

PALMETTO PATHWAY ONBOARDING IMPROVEMENT

Laura Faile

Academic Program Director, The University of South Carolina,
Palmetto Programs

April 2025



UNIVERSITY OF
South Carolina

PEOPLE INVOLVED

Project Sponsor

Dr. Ron Cox: Executive Program Director, Palmetto Programs

Subject Matter Experts

Dr. Amber Novotny: Vice Chancellor of Enrollment Management and Student Services, Palmetto College

Mr. Bob Dyer: Information Technology, Palmetto College

Ms. Teresa Florentin: Senior Associate Director, Office of Undergraduate Admissions

Ms. Mollie Connley: Kennedy and Company Consulting (now Human Capital)

Students and Staff



UNIVERSITY OF
South Carolina

LANDSCAPE

Current State Problems

1	Website Used as the Checklist	2	No Confirmation of Completed Steps
3	No Single Source of Truth	4	Columbia vs. Lancaster Confusion
5	Staff Don't Trust Their Own Answers	6	Email Overload Causing Tune-Out

Next Steps for Admitted Palmetto Pathway Students

Welcome to Palmetto Pathway! As you transition into your first year, please review and complete the items listed below. If you have any concerns, please don't hesitate to contact [Laura Humphrey Fails](mailto:Laura.Humphrey.Fails@usc.edu) at 597-1746.

In order to complete this section you must be fully admitted to Palmetto Pathway and received an acceptance email with your VIP ID. For questions regarding your acceptance email and VIP ID please contact USC Columbia Admissions at 803-777-7700.

Your journey begins by following these next steps:

- Set up your Self Service Carolina and email accounts.
 - Claim your [account](#).
 - Set-up **Multifactor Authentication**. (You must first know your password and you must then verify your identity by receiving a push notification. The free **Duo Security** app is the easiest and fastest way)
 - Claim your [Network Username](#).
 - A [Tutorial](#) is available to assist you with claiming and accessing your accounts. **Be sure to check your university email on a regular basis as important communications from Financial Aid, Admissions, and various campus departments will only be sent to your university email.**
- Have final high school transcripts and any dual enrollment course work sent to USC Lancaster. Dual enrollment coursework **MUST** be sent from the higher education institution who awarded the credit in the form of an official collegiate transcript. If you have any Advanced Placement (AP) test scores, those must also be sent to USC Lancaster. You may email these to uscladms@mailbox.usc.edu and copy me at humphrlb@mail.usc.edu.
- Submit your [Citizenship Verification](#) Form and Documentation.
- Required Immunizations
 - You must enter your immunizations in the "Medical Clearances" portion of [MyHealthSpace](#) and click on "Immunizations Record" and attach supporting documentation signed by a medical provider before orientation. (Note: You can take a photo of your documentation with your phone and upload the photo). Please also enter your immunization dates and vaccine types in the "Medical Clearances" portion for each vaccine received. **You will not be able to**
 - MMR Vaccine (two doses):** You'll need two doses of the measles, mumps and rubella vaccine (MMR), or positive blood titer reports. Please record these on MyHealthSpace in the "Medical Clearances" portion.
 - Meningococcal Vaccine (Menevo or Menactra):** You'll need the meningococcal vaccine to prevent meningitis if you are younger than 21. You must have received at least one meningococcal vaccine after your 16th birthday to satisfy this requirement. Please record these on MyHealthSpace in the "Medical Clearances" portion. If you have not received this vaccine you may decline this requirement by finding the link on the left hand side labeled "Downloadable Forms". From there you will need to find "Meningococcal Declaration Form" and follow the steps to complete this form and upload to MyHealthSpace.
 - TB Risk Screening Question:** Complete the questionnaire found on MyHealthSpace in the "Medical Clearances" portion.
- Submit your SC Residency Certification form in [my.usc.edu](#) that matches your start term (Fall, Spring, or Summer) AND year. Navigate to the Admissions Tab then Residency Certification Form. This online form **MUST BE** done to qualify for in-state tuition. You must choose Lancaster as your campus when completing residency. Failure to complete South Carolina Residency may result in a loss of scholarship eligibility for South Carolina state scholarships. Additionally, a registration hold may be placed on students who fail to complete this requirement.
- Complete the [Math Placement Test](#) and [Foreign Language Placement Test](#) before your Orientation date. Both are administered online, but the Foreign Language Placement test requires advanced registration.
- Complete your [FAFSA application](#) and be sure to add USC Lancaster.
- Palmetto Pathway students live in the [Bates House](#) residence hall community. We will notify you once the housing application for Bates House is open. Follow the [instructions](#) to submit your housing application!

9. New Student Orientation. You'll receive information about New Student Orientation dates and registration later. Course registration will occur at New Student Orientation, therefore it is mandatory for Pathway students to attend. This communication will come from the [University of South Carolina Office of New Student Orientation, USC Palmetto Pathway students do not need to pay an orientation fee.](#)

10. Complete [Alcohol/Educational and Sexual Assault Prevention for Undergraduates](#). Avoid having a hold placed on your account by making sure you complete both steps of these courses by the deadline. Until these steps are complete, you will be unable to register for classes. You will receive an email when these trainings are available to you. They must be completed by August and will not impact Fall registration status.

11. Explore the [First Day Complete](#) textbook program. Students are automatically opted in to receive required textbooks. Fees are assessed on the student's bill. Opt out is possible after course registration.



UNIVERSITY OF
South Carolina

PURPOSE & GOALS

Project Goals

1 Eliminate Information Fragmentation

2 Reduce Avoidable Enrollment Barriers

3 Clarify Roles Between Lancaster & Columbia

4 Proactive, Personalized Student Outreach

5 Real-Time Leadership Visibility

6 Build Pathway Student Identity & Belonging

PROJECT PURPOSE

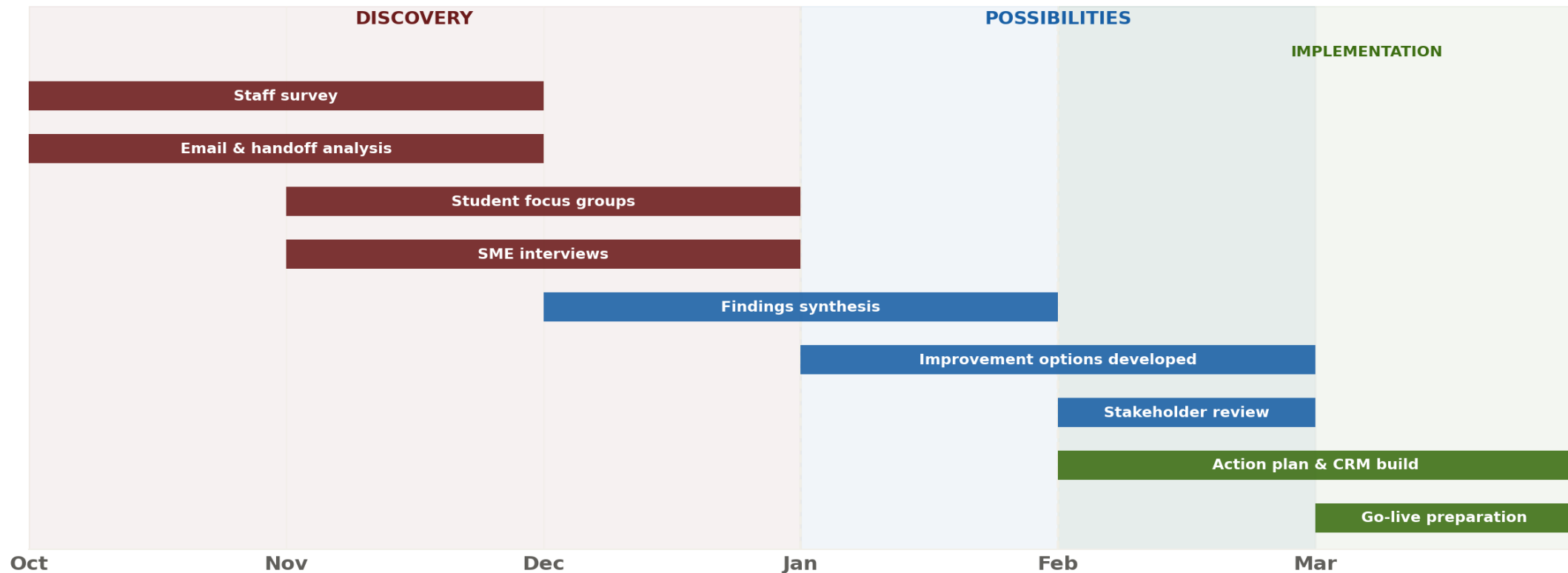
The purpose of this project is to better understand the existing gaps in onboarding support and to explore solutions that make the process clearer, more consistent, and better coordinated across units. By doing so, we aim to reduce avoidable barriers to student enrollment and enhance the program's ability to support and scale student success.



UNIVERSITY OF
South Carolina

PROJECT PATH

This project followed three phases over six months — Discovery (Oct–Dec), Possibilities (Jan–Feb), and Implementation (Feb–Mar).



DISCOVERY

Email Burden on Staff — 81-Student Cohort, 6 Months

USC Lancaster Palmetto Pathway · Mar – Aug 2025

762

Total emails
Mar – Aug 2025

9.4

Avg per student
emails per person

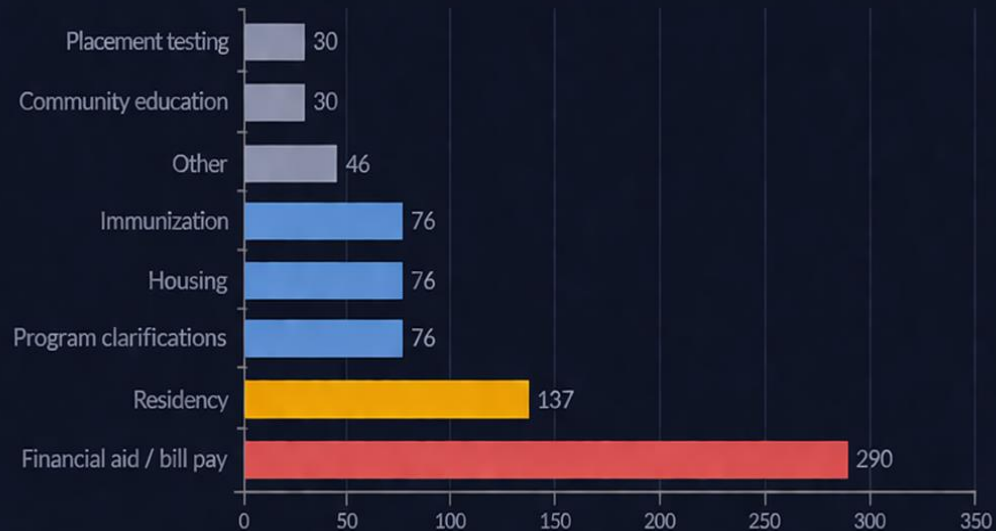
127 hrs

Staff time (6 mo)
@ 10 min per email

94 min

Time per student
avg staff time each

EMAIL VOLUME BY CATEGORY



KEY INSIGHTS

3 in 8 emails

57% of volume

9.4 emails each

EMAIL DATA



UNIVERSITY OF
South Carolina

DISCOVERY

Where Palmetto Pathway Onboarding Breaks Down

USC Lancaster Staff Survey • n = 13 respondents

56%

of staff are NOT fully confident in their answers

63%

must check multiple systems just to verify one student's status

50%

cite NO single checklist as their top pain point

44%

of students' questions come from Financial Aid & Holds alone

No Single Source of Truth

63%

check multiple systems (Banner, BDMS, TargetX, Parchment) per student

38%

must contact another office just to confirm a step is complete

50%

say a missing unified checklist is their #1 challenge

Staff Ambiguity

44%

of students who reach out do so frequently — daily or several times a week

56%

of staff are NOT fully confident in their answers

25%

cite unclear ownership between campuses & offices as a core barrier

Source: USC Palmetto Pathway Onboarding Survey — Staff (Spring 2026)

STAFF SURVEY



UNIVERSITY OF
South Carolina

DISCOVERY

What Students Said — Focus Group Findings

Palmetto Pathway Onboarding • Student Focus Groups • USC Lancaster

100%

Anxious or stressed

8+

Offices contacted

“Hope”

Completion tracking

TOP PAIN POINTS — VERBATIM THEMES

Too many portals

“There were so many different websites — it was really hard.” — Student

No completion visibility

“I kind of had to hope that it was done.” — Student

Wrong campus confusion

“I felt like I did everything in Columbia and then had to redo it in Lancaster.”

Email overload

“I started ignoring emails and I missed important things.” — Student

WHAT STUDENTS WANT



One Pathway portal



Real-time checklist



Direct contact numbers

Student Focus Group

Source: USC Lancaster Palmetto Pathway Student Focus Groups (2025-2026 Cohort)



UNIVERSITY OF
South Carolina

POSSIBILITIES

SKY IS THE LIMIT — POSSIBILITIES FOR PALMETTO PATHWAY

Student-Facing Technology	Communication & Outreach	Process & Systems	Belonging & Identity	Staffing & Coordination
<ul style="list-style-type: none"> AI chatbot answering onboarding questions 24/7 	<ul style="list-style-type: none"> Dedicated Pathway social media (IG, TikTok) 	<ul style="list-style-type: none"> Single sign-on portal (Lancaster + Columbia) 	<ul style="list-style-type: none"> Pathway-only orientation experience 	<ul style="list-style-type: none"> Dedicated Pathway onboarding coordinator
<ul style="list-style-type: none"> Mobile app with push notifications 	<ul style="list-style-type: none"> Parent/family portal with their own view 	<ul style="list-style-type: none"> Real-time API integration across all systems 	<ul style="list-style-type: none"> Pathway section on the USC app 	<ul style="list-style-type: none"> Cross-campus shared workspace (Slack/Teams)
<ul style="list-style-type: none"> Personalized onboarding video series by topic 	<ul style="list-style-type: none"> Text-to-human escalation line 	<ul style="list-style-type: none"> Predictive analytics for at-risk onboarding 	<ul style="list-style-type: none"> Alumni network linking students to graduates 	<ul style="list-style-type: none"> Annual onboarding audit cohort-over-cohort
<ul style="list-style-type: none"> Virtual campus tour in the onboarding portal 	<ul style="list-style-type: none"> Peer ambassador program 	<ul style="list-style-type: none"> Automated residency verification 	<ul style="list-style-type: none"> Annual Pathway traditions (t-shirt reveal, Bates meetup) 	<ul style="list-style-type: none"> SLAs between Lancaster and Columbia offices
<ul style="list-style-type: none"> Pathway roommate matching portal 	<ul style="list-style-type: none"> Personalized acceptance video from Dr. Cox 	<ul style="list-style-type: none"> Digital document upload directly in portal 	<ul style="list-style-type: none"> Pathway student council for program input 	<ul style="list-style-type: none"> Shared student risk dashboard across units
<ul style="list-style-type: none"> Digital signature — eliminate paper entirely 	<ul style="list-style-type: none"> "30 days to start" countdown email series 	<ul style="list-style-type: none"> Pathway deadlines synced to student calendars 	<ul style="list-style-type: none"> Early onboarding completion scholarship 	<ul style="list-style-type: none"> Onboarding completion rate KPI tracking

★ Items already implemented shown in your presentation ★ Items above represent the full vision for Pathway onboarding



UNIVERSITY OF
South Carolina

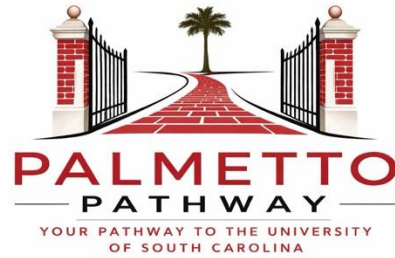
ACTION



- Real-Time Staff Checklist
- Automated Student Communications
- Live Executive Dashboard



QUICK WINS: IDENTITY



Confetti Acceptance Email



🎉 Congratulations and Welcome to Palmetto Pathway!

Dear {Insert Student Name},

We're so excited you're joining us. Palmetto Pathway is a unique (and supportive!) way to start your college journey with the University of South Carolina. You'll begin taking USC coursework while receiving extra guidance from our Palmetto Pathway team, and you'll be building momentum toward your transition to **USC Columbia**.

Welcome Mailer & T-Shirt



UNIVERSITY OF
South Carolina

IMPLEMENTATION

What I Built — Palmetto Pathway Onboarding System

Built independently as part of the USC Office of Organizational Excellence project • Spring 2026

Real-time

Staff checklist

every missing item at a glance

Auto

Student comms

instant email on each item received

Live

Executive dashboard

enrollment, risk flags, progress

WHAT I BUILT

CRM foundation

Custom objects & fields in Salesforce TargetX built specifically for Pathway onboarding requirements.

Designed for direct replication in Slate

Staff checklist

One screen shows every student's missing items in real time. Replaces manual checks across 7 screens in 3 systems.

Flow Builder triggers instant student confirm email

Automated student comms

Weekly personalized emails & texts listing only what each student is missing, with step-by-step instructions.

Fully automated — no manual staff effort required

Executive dashboard

Real-time view of missing items, enrollment data, academic progress, and upcoming registration

Includes student watchlist flagging at-risk completions

[↗ Dashboard Link](#)

[↗ Checklist Link](#)



UNIVERSITY OF
South Carolina

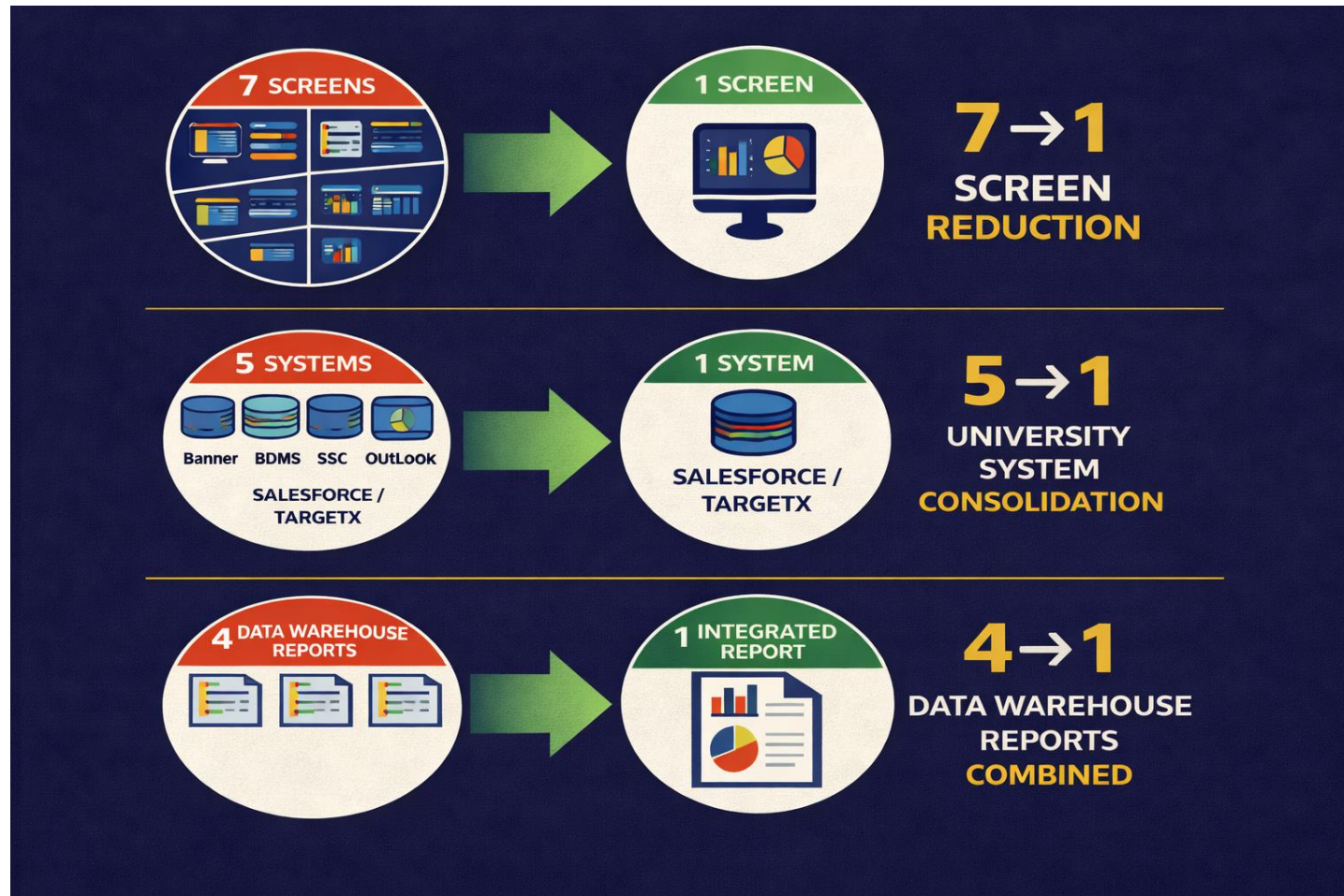
EMAIL TEMPLATES



UNIVERSITY OF
South Carolina

KEY IMPROVEMENTS

SYSTEMS EFFICIENCY



KEY IMPROVEMENTS

EMAIL REDUCTION IMPACT



KEY IMPROVEMENTS

STUDENT EXPERIENCE IMPACT

Student Wait Time Reduction — 81-Student Cohort, 6-Month Onboarding Period

USC Lancaster Palmetto Pathway • Real-time checklist vs. 48-hr email response • Baseline: Mar - Aug 2025

WAIT TIME PER STUDENT

450 hrs saved

643 hr → 191 hr total

FOLLOW-UP EMAILS GONE

324

4 avg. per student • 81 students

THE STUDENT STORY

"I kind of had to hope that it was done."

— Pathway student, Focus Group

KEY IMPROVEMENTS

- ✔ **450 hours saved**
Reduced collective student wait time by 450 hours over 6 months.
- ✔ **Up to 4 days → instant**
Students waiting on financial aid, residency, or immunization status now get real-time confirmation.
- ✔ **324 follow-ups eliminated**
~4 follow-up emails per student were sent purely because students had no visibility into their status.



UNIVERSITY OF
South Carolina

TO BE CONTINUED...

Next Steps










NEXT STEPS: STUDENT PORTAL

Palmetto Pathway — Student Portal Sarah Johnson | Sign out




Welcome back, Sarah
Palmetto Pathway · Fall 2025 cohort · USC Lancaster Fall 2025
Onboarding progress 7 of 12 complete

Action needed: You have 3 outstanding items that must be completed before you can register for classes. Please review below.


COMPLETED ITEMS

-  Enrollment deposit
Received March 3, 2025 Received
-  Multi-factor authentication setup
Received March 5, 2025 Received
-  Orientation registration
Received March 10, 2025 · Scheduled May 14 Received
-  Housing application
Received March 12, 2025 · Assigned: Bates House Received
-  Community education modules
Received March 18, 2025 Received
-  Meal plan selection
Received March 20, 2025 Received
-  Placement testing
Received March 22, 2025 Received

OUTSTANDING ITEMS

-  Immunization records
Submit via Columbia Student Health portal · Lancaster campus requirement Outstanding
-  Residency verification
Submit via USC Lancaster self-service · Lancaster campus requirement Outstanding
-  Final high school transcript
Submitted March 21 · Processing — allow up to 72 hours · Lancaster admissions Processing

YOUR PATHWAY ADVISOR

-  **Laura Faile**
Academic Program Director · USC Columbia Contact



UNIVERSITY OF
South Carolina

FINAL THOUGHTS

Reflections



BIGGEST LEARNING

Slow Down Before You Solve

Jumping to solutions is the riskiest move — you end up solving the wrong problem efficiently. Discovery taught me to let the data lead before forming an opinion.



GOING FORWARD

Two Questions I'll Always Ask

What does the data actually say — before I form an opinion? And what is broken vs. what is within my control to fix? That distinction alone changes everything.



HOW I THINK ABOUT IMPROVEMENT

Make the Invisible Visible

Improvement isn't just making things better — it's surfacing what's hidden, naming what's broken, and building systems that don't rely on people guessing and hoping.



THANK YOU!

Laura Faile

Academic Program Director, USC Columbia,
Palmetto Programs

humphrlb@mailbox.sc.edu



UNIVERSITY OF
South Carolina