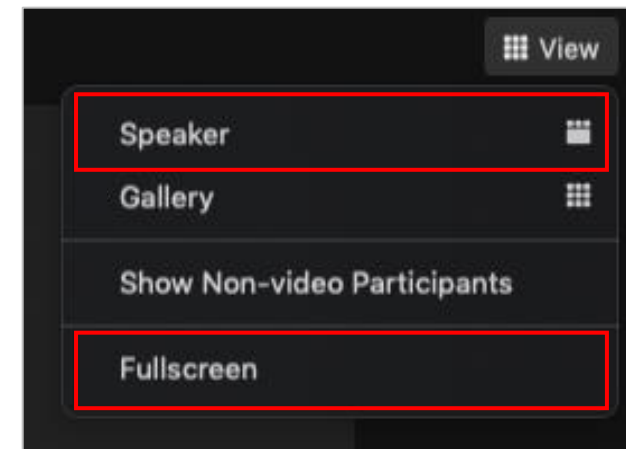


Welcome to the NGSS Information Session!

We'll get started shortly.

- ✓ Questions, Answers, and Commentary – As we go through the demo, we encourage you to ask your questions in the **chat**. Our moderators will be answering questions as they come in. We will also have a designated Q&A section.
- ✓ Mute Audio – Please toggle your microphone audio to **mute** to limit background noise and auditory distractions throughout the meeting.

- ✓ Zoom Viewing Settings – For the best experience, we recommended choosing the **Speaker** setting and viewing the meeting in **Fullscreen**.



Note: Meeting will be recorded.

NGSS Information Session

Next Generation Student Systems (NGSS)
University of Pennsylvania

December 10, 2021



Agenda

December 10, 2021

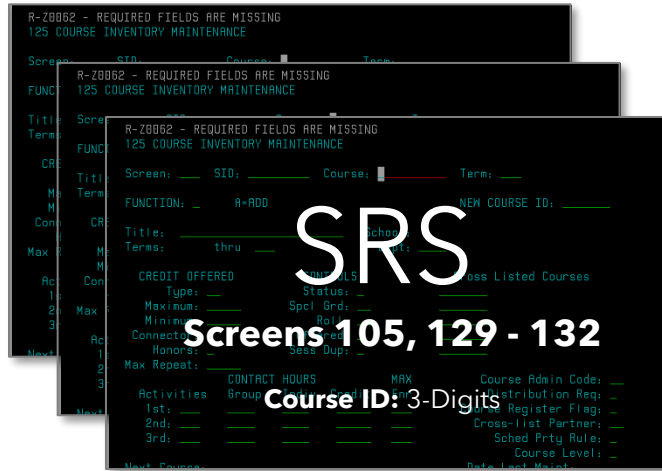
Advising

Improved Course Permissions Experience

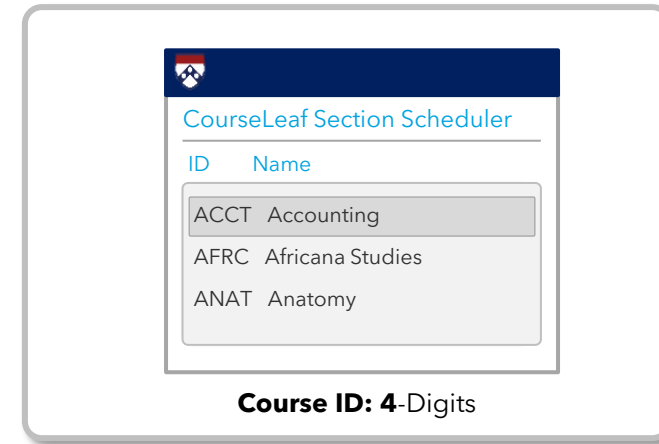
Student Financial Aid Experience

Implementation Timeline

Current State



Future State



Advising

Advising Roles

Advisor Roles



● Faculty Advisor



● Program Director/Departmental Administrator



● Assistant Dean/Advising Director

Engagement Layer



Advising Systems



CourseLeaf PATH



Degree Works



Banner



Advising@Penn Demonstration

Advising@Penn

My Advisees

- > List advisees
- > Unofficial transcript
- > Contact information
- > Path forms

CourseLeaf PATH

- > Academic history
- > Course search
- > Grades
- > Academic Plans
- > Planning and registration
- > GPA
- > View Registration
- > Degree progress and audit

Administration

- > Banner Self Service
- > Review max course load requests
- > Registration history
- > Path forms

Degree Works

- > Batch audit reports
- > Exceptions processing
- > What-if Audit tool
- > Student lookup
- > Audit/Worksheet

What is Path Forms?

The University is in the beginning stages of replacing its student-facing paper processes with online forms and approval workflows.

Through Path Forms, students, faculty and staff will be able to manage requests in a secure, remote, and efficient interface.



Undergraduate Engineering Petition

Student Information

Name	Workflow9, Test	Penn ID	WKFLW0008
Term	Fall 2043	Email Address	cadaly@upenn.edu.XX.
Primary Program	AS Bachelor of Arts	Secondary Program	SEAS BAS Computer an


Select the Petition Type

Petition Type

[> CONFIRM THIS SELECTION](#)

Path Forms: Mass Registration Change Form

Mass Registration Change Form



- Used for moving registrations from a cancelled section to another active section
- Drop registrations from a cancelled section
- Minimum data required is the Term, Section and the type of Action
- A new section is only required for a MOVE action

Mass Registration Change Form

Form Submitted By Ed Stemmler Initiated On December 06 2021

Choose Term (select Term) ▼

Existing Subject (select Subject Area) ▼

Choose Section ▼

Section Status:
Instructor Name:

Action to Take DROP MOVE

Document Upload Section

- Used for attaching screenshots of your work or spreadsheets to explain how to move existing students to other sections
- Click the Upload Documents button, browse for the file and attach to this form

Upload Documents

Review History and Comments

Review Step	Name	Date	Comment
-------------	------	------	---------

Add Comment

Path Forms: Declare a Field of Study Request Review



Declare a Field of Study Request Review

Testing:

Show Hidden Stuff: [Help](#)

Student Information

Name	FOS Workflow, Seven	Penn ID	FOSWKF007
Term	Fall 2043	Email Address	
Primary Program		Secondary Program	

Request

Request	DECLARE A MAJOR AND/OR CONCENTRATION
Declaration Term	Fall 2018
Why Current Term?	I need to do this now!
Explanation	FOS test 3 explanation.
Current Academic Program	Arts & Sciences -- Afro-American Studies
Selected Academic Program	--
Selected Major / Minor	Biology
Selected Concentration	Computational Biology

Declare a Field of Study - FOSWKF007 FOS Workflow, Seven - 12/6/2021 9:53 AM [View](#)

[> ATTACH ADDITIONAL DOCUMENTS](#)

Declare a Field of Study Request - COL School Registrar Review (not in use)

Declaration Term	Spring 2019 v
Major	Biology v
Concentration	Computational Biology v
Expected Graduation Term	Fall 2021 v

Review History and Comments

Review Step	Name	Date	Comment
Request Created	Keith Retzack	12/6/2021 9:54 AM	-

Advising Notes or Notes

Advisor to Advisor
Advisor to Self (Delayed)
Student to Advisor (Delayed)

Advising Actions or Actions

Hold Release

Advising Action *with* Notes

Exception Request

Correspondence

Converted Notes from SRS

1

Exclude time for non-class activities

2

Add/Drop/Swap

3

Narrow search by undergraduate versus graduate

Improved Course Permissions

Permission Request in CourseLeaf PATH

The screenshot displays the CourseLeaf PATH interface. On the left, there is a search sidebar with filters for 'Fall 2021', 'WRIT 0760', and 'Any Instruction Method'. A 'SEARCH' button is visible. Below the search results, there are sections for 'Suggestions' (EXPLORE PROGRAMS, ADVISING), 'Carts' (PRIMARY CART, PRIMARY PLAN), and 'ADVANCED SEARCH' (Exclude Times, Any Subject). The main content area shows search results for 'WRIT 0760 Critical Writing Seminar in Political Science' with three sections (304, 305, 306) listed. A 'Search Criteria' box shows 'Term: Fall 2021' and 'Title, Subject, Instructor, Keyword : WRIT 0760'. The course details for 'WRIT 0760' are shown, including 'Section 304, CRN 70205', 'Last Updated 9/23/2021, 11:03:33 AM', 'Section Status: Active', 'Schedule Type: Seminar', 'Instruction Method: In Class', 'Campus: Philadelphia', 'Credit: 1', 'Current Enrollment: 0', and 'Max Enrollment: 16'. A 'Course Description' section follows. At the bottom, a 'Schedule and Location' section shows a notification: 'WRIT 0760 section 304 in Fall 2021 will be added to your cart'. Below this is a 'Which Cart' section with a dropdown menu set to 'Primary' and a 'Permission Request' button. A text area contains the message: 'This is the only class that does not conflict with my schedule.' At the bottom right of the form are 'CANCEL' and 'OK' buttons.

- Student Submits Permission Request in CourseLeaf PATH
- No longer required to struggle to identify who to email, what office to visit, etc.

Permission Request Status

WRIT 0760

Critical Writing Seminar in Political Science

Section 304, CRN 70205

Last Updated 9/23/2021, 11:03:33 AM

Section Status: Active

Schedule Type: Seminar

Instruction Method: In Class

Campus: Philadelphia

Credit: 1

Current Enrollment: 0

Max Enrollment: 16

Course Description

This writing seminar focuses on a scholarly inquiry in the field of Political Science, the study and analysis of political activities, political behavior, political thought, and systems of government. This seminar will introduce students to scholarly conversations on a specific topic in this discipline as a basis for understanding discipline- and profession-based writing. This includes types of reasoning, evidence, citation practices, and other means of creating, testing, and sharing knowledge with diverse audiences. Throughout, students are introduced to new writing situations as a means of sharpening their skills and learning how to be adaptive, effective writers.

Registration Notes

This section is in your cart: Primary

EDIT REGISTRATION OPTIONS

GRADE MODE: Standard Letter Grade

CREDIT HOURS: 0

Schedule and Location

MW 2pm-3:20pm

Instructor(s)

ADD TO PLAN **REMOVE FROM CART** **ADD TO CART** **SUBMIT SCHEDULE**

Cart Contents

Cart: Primary (Fall 2021) [Clear Cart](#)

⚠ The student is currently prevented from registering due to missing advisor signoff.

ACCT 1010 Accounting and Financial Re...

001 MW 9-10:20a L. Hail

WRIT 0760 Critical Writing Seminar in Po...

⚠ Writing program perm needed

Override Request: This is the only class that does not conflict with my schedule. **Pending**

304 MW 2-3:20p R. Khachaturian

Status of Permission request is visible in the student cart.

WRIT 0760 Critical Writing Seminar in Po...

⚠ Writing program perm needed

Override Request: This is the only class that does not conflict with my schedule.

Pending

304 MW 2-3:20p R. Khachaturian

WRIT 0760 Critical Writing Seminar in Po...

⚠ Writing program perm needed

Override Request: I really want to take this course.

Approved

304 MW 2-3:20p R. Khachaturian

Permission Request Approval

The screenshot shows a web application interface for searching and managing courses. The top navigation bar includes 'Search Classes', 'Search Results', and 'WRIT 0760'. The left sidebar contains search filters and navigation buttons like 'SEARCH', 'EXPLORE PROGRAMS', 'COURSE MANAGEMENT', 'ADVISING', 'PRIMARY CART', and 'PRIMARY PLAN'. The main content area displays search results for 'WRIT 0760 Critical Writing Seminar in Political Science'. The course details include section information, status, schedule, and enrollment. A red box highlights the 'MANAGE OVERRIDES' button at the bottom of the course details.

- 'Permission Approver' can easily identify pending requests in a user-friendly interface.
- No longer managing email correspondence etc.

EDIT PAGE SEARCH
Welcome, [User]

Search Results
WRIT 0760
Reset Search

Found 1 course

WRIT 0760 Critical Writing Seminar in Poli...

2 304 MW 2-3:20p R. Khachatourian

Matched 1 of 3

Search Criteria

Term: Fall 2021

Course Management

WRIT 0760 Critical Writing Seminar in Political Science

Section 304, CRN 70205

Last Updated 9/23/2021, 11:03:33 AM

Section Status: Active

Schedule Type: Seminar

Instruction Method: In Class

Campus: Philadelphia

Credit: 1

Current Enrollment: 0

Max Enrollment: 16

Course Description

This writing seminar focuses on a scholarly inquiry in the field of Political Science, the study and analysis of political activities, political behavior, political thought, and systems of government. This seminar will introduce students to scholarly conversations on a specific topic in this discipline as a basis for understanding discipline- and profession-based writing. This includes types of reasoning, evidence, citation practices, and other means of creating, testing, and sharing knowledge with diverse audiences. Throughout, students are introduced to new writing situations as a means of sharpening their skills and learning how to be adaptive, effective writers.

Schedule and Location

MW 2pm-3:20pm

Instructor(s)

Rafael Khachatourian

All Sections

Section #	Type	Schedule	Instructor
304	SEM	MW 2-3:20p	R. Khachatourian
305	SEM	MW 5-6:20p	R. Khachatourian
306	SEM	TR 3-4:20p	R. Khachatourian

MANAGE COURSE 2

Section 304, CRN 70205 in Fall 2021

SORT BY: Time Received

Sorting is grouped by status (Open, Approved, Denied, Registered)

Date/Time	Student	Lvl. Conc.	Request Text	
12/1 12:10p	Lee, Peg	FR UNDC-BS	I'd really like to take this class	<input type="checkbox"/>
9/21 6:10p	Brintle, Leroy	FR UNDC-BS	I have professional experience editing a medical journal; this is easy-peasy for ...	<input checked="" type="checkbox"/>
9/23 7:36p	Hill, Harold	FR UNDC-BS	No other writing class fits my schedule, please let me in.	<input checked="" type="checkbox"/>
9/23 7:34p	Hart, Roxie	FR UNDC-BS	Please keep in mind I did well in your last class.	<input checked="" type="checkbox"/>
9/22 2:29p	Hamilton, Eliza	FR UNDC-BS	I really want to take this course.	<input checked="" type="checkbox"/>
9/23 6:58p	Addams, Jane	FR UNDC-BS	Please allow me to take this great poli sci course.	<input checked="" type="checkbox"/>
9/23 7:33p	Woods, Elle	FR UNDC-BS	Being a political commentator is my dream job and this class is my first step.	<input checked="" type="checkbox"/>

Expanding panels provides details about the student request

You are about to submit the following changes:

- Approve: 1
- Automatically deny all other pending requests (1).

CANCEL
SUBMIT CHANGES

Student Financial Aid Experience

Home Page Features

1. Award Year selection drop-down

2. Email icon initiates sending an email to SFSmail

3. Ability to view holds

The screenshot shows the Financial Aid Home Page interface. At the top left is the Penn logo. The main heading is "Financial Aid". To the right of the heading is the "Award Year" dropdown menu, currently set to "2022-2023 Financia...", with a callout "1" pointing to it. Next to the dropdown is an email icon with a callout "2". Below the heading is a navigation menu with "Home" highlighted. A large blue informational message is displayed, with a callout "2" pointing to the signature "Sincerely, Financial aid Office". Below the message is a "Holds" section with a callout "3" pointing to it. A callout "3" also points to the "Exit Interview Hold" message. An email composition window is overlaid on the bottom right, showing the "Format" tab and the "To" field set to "sfsmail@pobox.upenn.edu".

Applicant Requirements

The screenshot shows the Penn State Student Requirements portal. At the top, the Penn State logo is visible. Below it, the heading "Student Requirements" is highlighted in green. A blue information banner states: "Satisfied requirements have been completed. There is no additional action required. Unsatisfied requirements must be completed to be awarded with financial aid. Please complete and submit the requested information. To securely upload a document, click [here](#)." Below this, the "Unsatisfied Requirements" section is highlighted in green and contains one entry: "Parent 1 Tax Transcript 2019" with a warning icon, last updated 11/24/2021, and a "REQUIRED, PLEASE SUBMIT" button. Below that, the "Satisfied Requirements" section is highlighted in green and contains one entry: "CSS Profile" with a checkmark icon, last updated 11/23/2021, and a "RECEIVED AND SATISFIED" button. Green arrows point from external text boxes to the information banner, the unsatisfied requirement entry, and the satisfied requirement entry.

Student requirements, both satisfied and unsatisfied display along with an information message containing the link to upload documents.

Dropdown provides additional information.

Award Offer Sections

Housing Status

Expected Family Contribution

Cost of Attendance

Grants & Scholarships

Net Cost

Options to Pay Net Cost: Work & Loans



Zeynep Karadeniz

Financial Aid

Award Year: 2020-2021 Financia... ▾



Home Award Offer Financial Aid History Resources Notifications Satisfactory Academic Progress College Financ >

Grants and Scholarships to Pay for College ?

The grants and scholarships shown reflect our calculation of your demonstrated financial need. Grant/scholarship funding does not need to be repaid.

Type		Spring 2021	Total Amount
Federal Pell Grant		\$3,097.00	\$6,195.00 ACCEPTED
Seog Grant	\$2,000.00	\$2,000.00	\$4,000.00 ACCEPTED
Penn Grant	\$27,853.00	\$27,852.00	\$55,705.00 ACCEPTED
	\$32,951.00	\$32,949.00	\$65,900.00
			-\$65,900.00

Financial Aid Award Year: 2020-2021 Financia... | ✉

Home Award Offer Financial Aid History Resources Notifications Satisfactory Academic Progress College Financ >

Grants and So \$0.00

All Years ?

Year Fund Accepted Paid

2020 - 2021	Federal Pell Grant	09/01/2020 - 12/22/2020	\$3,098.00	\$0.00
		01/13/2021 - 05/11/2021	\$3,097.00	\$0.00

Please note that the detail here may not be all inclusive. This is intended to give you a snap shot of all the aid you have received while at Penn, however, there may be data that did not convert into the new system. Please refer to your previous award notices for the accurate funding programs and amounts.

Grants, scholarships, work and loan awards are available for all active aid years.

Financial Aid Award Year: 2020-2021 Financia... |

Home Award Offer Financial Aid History Resources Notifications Satisfactory Academic Progress College Finance >

Resources tab includes messages/links such as:

- Link to Penn's Loan System (PLS)
- Messages for Highly Aided, International and Quest bridge students
- Links to NSLDS and the SFS loan information page
- Title IV Authorization

Message 1: If you are interested in your potential student loan eligibility for this school year, [click here.](#)

Message 2: Based on your family income and expected family contribution, Penn considers you a Highly Aided student. At Penn, Highly Aided students receive financial aid packages with added benefits and are eligible for certain additional programs throughout the year. Read more at SRFs's [Highly Aided Student page.](#)

Message 3: The [National Student Loan Data System \(NSLDS\)](#) is the U.S. Department of Education's (ED's) central database for student aid. NSLDS receives data from schools, guaranty agencies, the Direct Loan program, and other Department ...

Message 4: Looking for more information on student loans ?
Student Financial Services can help you access a variety of federal, institutional, and private loan programs to help

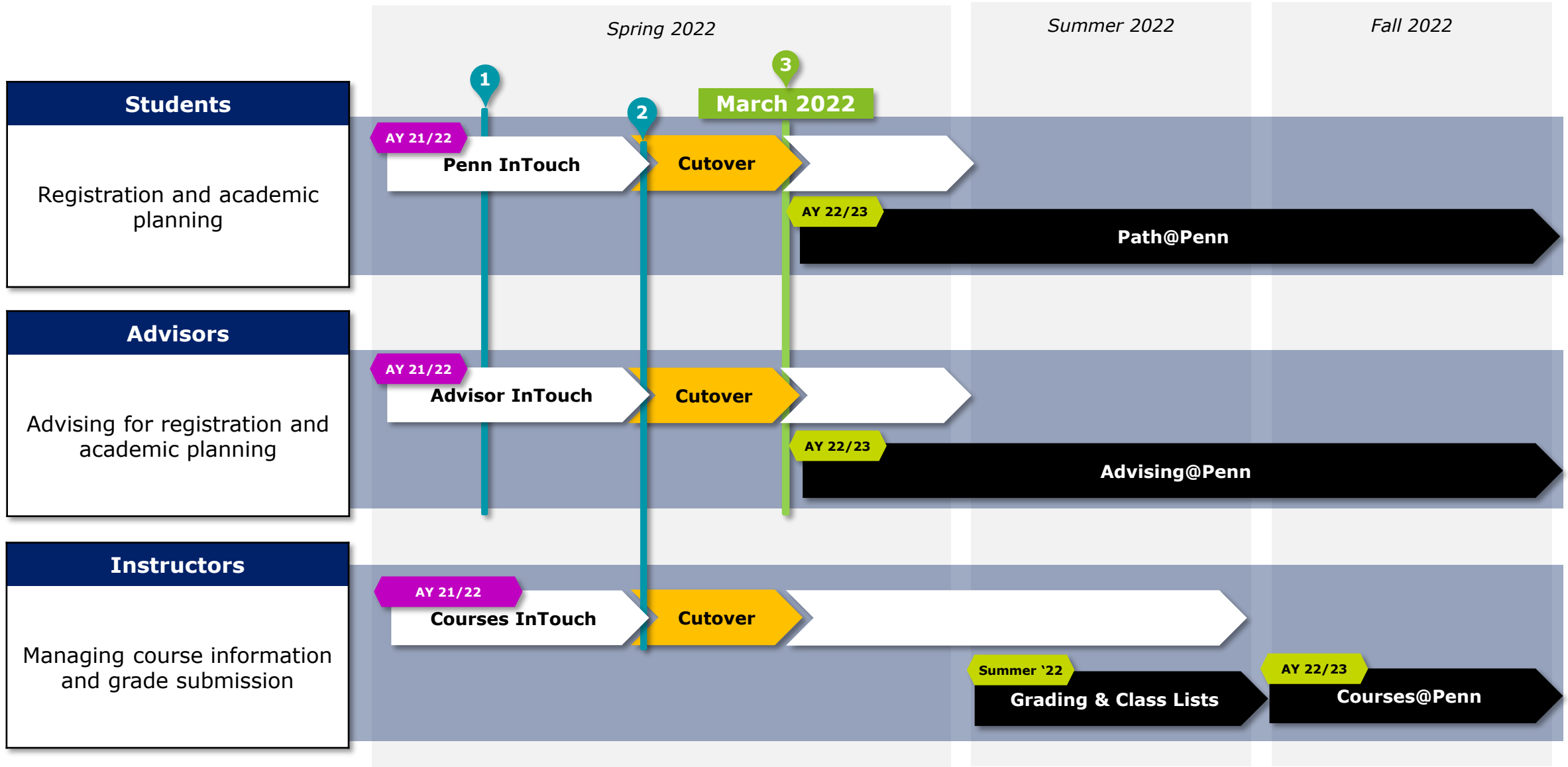
Enhancing the Student Experience

- Improve overall **satisfaction** of parent/student interactions
- Decrease number of interactions by providing means to **educate** students on how to navigate systems
- Reduce number of handoffs
- Financial Wellness Education
- Use **technology** to manage interactions and resolve issues



Implementation Timeline

Registration & Advising Cutover to Pennant



Key Dates

- 1. **Feb 18** – Deadline for curriculum changes
- 2. **Mar 3-13** – System Blackout
- 3. **Mar 14** – Go-Live

Legend

Current →
 Cutover →
 Pennant →
 R2 Go-Live |
 Key Dates |
 Academic Year

Academic Planning: Cutover to Pennant

Key Dates

	Date	Event
1.	February 18, 2022	<ul style="list-style-type: none">• Schools review advisor assignments in SRS and make any changes• Students and advisors make curriculum changes• Students encouraged to declare/change field of study, if known
2.	March 3-13, 2022	System Blackout - Systems will NOT be available <ul style="list-style-type: none">• SRS, Pennant Accounts, Advisor InTouch, Penn InTouch, and Courses InTouch• Data conversion
3.	March 14	Go-Live

System Blackout: Student Records Applications

March 3-13, 2022

Application	Description	Status	Details
Pennant Records	Banner student records system (Courses, Sections, Instructors Summer 2021 and beyond)	Unavailable	No query or update access
CourseLeaf Section Scheduler (CLSS)	Course and section scheduling system	Unavailable	TBD
University Catalog/Curriculum Manager (CM)	Curriculum management and course catalog system	Unavailable	TBD
Slate/CollegeNET	University admissions systems (graduate and undergraduate)	Partially available	Systems will be available, but no integrations to or from Banner
InfoSilem	System for room and exam scheduling	Unavailable	TBD
Student Records System (SRS)	Student Records System	Unavailable	No query or update access

System Blackout: Financial Aid Applications

March 3-13, 2022

Application	Description	Status	Details
Pennant Aid	Banner application for processing student Financial Aid	Unavailable	No query or update access
Penn Institutional Methodology (IM) Tool	Application to calculate student need based on institutional rules	Unavailable	No query or update access
Graduate Funding	Application to enter departmental awards and grants for graduate students	Partially available	Award data can be entered into the application, but no transactions will be posted to Banner
SAM	Legacy Student Aid Management System	Partially available	Will be available, but no Financial Aid disbursements will be applied to student accounts
Penn Loan System (PLS)	Penn Loan System	Unavailable	No query or update access

System Blackout: Student Accounts Applications

March 3-13, 2022

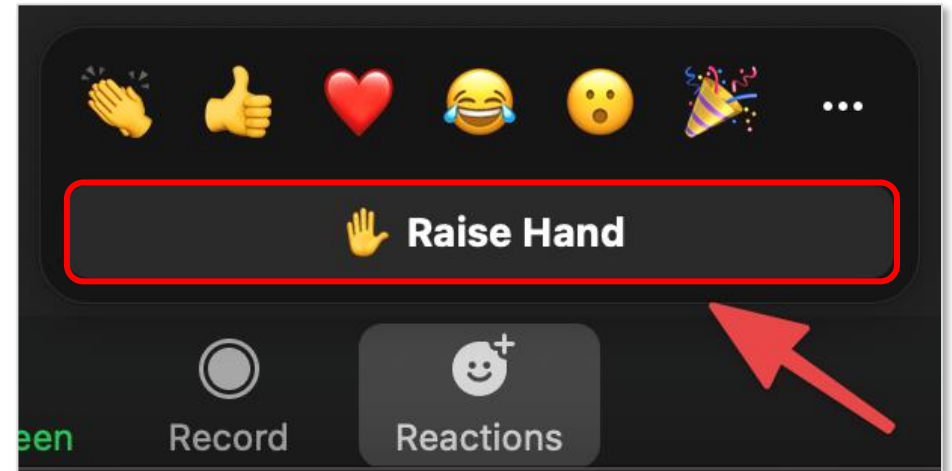
Application	Description	Status	Details
Pennant Accounts	Native Banner application for student accounts (charges/payments)	Unavailable	No query or update access
Pennant Student Account Summary (PSAS)	Summary screen of student billing (charges, payments), and relevant academic program information	Unavailable	No access
Pennant Feeder Application	Application to submit charges/credits to a student's account	Partially available	Transactions can be submitted via the application, but charges will not be posted to the student's account until after cut-over
Pay My Tuition	Application through which students pay their bills	Partially available	Student can submit payments, but no transactions will be posted to banner

System Blackout: Reporting Applications

March 3-13, 2022

Application	Description	Status	Details
Data Warehouse	Reporting data collection for student records, penant account, pennant aid, other student related data	Partially available	Data warehouse will be available for query access, but none of the primary date collections will be updated
Pennant Reports	Reporting application for basic student queries	Partially available	Pennant reports will be available for query access, but the data will not be refreshed

Question & Answer



If you would like to come off mute to ask your question, use the raise hand reaction.

What's Next

January – February 2022

- **OUR, Registrars, and Department/Program Staff** – User training & materials available starting in January
- **Advisors** – CourseLeaf PATH videos available and communication from Schools in February
- **Students** – Information sessions for students in February

March 2022 (Go-Live)

- **All** - Hypercare support begins
- **Advisors & Students** - Reference materials available

Post Go-Live

- **Advisors & Students** – Verify data for accuracy
- **Summer Instructors** – Information session in May
- **Instructors** – Information session in August to prepare for Fall

Pennant Resources on SRFS Page

Quick reference guides and other reference material

Workshop Schedule & Office Hours

Freshdesk Ticketing

Coordination with Local Service Providers

The screenshot shows the Pennant website interface. At the top left is the logo for Student Registration & Financial Services. To the right are search and full menu icons. A dark blue banner with a geometric pattern contains the word "Pennant" in white. Below the banner, there are navigation links: "UP TO MAIN MENU" and "BACK TO FACULTY & STAFF RESOURCES MENU". The main content area has a breadcrumb trail: "Penn Student Registration & Financial Services > Faculty & Staff Resources > Pennant". The text describes Pennant as Penn's suite of next-generation student information systems, including Accounts, Financial Aid, and Records. It mentions an upgraded user interface and enhanced search capabilities. A red circular icon with a white speech bubble is visible in the bottom right corner of the screenshot.

<https://sfs.upenn.edu/faculty-staff-resources/pennant>

Thank You

NGSS Sponsors

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Tom Murphy

Speakers

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Kathy Higgins
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For any outstanding questions, email
ngsscomms@isc.upenn.edu.

For more information about NGSS/Pennant, visit
ngss.srfs.upenn.edu.