Welcome to the CourseLeaf PATH Advising Demonstration

Note: Meeting will be recorded.

✓ Questions, Answers, and Commentary – 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.

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

✓ Turn Off Video – Please turn off your video function to minimize bandwidth use during the meeting.
WHAT IS NGSS?

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

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.

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.

Benefits to Community

NGSS TEAM

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
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).
<table>
<thead>
<tr>
<th>Pennant Accounts 2015</th>
<th>Pennant Records</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts-receivable and student-profile.</td>
<td><strong>University Catalog</strong> 2017</td>
</tr>
<tr>
<td></td>
<td>All of Penn’s course offerings, programs, degree requirements, and academic policies.</td>
</tr>
</tbody>
</table>
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
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:

<table>
<thead>
<tr>
<th>Pennant Accounts</th>
<th>Pennant Records</th>
<th>Pennant Aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live as of 2015</td>
<td>RELEASE 1 - FALL 2021</td>
<td>RELEASE 2 - MARCH 2022</td>
</tr>
</tbody>
</table>

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**
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# NGSS Milestone History

<table>
<thead>
<tr>
<th>Year</th>
<th>Milestone</th>
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<tbody>
<tr>
<td>2015</td>
<td>Introduction of Pennant Accounts</td>
</tr>
<tr>
<td>2017</td>
<td><strong>CATALOG - RELEASE 1.0</strong> Undergrad Programs and All Courses</td>
</tr>
<tr>
<td><strong>MAY 2018</strong></td>
<td><strong>CATALOG - RELEASE 2.0</strong> Catalog content expanded; external visits double</td>
</tr>
<tr>
<td><strong>JUNE 2018</strong></td>
<td><strong>CURRICULUM MANAGER RELEASE 1.0 - “Pilot”</strong> College of Arts and Sciences</td>
</tr>
<tr>
<td><strong>MAY 2019</strong></td>
<td><strong>CATALOG - RELEASE 3.0</strong> All Penn academic offerings viewable</td>
</tr>
<tr>
<td><strong>AUGUST 2019</strong></td>
<td><strong>CURRICULUM MANAGER - RELEASE 2.0</strong> All Schools using a new tool and workflow to build and manage curriculum</td>
</tr>
</tbody>
</table>

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# Future Releases

**FALL 2021**

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

**SPRING 2022**

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

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*For new applicants only

**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

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**For returning student population**

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Student Registration Experience

Student & Advisor Collaboration

Student Registration

Data Sources

Degree Works

Banner
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
<table>
<thead>
<tr>
<th>Penn InTouch Terminology</th>
<th>Pennant Terminology</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Penn InTouch</td>
<td>Path@Penn</td>
<td>Student engagement layer which hosts student information, resources and access points to applications and tools, such as CourseLeaf PATH.</td>
</tr>
<tr>
<td>Mock Schedule</td>
<td>Cart</td>
<td>Students can create multiple carts to experiment with various scheduling combinations.</td>
</tr>
<tr>
<td>Primary Request</td>
<td>Primary Cart</td>
<td>Cart that will be submitted for advance registration request.</td>
</tr>
<tr>
<td>Alternate Request</td>
<td>Alternatives Cart</td>
<td>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.</td>
</tr>
<tr>
<td>Course Selection</td>
<td>Add/Drop/Swap</td>
<td>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.</td>
</tr>
</tbody>
</table>
## Changes in Language

### Advisor

<table>
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<tr>
<td>Advisor InTouch</td>
<td>Advising@Penn</td>
<td>Advisor engagement layer which hosts resources and access points to applications and tools, such as CourseLeaf PATH.</td>
</tr>
<tr>
<td>Unofficial Worksheet</td>
<td>Planner</td>
<td>Planning tool to explore academic options and programs.</td>
</tr>
<tr>
<td>Official Worksheet</td>
<td>Audit</td>
<td>Tool to verify how student’s past, current, and future courses will meet degree or program requirements.</td>
</tr>
<tr>
<td>Permit</td>
<td>Permission Request</td>
<td>Request for enrollment in a course section for a student not able to add due to restrictions on the section.</td>
</tr>
</tbody>
</table>
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
### Pennant Records Advisory Group (PRAG)

<table>
<thead>
<tr>
<th>Name</th>
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<tr>
<td>A. J. Jordan</td>
<td>Caroline Gonzalez Ciccone</td>
<td>David Corbin</td>
<td>John O'Donnell</td>
<td>Margaret Kip</td>
<td>Molly McGlone</td>
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<td>Alex Milne</td>
<td>Catherine Lyssenko</td>
<td>Deborah Stagg</td>
<td>Judith McKee</td>
<td>Mariel Staszewski</td>
<td>Niel McDowell</td>
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<td>Alison Feather</td>
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<td>Andrea Porter</td>
<td>Chris Veitz</td>
<td>Isabel Boston</td>
<td>Kathryn Brossa</td>
<td>Melinda Pontes</td>
<td>Rachel McGarrigle</td>
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<td>Amy Myers</td>
<td>Christy Daly</td>
<td>Jaclyn Sliben</td>
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<td>Michael Griego</td>
<td>Rick Dunn</td>
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<td>Bethany Schell</td>
<td>Claire Wallace</td>
<td>Janeen Chavis</td>
<td>Kristina Leonard</td>
<td>Michael Peterson</td>
<td>Tak Puang</td>
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<td>Bradley Warren</td>
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<td>Jenily Reves</td>
<td>Kristyn Palmiotto</td>
<td>Michele Tuohy</td>
<td>Tanya Jung</td>
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<td>Brendan O'Neill</td>
<td>Dana McElroy</td>
<td>Joanne Murray</td>
<td>Lily Zhang</td>
<td>Mike O'Brien</td>
<td>Ted Marvel</td>
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<tr>
<td>Brianna Sidorick-Potts</td>
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<td>Julie Orts</td>
<td>Moriah Hall</td>
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<td>Kathy Urban</td>
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### Student PATH Advisory Group

**Penn Apps Labs, Graduate and Professional Student Assembly, Student Committee on Undergraduate Education Undergraduate Assembly**

**2021 - 2022**

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<thead>
<tr>
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<tr>
<td>Sue Agravidor</td>
<td>Daniel Ng</td>
<td>Misty Liao</td>
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<tr>
<td>Charles Cunningham</td>
<td>Jonah Schenk</td>
<td>Oliver Kaplan</td>
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<tr>
<td>Chiadika Eleh</td>
<td>Joseph Squillaro</td>
<td>Sara Whitelaw</td>
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<tr>
<td>Daniel Like</td>
<td>Marta Garcia Ferreiro</td>
<td>Pranav Tadikonda</td>
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Questions & Feedback

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