

# Assign Policy Groups to Appointments [Share](#)

Last Modified on 06/17/2025 3:18 pm EDT

Depending on your organization and the [Appointments](#) you offer, you may need to assign specific [Policy Groups](#) for private lessons, evaluations, room rentals, and more. This determines which policies families must agree to when booking an appointment.



Changes to an Appointment Type, such as assigning Policy Groups, apply only to new bookings. Previously booked appointments are not affected. You can also assign Policy Groups when creating a new Appointment Type. Learn more in our article [Create an Appointment Type](#).

To assign Policy Groups to an existing Appointment Type:

1. Go to the **Appointments** menu > **Appointment Type**.
2. Select **Edit** next to the Appointment Type you want to update.

**Appointment Types**

Appointment Types (4) 🔍 ⋮ [Add Appointment Type](#)

50 ▼ Items Per Page ↕ Sort By: Z to A 1 - 4 of 4

<input type="checkbox"/>	<b>Open House Volunteer</b> EDU • 5 hours • Max Size: 15	Date Added: Oct 15, 2024 10:31 AM	<span>⋮</span>	<a href="#">Edit</a>	<a href="#">Duplicate</a>
<input type="checkbox"/>	<b>Private Guitar</b> EDU • 1 hour • Max Size: 1	Date Added: Mar 12, 2025 11:39 PM	<span>⋮</span>	<a href="#">Edit</a>	<a href="#">Duplicate</a>
<input type="checkbox"/>	<b>Swim Evaluation</b> EDU • 30 min • Max Size: 12	Date Added: Oct 10, 2024 11:17 AM	<span>⋮</span>	<a href="#">Edit</a>	<a href="#">Duplicate</a>

3. Go to the **Step 4 Additional Information** tab, and select the checkbox next to each Policy Group you want to assign.

## Edit Appointment Type

Private Guitar



Step 1  
Details and Availability Window

Step 2  
Scheduling & Thresholds

Step 3  
Fees

Step 4  
Additional Information

### Additional Information

Location \*  
EDU

Max Size  
1

Category 1 \*  
Music Lessons

Category 2

Category 3

Policy Groups (1 Selected) [Clear All](#)

☐ Select All

☐ Dance Classes

☒ Default Policies

☐ Special Events

☐ Swim Classes

Select the checkbox next to each Policy Group you want to assign.

Hold SHIFT + Click to Select Several in a Row

### Email Notifications

[Back](#)

Step 4 of 4

[Save as Draft](#)

[Save and Publish](#)

4. Click **Save and Publish**.

5. In the pop-up window, click **Yes, Update** to confirm the changes apply to future bookings only.