Track User actions related to policies with the **User Activity** report for better oversight.

Permissions define the data Users can access and the actions they are allowed to perform. Policies and Policy Groups require the *Manage Policies* and *View/Assign Policies* permissions in the Tools category. Learn more about **Permissions for Jackrabbit Users**.

Check out our articles below to help guide you through the process of creating and managing the legal policies for your organization.

Create a New Policy	Create and manage individual policies, such as waivers or consents, and add them to Policy Groups.

Create a Policy Group	Organize individual policies into Policy Groups for assignment to classes or appointments.
Assign Policy Groups to Classes	Assign one or more Policy Groups to a single class or multiple classes.
Assign Policy Groups to Appointments	Assign one or more Policy Groups to appointment types.
Select Parent Portal Settings	Control how often families must accept policies. Choose to require agreement for every enrollment, or only when policies are new or updated. Access this setting from the Gear icon > Settings > Parent Portal > Settings tab > Class Enrollment Settings section.

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 click the **Open filters** icon . Under the Policies, Agreements, Contracts & Messages filter*, set Policies: show families that have... Agreed to all active policies?* to **No***.* This will list all the families in the grid that have **not** agreed to your policies.

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

A. Any change to a policy automatically triggers a reagreement prompt in the Parent Portal the next time they log in. Consider putting the new 'term' for the policy in the name (e.g., Assumption of Risk 2022). You can also require reagreement by going to the Policies tab and enabling **Require Reagreement**.

Q. *Do parents have to agree to policies if their child is waitlisted?*

A. Yes, parents must agree to any policies assigned to the class, even if the student is placed on the waitlist.

Q. *How are policies shown in the Family record?*

A. When a student is enrolled, all policies tied to their classes and appointments

appear on the family's Policies tab. A family only needs to agree to a policy once, even if it's in multiple Policy Groups. Click **Policy Agreement History** on the Policies tab to view previous versions or inactive policies.

Q. *What happens to policy agreements when a family is moved to the Lead File?*

A. When a family is moved to the **Lead File**, the agreement history is retained but not viewable. When a family is restored, the agreement history can be found in the **Family** record > **Misc** > **View Registrations**. Then, click **View** next to an entry to see the details.

Q. *How do policy agreements in Jackrabbit comply with the* **Electronic Signatures in Global and National Commerce Act (E-Sign Act)***?*

A. Jackrabbit utilizes e-Signature and "clickwrap" agreement to ensure compliance. A clickwrap agreement requires a User to click a checkbox to accept each policy, which records their name, date, and time stamp. If a policy is updated, Users are prompted to agree again, creating a complete agreement history. The additional e-Signature provides a final confirmation of acceptance.

Each Jackrabbit system is created with a set of default policies, including Assumption of Risk, Release of Liability, Medical Emergencies, and Payment Policy. These policies are created to help you get started and can be modified at any time under the Gear icon > Settings > Policies > Policies tab.