

# Legal Policies and the Parent Portal

Last Modified on 06/05/2019 8:44 pm EDT

The Parent Portal is a great tool to have your customers agree to your legal policies on an annual basis or renew their agreement if you change your current policies. You can control the settings that determine when this is needed.

Jackrabbit captures your parent's agreement and stores it. Your attorney can advise you as to how often you should update your policies or require new agreements.

To set up or edit your policies go to the **Tools** menu > **Online Web Registration** and select **Agreement Text (Legalese)**. See our Help article [Web Registration Form - Agreement Text \(Legalese\)](#) for more information.

Whenever a **NEW** customer registers online coming in via the Web Registration Form, your current legal policies are displayed at the bottom of the registration form and they must agree to each one by checking the boxes and typing their full name, which Jackrabbit stores for your easy access.

## Renew Policy Agreements

There are a few circumstances where you may need to have **EXISTING** customers renew their agreement to your policies:

- When you first begin with Jackrabbit and have your existing customers imported, you should have them log into their Parent Portal to agree to your policies so that it is captured and stored.
- When you use the Quick Registration feature, where your staff completes the registration directly in Jackrabbit, you can require that the customers use the Parent Portal to provide their agreements.
- If you change your policies or add new policies, you can require all of your customers to renew their agreements in the Parent Portal.

To prompt your parents to renew their agreements when they log into their Portal, use the **Policies Agreement Date** (**Tools > Parent Portal > Settings > Family/Student Information**).

**Family / Student Information**

Policies Agreement Date:   Use Today's or a Past Date

*(When a date is entered, then all families which have not agreed to the policies on or after that date will be prompted to re-agree upon logging into the Parent Portal. If a Future Date is used, all parents entering the Portal will be prompted to re-agree to the policies.)*

Use the current date or a past date (such as the date you started with Jackrabbit and added your policies or the last time you edited/changed your policies, or your most recent past annual renewal date such as Jan 1).

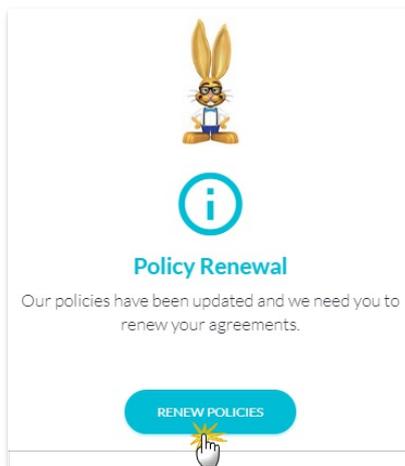
When a date is entered, all families who have not agreed to the policies **on or after that date** will be

prompted to agree when logging into the Parent Portal. **Note: If a Future Date is used, all parents entering the Portal will be prompted to re-agree to the policies until that date is reached.**

When a parent logs into the Portal and has not agreed since the date entered above (or has never agreed), they will immediately be presented with the Policy Renewal alert that advises them that they need to renew their agreements.

**Policy Renewal Prompt**

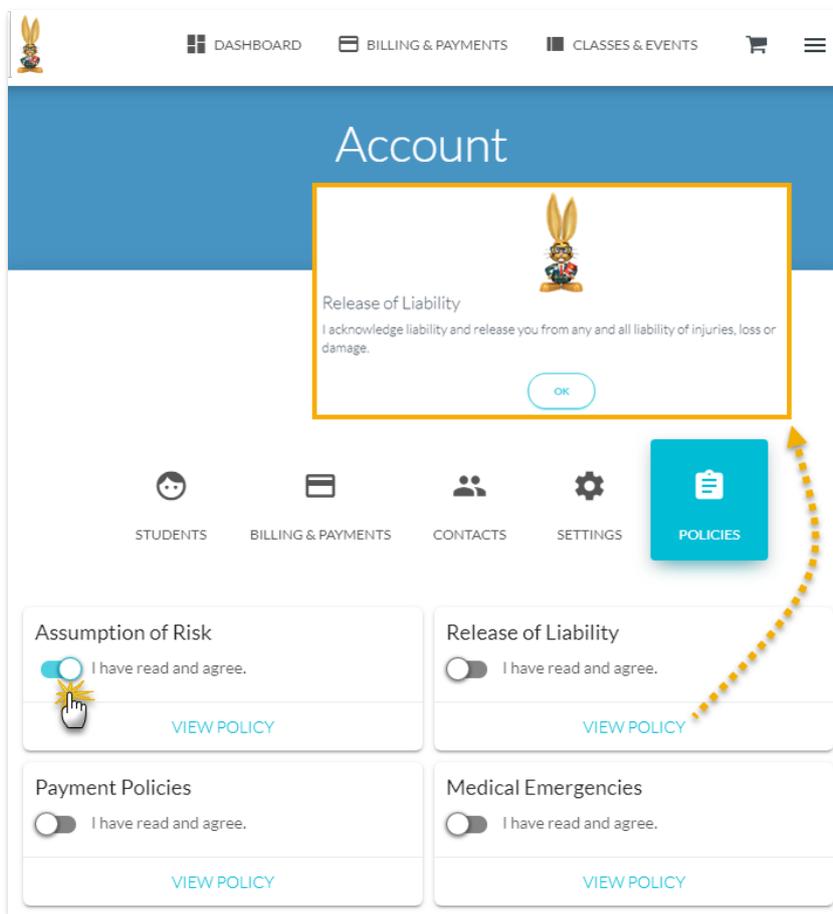
- Click **Renew Policies**



When they click **Renew Policies** they are taken to the **Policies** tab (this can also be accessed from the *Billing & Payments* link in the top menu or from the sidebar menu > *Account*).

To view the details of each agreement:

- Click **View Policy** and a pop-up window will display the agreement text.
- Click **OK** to close the window and return to the policies.
- Click *I have read and agree* toggle to the right until it is blue to agree to a policy.



## Policy Confirmation

When all policies have been agreed to, a confirmation that the policies are now up to date will briefly display.

DASHBOARD

BILLING & PAYMENTS

CLASSES & EVENTS



1

✓ Your policies are now up to date!

# Account

## View Policy Agreements

### In the Parent Portal

From the right sidebar menu the parent is able to view their agreement from the sidebar menu > Messages. It will have a *Subject of Agreement* and a *Type of Registration*.

Message

NEW!

Agreement  
05/05/2020

REGISTRATION MESSAGE

**Assumption of Risk**  
You assume all risk and agree to hold us harmless.  
✓ I have read the above and agree.

**Release of Liability**  
I acknowledge liability and release you from any and all liability of injuries, loss or damage.  
✓ I have read the above and agree.

**Payment Policies**  
I agree to pay the amount of full tuition by the due date.  
✓ I have read the above and agree.

**Medical Emergencies**  
I authorize any and all medical attention necessary to my child in the event of accident, injury, or sickness.  
✓ I have read the above and agree.

Full Name: Victor Ager  
05/05/20 10:02 AM

The name of the Contact who logged into the Parent Portal and completed the agreement is recorded here with a date/time stamp.

## Notification by Email

A notification of the agreement is emailed to both the parent and also to your organization (will be received in the address designated as the the "Reply to" and "Send Alert to" Email Address in your Portal Settings (*Tools > Parent Portal > Settings*)).

## View In Jackrabbit - Family Record

From the *Family* record > *Misc* tab, click **View Registrations**. Locate the agreement and use the **View** link to see the details.

**Assumption of Risk**  
You assume all risk and agree to hold us harmless.  
✓ I have read the above and agree.

**Release of Liability**  
I acknowledge liability and release you from any and all liability of injuries, loss or damage.  
✓ I have read the above and agree.

**Payment Policies**  
I agree to pay the amount of full tuition by the due date.  
✓ I have read the above and agree.

**Medical Emergencies**  
I authorize any and all medical attention necessary to my child in the event of accident, injury, or sickness.  
✓ I have read the above and agree.

**Full Name: Victor Ager**  
05/05/20 10:02 AM

The date of the family's **Last Policy Agreement Date** is also located in the *Family* record > *Misc* tab.

### Family: Ager

← RETURNSAVE CHANGESDELETE

Make Sale/Post FeesPaymentRefundStatementAdd StudentAdd ContactArchive FamilyFamily

SummaryContactsClassesEventsTransactionsBilling InfoMisc

View RegistrationsView Sent Emails

Contract Start Date   Contract End Date

Booster  Referral

Emergency Contact Form Completed  Enrollment Form Received

Notes

Source  (How they heard about us) Referral Name

Prospect  (Not automatically Updated)

Parent Portal Login Message

Portal Message Expiration Date

**Last Policy Agreement Date** 5/5/2020

Last Policy Agreement Date shown here.

## Parent Portal Log

The **Parent Portal Log** (*Reports* menu > *Family/Students Reports* > *Families* > *Parent/Customer Portal Log*)

will also list information relating to policy agreements.

### Parent Portal Log

← RETURN

View 1 - 42 of 42    Print    Export    Refresh    Show/Hide Columns    Restore Columns

Date/Time (Local)	Family/Acct	Contact	Portal User ID	Message
5/5/2020 10:03:00 AM	<a href="#">Ager</a>	<a href="#">Victor Ager</a>	agingvictor@gmail.com	Agreed to Policies: Victor Ager
5/5/2020 9:59:00 AM	<a href="#">Ager</a>	<a href="#">Victor Ager</a>	agingvictor@gmail.com	Login successful for UserID: agingvictor@gmail.com

## Send Families Email Request to Renew Policy Agreement

You can quickly email all families that need to renew their agreements by going to **Families > Email/Text Families > Family/Student Search Criteria** and using the search criteria *Has not agreed to Policies since*. Include a link to your Parent Portal in the email to make it easy for the parents to log into their portals and agree.

Registration Date from  through

Source

Balance from  to

Has not agreed to Policies since

Include Problem Accounts

Student Age from  through  Student birth month

Select a date for the search criteria.

You can also use **Families > Search** to search for families that have not agreed to the policies, or have not agreed since a certain date. Email directly from the report.

Contract End Date from  through

Emergency Contact Form Completed  Enrollment form received

Has agreed to Policies  If Yes, has not agreed since

Has Portal Message

Registration Month

Select No to find families who have not agreed to policies.



*Jackrabbit abides by the Electronic Signatures Act signed in 2000 which considers online submissions binding. Read more about the [ESIGN Act in Wikipedia](#). We recommend that you confirm procedures with your insurance agent and attorney. The email notification with time and date stamp falls under the criteria of this Electronic Signatures Act and allows you to consider Online Registrations and Portal agreements binding.*