Welcome to the CourseLeaf PATH Advising Demonstration

<u>Note</u>: Meeting will be recorded.

✓ <u>Questions, Answers, and Commentary</u> – As we go through the demo, we encourage you to ask your questions in the **chat**. We will address your question in the designated Q&A section.

If you have difficulties accessing the chat function for Q&A, please email your question to ngsscomms@isc.upenn.edu.

✓ <u>Mute Audio</u> – Please toggle your microphone audio to **mute**. Best practice is to limit background noise and auditory distractions throughout the meeting.

✓ <u>Turn Off Video</u> – Please **turn off** your video function to minimize bandwidth use during the meeting.

WHAT *IS* NGSS?

Next Generation Student Systems

NGSS consists of multiple projects to launch catalog and curriculum management solutions, and the remaining components of the **Pennant** suite of applications:

pennant

Pennant Accounts	Pennant Records	Pennant Aid
Live as of 2015	**RELEASE 1** – FALL 2021 **RELEASE 2** – MARCH 2022	

NGSS TEAM

A collection of more than 50 Penn employees, leaders, and partners (*including ten Penn graduates*) with expertise in Penn operations and higher education.

NGSS Drivers

Regulatory and Security
Increasing complexity and risk call for advanced capabilities.

User Expectations
Students, faculty, advisors, and staff expect system experience to be engaging, intuitive, and satisfying.

Academic Complexity
The growing interdisciplinarity and diversity of academic programs place greater demands on information systems.

Need for Efficiency
Decreased tolerance for unnecessary steps and inefficient processes.

Pace of Technology
Pace and evolution of technology and Penn's changing needs.

Benefits to Community

Students
- Upgraded user-interfaces
- Enhanced search capabilities for all devices

Faculty
- Increased collaboration around Curriculum Management
- Improved reporting capabilities

Advisors
- More intuitive system for degree audit and advising

Staff
- Transition from "green screen" to a more modern interface
- Improved workflows enable fewer manual steps

Pennant Records Go-Live

September 13, 2021

We are excited to announce that the Next Generation Student Systems (NGSS) project launched the first release of Pennant Records on September 13, 2021.

Pennant Records will be used by registrar staff in schools and departments for scheduling and managing courses offered in Summer 2022 and later.

The systems deployed as part of this release will be CourseLeaf Section Scheduler (CLSS), a section maintenance tool to create, edit, and validate sections, and an updated Curriculum Manager (CM).

Pennant Accounts & Records Overview

Pennant Accounts	Pennant Records		
2015	**University Catalog** *2017*	**Curriculum Manager (CM)** *2019*	**CourseLeaf Section Scheduler (CLSS)** *2021*
Accounts-receivable and student-profile.	All of Penn's course offerings, programs, degree requirements, and academic policies.	Manages curricular changes and updates information in the Catalog and systems.	Creates, edits, and schedules sections of courses offered each term.

CourseLeaf PATH Advising Demonstration

Next Generation Student Systems (NGSS)
University of Pennsylvania

October 1, 2021

Agenda

NGSS & Pennant Overview

Advising Demonstration

Question & Answer

Credits

NGSS & Pennant Overview

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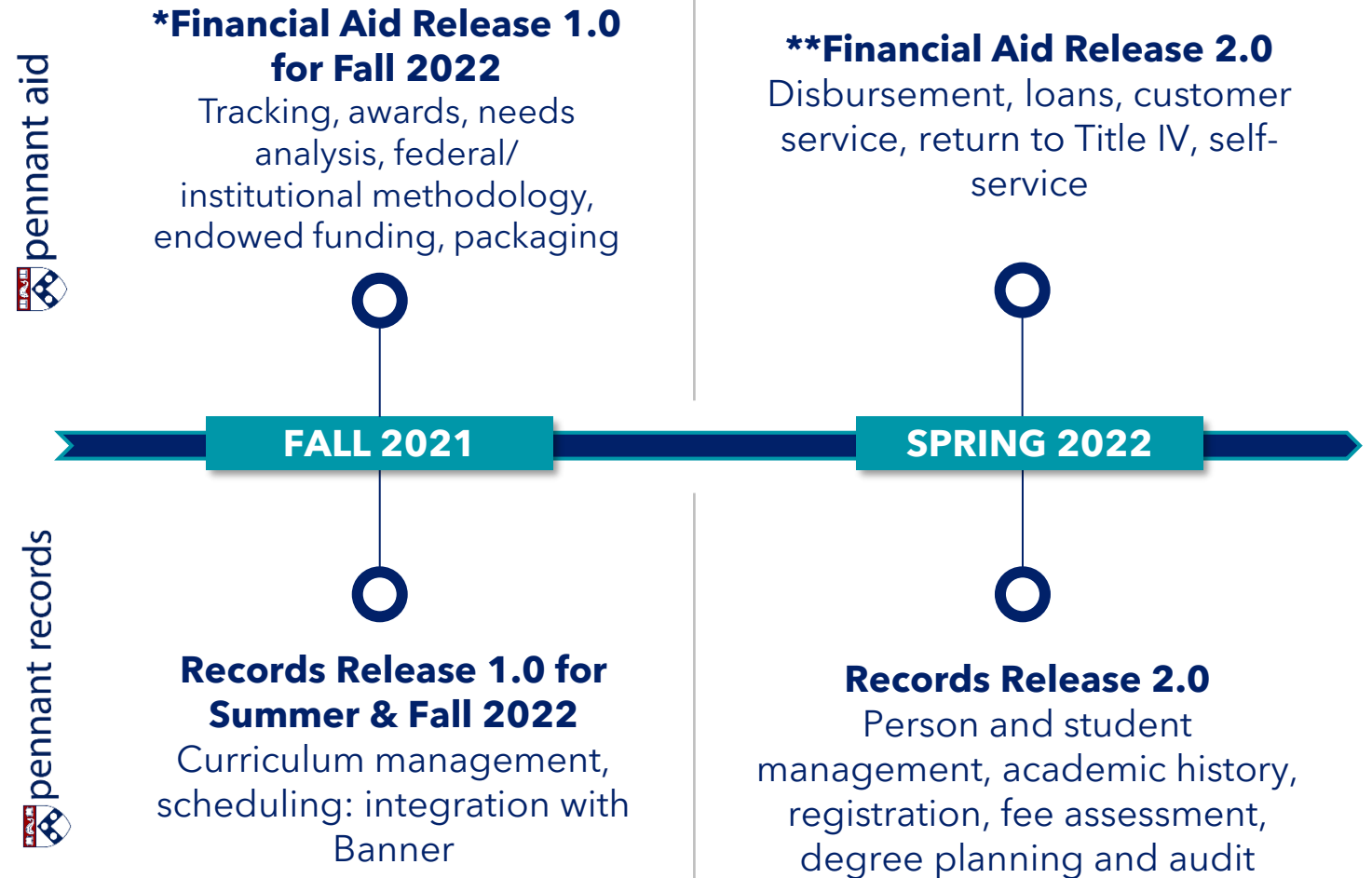- Improved workflows enable fewer manual steps

THE PATH TO COMPLETION

NGSS | pennant

NGSS MILESTONE HISTORY

2015
Introduction of Pennant Accounts

2017
CATALOG - RELEASE 1.0
Undergrad Programs and All Courses

MAY 2018
CATALOG - RELEASE 2.0
Catalog content expanded; external visits double

JUNE 2018
CURRICULUM MANAGER RELEASE 1.0 – "Pilot"
College of Arts and Sciences

MAY 2019
CATALOG - RELEASE 3.0
All Penn academic offerings viewable

AUGUST 2019
CURRICULUM MANAGER - RELEASE 2.0
All Schools using a new tool and workflow to build and manage curriculum

FUTURE RELEASES

pennant aid

*Financial Aid Release 1.0 for Fall 2022
Tracking, awards, needs analysis, federal/ institutional methodology, endowed funding, packaging

**Financial Aid Release 2.0
Disbursement, loans, customer service, return to Title IV, self-service

FALL 2021   **SPRING 2022**

pennant records

Records Release 1.0 for Summer & Fall 2022
Curriculum management, scheduling: integration with Banner

Records Release 2.0
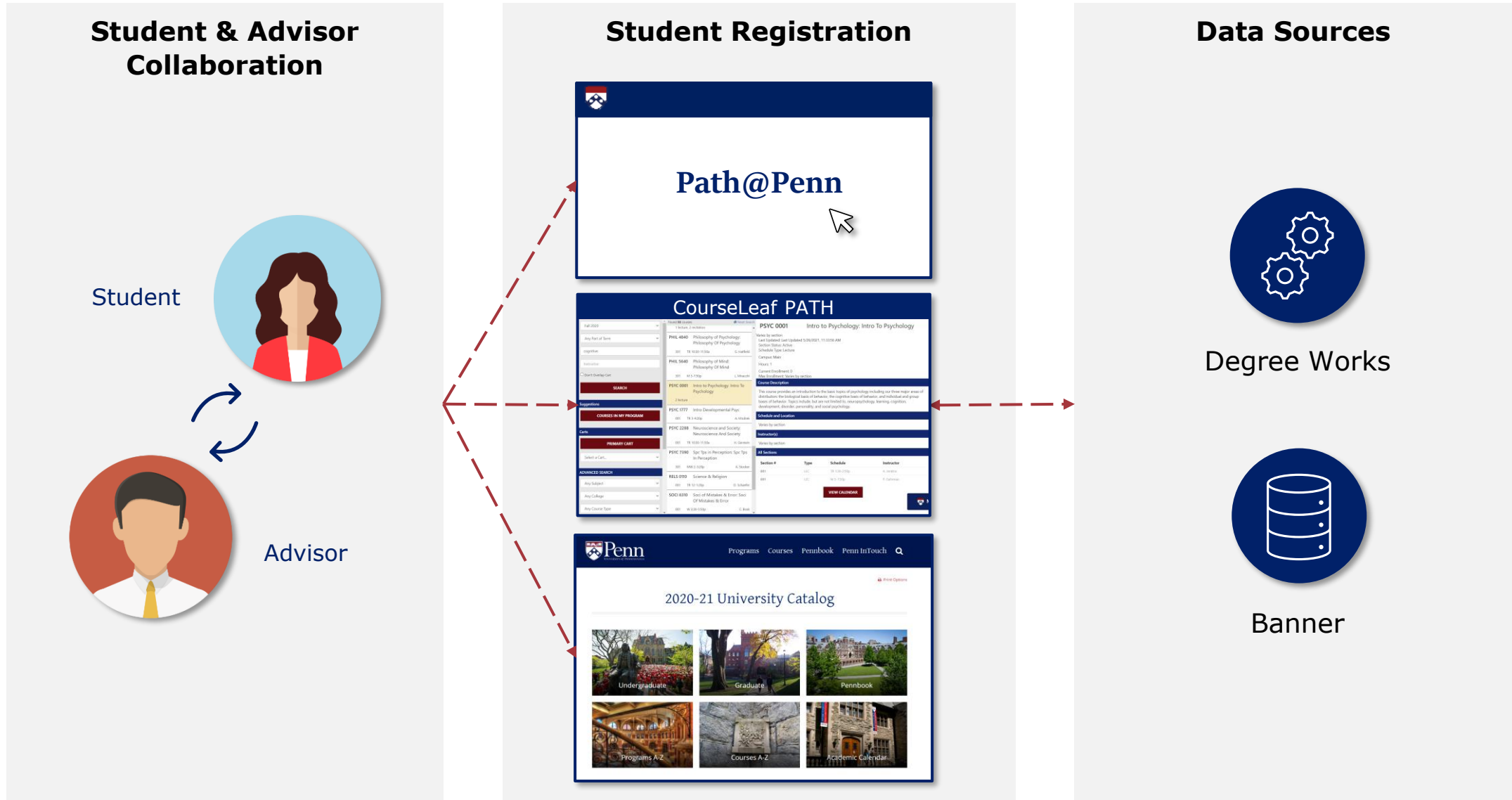Person and student management, academic history, registration, fee assessment, degree planning and audit

For **new applicants only*
Tracking, Awards, Needs Analysis, Endowed Funding, and Packaging for **returning student population

Student Registration Experience

Advising Roles

Advisor Roles

- Faculty Advisor
- Program Director/Departmental Administrator
- Assistant Dean/Advising Director

Engagement Layer

Advising@Penn

Advising Systems

- CourseLeaf PATH
- Degree Works
- Banner

Student Personas

Peg

Incoming First Year

Wharton

Permission Request
Add/Remove Courses from Planner
Request Exception
Add Advising Note

Stu

Rising Junior

College

Lift Advising Hold
Degree Audit
Add Advising Note

Changes in Language
Student

Penn InTouch Terminology	Pennant Terminology	Definition
Penn InTouch	Path@Penn	Student engagement layer which hosts student information, resources and access points to applications and tools, such as CourseLeaf PATH.
Mock Schedule	Cart	Students can create multiple carts to experiment with various scheduling combinations.
Primary Request	Primary Cart	Cart that will be submitted for advance registration request.
Alternate Request	Alternatives Cart	Cart that is linked to the Primary Cart and will be used for the Advance Registration request. If a course in the Primary Cart is not available, the system will use the alternate specified in the Alternatives Cart.
Course Selection	Add/Drop/Swap	Following Advance Registration, students can modify the system-created schedule during the specified ~2.5-week window in the beginning of the semester. Students can modify their schedule by adding, dropping, or swapping courses.

Changes in Language
Advisor

Penn InTouch Terminology	Pennant Terminology	Definition
Advisor InTouch	Advising@Penn	Advisor engagement layer which hosts resources and access points to applications and tools, such as CourseLeaf PATH.
Unofficial Worksheet	Planner	Planning tool to explore academic options and programs.
Official Worksheet	Audit	Tool to verify how student's past, current, and future courses will meet degree or program requirements.
Permit	Permission Request	Request for enrollment in a course section for a student not able to add due to restrictions on the section

Advising Demonstration

Question & Answer

Questions, Answers, and Commentary

You can ask your question in 2 ways:

1. Use the **raise hand** functionality. Once called on, you can go off Mute to ask your question.

2. Enter your question in the chat.

If you have difficulties accessing the chat function for Q&A, please email your question to ngsscomms@isc.upenn.edu.

What's Next

What's Next

October 29

Student Information Session
- Path@Penn preview
- Showcase registration in CourseLeaf PATH system from student perspective

December

Release 2 Information Session
- Release 2 Information Session for Advisors and Financial Aid staff
- Engagement layer preview (Advising@Penn)

Thank You

NGSS Sponsors

Mark Dingfield
MaryFrances McCourt
Tom Murphy

Speakers

Adam Sherr
Kathy Higgins
Michael Peterson

NGSS Owners

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Jeanne Curtis
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NGSS Student Records

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Pennant Records Advisory Group (PRAG)

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Brendan O'Neill	Colleen Dunn	Joanne Murray	Lily Zhang	Mike O'Brien	Ted Marvel	
Brianna Sidorick-Potts	Dana McElroy					

PATH Advisory Group

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Caroline Gonzalez Ciccone	Jenna Tesauro	Megan Maxwell	Rebecca Stein
Celina Gray	Judith McKee	Michaile Rainey	Rick Dunn
David W. Corbin	Judy Jackson	Molly McGlone	Tanya Jung
Ellen Eckert	Julie Orts	Moriah Hall	Ted Marvel
Gary Purpura	Kathy Urban	Niel McDowell	Tracey Turner
Helen W. Xu	Kristyn Palmiotto	Nigel Cossar	Victoria Frew
Janae Lamoureux	Linda Turner	Rachel McGarrigle	Yvette Bordeaux

Student PATH Advisory Group
Penn Apps Labs, Graduate and Professional Student Assembly, Student Committee on Undergraduate Education Undergraduate Assembly

2021 - 2022

Sue Agravidor	Daniel Ng	Misty Liao
Charles Cunningham	Jonah Schenk	Oliver Kaplan
Chiadika Eleh	Joseph Squillaro	Sara Whitelaw
Daniel Like	Marta Garcia Ferreiro	Pranav Tadikonda
Aidan Young		

Questions & Feedback

For any follow-up questions or feedback, please email
ngsscomms@isc.upenn.edu.