The Next Generation Student Systems (NGSS) project team has compiled the Current Systems Freeze Information Packet to prepare the Penn Community for the NGSS Systems Freeze Period, which will begin January 1, 2021.

The purpose of this document is to socialize the critical dates and needs relevant to the Current Systems Freeze period in an effort to facilitate conversation between the impacted stakeholders and the project team. We encourage you to share and discuss this information with your constituents and colleagues.

Please reach out to the team with any questions or concerns related to the planned Current Systems Freeze period by emailing **NGSS_FREEZE_CR@LISTS.UPENN.EDU**.

NGSS
Next Generation Student Systems

CURRENT SYSTEMS FREEZE INFORMATION PACKET

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CURRENT SYSTEMS FREEZE INFORMATION PACKET

OVERVIEW

The NGSS project is implementing a **Current Systems Freeze** period beginning on **January 1, 2021** and lasting the remainder of the project until **March 2022**.

Purpose

Why implement a Current Systems Freeze period?
- In support of NGSS system implementation efforts, the project needs to limit changes to current systems that would impact the Release 1 and 2 functionality.
- See page 4 for the list of systems included in the freeze period.

Scope

What changes are included in the freeze period?
- The freeze period will apply to current System and Policy changes beginning January 1st and will apply to Data/Transactions in phases throughout 2021 (exact dates being defined – see page 5 for data/transactions with January 2021 freeze dates).
- Exceptions to the freeze period will be made for known regulatory changes and those identified on the Academic Calendar.

Exceptions

Can I request a non-regulatory change during the freeze period?
- Yes – in addition to your normal channels/processes for change requests, during the freeze period, please also communicate system, policy, and/or data/transaction change requests to Rob Nelson and Matt Sessa by emailing NGSS_FREEZE_CR@LISTS.UPENN.EDU.
- Rob Nelson and Matt Sessa will document the request and collaborate with appropriate University stakeholders to determine whether the need warrants an exception.

Types of Changes

System Change

Enhancements, third party changes, business processes, including any activity outside the NGSS project to current systems that can impact NGSS work.

Example: Adding a field to a SRS screen.

Policy Change

Proposing a new or changes to current University policies.

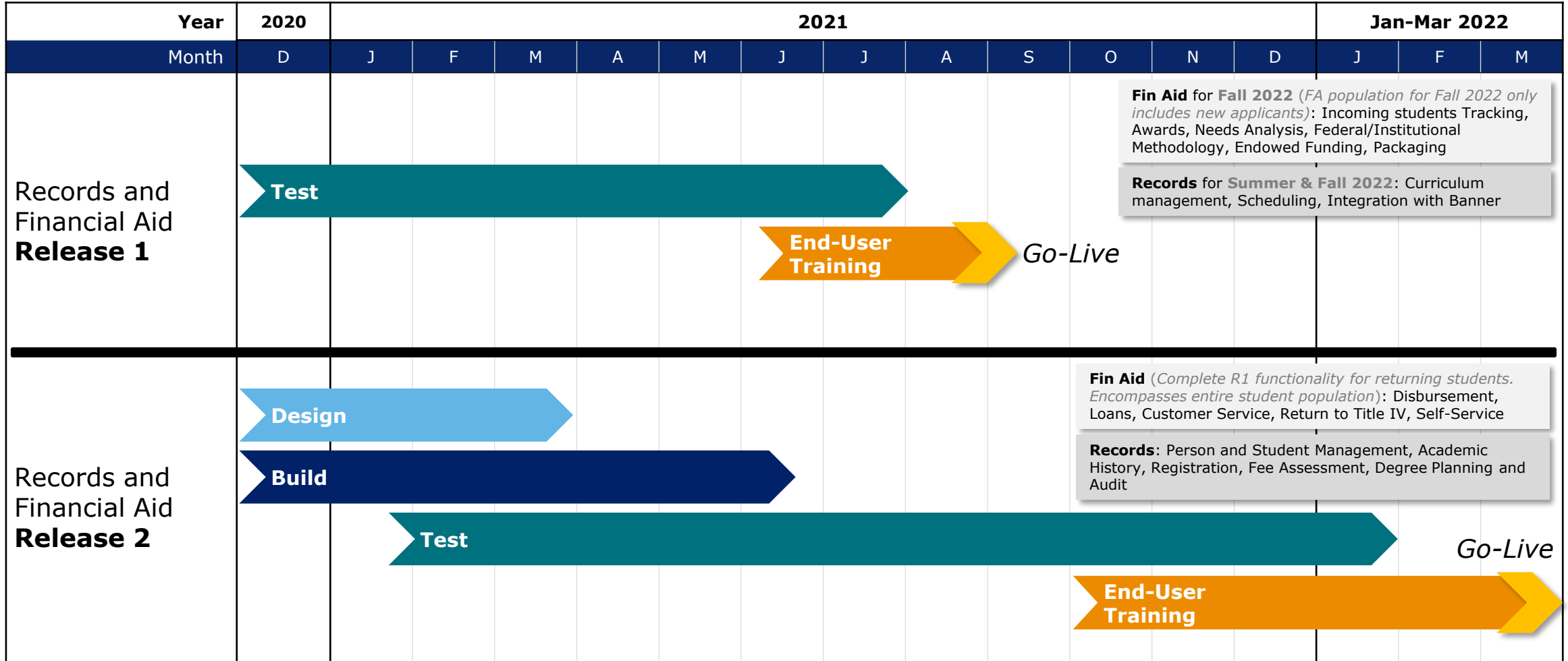**Example**: Update/change to the Return of Federal Aid Policy.

Data/Transaction Change

Requesting to change the data within a defined system.

Example: New or changes to courses, degrees, majors and minors.

PROJECT TIMELINE

The current systems freeze period will begin on **January 1, 2021** and last the remainder of the project until **March 2022**.

Year	2020	2021												Jan-Mar 2022		
Month	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M

Records and Financial Aid Release 1

Test

End-User Training → *Go-Live*

> **Fin Aid** for **Fall 2022** (*FA population for Fall 2022 only includes new applicants*): Incoming students Tracking, Awards, Needs Analysis, Federal/Institutional Methodology, Endowed Funding, Packaging

> **Records** for **Summer & Fall 2022**: Curriculum management, Scheduling, Integration with Banner

Records and Financial Aid Release 2

Design

Build

Test

End-User Training → *Go-Live*

> **Fin Aid** (*Complete R1 functionality for returning students. Encompasses entire student population*): Disbursement, Loans, Customer Service, Return to Title IV, Self-Service

> **Records**: Person and Student Management, Academic History, Registration, Fee Assessment, Degree Planning and Audit

All information as of December 11, 2020; subject to change.

IMPACTED CURRENT SYSTEMS

The following current systems are included in the freeze period as changes to these systems would impact NGSS Release 1 and 2 functionality.

Student Records	Financial Aid	Student Accounts
• Advisor InTouch (AIT) • BP Logix – Workflow • Courses InTouch (CIT) • Curriculum Manager (CM) • External Course Approval Tool (XCAT) - SAS • Final Exam Scheduler (FNLEXM) • Graduate Admissions Data Warehouse Collection • Penn InTouch (PIT) • Slate • SRS • Student Data Warehouse • University Catalog • Integrations with other systems	• Blackbaud • CollegeNet • FA Data Warehouse • Needs Analyzer • Penn Loan System (PLS) • Pennant Grad Funding • Slate • Student Aid Management (SAM) • Integrations with other systems	• Pennant Accounts • Pennant Feeder Application • Pennant Plus • Tuition Calc • Integrations with other systems

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NEAR-TERM DATA/TRANSACTION FREEZE DATES

The following data/transactions will be frozen as of **Friday, January 8, 2021.** After this date, such data/transaction changes will require approval as exceptions before being executed.

Event Type	Information needed by January 8th
Program Change*	• Change to Program Title • New Major/Concentration • New Degree/Certificates • Requirements (if substantive changes)
Course Change*	• New Subject Code • New Department Code
Cohort Change	• Changes impacting Budgeting (Fee Assessment) or Packaging
Special Programs Change	• New Code • Change or Removal of Code
Admissions Change	• New Code (effective for Fall 2022) • Change or Removal of Code (effective for Fall 2022)
Additional context on Program and Course Changes	

- New programs and substantive changes with an effective date of Fall 2021 must be to **OUR step in Curriculum Manager (CM) by Jan. 8, 2021**
- **If the proposal has not yet been submitted in CM, contact Michael and Michele at** curriculum@registrar.upenn.edu
- **Substantive Changes** include:
  - Major curricular overhaul (changes in requirement totals, structure, etc.)
- **Non-Substantive Changes** include:
  - Resolving redboxes (replacing deactivated courses)
  - Inserting a course as an option for a requirement
  - Formatting tables