

POLICY, PROCEDURE, & TRAINING MODERNIZATION

Building a more structured and scalable approach to our PPT.

Stephanie McCarter

Assistant Director of Compliance & Quality Control

Office of Student Financial Aid & Scholarships



WHERE DO WE GO FOR ANSWERS?



Policy. Procedure. Email. Teams.
Ask someone...

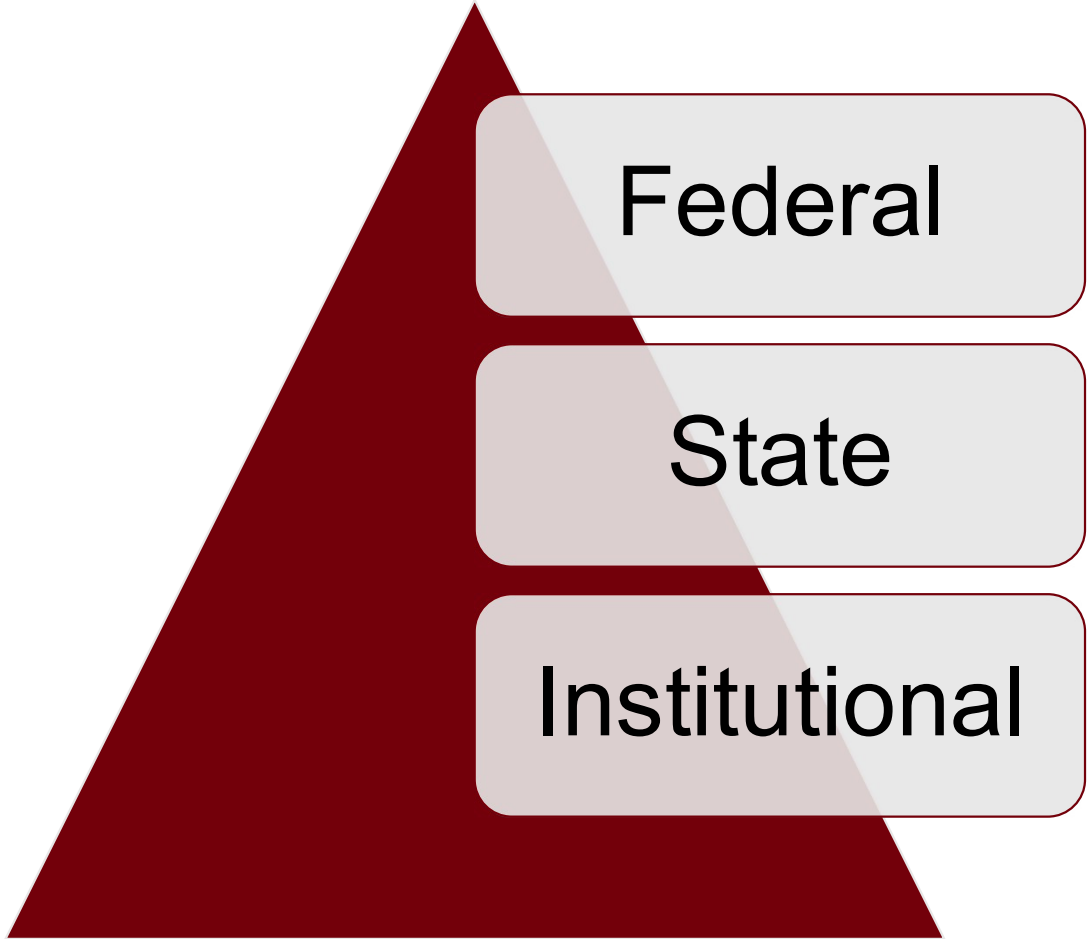


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South Carolina

FINANCIAL AID OPERATING ENVIRONMENT

- Regulatory complexity
- High-volume processing
- Dependence on consistent decision-making and staff alignment

Close to
\$500M
Processed
Annually



CURRENT PAIN POINTS

Decentralized
Documentation

Knowledge
Dependency
Risk

Inconsistent
Interpretation

Staff Turnover
& Transitions

Long Training
Time



OPPORTUNITY TO STRENGTHEN OUR APPROACH



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VALUE OF A STRUCTURED PPT

Consistent Decision-Making > Standard guidance across all staff and units

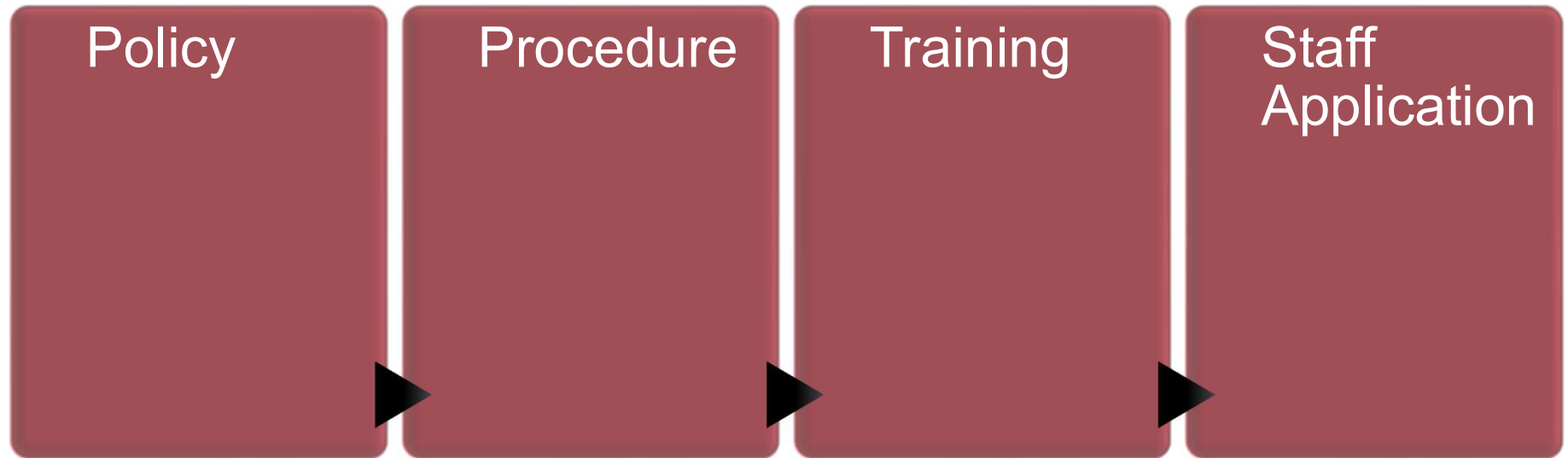
Improved Staff Efficiency > Reduced time spent searching and interpreting information

Faster Time to Competency > More structured and scalable onboarding experience

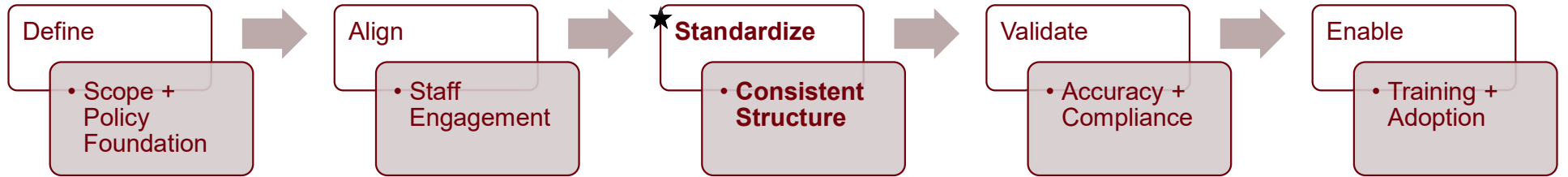
Scalable Operations > Processes and training that can grow with the organization



STRUCTURED PPT MODEL



IMPLEMENTATION APPROACH



OPERATIONAL ENHANCEMENTS SUPPORTING PPT

Blackboard

(Training Transformation)

- Structured, role-based modules
- Standardized onboarding
- Reduced time to competency

AI

(SharePoint + CoPilot Agent)

- Centralized knowledge access
- Faster policy/procedure lookup
- Reduced dependency on individual knowledge



SHAREPOINT FEATURES

The screenshot shows a SharePoint document library page. At the top, a blue navigation bar contains a search bar with the text "rejected record" and a magnifying glass icon. Below the navigation bar, the breadcrumb path is "Committee Shared Intranet > Shared Office of Student Financial Aid and Scholarships / University Advising Center > The Talk > Inventory Tracking". To the right of the breadcrumb are "Following" and "Site access" options. Below the breadcrumb, the page title is "Processing Manual > Counselor Review > 2526". To the right of the title are "Share", "Copy link", "AI actions", "Add shortcut to OneDrive", "Forms", and "Create or upload" buttons. Below the title and buttons are several application icons (Word, Excel, PowerPoint, OneDrive). The main content area is a table with columns "Name", "Modified", and "Note". A table with three rows of document entries is shown below. A black arrow points to the search bar, another points to the "AI actions" button, and a third points to the "Name" column header.

Name	Modified	Note
2025-26 Counselor Review Report Guide.docx	October 13, 2025	
CR_Counselor Review Report (RZRRCR26 on ePrint).docx	February 12	
CR_Reject Status Change.docx	October 27, 2025	



COPILOT AGENT

Committee Shared Intranet Shared Office of Student Financial Aid and Scholarships / University Advising Center The Talk Inventory Tracking

Search this library

> Counselor Re... > 2526

+ Create or upload

Open Share Copy link Edit Delete Pin to top Favorite Add shortcut 1 selected Details

Name	Modified	Note
2025-26 Counselor Review Report Guide.docx	October 13, 2025	
2526 CR Agent.agent	A few seconds ago	
CR_Bankruptcy (3BKRPT).docx	October 27, 2025	
CR_Counselor Review Report (RZRRCR26 on ePrint).docx	February 12	
CR_Default (3FEDDF) and Overpayment (3FEDDOV).docx	October 27, 2025	
CR_Dependency Override Flag.docx	October 27, 2025	
CR_Disability Discharge (3DISAB).docx	March 2	
CR_Exceeds Loan Limit (30AGGX and 3AGGLN).docx	October 27, 2025	
CR_Post Screen Reason Codes .docx	October 27, 2025	

Following Site access

2526 CR Agent

What should someone do when a record is rejected (keep simple)?

2526 CR Agent

Based on the documented procedure in [CR Reject Status Change.docx](#), when a record is rejected, the appropriate action is as follows (kept simple):

- **Identify the reason for the rejection** by reviewing the reject reason code(s) on the record.
- **Correct or provide the missing or incorrect information** that caused the rejection (for example, missing signatures or inconsistent data).
- **Resubmit the corrected record** so it can be processed again.
- **Confirm that a non-rejected record is generated** once the issue is resolved, and ensure the correct record is made current after review.



RESOURCE INVESTMENT

- **Leverages existing tools and resources**
(No significant new infrastructure required)
- **AI integration to support staff efficiency**
CoPilot embedded within SharePoint to assist with locating and interpreting information
 - SharePoint: existing platform
 - CoPilot: estimated ~\$30/month per staff member



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FROM CHALLENGES TO IMPROVEMENTS

Centralized,
accessible
information

Shared
knowledge across
the team

Clear, consistent
guidance

Improved
continuity through
documented
processes

Faster
onboarding and
time to
competency



THANKS!

Stephanie McCarter

Assistant Director of Compliance & Quality Control

MCCARTES@email.sc.edu

[Connect on LinkedIn](#)



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