

Presentation by :

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# How to Evaluate AI Tools for Employee Support



# The Role of AI in Employee Support

1. Answering questions
2. Guiding through tasks
3. Solving problems

# Understanding How AI Works





# Pulling Back the Curtain on AI

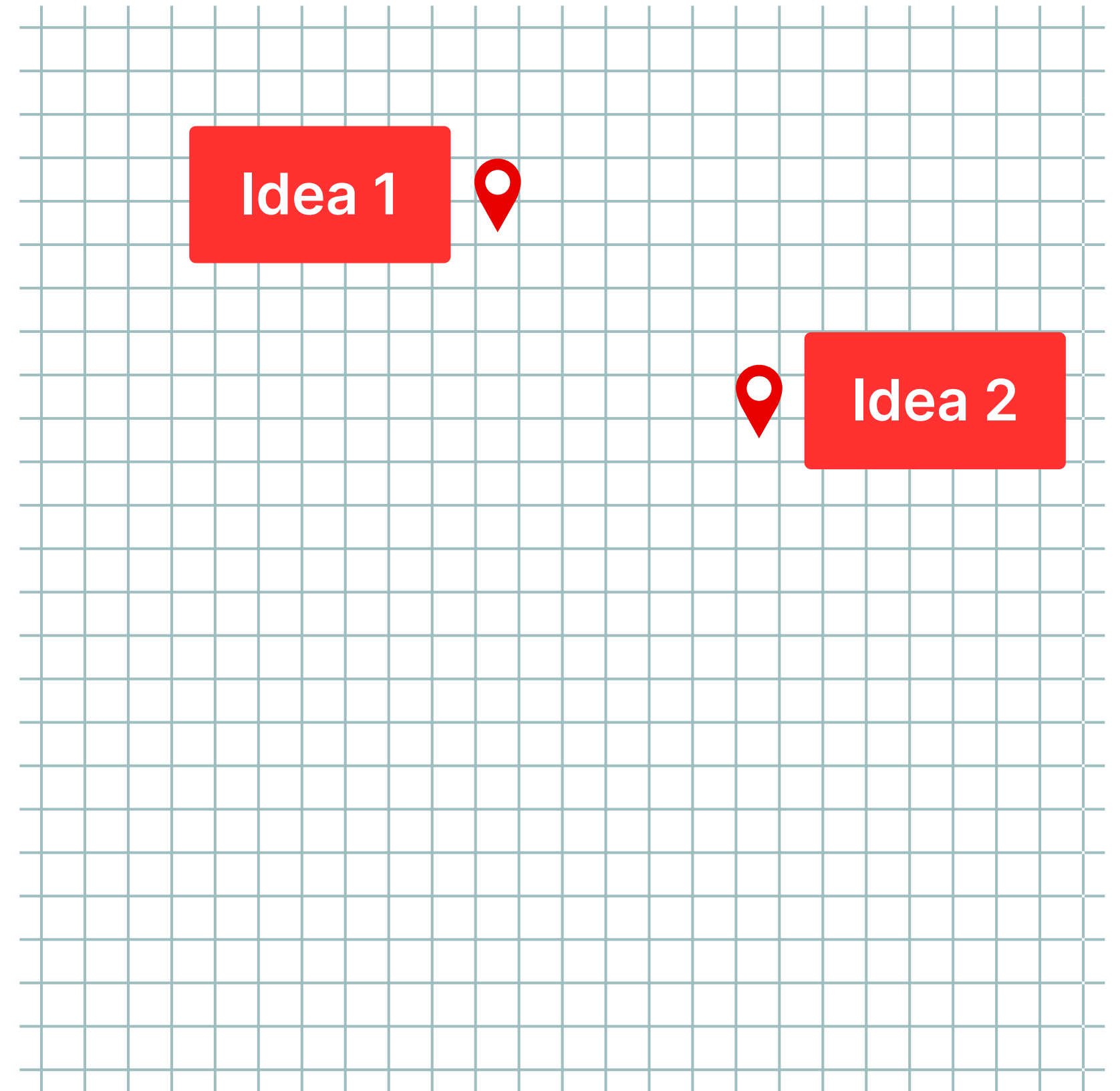
- Understand intent
- Understand context
- Use a vector database to perform a search
- Generate a response using the LLM





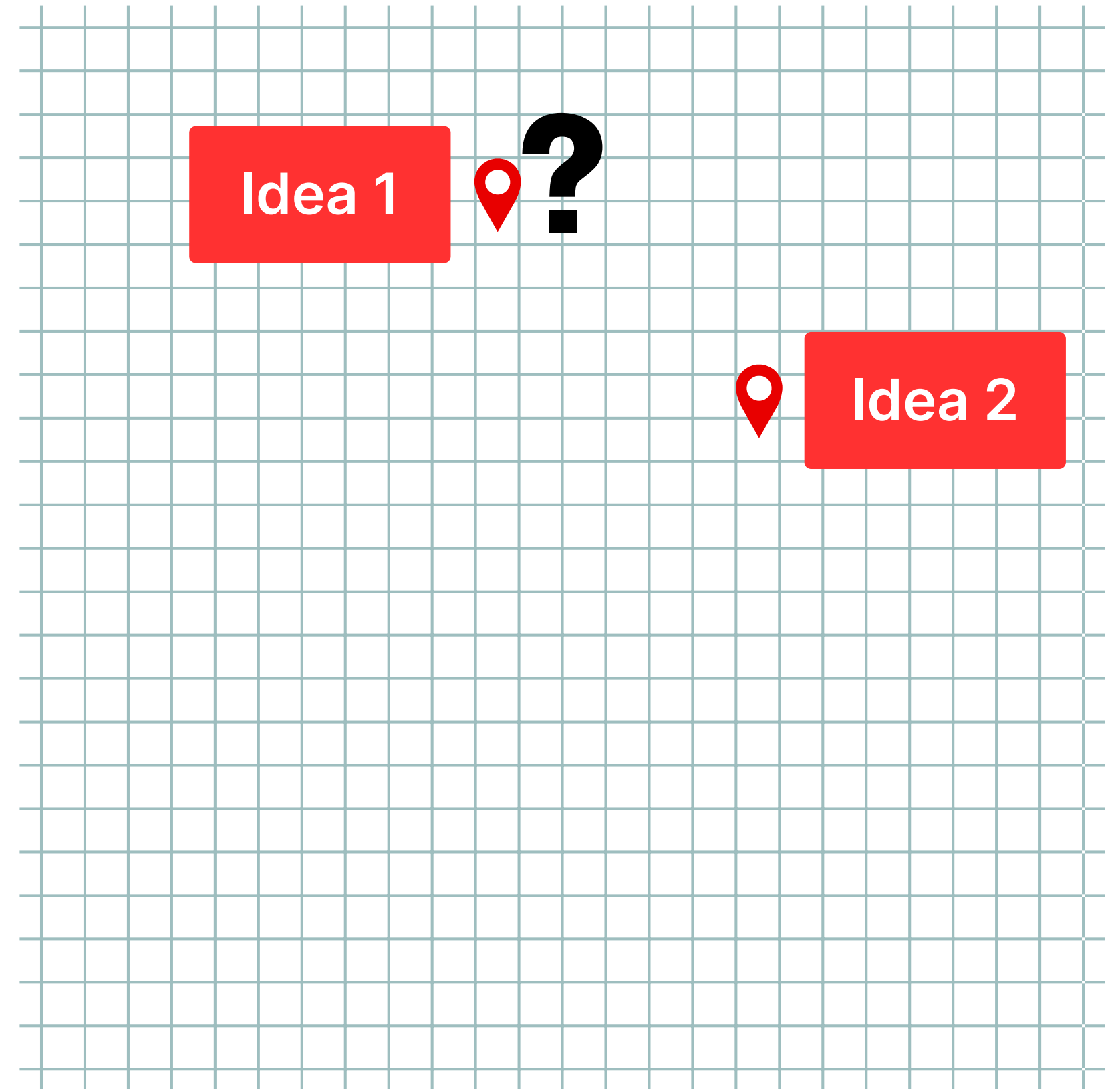
# What is a Vector DB?

- Turns content into numbers
- Builds a map of ideas
- Finds nearest matches



# Querying

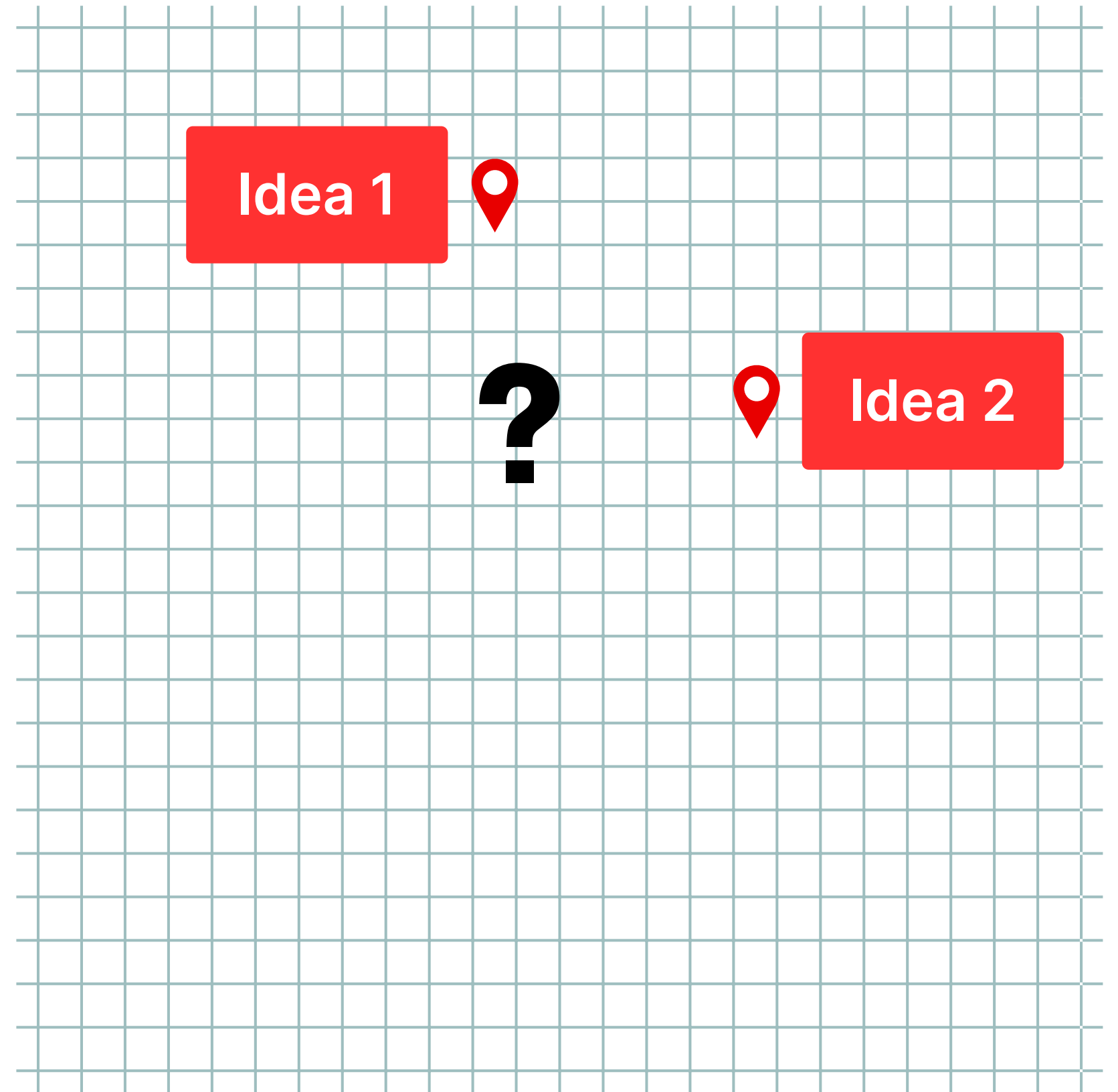
- Queries are turned into vectors
- Ideas that are closely related to the query are returned





# What happens when there isn't an exact match?

- Hallucinations





# Why do hallucinations happen?

- Vectors return “close enough” matches
- LLM fills in the gaps
- You get confident but incorrect answers





**AI is all about the data**  
**Garbage in → Garbage out**





# Two Possible Strategies

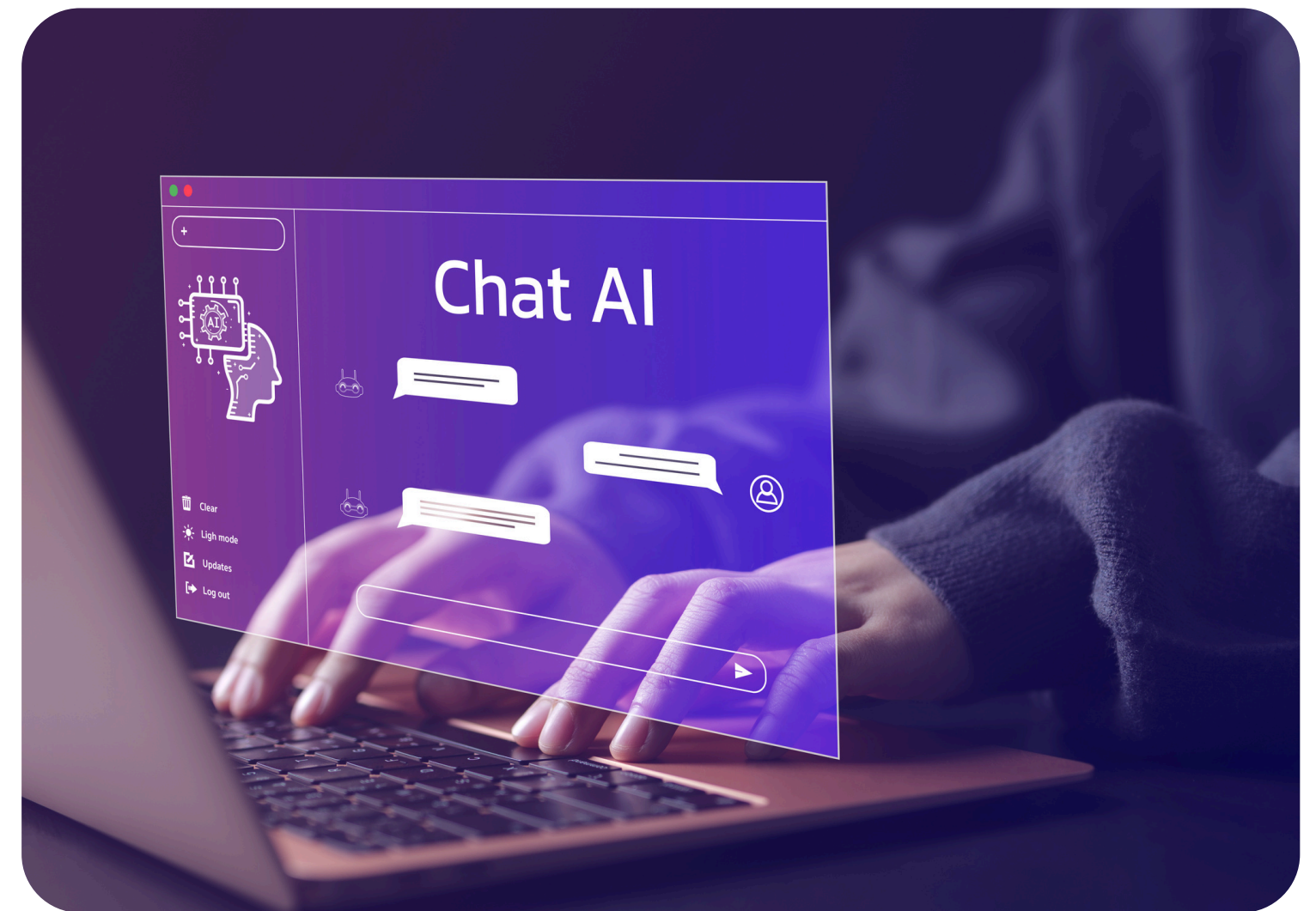


## Option 1: Junk Drawer + Train Strategy

# Give AI our Junk-drawer of knowledge



## Evaluate text-based responses and train





# It's a game of wack-a-mole

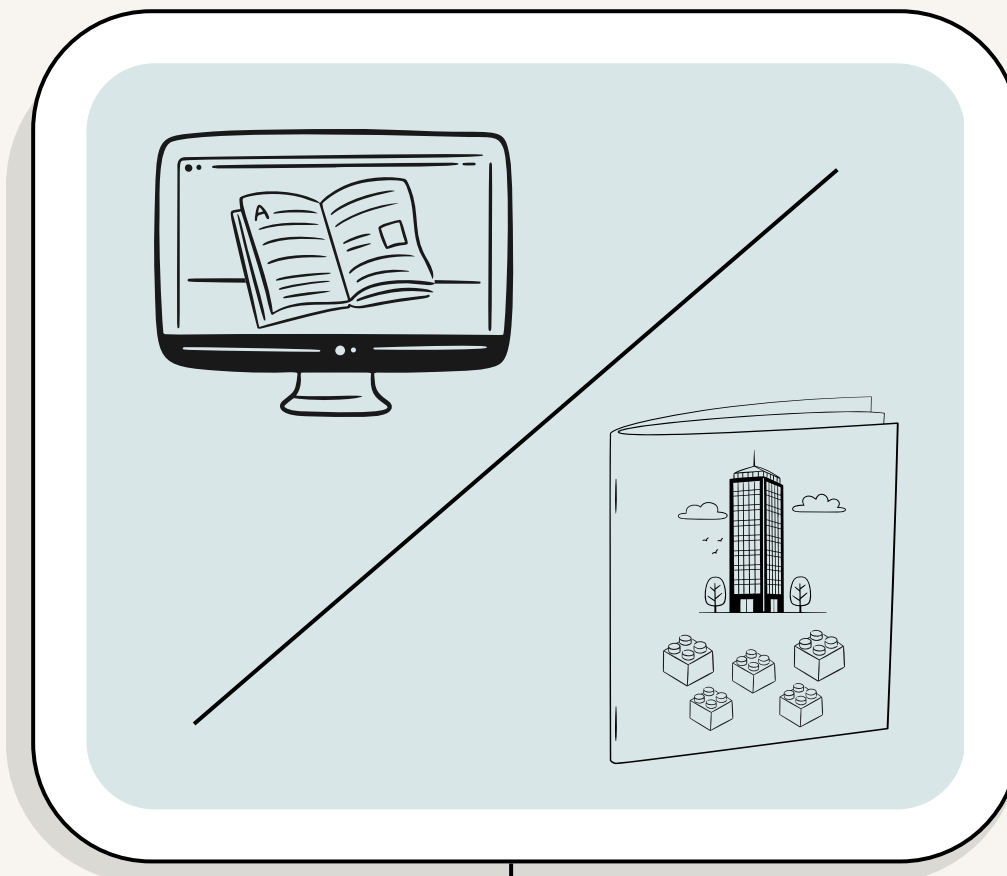




# Option 2

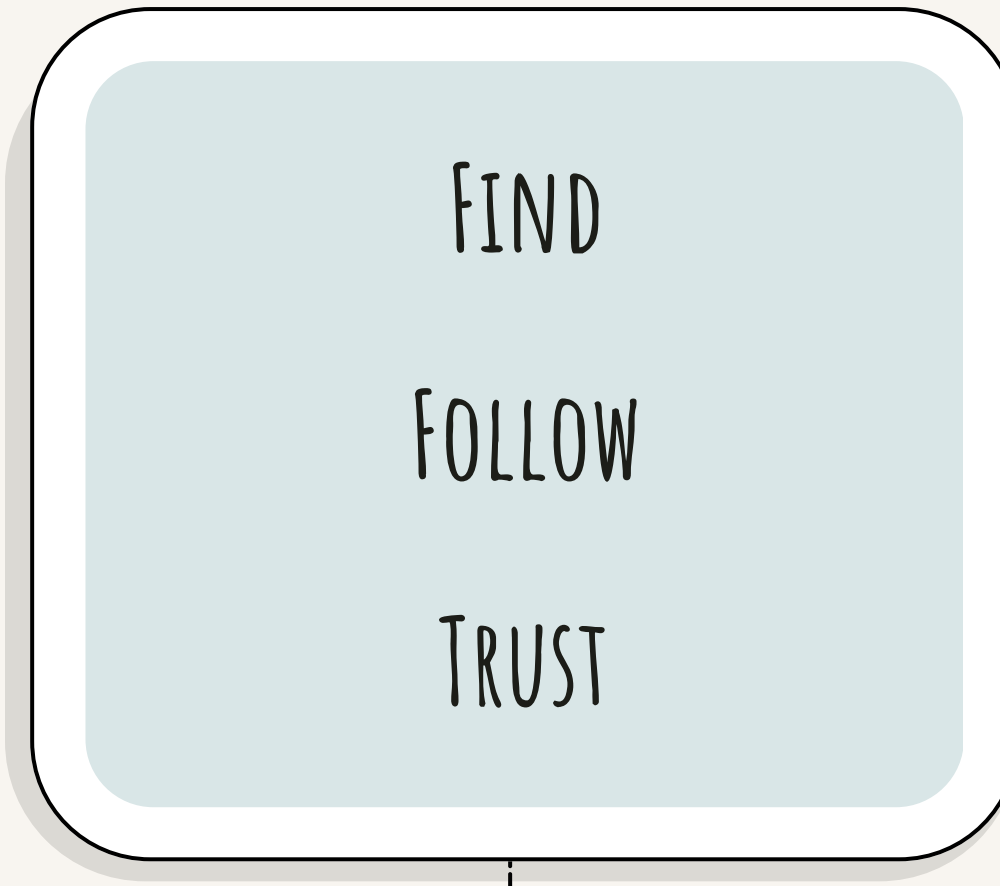
Use AI to generate  
Human Approved Recipes  
that Humans can Follow

# Use AI to Create the Find & Follow Program



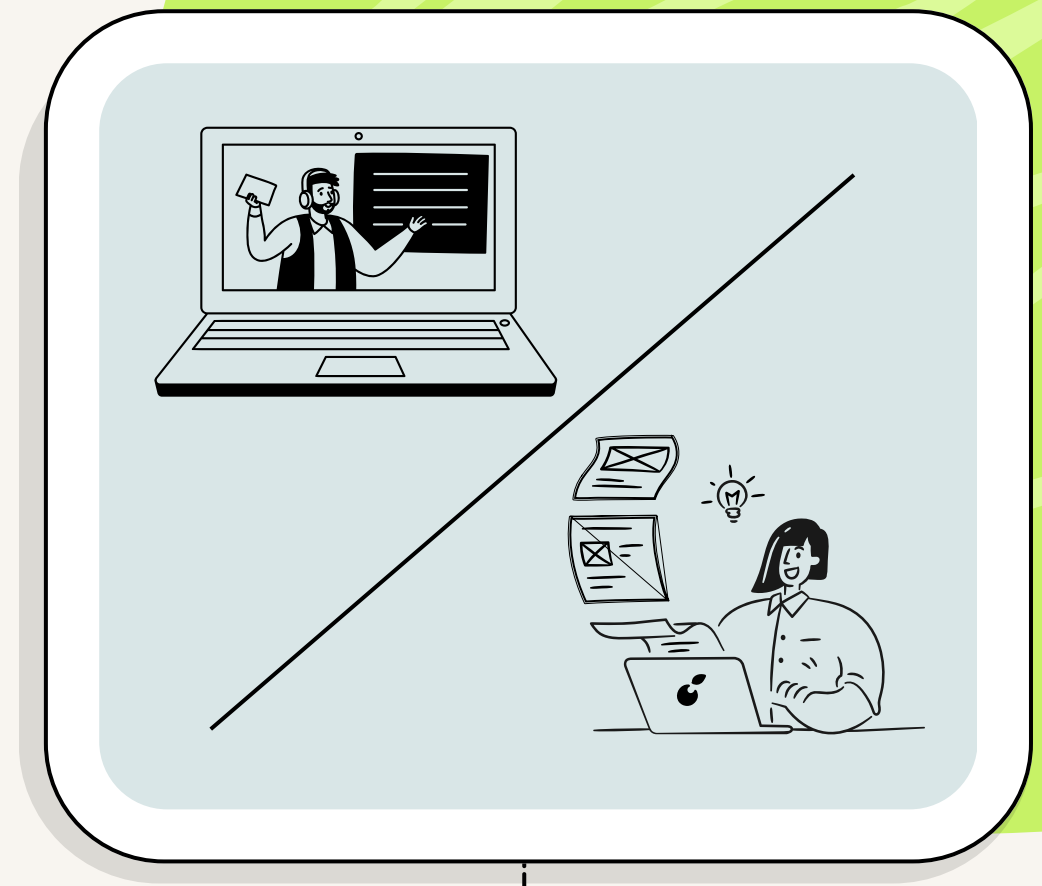
1

Separate Foundational  
and Actionable  
Knowledge



2

Optimize the content—  
make it findable,  
followable, and accurate



3

Teach Foundational,  
Practice Finding &  
Following

# How We Help You Get There

## Convert Information Into Recipes



### How to process an internal transfer or payment

Updated on Mar 18, 2025

#### 1. Navigate to the member's account

1. Log in
2. Search for the member using member number, account number, or name and date of birth.
3. Select the member's profile to view all linked accounts.

#### 2. Navigate to funds transfer

1. Navigate to the "Transfers" or "Internal Transactions" menu
2. Choose "Funds Transfer" or "Loan Payment"

#### 3. Select the source account

E.g. Checking or Savings

#### 4. Select the destination account

- Another checking or savings account for regular transfer.
- Loan account for loan payment.

#### 5. Enter the transfer amount

#### 6. Determine transfer type

- One-Time Transfer for immediate transaction.
- Recurring Transfer for future automatic scheduling.
  - Choose frequency.
  - Set start and end dates.



# Document from Audio and Format for Performance

← Back to articles

Live - All changes saved

☰

How to print a transaction

File Edit View Insert Format Tools Help

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Normal text

B I U Aa 🔊

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Type text or add a content block

Clarify Create

What would you like Clarify AI to help outline?

Enter a question or topic you want help breaking down. Clarify AI will generate a structured outline you can edit and adjust.

How to print a transaction

Text

Voice

File

Record or upload your explanation

Describe the topic out loud, or upload an existing audio file. Clarify AI will turn this into a clear, editable outline.

Record audio

Upload file

🔴

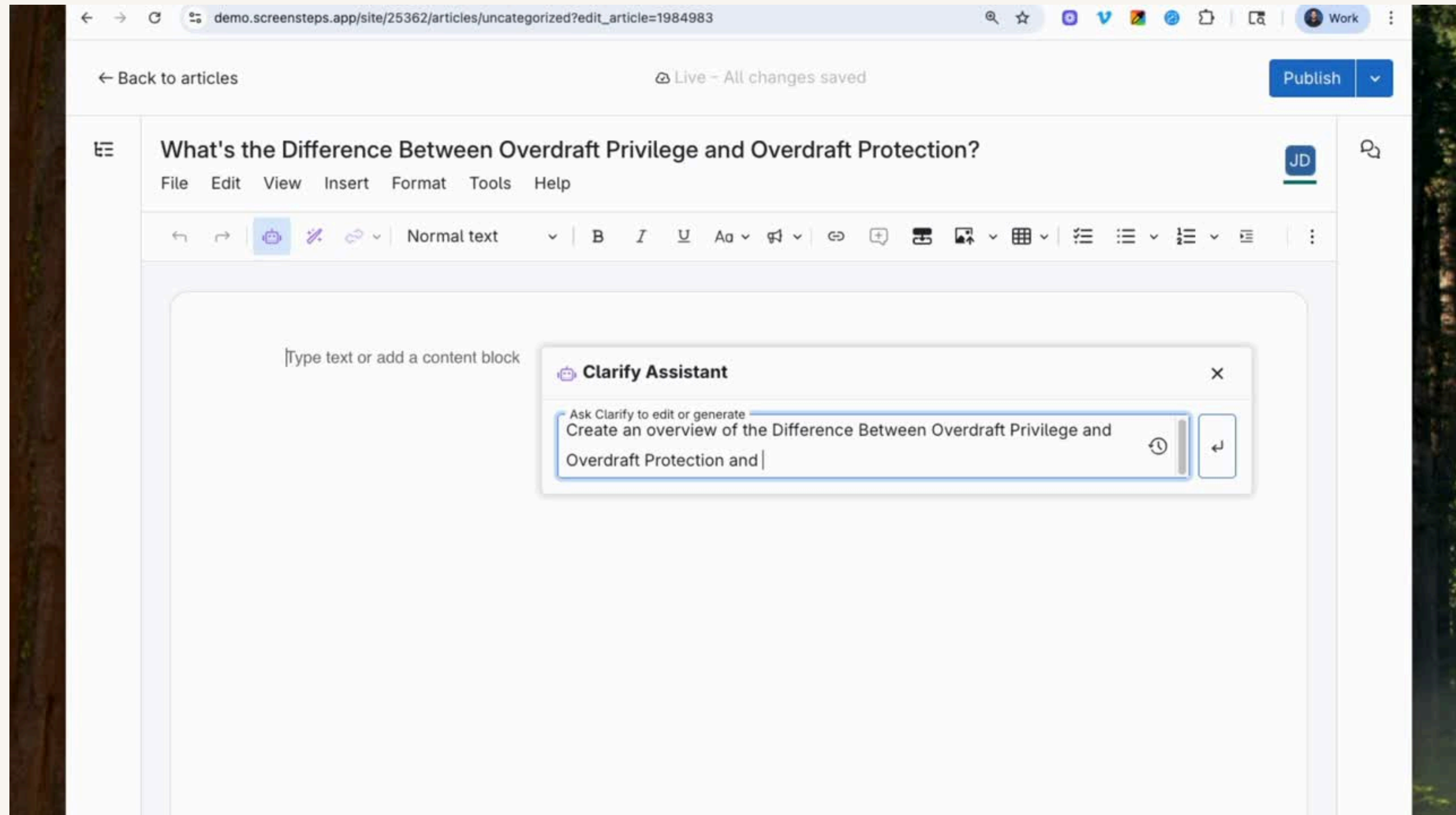
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0:00

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# Create from Nothing





# Convert Existing Content to a Format for Performance

The screenshot displays a web browser window with multiple tabs. The active tab is titled "demo.screensteps.app/site/25362/articles/all?edit\_article=1984812". The browser's address bar shows the URL. The page content is a document titled "How to increase debit card limits" with a menu bar (File, Edit, View, Insert, Format, Tools, Help) and a rich text editor toolbar. The document text is as follows:

When a member approaches the credit union with a request to increase the daily spending member's account is in good standing, which includes, but is not limited to, verifying that th privileges. Once you have established that the member's account meets the eligibility criteri increase, because the credit union typically requires a justification such as traveling abroad insufficient for the member's typical spending habits.

After gathering this information, you will then proceed to access the card management syst be housed in a separate vendor application, and you should ensure that you are using the profile, which will involve searching by account number, card number, or member identifica you should carefully review the current limits that are already set for point-of-sale transacti need one category increased rather than all of them.

If the member is requesting an adjustment, you will need to consider the credit union's policies, which may dictate that only certain employees or supervisors have the authority to approve such increases, and it is always advisable to check with your manager or the risk management team if you are unsure. Once authorization has been confirmed, you can then manually adjust the fields that control the spending or withdrawal amounts, being cautious not to exceed the maximum thresholds established by the credit union's risk policies or by the card network's rules. After you have made the adjustments, you will typically need to save and confirm the changes, at which point the system may require dual authorization or may generate a confirmation message that you should read carefully to ensure the changes are correct.

Finally, you must communicate with the member about the outcome, letting them know what their new limit is, whether it applies immediately or has a short waiting period before it takes effect, and advising them on how to use their card responsibly under the new conditions. It is also considered good practice to document the interaction in the member's account notes, including the reason for the increase, the date, and who authorized it, so that there is a record of the decision in case of future questions or disputes.

A sidebar titled "Clarify Assistant" is open on the right side of the editor. It contains a text input field with the word "What", a "Replace" button, and options "Insert below", "Try again", and "Stop". Below the input field, there is a section titled "Ask Clarify to edit or generate" with the text "Find & Follow; Make actionable".



# Even Those Complex Procedures with Decision Trees

CU Starter / Account Management / Account Management FAQ

## What to do when you find out a member is deceased

Updated on May 07, 2025

Complete the following

☐ Gather information from informant

☐ Obtain death certificate

☐ Look up member from information on death certificate

1. Name

2. Date of Birth

STATE OF NORTH CAROLINA  
ORANGE COUNTY  
OFFICE OF REGISTER OF DEEDS

☐ Determine Type of Account

1. What kind of account is this?

Joint

Individual

Request a New Job Aid

Account Management

Account Management 11 >

Balance and Transactions 8 >

Account Management FAQ 3 v

What to do when you find out a member is deceased

How to address a dormant account for a member

How to submit a travel notice for a member

Business Accounts 5 >

Quick Links

1. When are credit union member's charged a fee for ACH and how much is it?

2. How long does a member have a cover returned item (ACH/Check)?

3. What are the wire cutoff times?

4. How to process a dispute

5. What to do when you find out a member is deceased

6. When will a pending deposit/withdraw post?

7. How member can view external transfer activity



# How do you get there with ScreenSteps?

- ☒ Document Procedures in Minutes (so it actually gets done)
- ☒ Format for Performance (With Automated Options)
- ☒ Validate Answers and Process Feedback from Employees
- ☐ Enable Employees to Perform With Answers They Can Trust





# Approve and Certify Content

Articles

AllUncategorizedArchived

Search...342 total articles

Filter

☐ Article

☒ How to print a transaction

☐ How to print statements

☐ What to do if a member has a negative balanc...

☐ How view transaction history

☐ How to respond to a Loan Payoff Call (v5 don...

☐ How to process a loan payoff over the phone

☐ How to add a vendor in Bill Pay (Workflow)

PreviewDetailsPermissionsCertifications

How to print a transaction

Last version update: Sep 10, 2025

Total views0Last 30 days

Rating0

Properties

Title

Give your article a clear, descriptive name. This title appears in search results, lists, and navigation.

Assigned to

Select a person who is responsible for the next actions on this article

Set status

Use status to communicate the article's current state in your workflow (e.g., draft, in review, approved).

Tags

Tags are only visible in the admin UI but can be used for search on the published site or via the API.

Users

☒ NNo user assigned

☐ DDavid Buttars

david+demo@screenst...

☐ GGreg DeVore

greg@screensteps.com

☐ JJonathan DeVore

ja+demo@screensteps...

☐ TTrevor DeVore

trevor.devore@ibfuma...

No user assigned

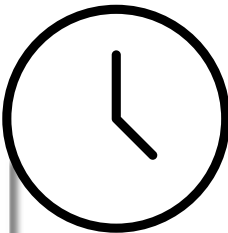
None

Select tag(s)

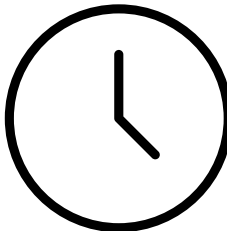


# How We Help You Get There

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One Work Day



One Work Week



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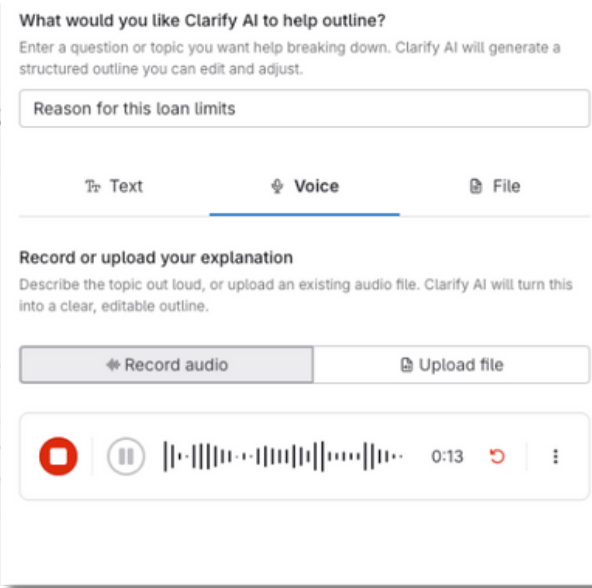
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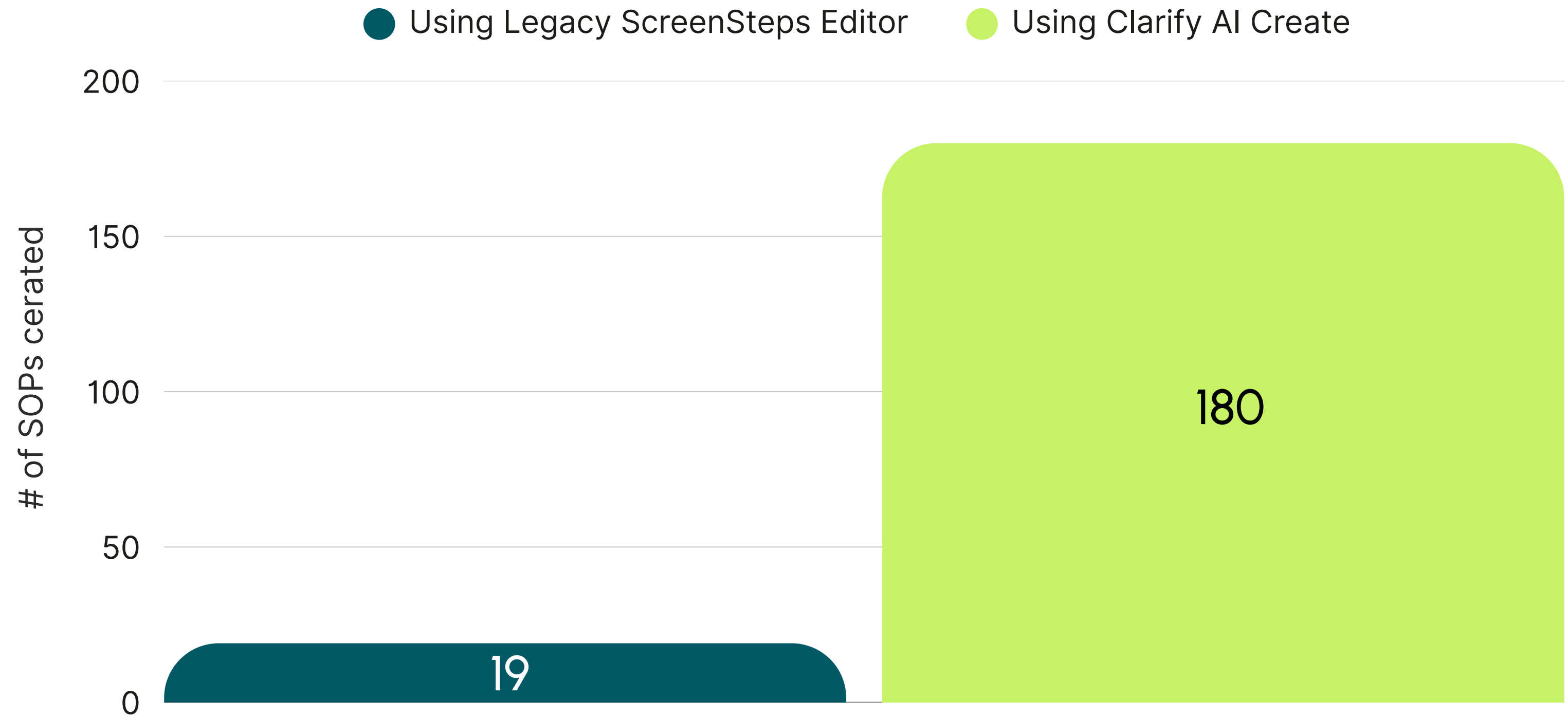
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- Recurring Transfer for future automatic scheduling.
  - Choose frequency.
  - Set start and end dates.



# ScreenSteps Clarify AI Create





“It used to take us months of undivided one-on-one time to train new hires.

With ScreenSteps, new hires are up and running in just a day or two.”

Kaylee Schiffelbein  
High Plains Farm Credit  
Operations Manager



# Try the ScreenSteps AI tools for yourself



**Get a Free Trial Account:**

[screensteps.com/trial](https://screensteps.com/trial)