



The New ScreenSteps

A Platform Walkthrough Comparing
Legacy vs. New ScreenSteps

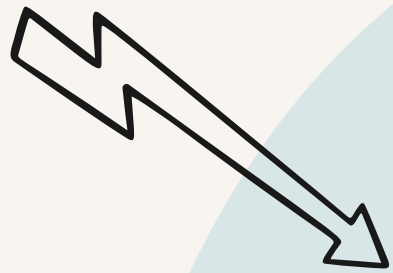
Presentation by: Jonathan DeVore & Mark Higginson

What Do We Want to
Help You Accomplish?

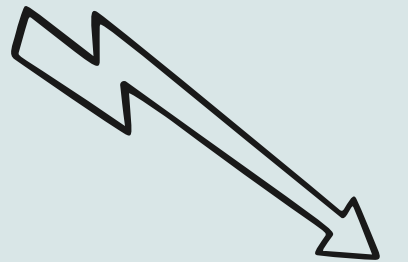
To Become a Find & Follow Organization



80% Reduction in Escalations



~



90% Faster Onboarding



6 months



2 weeks

More Capable Employees



Fewer
Mistakes

More
Confidence

More
Knowledgeable

WHY

Get you to Find & Follow Faster

WHAT

Amplify Your Efforts + Make Your
Small Team a Mighty Team Who Can
Have a Huge Impact

Knowledge Ops Platform

Single Source of Truth for Operational Knowledge

Admin Center & Permissions

Article Editor

Sidekick

Feedback Loop

Courses/Learning Paths

Permissions levels

Understand what each permission level allows users to do.



Assigned only

Can only view or act on content that has been specifically assigned to them.

View

Read-only access to published content in your published site in the browser extension.

Review

Can view and edit content. Cannot edit content.

Contribute

Can create and edit content, or content.

Manage

Can create and edit content and category settings.

Site admin

Full access to user management, manage roles.

Articles

Export CSV

View site

Create article

All Archived

Search...

228 total articles

Filter

Columns

Article

Tags

Certification

Assignee

Status

Last updated

Approved

14 hours

⋮

Approved

14 hours

⋮

Approved

14 hours

⋮

Approved

14 hours

⋮

Needs Update

14 hours

⋮

Approved

14 hours

⋮

Approved

14 hours

⋮

Needs Update

14 hours

⋮

Approved

14 hours

⋮

Reports

Content

Users

Certification

Searches

Filter

ScreenSteps 5

Oct 16, 2025 - Oct 30, 2025

Articles

All

Articles

82

Views

172

100

80

60

40

20

0



Knowledge Ops Platform

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Courses/Learning Paths

← Back to articles

Article associations ▾ | Live - All changes

☰

How to Increase Debit Card Limits

File Edit View Insert Format Tools Help

← → | 🗨️ ✎️ 🔗 ▾ | Choose heading ▾ | **B** *I* U Aa ▾ 🔊 ▾ | 🔗 💬 📎

H2

H2

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H2

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H2

Reviewed by	Approved on
Nathaniel	10-1-25

Overview: You will **process** a member's request to increase their debit card limits. [Debit Card Limits and What Are Requests We Receive Around Them?](#)

Verify Member Identity

- **Obtain** and record:
 - Full name
 - Member **account information** - **number**
 - Date of birth
 - At least two **authentication** pieces (e.g., last 4 of SSN, security question, one-time password)
- **Document** verifier's name, time, and method in member's record.

Confirm Requested Limit Change

- **Ask** which limit to change:
 - Daily ATM withdrawal
 - Daily POS/combined purchase
 - Single-transaction
 - International transaction
- **Clarify** if change applies to all channels or specific ones.

Clarify Create

✕

🗣️

Record your voice

Talk through the topic and Clarify will turn it into a clear, structured guide.

📺

Record your screen

Capture your screen and voice and Clarify will create a guide with key steps or insights.

📄

Upload a file

Drop in a file and Clarify will pull out and organize the essential info.

✍️

Write your explanation

Write what you know and Clarify will shape it into a guide others can use.

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Courses/Learning Paths

ARP Credit Union

Search By Contact Number

Member's Information

Name

Adam Proctor

Address

2148, Pineway Dr

City

Kalkaska

State

Michigan

Zip Code

49646

SSN

*****2233

Driver License No.

P142-4668-7294

Account Open Date

09/08/2012

Joint Account Holder

Andy Proctor

Phone Number

777-777-7777

Last FM Date

30/06/2019

Account Warning Code

5

Reset Home Banking Password

Open Epsysis Quest

Card Summary

Loan List

Share List

Funds Transfer

Card Block / Unblock

Number	Card Issue Date	Card Exp Date	Status	Status Reason
xxxx-xxxx-xxxx-1567	01/02/2015	01/02/2025	Active	Active Member
xxxx-xxxx-xxxx-1890	10/07/2014	10/07/2024	Active	Active Member
xxxx-xxxx-xxxx-1224	02/02/2013	02/02/2023	Inactive	Stolen
xxxx-xxxx-xxxx-2035	01/05/2012	01/05/2022	Active	Active Member
xxxx-xxxx-xxxx-2127	01/02/2012	01/02/2022	Inactive	Lost
xxxx-xxxx-xxxx-1954	12/01/2012	12/01/2022	Inactive	Lost
xxxx-xxxx-xxxx-1532	08/03/2018	08/03/2028	Active	Active Member
xxxx-xxxx-xxxx-2278	09/08/2020	09/08/2030	Active	Active Member

Last X Calls

Agent ID	Call Start Time	Call End Time	Duration	Call Disposition
1001	01:12:05	01:22:05	00:10:05	Balance
1002	14:20:00	14:25:00	00:05:00	Enquiry
1003	10:50:02	11:00:00	00:10:02	Balance
1004	11:30:00	11:32:05	00:02:05	FCR
1005	09:30:05	10:00:05	00:30:05	FCR
1006	10:30:05	11:00:05	00:30:00	Fund Transfer

Account Comments

Add Account Comments

Effective Date	Expiration Date	Comments
10/08/2019	10/08/2019	Comment 1
12/08/2019	12/08/2019	Comment 2
15/08/2019	15/08/2019	Comment 3
20/08/2019	20/08/2019	Comment 4
22/08/2019	22/08/2019	Comment 5
30/08/2019	30/08/2019	Comment 6

ScreenSteps

← Back to Articles

Knowledge Hub / Account Management / Opening Accounts

Opening a New Account

Verify Prospective Member Meets Criteria

☒ 1. Current Driver's License with Address

☒ 2. SSN or TIN

☒ 3. Meet Eligibility Requirements

☒ 4. \$25 to open account

Does Prospective Member Meet the Above Criteria

1. Select one Option Below

YES

NO

Show Comments



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Courses/Learning Paths

 Notice

Miranda Jacobs

Jul 1

Mobile Billing Article

We've made updates to our mobile billing digital guides. Please review and acknowledge changes.

Read & Acknowledge



 Notice

Miranda Jacobs

Jul 1

New Fraud Detection Checklist Available

Joe has created a new checklist for us to use to detect fraud. Please review and acknowledge.

Read & Acknowledge



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Courses/Learning Paths



The screenshot displays the 'screensteps' Knowledge Hub interface. The top navigation bar includes 'Knowledge Hub', 'Courses', and user profile icons. The main content area is titled 'Online & Mobile Banking' and shows '0 of 16 steps Completed'. A list of course topics is visible on the left, with 'Welcome to the Course' selected. The main video player displays 'Welcome to the Course' and 'Online & Mobile Banking Credit Union Training' with a play button overlay. The video duration is 1:00.

screensteps

Knowledge Hub Courses

Online & Mobile Banking

0 of 16 steps Completed

Welcome to the Course

My Accounts

Bill Pay

Move Money

Alerts & Notifications

Statements & Documents

Mobile Check Deposit

Stop Payment

Time for Role Play

View Account Balance Scenario

Bill Pay Scenario

Welcome to the Course

Online & Mobile Banking

Credit Union Training

1.00

ScreenSteps

And a Lot More to Come...

How Can You Upgrade?

Fill out the form on this page. →

- + Request an upgrade
- + Work with Mark for a custom plan
- + Roll out upgrade

screensteps.com/account-upgrade

