NGSS
Next Generation Student Systems

SUPPLEMENTARY CURRENT SYSTEMS FREEZE INFORMATION PACKET -
Curriculum

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**.

TABLE OF CONTENTS

Penn

N·G·S·S
Next Generation Student Systems

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.

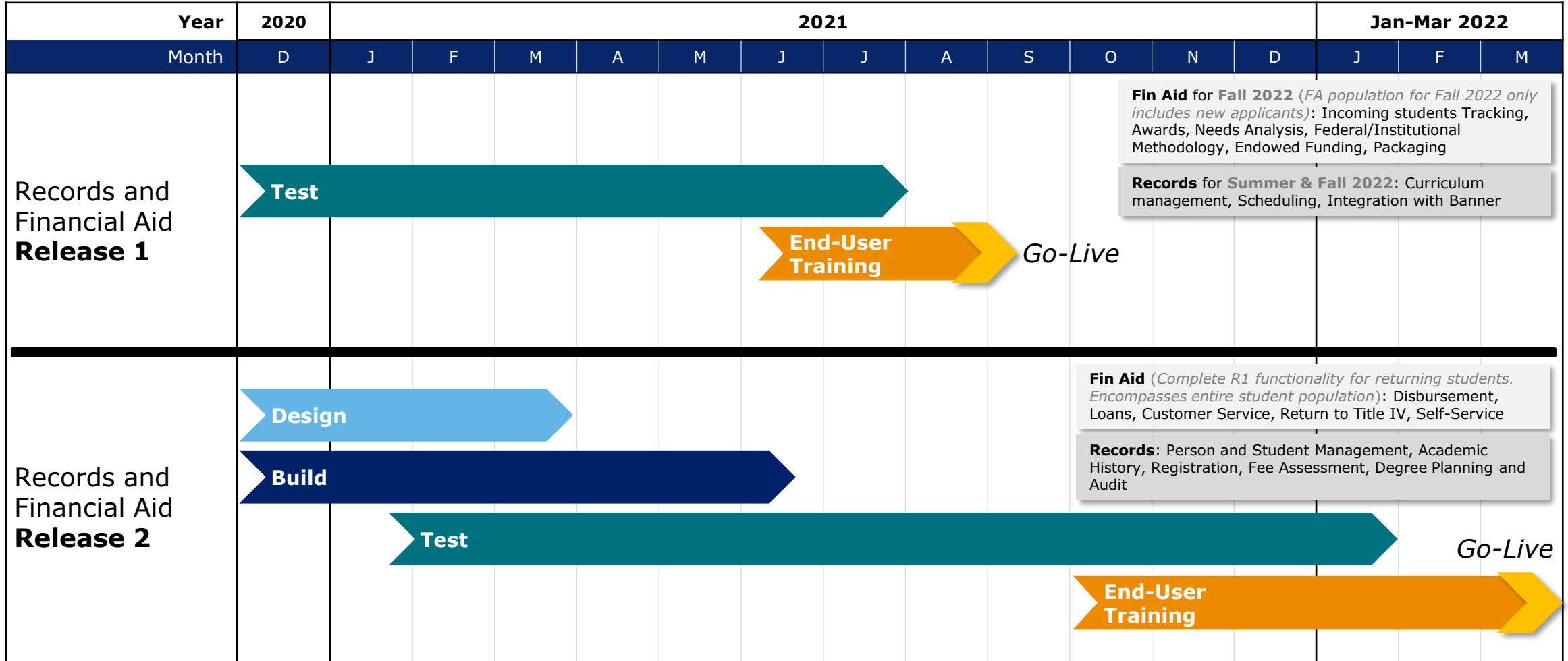**Example**: Update/change to the Return of Federal Aid Policy.

Data/Transaction Change

Requesting to change the data within a defined system.

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

Penn | NGSS Next Generation Student Systems

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

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

NGSS
Next Generation Student Systems

Curriculum Systems Freeze Details & Timelines

TABLE OF CONTENTS

Provides high-level timeline of how Systems Freeze impacts academic processes

Provides a "Closer Look" at items related to Student Records Program & Course Changes referenced in the *R1 Student Records Master Timeline*

Provides a "Closer Look" at items related to Section Maintenance referenced in the *R1 Student Records Master Timeline*

RELEASE 1 STUDENT RECORDS MASTER TIMELINE

|	Fall 2020	Spring 2021	Summer 2021	Fall 2021	Spring 2022	Summer 2022	Fall 2022	Spring 2023

Program & Course Changes

University Catalog (CAT)
- *See page 8-10 for additional details*

AY 21/22 ⬡3 — Catalog (CAT) → **Cutover** → **AY 22/23** ⬡4 — Catalog (CAT)

Curriculum Management (CM)
- *See pages 8-10 for additional details*

AY 21/22 ⬡3 — Curriculum Manager (CM) → **Cutover** → **AY 22/23** ⬡4 — Curriculum Manager (CM) Retrofit
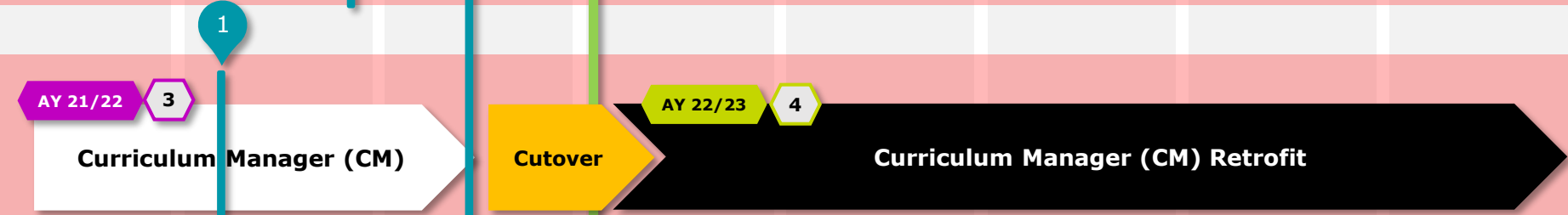
Section Maintenance

Section Maintenance & Scheduling
- *See page 11 for additional details*

AY 21/22 ⬡3 — SRS Screens 129-132

AY 22/23 ⬡4 — CourseLeaf Section Scheduler (CLSS)
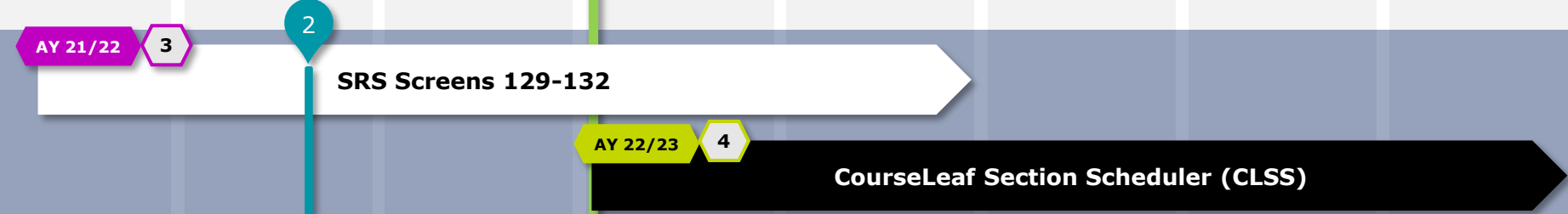
Final Exam Requests
- *See page 11 for additional details*

AY 21/22 ⬡3 — Courses InTouch (CIT) Final Exam Application

AY 22/23 ⬡4 — CourseLeaf Section Scheduler (CLSS)
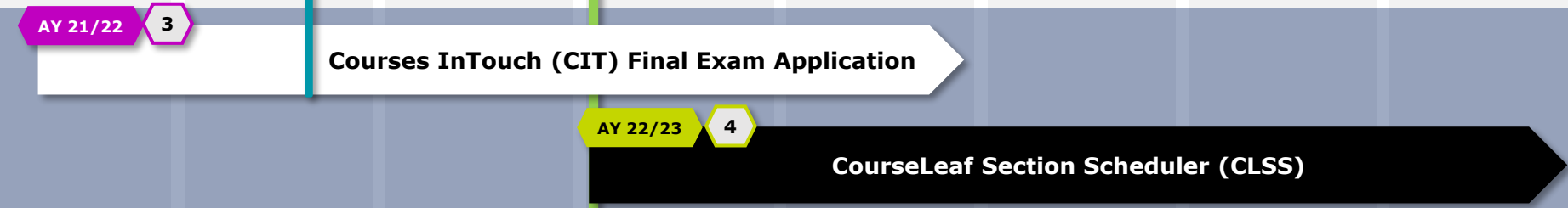
Legend

Current — Pennant — Cutover — | R1 Go-Live | Key Dates | ⬡# Course Digits #

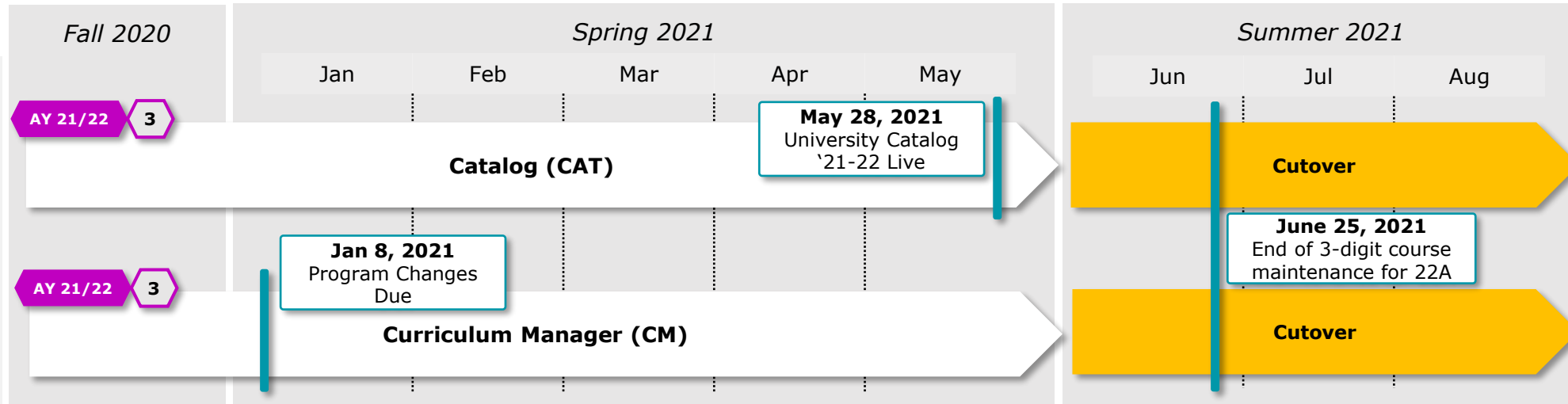| 1. Jan 8, 2021 Course & Program Changes Due	2. Apr 28, 2021 Roll 22A Sections	3. May 28, 2021 University Catalog '21-22 Live	4. Jun 25, 2021 End of 3-digit maintenance for 22A in CM	5. Fall 2021 Release 1 Go-Live

Closer Look: Release 1 Student Records Program & Course Items

Program & Course Changes

	Fall 2020	Spring 2021					Summer 2021		
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug

University Catalog (CAT) — AY 21/22 | 3 — Catalog (CAT) — May 28, 2021 University Catalog '21-22 Live — Cutover

Curriculum Management (CM) — AY 21/22 | 3 — Jan 8, 2021 Program Changes Due — Curriculum Manager (CM) — June 25, 2021 End of 3-digit course maintenance for 22A — Cutover

Program Change Details

- New programs and substantive changes with an effective date of Fall 2021, must be to **OUR step in CM by January 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
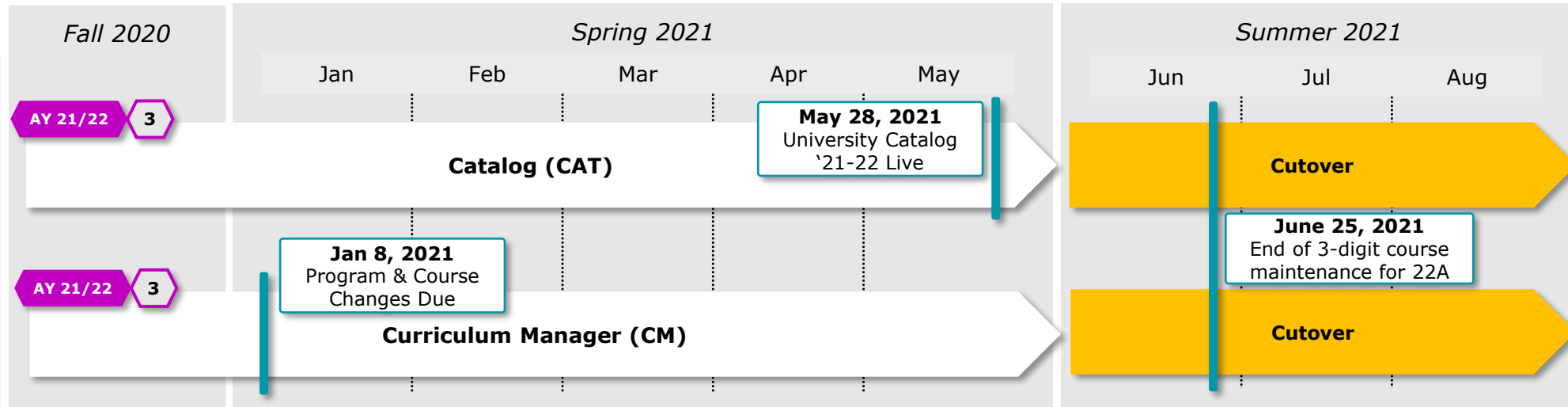 - Formatting tables

Course Change Details

- New course proposals, deactivations, substantive changes, etc. with an effective term of 22A or prior, **must be to OUR step in CM by May 28, 2021**
  - Non-substantive course description edits can be made through June 25, 2021
- **Substantive Changes** include:
  - Change in Course Title
  - Significant Changes in Course Description
  - Change in Credit Value
  - Change in Activity Type

Legend

| Current | Pennant | Cutover | | R1 Go-Live | | Key Dates | # | Course Digits # |

8

Closer Look: Release 1 Student Records Program & Course Timeline

Program & Course Changes

	Fall 2020	Spring 2021					Summer 2021		
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug

University Catalog (CAT)

AY 21/22 — 3

Catalog (CAT)

May 28, 2021 University Catalog '21-22 Live

Cutover

Curriculum Management (CM)

AY 21/22 — 3

Jan 8, 2021 Program & Course Changes Due

Curriculum Manager (CM)

June 25, 2021 End of 3-digit course maintenance for 22A

Cutover

Data Freeze Date	Event Type	Information Needed by Data Freeze Date	
January 8	Program Change	• Change to Program Title • New Major/Concentration	• New Degree/Certificates • Requirements (Substantive Changes)*
	Course Change	• New Subject Code	• New Department Code
May 28 University Catalog 2021-2022 Live	Program Change	• Deactivate Program	
	Course Change	• New Course/Cross-list (effective term 22A/3 digits) • Substantive Changes*(effective term 22A/3 digits)	• Method of Instruction (effective term 22A/3 digits) • Deactivate Course (effective term 22A or prior/3 digits)
June 25 End of 3-digit course maintenance for 22A in CM	Program Change	• Catalog Descriptions (Non-Substantive Edits)*	• Requirements (Non-Substantive Changes)*
	Course Change	• Non-Substantive Course Description Updates (effective term 22A/3 digits)	

* See page 6 for examples of Substantive and Non-Substantive changes

Legend

Current | Pennant | Cutover | | R1 Go-Live | | Key Dates | # Course Digits #

Closer Look: Release 1 Student Records Program & Course Items and Timeline

Program Change Details

- New programs and substantive changes with an effective date of Fall 2021, must be to **OUR step in CM by January 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

Course Change Details

- New course proposals, deactivations, substantive changes, etc. with an effective term of 22A or prior, **must be to OUR step in CM by May 28, 2021**
  - Non-substantive course description edits can be made through June 25, 2021
- **Substantive Changes** include:
  - Change in Course Title
  - Significant Changes in Course Description
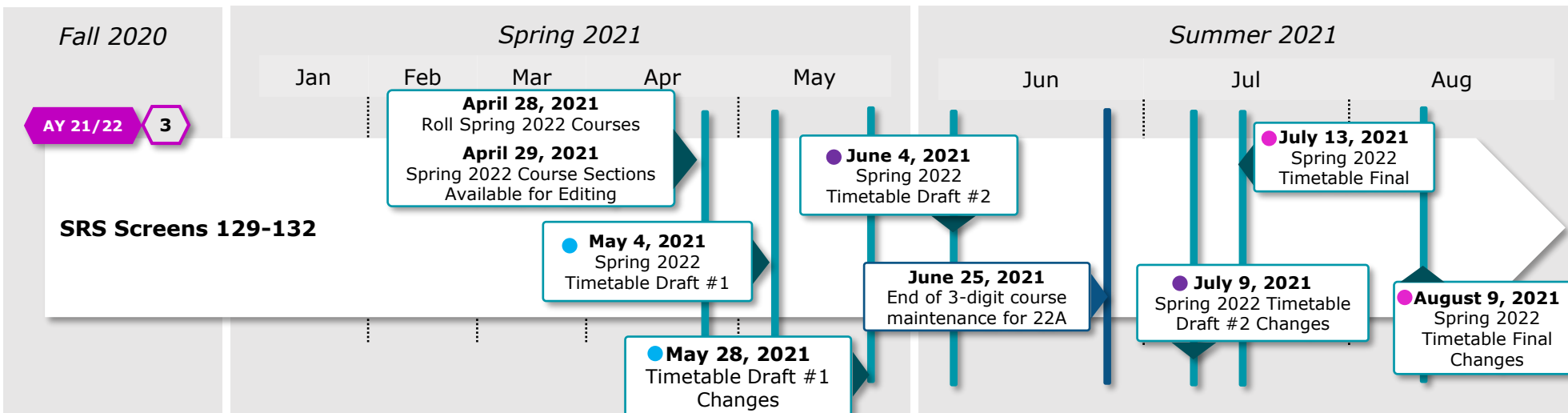 - Change in Credit Value
  - Change in Activity Type

Data Freeze Date	Event Type	Information Needed by Data Freeze Date	
January 8	Program Change	• Change to Program Title • New Major/Concentration	• New Degree/Certificates • Requirements (Substantive Changes)
	Course Change	• New Subject Code	• New Department Code
May 28 University Catalog 2021-2022 Live	Program Change	• Deactivate Program	
	Course Change	• New Course/Cross-list (effective term 22A/3 digits) • Substantive Changes (effective term 22A/3 digits)	• Method of Instruction (effective term 22A/3 digits) • Deactivate Course (effective term 22A or prior/3 digits)
June 25 End of 3-digit course maintenance for 22A in CM	Program Change	• Catalog Descriptions (Non-Substantive Edits)	• Requirements (Non-Substantive Changes)
	Course Change	• Non-Substantive Course Description Updates (effective term 22A/3 digits)	

Closer Look: Release 1 Student Records Section Maintenance Items and Timeline

Section Maintenance

Section Maintenance & Scheduling

SRS Screens 129-132

AY 21/22 — 3

Fall 2020

Spring 2021 — Jan | Feb | Mar | Apr | May

Summer 2021 — Jun | Jul | Aug

April 28, 2021 Roll Spring 2022 Courses

April 29, 2021 Spring 2022 Course Sections Available for Editing

● **May 4, 2021** Spring 2022 Timetable Draft #1

● **May 28, 2021** Timetable Draft #1 Changes

● **June 4, 2021** Spring 2022 Timetable Draft #2

June 25, 2021 End of 3-digit course maintenance for 22A

● **July 13, 2021** Spring 2022 Timetable Final

● **July 9, 2021** Spring 2022 Timetable Draft #2 Changes

● **August 9, 2021** Spring 2022 Timetable Final Changes

Final Exam Requests *(Will occur in Fall 2021)*

Event	Due Date	Information Needed by Due Date
April 28 Roll Spring 2022 Courses	N/A	• N/A
April 29 Spring 2022 Course Sections Available in SRS for Editing	N/A	• N/A
● **May 4** Spring 2022 Course Timetable Draft #1 on Infodesk	May 28, 5:00 p.m.	• Changes to the Spring 2022 Course Timetable Draft #1
● **June 4** Spring 2022 Course Timetable Draft #2 on Infodesk	July 9, 5:00 p.m.	• Changes to the Spring 2022 Course Timetable Draft #2
June 25 End of 3-digit course maintenance for 22A in CM	June 25	• Course changes must be in CM
● **July 13** Spring 2022 Final Course Timetable on Infodesk	August 9, 5:00 p.m.	• Changes to Spring 2022 Final Course Timetable

Section Maintenance Details

- Goal is for 100% of core Spring 2022 section configurations to be complete by **August 9, 2021**
  - 70% of all other Spring 2022 sections complete
- Spring 2022 Course Timetable publication will still be in October 2021
- All Spring 2022 section maintenance must be complete by the publication date (**October 2021**)
  - Timeline of the publication is unchanged from the current business process

Legend

Current | Pennant | Cutover | R1 Go-Live | Key Dates | # Course Digits #