

Create & Manage Policies

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Policies can be made and added as a required step during **Online Registration** to help gather additional information from families to make a decision about enrollment. They are then kept on the child's file for future reference. Use policies to:

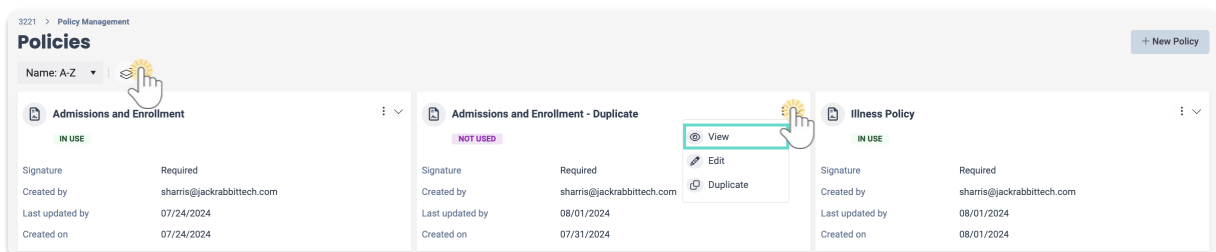
- ✦ Gather digital signatures to reduce paperwork.
- ✦ Create agreements between families and your business before a child is enrolled.
- ✦ Assign different policies to different Programs, based on need.

Expand/Collapse All

View Policies

Follow these steps to view policies already existing for your business. If no policies exist yet, skip ahead to creating one!

1. Go to **Settings** (left menu) > **Business Settings** card > **Manage Policies**.
2. Click the **Expand** icon  to see details for all policies.
3. Click the **Options** icon  > **View** on the card of the policy you want to see agreement details for.

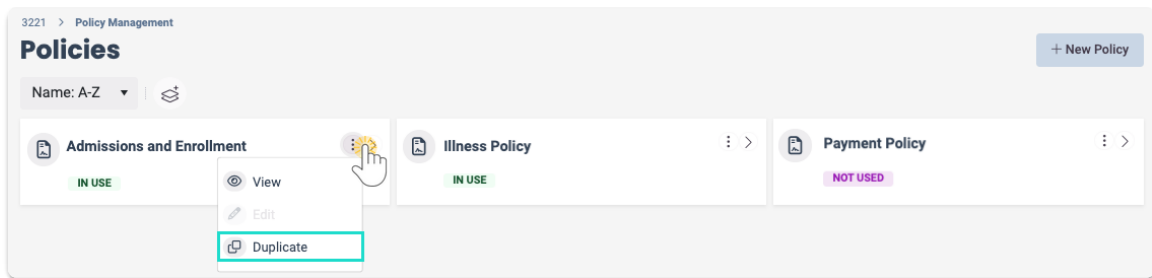



Create a Policy

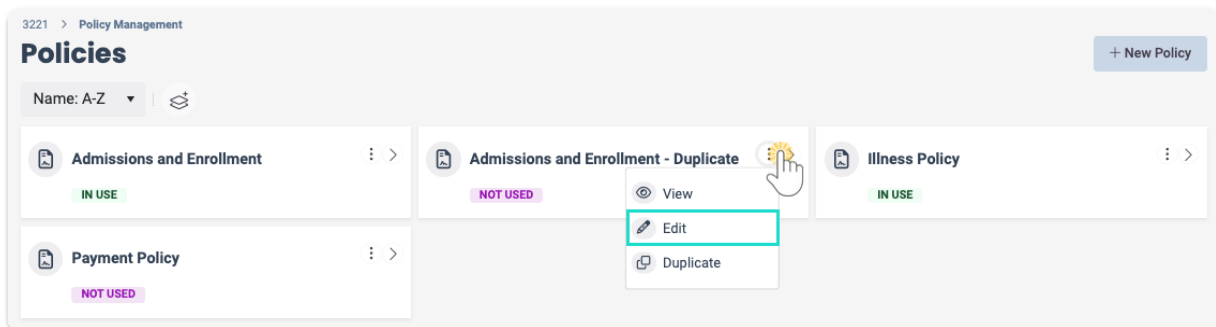
Follow these steps to create a policy. Policies can later be added to an Online Registration form.

Create a New Policy

1. Go to **Settings** (left menu) > **Business Settings** card > **Manage Policies**.
2. Click the **+ New Policy** button.
 - o Enter a required **Policy Name**.
 - o Add the required **Policy Content** and use the toolbar to edit the text's formatting and style. To add an image, copy it to your clipboard and paste it into the textbox.
 - o Select a required **Signature type** from the drop-down list, such as *Agree Checkbox*, *Agree/Disagree Checkbox*, *No Signature*, or *Digital Signature*.
3. Click **Create Policy**, and the new policy will be added to the Policies page.




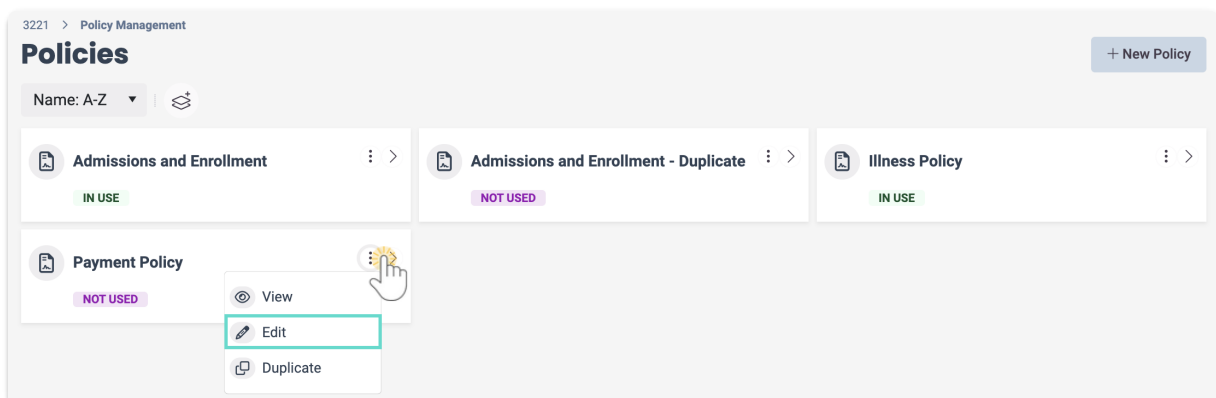
3. Click the **Options** icon  > **Edit** on the new, duplicated policy to make any changes.



Edit Existing Policies

Policies that are not in use on an Online Registration form can be edited. Unused policies will appear with a Not Used badge **NOT USED** on their card.

1. Go to **Settings** (left menu) > **Business Settings** card > **Manage Policies**.
2. Click the **Options** icon  > **Edit** on the policy card you want to make edits to.



3. Make edits to the existing policy, including:
 - o Change the *Policy name*.
 - o Use the text box and toolbar to edit the text's formatting and style. To add an image, copy it to your clipboard and paste it into the textbox.
 - o Change the *Signature type* required.
4. Click **Save Policy** when finished.

Payment Policy

Create a simple policy document and require a contact's signature. Agreement to the policy can be optional.


Content

Policy Name *

Payment Policy

Policy Content

Payment Methods



We accept the following payment methods:

- Cash
- Check
- Credit/debit card
- ACH
- Payment through the CircleTime parent app

Agreement and Signature

Signature type: *

Digital Signature

The parent or caregiver must sign this policy by typing their full name.

Agreement message:

By typing your full name you accept Payment Policy

Cancel
Save Policy

View Agreed-to Policies

On a Completed Registration

Once a family agrees to policies during Online Registration, follow these steps to see their agreements on the Online Registration form:

1. Go to **Enrollment** (left menu) > **Online Registration** card > **View Recieved Registrations**.
2. Go to either the Pending or History tab to find the registration, depending on whether it has been approved or not.
3. Click **Review** if the registration is on the Pending tab or **View** if the registration is on the History tab.
4. Find the *Documents and Policies* section. Any agreed-to policy will show with *Agreed on MM/DD/YYYY*.

13037211 > Site > Online Registration

Samuel Kiteman

Actions

Preferred Enrollment

- 1 - Infant Care Program
- Ladybugs Class
- Preschool - Age 4 (MWF) pm Schedule
- 05/31/2024 Preferred Start Date

Custom Questions


Can you describe your child's previous experiences... Questions

Documents and Policies

- birth certificate.jpeg Birth Certificate
- health record.jpg Immunization Records
- Illness Policy (V2.2)** Agreed on 05/31/2024
- Toilet Learning Policy (R500.812)** Agreed on 05/31/2024

From a Child's Account

After a child is enrolled, follow these steps to see a family's policy agreements on a child's account:

1. Go to **Family Accounts** (left menu) > **Profiles** card > **View # Active Family Accounts**
2. Select the family card for the child you want to see, then click the child's name in the Children section.
3. Click the **Policies** tab.
4. Find the Registration and Class, then click the **View** icon  on that line.





Account > Child

Samuel Kiteman

DETAILS ENROLLMENTS 1 CONTACTS 1 FILES 2 **POLICIES 2** CUSTOM QUESTIONS 1

Export To Excel Print

Drag a column header and drop it here to group by that column


Registration	Class	Policy Name	Date Uploaded	Uploaded By	
Online Registration - Infant Care	Ladybugs	Toilet Learning Policy (R500.812)	05/31/2024	Jennifer Kiteman	 
Online Registration - Infant Care	Ladybugs	Illness Policy (V2.2)	05/31/2024	Jennifer Kiteman	 

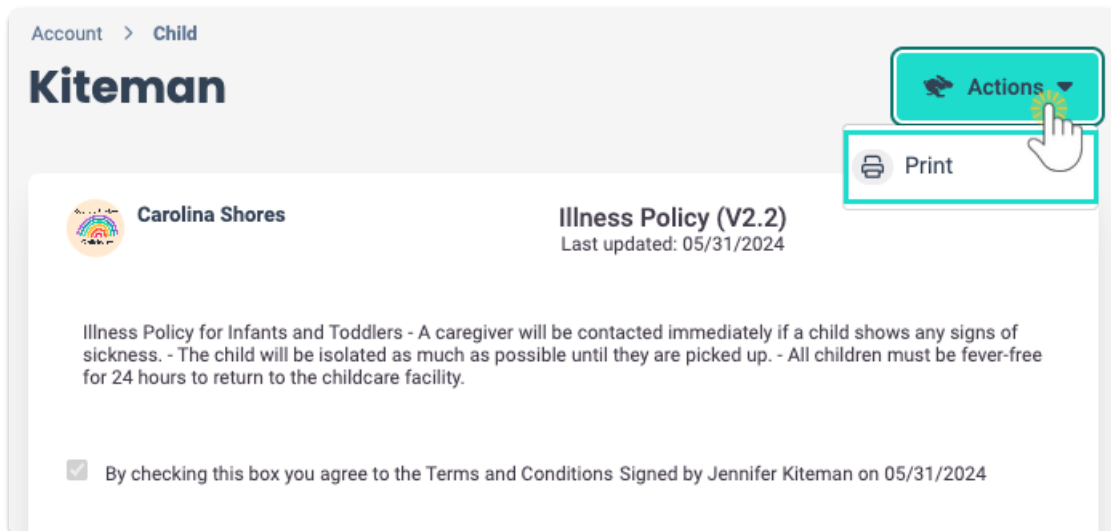


To delete previously answered policies from a child's account, click the **Trash** icon  .

Print Agreed-to Policies

Follow these steps to print agreed-to policies from families:

1. Go to **Family Accounts** (left menu) > **Profiles** card > **View # Active Family Accounts**
2. Select the family card for the child you want to see, then click the child's name in the Children section.
3. Click the **Policies** tab.
4. Find the Registration and Class, then click the **View** icon  on that line.
5. Go to the **Actions** menu > **Print**.



Frequently Asked Questions

Q. Why can't I edit a policy that's in use?

A. A policy is a legal agreement between families and your center. Editing a policy that is already attached to an Online Registration form can alter the agreement made. To edit a policy you are currently using, detach it from the Online Registration form, edit it, and then reattach it for future registrations or enrollments.