

## Guide to Advising@Penn

### Welcome to Advising@Penn!

Advising@Penn provides access to the information and tools academic advisors need to help students register for classes and complete their degree or program. Advising@Penn is replacing Advisor InTouch as part of the implementation of Pennant, the new student information system at Penn. Visit Advising@Penn at <https://advising.at.upenn.edu/>.

### Need help?

Help is available by going to the Pennant Resources website:

<https://srf.s.upenn.edu/faculty-staff-resources/pennant/pennant-records/pennant-records-resources-support>

There you can:

- Access the full collection of training documents for Pennant.
- Register for Workshops or View a Schedule of Drop-In Office Hours.
- Open a Support Ticket to let us know about a problem. Someone will follow up to assist you.

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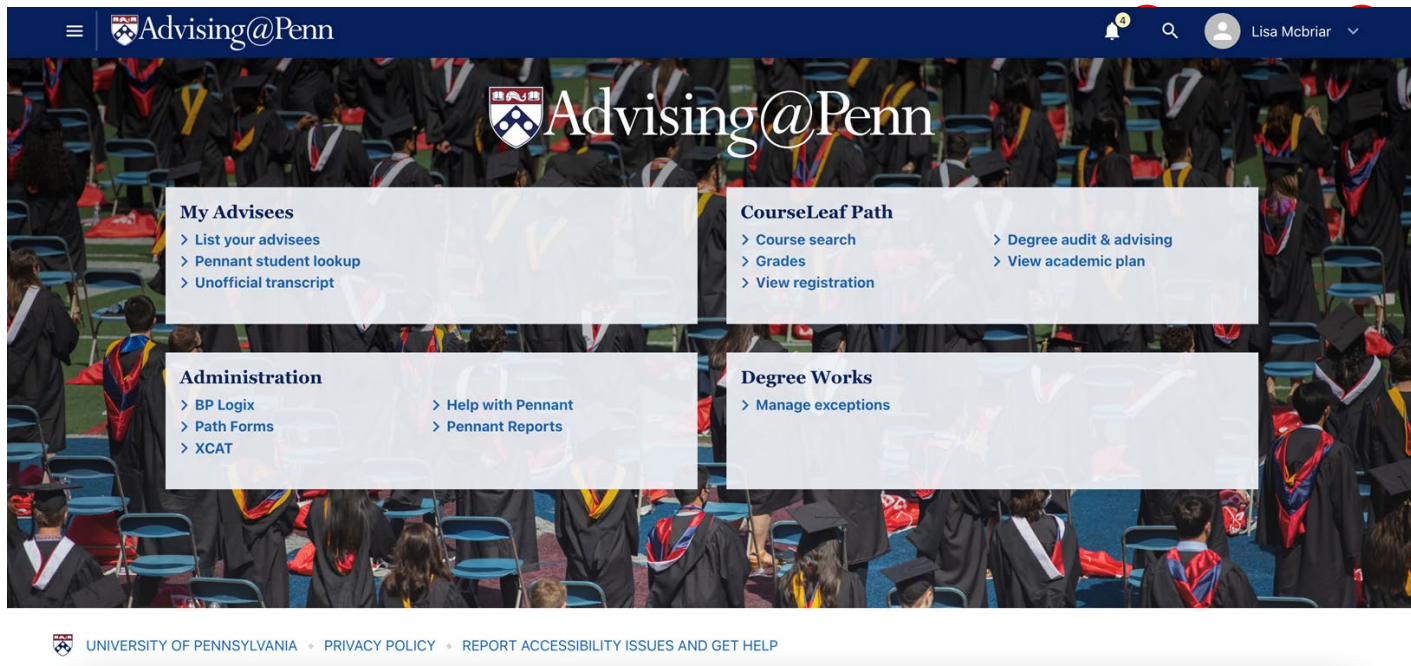
### Pennant: From InTouch to @Penn

Pennant introduces new points of access to the system for students and advisors. Path@Penn is replacing Penn InTouch and Advising@Penn is replacing Advisor InTouch. Here are some changes in the language used in Pennant that you will see on Advising@Penn and in the tools you will use that are part of Pennant.

InTouch Terminology	Pennant Terminology	Definition
Penn InTouch	Path@Penn	Student website which provides access to applications and tools to support academic planning, financial aid, registration, and other important academic and financial processes.
Advisor InTouch	Advising@Penn	Advisor website which hosts resources and access points to applications and tools, such as CourseLeaf PATH and Self-Service Banner Advising.
Mock Schedule	Cart	Students can create multiple carts to experiment with various scheduling combinations.
Primary Request	Primary Cart	Students use this Cart to submit their advance registration request modify their schedule during course selection. Select upcoming term to view classes requested.
Alternate Request	Alternatives Cart	Students use this Cart, which is linked to the Primary Cart, to submit alternatives to their advance registration request
Add/Drop	Add/Drop/Swap	During the Course Selection period, students can modify their schedule by adding, dropping, or swapping courses in their Primary Cart.
View Schedule	Primary Cart	Advisors can view a student's schedule by selecting the current term and clicking on Primary Cart. Click on the calendar view icon to see weekly schedule.
Permit	Permission Request	Request for enrollment in a class for a student not able to add.

## Getting Started

Log in to Advising@Penn by entering <https://advising.at.upenn.edu/> into your browser.



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- 1 User Name:** The preferred name of the Advisor will be displayed in the top right hand corner. Click on the dropdown arrow to the right of your name to view your account information.
- 2 Notifications:** Click on the bell icon to review notifications, such as alerts and important dates.
- 3 My Advisees:** Use these links to view a list of your advisees, their contact information and their unofficial transcript.
- 4 CourseLeaf Path:** Use links to view information about students and assist them with course selection, registration, and academic planning.
- 5 Administration:** Use these links to access reports and online forms.
- 6 Degree Works:** Program directors and administrators use these links to access tools to review and approve exceptions to degree requirements, view details of a student's progress toward degree, and audit students in a program. *NOTE: Many advisors do not have access to Degree Works.*

**Search and Favorite Links:** Use search icon in top right to search Advising@Penn. Click on "Add to Quick Links" star in list to save favorite a particular link.

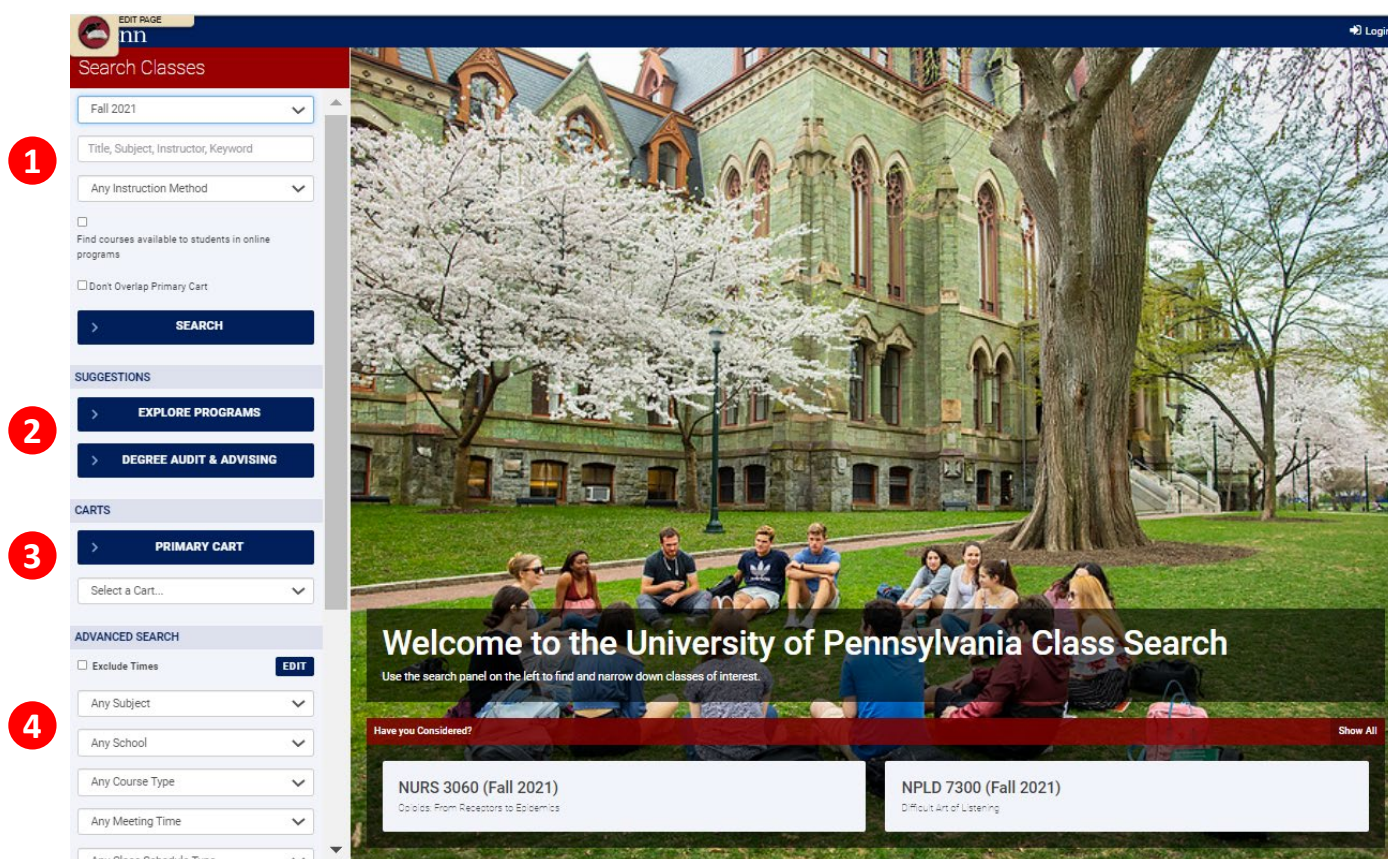
**More Links:** Click the menu icon in the top left to finds links to additional information, such as school advising offices and additional resources for supporting students.

## Getting Started in CourseLeaf Path

CourseLeaf Path is an application that enables academic advisors and students to collaborate as the student makes decisions about what courses to take and what academic opportunities to pursue. Advisors access CourseLeaf Path through Advising@Penn and students through Path@Penn.

During the Spring 2022 term, students will register for summer and fall classes using CourseLeaf Path. Students will use Penn InTouch and academic advisors will use Advisor InTouch to determine what degree requirements have been satisfied and what remains to be completed. This guide focuses on supporting students registering for classes in the upcoming summer and fall terms.

Click on a link in Advising@Penn to access CourseLeaf Path.



- 1 Search Classes**

Select the upcoming term and enter any keywords or course names you wish to narrow search for classes offered for that term.
- 2 Suggestions**

**Explore Programs** and **Degree Audit & Advising** will not be fully functioning until June 2022. Advisor InTouch should be used for academic planning and degree audits while advising students who are registering for classes in the Summer and Fall 2022 terms.
- 3 Carts**

Students use Carts to create mock schedules and make requests during advance registration. During the Course Selection Period, students use their Primary Cart to add/drop/swap courses on their schedule. The Alternative Cart is used to add optional courses.
- 4 Advanced Search**

Use the fields here to narrow your search or to exclude classes during certain times.

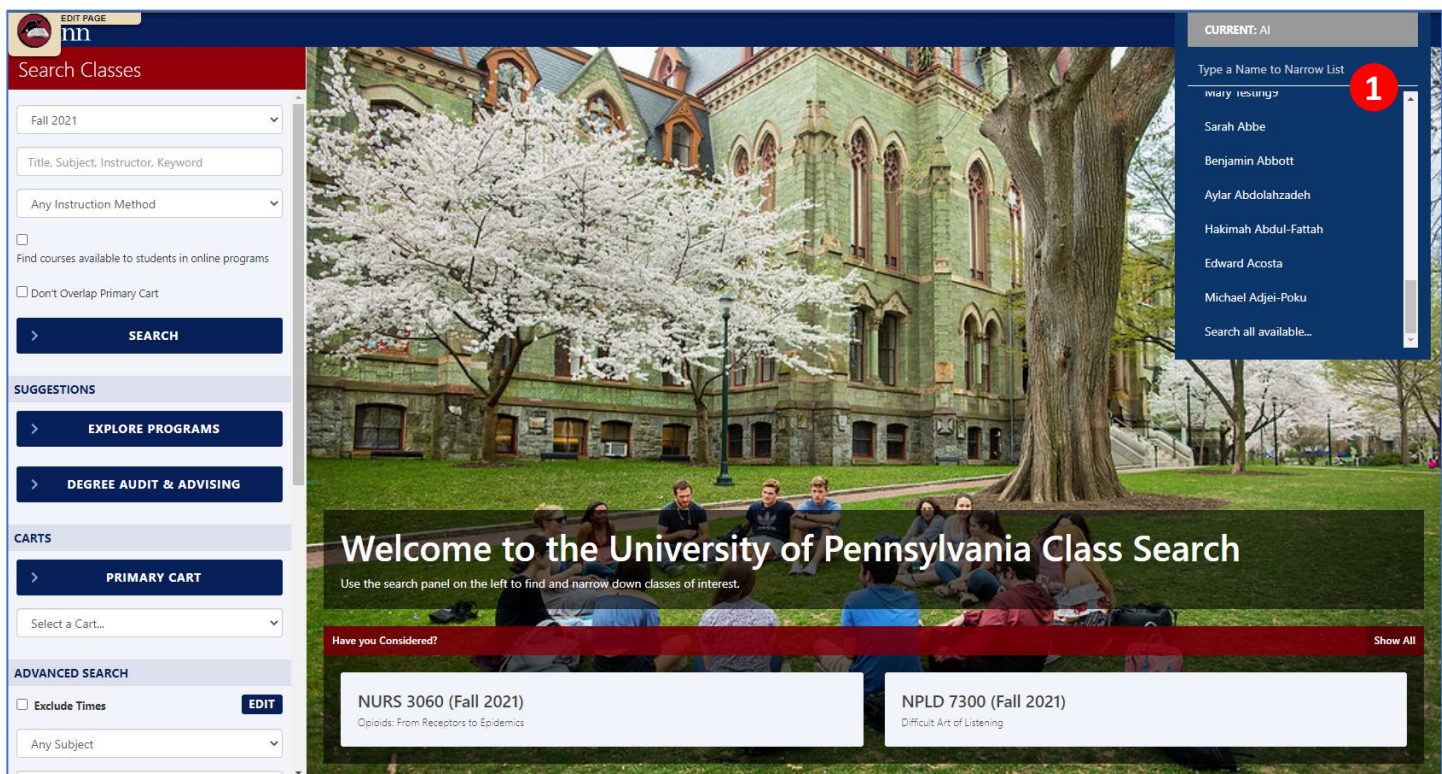
## Mirroring a Student

CourseLeaf Path is designed for collaboration so many of the actions you take as an advisor are accomplished by “mirroring” or “acting as” the student.

Advisors mirror a student to:

- Assist students in navigating the registration and planning tools in Path. This is particularly useful during remote advising sessions.
- View information about a student’s Cart and Plan or take actions as the student to collaborate on course selection and degree planning.
- Take actions such as view and release holds, view and enter advising notes, or view an advising audit.

Mirroring a student in Path ***does not allow*** advisors to submit a registration request or complete add/drop/swap in the Primary Cart. Only students may take actions such as register for classes or update their schedule of classes. Students cannot see advising notes.



**1** To mirror a student, navigate to CourseLeaf Path and select the arrow next to your name in the upper right corner. Select a student from the list or type a student’s name or Penn ID into the text box. You know you are mirroring a student when the name of the student appears in the upper right corner.

To find a student who is not assigned to you as an advisor, scroll to the bottom of the list and click “Search all Available.” Not all advisors have permission to search for a student who is not assigned to them.

## Supporting Students during Registration

### Advance Registration

During Advance Registration, students select their preferred courses by using their Primary Cart and alternative courses, using the Alternative Cart. Students can submit their course requests at any time during this period. All course requests are processed at the conclusion of the Advance Registration period, regardless of when the request was submitted. There is no advantage to registering early and no guarantee that students will be enrolled in all their requested courses.

See the Advance Registration Quick Reference Guide for details.

### Course Selection

During Course Selection, students register for classes or adjust their schedule using their Primary Cart. Students can add/drop/swap courses at any time during this period.

See the Course Selection Quick Reference Guide for details.

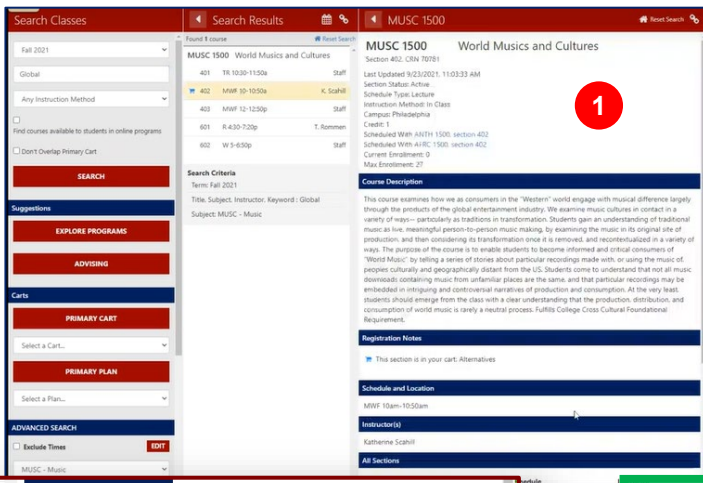
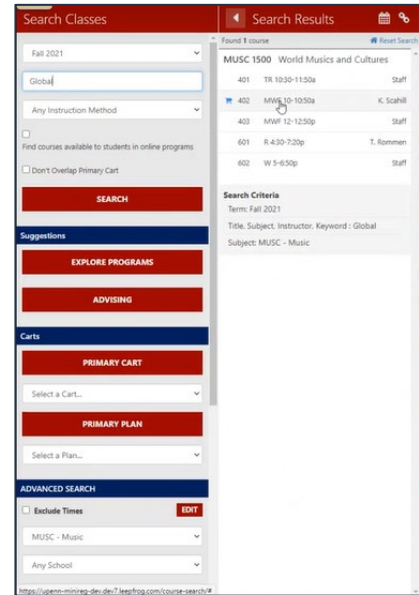
### After Course Selection

After the Course Selection Period ends, students are limited in the changes they may make to their schedule of classes. They may drop classes until the drop deadline. However, there are rules governing dropping classes for full-time students, students with financial aid, students on academic probation, athletes, and international students. These students should consult their academic advisors before dropping a course. Students who wish to change their schedules after an academic deadline can petition for exception to University Policy using Path Forms.

## I want to submit my registration request and get my preferred schedule!



From Path@Penn, click **Search & Register for Classes** under *Academic Planning and Registration*.



Enter the desired Term and any search criteria in the search bar before clicking **Search**.

Available courses and sections appear in a new panel to the right.

*Tip: To refine search, use the **Advanced Search** functionality in the bottom of the **Search Courses** bar.*

1 Click on the desired course section to open the **Course Details Panel** to learn more.

2 Click the **Add to Cart** button to add that section to the **Primary Cart** or **Alternate Cart** and then click OK.

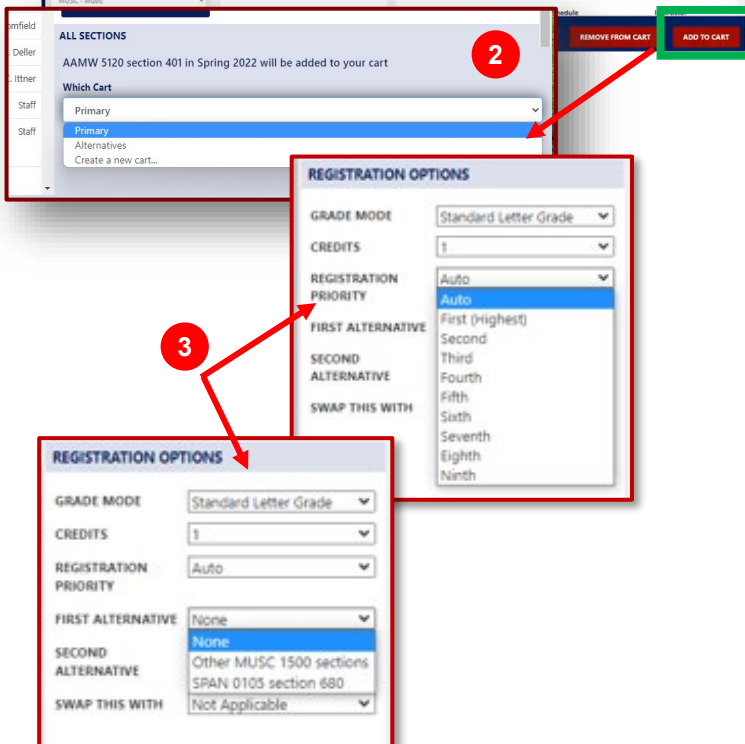
*Tip: **Primary Cart** includes first choice sections you **plan to register for**. **Alternate** carts hold alternative courses you **might register for**.*

3 Use the **Edit Registration Options** panel to update the grade mode, credits, or to select a registration priority. Select a first or second alternative or swap the selected section for another section you are already registered for.

- Use **Registration Priority** to rank your requests. NOTE: *Auto* priority will rank your advance registrations based on popularity (*seats available and number of students requesting the class*).

- The **First & Second Alternative** dropdowns contain an option for **Other...** if you would accept any section of the class, as well as any sections you have in your Alternatives Cart.

When done, click **Submit Schedule**.





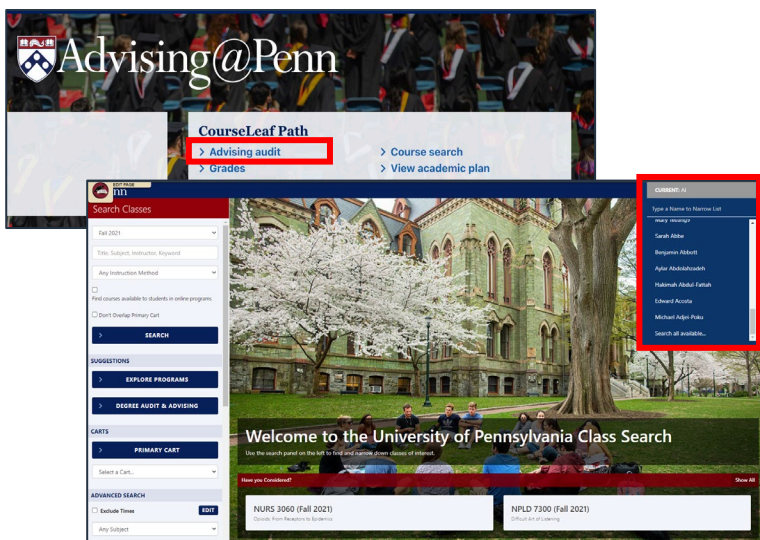
### OVERVIEW

Advisors can add new or view all existing advising notes on the student record, including those made by other advisors.

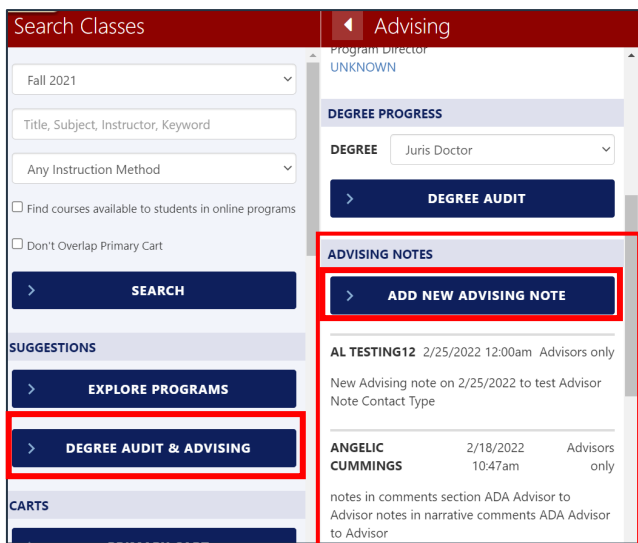
#### Mirror the Student

1. From Advising@Penn, click **Degree audit & advising** under CourseLeaf Path.
2. In the top right, click the arrow next to your name to see your list of advisees. Click the name of the student you wish to mirror.

*NOTE: To see students not assigned to you, click **Search all Available** at the bottom of your advisee list then search for and select the desired student.*



#### Viewing Advising Notes

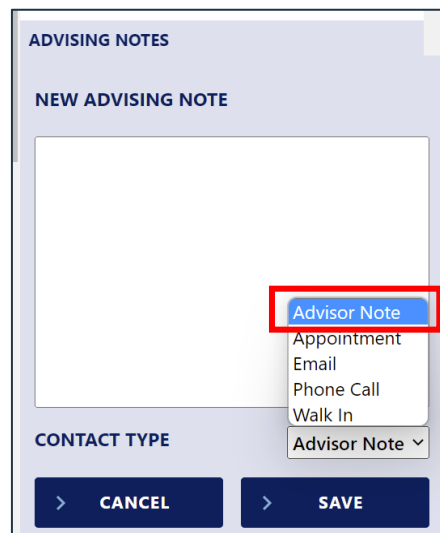


1. Click on **Degree Audit & Advising** in left navigation bar.
2. General student information, such as name, major, advisor, etc. appears at the top of the new panel.
3. In the **Advising Notes** section, you will find all Advising Notes related to this student, including notes from other advisors.
4. You will see each note, the author, date, type of note, and the text entered on the note.

*NOTE: In addition to Advising Notes, you may see Correspondence, Exit/Final Action, Student Financial Services and Student Accounts / Collections notes in Path.*

#### Adding a New Advising Note

1. To add a new advising note, click on **Add New Advising Note** (shown above).
2. Enter the desired note in the text box.
  - **DOUBLE-CHECK** the note entered and student name before saving. **Notes cannot be edited or deleted** once added, even if added to the wrong student record.
3. Select **Advisor Note** or appropriate **Contact Type** from dropdown.
4. Click **Save**.  
The new note now appears under the list of Advising Notes. It includes your name, date & time of note, and note type Advisors Only.



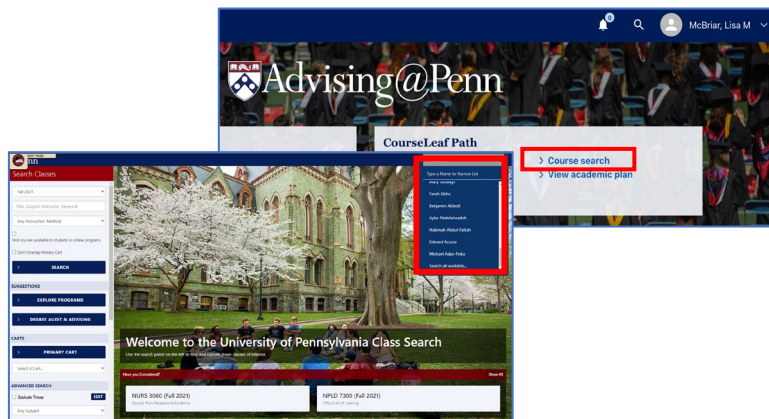
### OVERVIEW

Advisors can assist students with adding, dropping or swapping courses by mirroring the student. They cannot submit the registration change on the student's behalf. Only Students can submit registration changes.

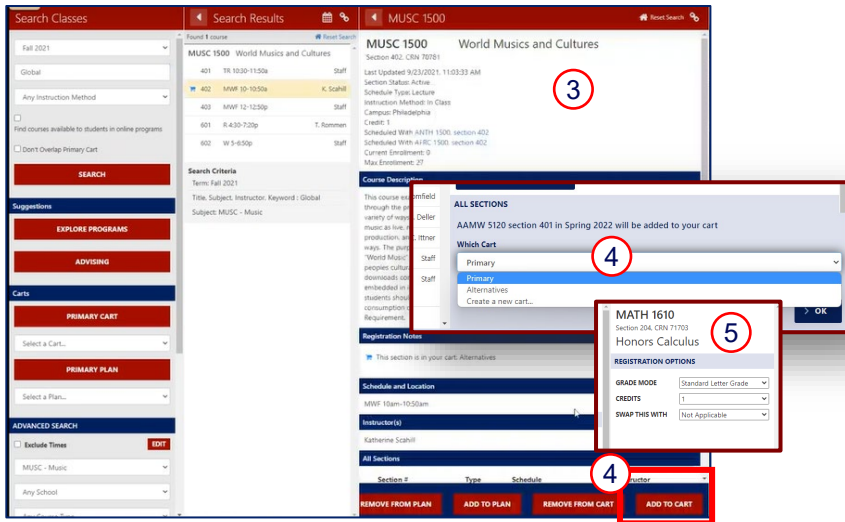
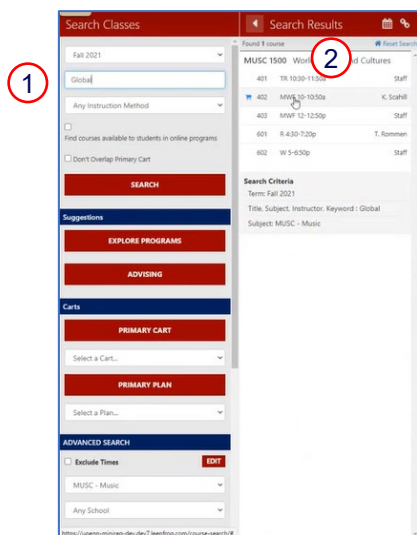
### Mirror the Student

- From Advising@Penn, click **Course Search** under CourseLeaf Path.
- In the top right, click the arrow next to your name to see your list of advisees. Click the student's name you want to mirror.

*NOTE: To see students, not assigned to you, click **Search all Available** at the bottom of your advisee list then search for and select the desired student.*



### Add or Swap Course



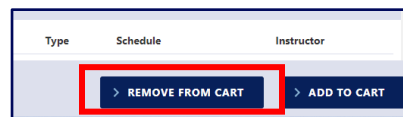
- Enter the desired Term and any search criteria in the search bar before clicking **Search**.
- Available courses & sections appear in *Search Results* panel.  
**Tip: To refine search, use the **Advanced Search** functionality in the bottom of the Search Courses bar.**
- Click on the desired course section to open the Course Panel.
- Click the **Add to Cart** button to add that section to the **Primary Cart** or **Alternate Cart**.  
**Tip: Primary Cart includes course sections you plan to register for. Alternative carts hold courses you might register for.**
- Use the **Edit Registration Options** panel to update the grade mode, credits, or to **swap** the selected section for another section you are already registered for.

When done, click **Save Changes**.

**The Student must Submit the Registration Change themselves.**

### Drop Course

- From the Search Courses bar, click on **Primary Cart** to open your current registrations.
- Click the desired class to open the Course Panel.  
**Tip: To refine search, use the **Advanced Search** functionality in the bottom of Search Courses.**
- Click the **Remove From Cart** button. The dropped class will now appear in the cart with a red (|) line in front to designate you are dropping it.



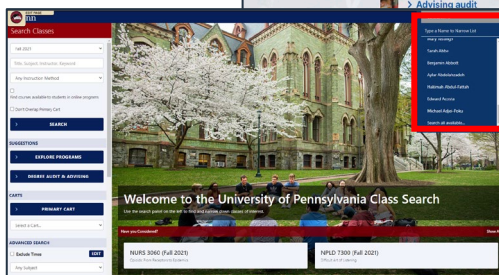
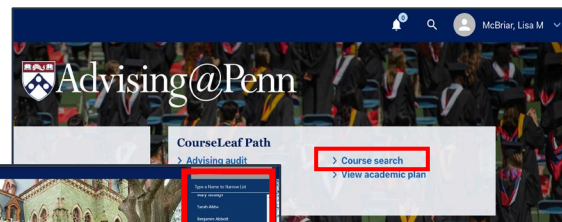
- The Student must go back in and Submit the Registration Change themselves.**

## OVERVIEW

Advisors review holds on a student's record by mirroring the student and reviewing the hold message in their cart. Advisors with the proper authority can release the hold. Otherwise, refer the student to the appropriate office to have the hold removed.

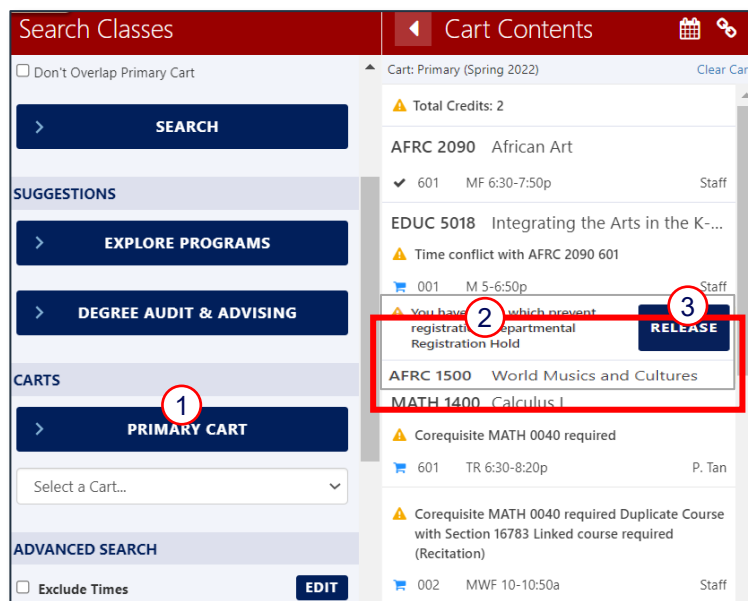
### Mirror the Student

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2. In the top right, click the arrow next to your name to see your list of advisees. Click the name of the student you wish to mirror.



*NOTE:* To see students not assigned to you, click **Search all Available** at the bottom of your advisee list then search for and select the desired student.

### Lift Advising Holds



1. From the Search Courses bar, click on **Primary Cart**.
2. If there is a hold a **yellow warning icon** and message will be visible noting the type of hold on the student's record.
  - a. If you have the proper authority to release the advising hold, a blue **Release** button will appear next to the warning alert.  
*Tip: The Release Hold button will still display even if the Student has not added courses to their cart.*
  - b. If you do not have the proper authority to release an advising hold you will receive a message. To release other holds that prevent registration, please refer the student to the proper office to request the hold be removed.
3. Assuming you have the proper authority, click the **Release** button and the hold will be released.
4. The Release button will disappear, the related yellow warning removed, and a record is created of when and by whom the record was released.
5. Advise the student that they can now register for courses.

## Primary vs Alternative Cart

Create multiple carts to assist in creating your desired schedule. Two carts are automatically available or create your own!

- **Primary cart** for classes in which you know you want to register
- **Alternatives cart** for other classes you may want to take or swap into
- Create your own cart to pull classes into your view when considering schedules

*NOTE: If you make your own cart, be sure to move your class selections into the Alternatives Cart or the Primary cart in order to register.*

From Path@Penn, click **Search & Register for classes** under *Academic Planning and Registration*.

Click **Primary cart** to open the Primary cart

OR

Click the **Select a Cart...** dropdown to open the **Alternative cart**

After selecting a course/section, click the **Add to Cart** button and select either the Primary or Alternative Cart. You can also create a new cart to add that section to.

## Interpreting the Cart

Whether searching courses or just looking in your carts, you will notice colored icons:

 *A blue cart indicates that the course is in one of your carts.*

 *A black check mark shows you are registered.*

 *A red line shows you are going to drop the section.*

 *A pencil shows you are changing the registration options.*

 *A triangle with an explanation point shows a warning:*

- *Section is full*
- *A hold exists*
- *A time conflict exists with excluded times*
- *A required Pre- or Co-requisite*

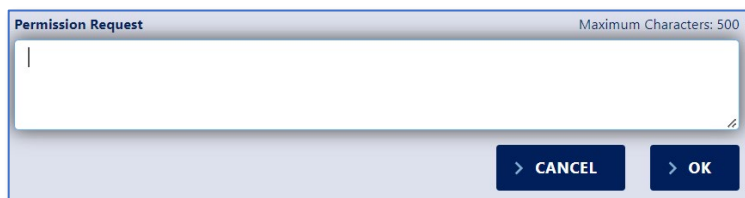
## Requesting Permission to Register

If a section is restricted or you lack a pre-requisite, you may request permission to register.

From Path@Penn, click **Search & Register for classes**.

Search for and add the desired section to your **Primary Cart**.

If permission is required, a **Permission Request text box** will appear for you to provide a detailed explanation then click **OK**.



The Registration Options panel will appear to allow updates to grade mode, credits or swap this with if applicable. When done, click **Save Changes**.

Contact the department offering the class for questions about your request or if the request is "pending" for more than 5 business days.

## Swap This With

Want to swap a course, but don't want to risk dropping it before know if you will get in?

Try the **Swap This With...**

This tool allows you to opt to conditionally swap a course in your primary cart with another registered course.

From Path@Penn, click **Add/Drop/Swap Classes**

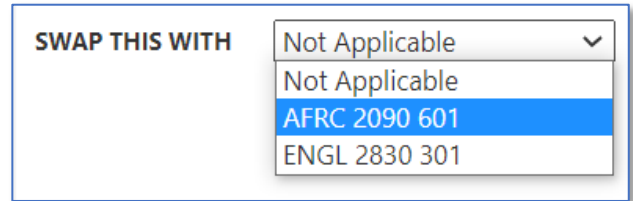
Add the section you want to swap with to your Primary Cart.

Click the course to be conditionally drop in your Primary Cart.

Click **Edit Registration Options**.

Select the desired course you want to swap with

When done, click **Save Changes**.



If the swap is available, there will be a dropped course & a new course with a pencil icon in your Primary Cart.

Click Submit Registration to finalize the change, The dropped course disappears and the newly swapped course appears with a blue cart icon.

## Change Grade Mode – Current Course

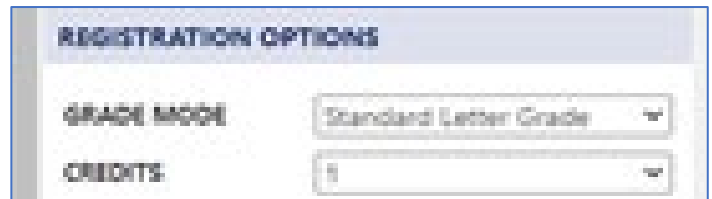
From Path@Penn, click **Add/Drop/Swap Classes**

Click **Primary Cart** then click section to change.

Click **Edit Registration Options**.

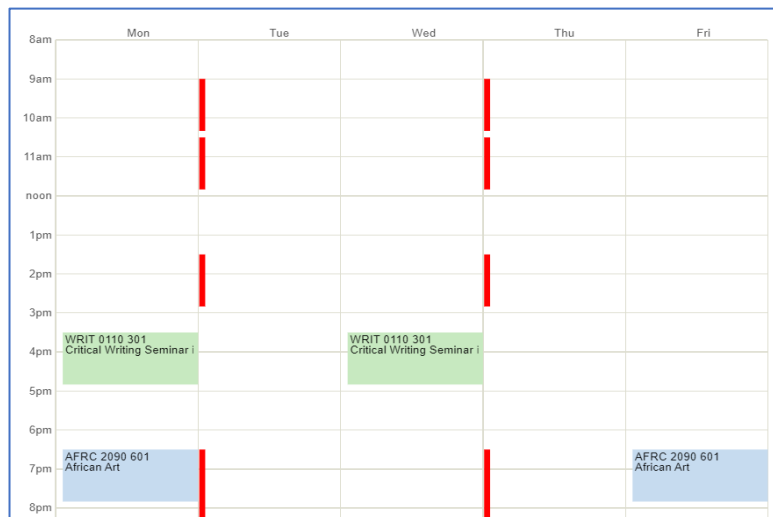
Select the desired Grade Mode.

When done, click **Save Changes**.



## Viewing Calendar Overlays

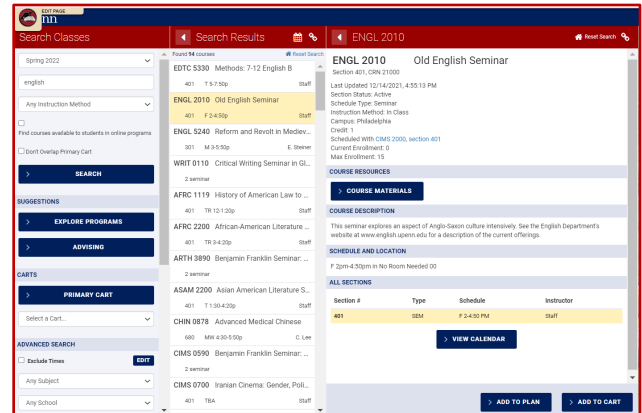
When **Searching & Registering for classes** and viewing the calendar of your alternate cart, note that your primary cart selections overlay into your alternative cart. Hover over the red markers to view course details.





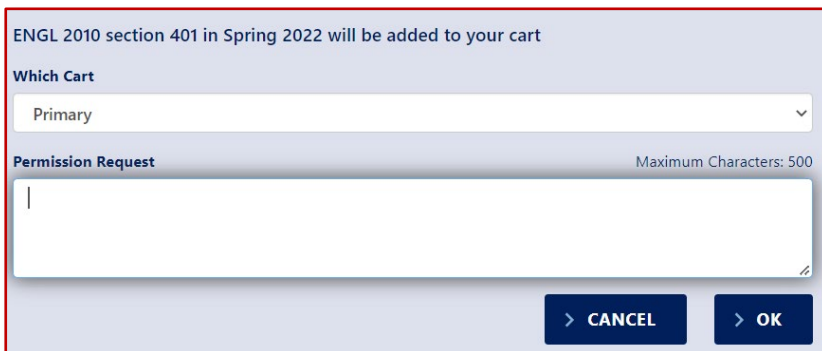
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From Path@Penn, click **Search & Register for Classes** under Academic Planning & Registration



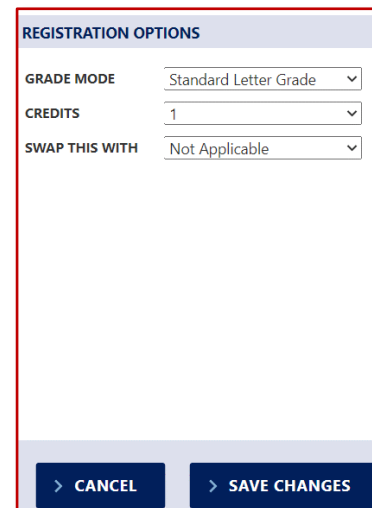
2

Search for & Select the desired course to see the Course Details. Click **Add to Cart**.



3

Select the **Primary Cart**. Because the class requested is not currently allowed, the **Permission Request** box appears for you to enter your detailed reason for requesting permission to take this class. Click **OK** when complete.



4

Use the **Edit Registration Options** panel to update the grade mode, credits, or to swap classes. When done, click **Save Changes**.

The class will now be in your primary cart as **Pending** with the permission request.

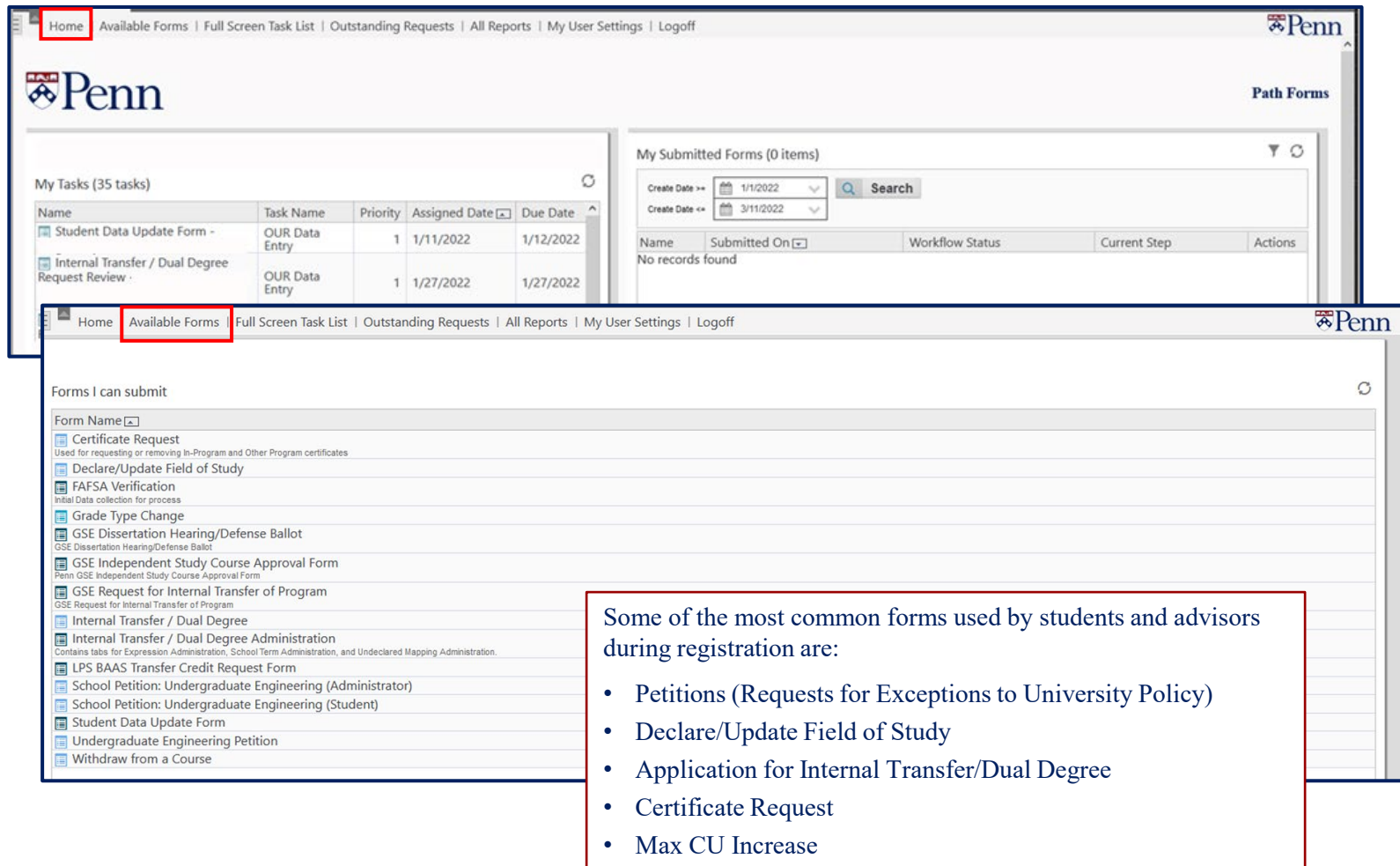
When a decision is made, the status will change to approved or denied.

If approved, the section is available for registration in Path.

*NOTE: Some departments have a separate waitlist or permission request process. Contact the department offering a class if you have questions about your request or the request is "pending" for longer than 5 business days.*

## Path Forms

Pennant includes [Path Forms](#), a collection of online workflow forms that replace paper- and email-based processes. Students access Path Forms through Path@Penn. Advisors and administrators who review and manage requests submitted through Path Forms access the tool through the link on Advising@Penn.



The screenshot displays the Pennant Path Forms interface. The top navigation bar includes links for Home, Available Forms, Full Screen Task List, Outstanding Requests, All Reports, My User Settings, and Logoff. The main content area is divided into two sections: 'My Tasks (35 tasks)' and 'My Submitted Forms (0 items)'. The 'My Tasks' section contains a table with columns for Name, Task Name, Priority, Assigned Date, and Due Date. The 'My Submitted Forms' section includes a search bar and a table with columns for Name, Submitted On, Workflow Status, Current Step, and Actions. Below these sections is a list of 'Forms I can submit' with a search bar and a list of form names and descriptions.

Name	Task Name	Priority	Assigned Date	Due Date
Student Data Update Form -	OUR Data Entry	1	1/11/2022	1/12/2022
Internal Transfer / Dual Degree Request Review -	OUR Data Entry	1	1/27/2022	1/27/2022

Some of the most common forms used by students and advisors during registration are:

- Petitions (Requests for Exceptions to University Policy)
- Declare/Update Field of Study
- Application for Internal Transfer/Dual Degree
- Certificate Request
- Max CU Increase

## Exceptions to Degree Requirements

Students who wish to request an exception to a degree requirement related to a course they are registering for in the summer or fall should talk to an advisor in the appropriate school or department. Advisors with the authority to approve exceptions manage this process through Degree Works, one of the applications in Pennant. Degree Works is accessed through links on Advising@Penn.

# Guide to Advising@Penn

Need Assistance?

## Help with Advising@Penn and CourseLeaf Path

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