

ScreenSteps Platform Walk Through

Presentation by : Greg DeVore

What is the difference?



What is the difference?



Time to Proficiency



14 weeks



6 weeks

Time to Proficiency

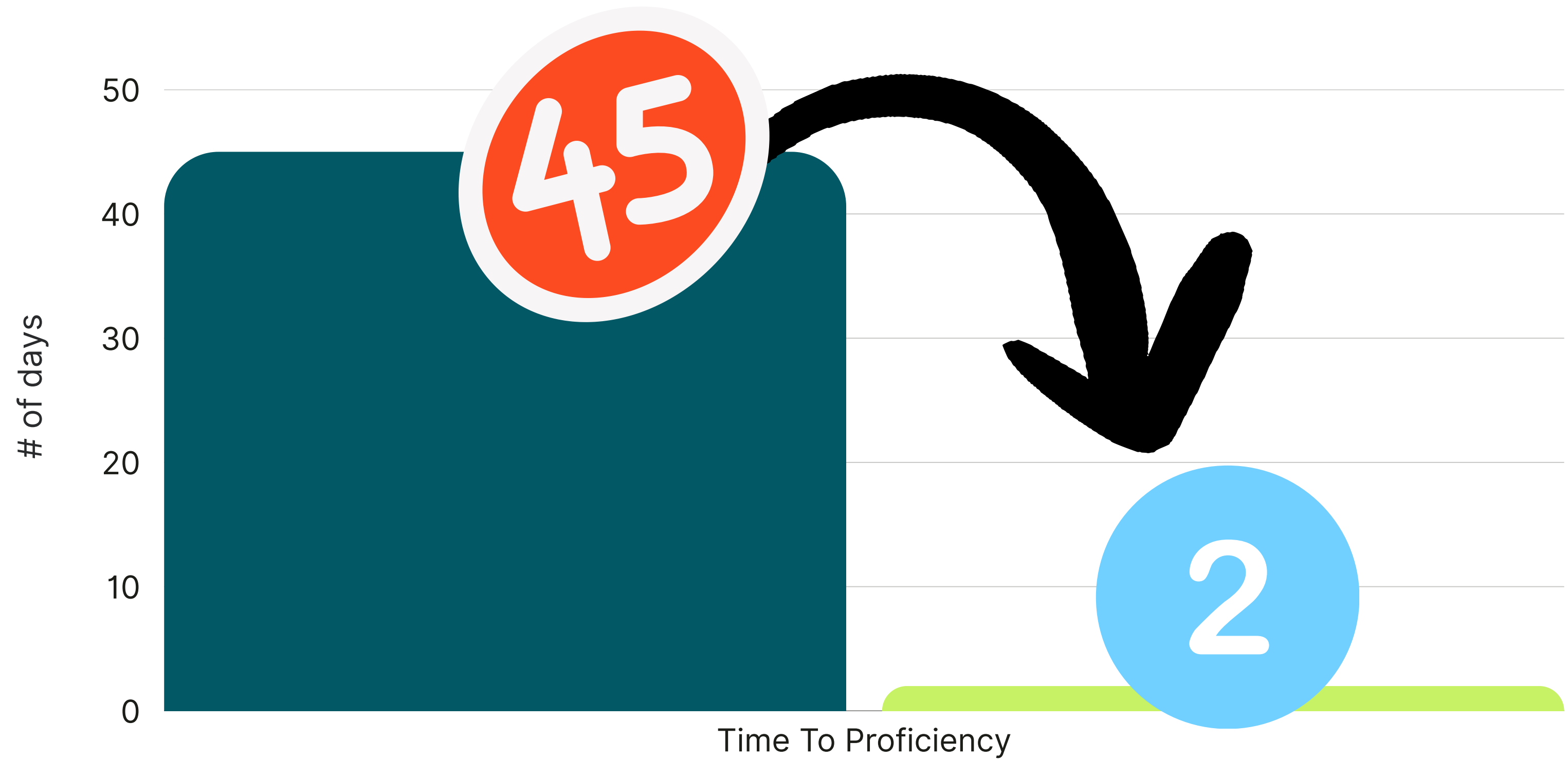


14 weeks



6 weeks

Time to Proficiency in days



80% Reduction in Escalations



In a Perfect World

- All procedures are documented
- Formatted for Performance
- Validated for Accuracy
- Delivered to Employees Within Seconds

How Do You Get There?

- Rewrite All Your Documentation
- Type New Content From Scratch
- Spend 6-12 Months Training AI



Key Insight

In order to have answers at employees fingertips that they can trust, you MUST have a system in place for:

- Capturing Knowledge
- Converting it to a format that's designed for performance
- Delivering it to your employee's without friction
- Maintaining the validity of that knowledge over time

How Do You Get There?

- Rewrite All Your Documentation
- Type New Content From Scratch
- Spend 6-12 Months Training AI



How We Help You Get There

Convert Information Into Recipes

Digital Banking

Things you need in order to access The Bank Digital Banking:

You can access The Bank Digital Banking with an internet connection and a supported web browser or our mobile banking app.

For desktops running Windows or macOS, the minimum system requirements for browsers include:

- Current version of Google Chrome and
- Current version of Mozilla Firefox and
- Current version of Microsoft Edge and
- Current version of Apple Safari and

The minimum system requirements for our

- Current version of iOS and previous 1
- Current version of Android and previ

Note: Earlier versions of browsers and open source features may not display or function available in older versions. Experiences m combinations.

Direct deposit

Direct deposit with your employer can be s in a new tab.

You'll need to give the completed form, you department.

Direct deposit of federal payments can be i

- Email online at GoDirect.ang, Opens in a new tab
- Call 800-333-1795
- Visit your local The Bank Branch, Open

Secure access card or register browser or device

There are several reasons you may need to

- **You may need to register your device**

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- Current version of Microsoft Edge and
- Current version of Apple Safari and previous two versions (recommended)
- Current version of Mozilla Firefox and previous two versions (supported)
- Current version of Microsoft Edge and previous two versions (supported for Windows)
- Current version of Apple Safari and previous two versions (supported for Android)

The minimum system requirements for our mobile banking app include:

- Current version of iOS and previous two versions (supported for iPhone® and iPad® devices)
- Current version of Android and previous two versions (supported for Android™ devices)

Note: Earlier versions of browsers and operating systems may still be able to access Digital Banking. However, certain features may not display or function correctly. Additional bug fixes and security enhancements may be available in older versions. Experiences may differ across various browser, device and operating system combinations.

Direct deposit

Direct deposit with your employer can be set up by downloading and filling out the [direct deposit form \(PDF\)](#), Opens in a new tab.

You'll need to give the completed form, your The Bank account and **ABA routing number** to your employer's payroll department.

Direct deposit of federal payments can be set up in several ways:

- Email online at GoDirect.ang, Opens in a new tab
- Call 800-333-1795
- Visit your local The Bank branch, Opens in a new tab

Secure access card or register browser or device


There are several reasons you may need to request a secure access card each time you log in.


- **You may need to register your device** to utilize online user account creation or device recognition. We recommend that


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.

Reason for this loan limits


 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



0:13



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.

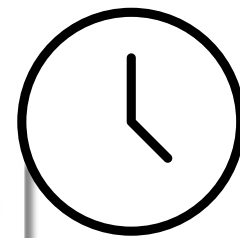
5. Enter the transfer amount

6. Determine transfer type

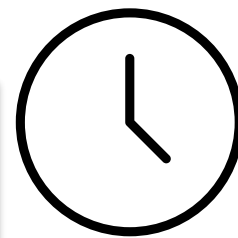
- One-Time Transfer for immediate transaction.
- Recurring Transfer for future automatic scheduling.
 - Choose frequency.
 - Set start and end dates.

How We Help You Get There

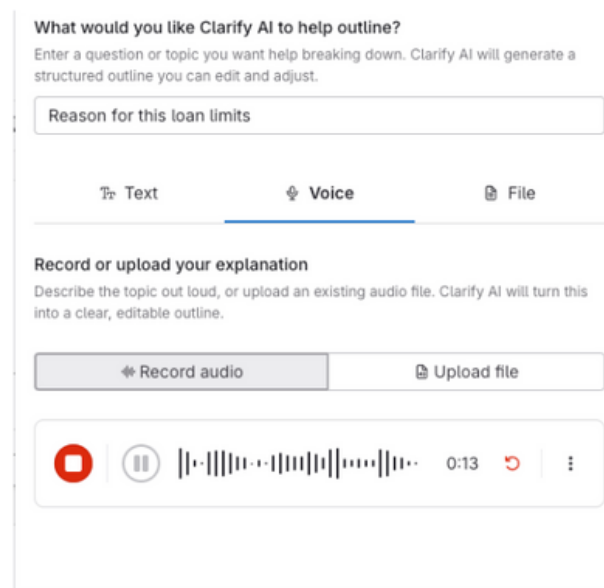
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One Work Day



One Work Week



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ScreenSteps Clarify AI Create

