

2025 ScreenSteps AI Workflow Updates

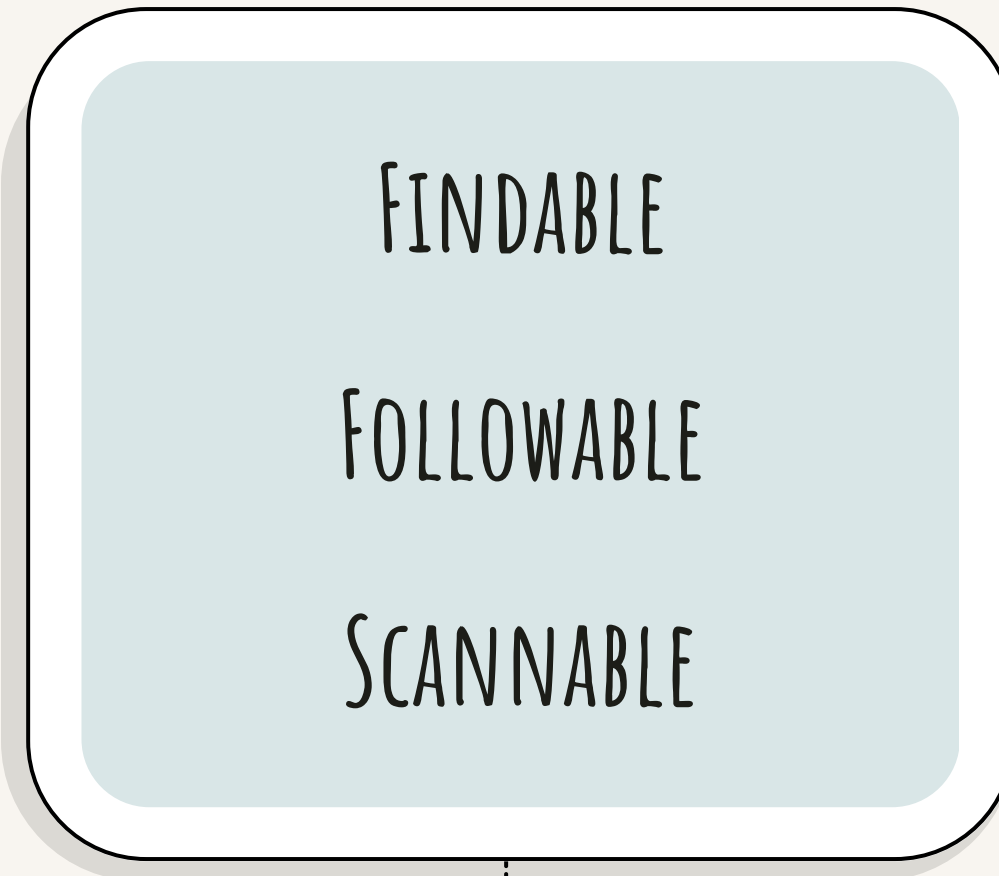
✦ ScreenSteps

The Goals Of This Change



1

Productivity



2

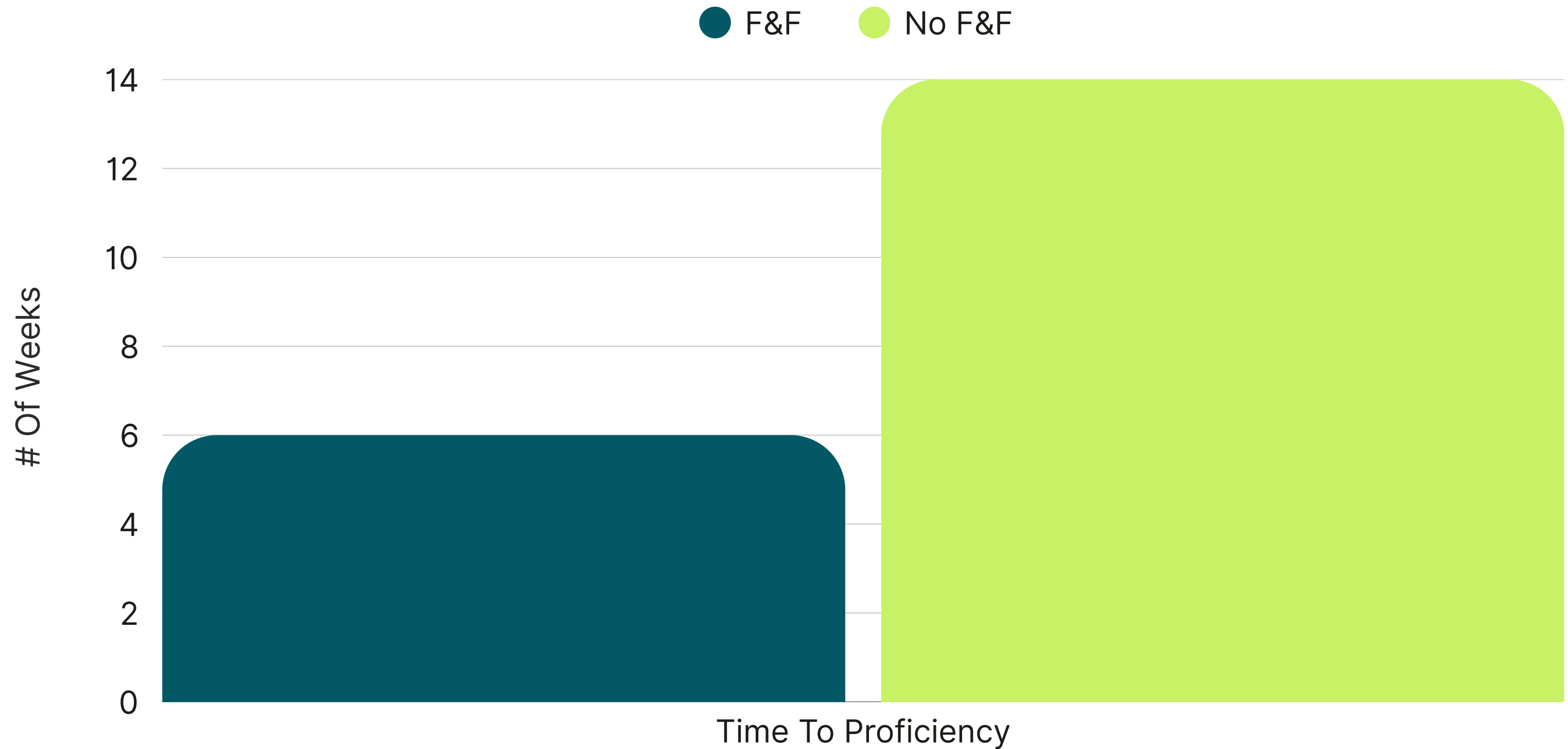
Best Practices



3

A Faster Path to
Find & Follow

8 Week Difference in Time To Proficiency



80% Reduction in Escalations



CRM Rollout Training Switched in Week 1 to Find & Follow

Before

“This is too much information!”

“I don’t have time for this.”

“This is way too confusing.”

“How are we supposed to do this?”

After

“It seems pretty straight forward – all I have to do is follow the steps”

“YES YES YES! I LOVE THIS.”

“This is how all of our training should be”

Scenarios

- A ton of documentation in Word/PDF format
- You have “nothing”
- Docs in ScreenSteps that aren’t Find & Follow ready
- A massive documentation project for formal review



Use Case #1

A mountain of PDF, Word, or PowerPoint files

1. Copy/Paste or Import As-is

2. Manually Review

a. *What is it trying to say?*

b. *What is foundational?*

c. *What is actionable?*

3. Manually Optimize

4. Review and approve



The screenshot displays the 'screensteps' user interface. On the left is a sidebar with navigation options: Search, Content, Table of contents (selected), Articles, Courses, Feedback, Reporting, Design, Site, Settings, and Support. The main area shows a 'Table of contents' with a search bar and a table with columns: Title, Permissions, Contents, and Status. Below this, two article previews are visible. The first preview is titled 'Opening a New Account' and shows a list of requirements: '1. Current Driver's License with Address', '2. SSN or TIN', '3. Meet Eligibility Requirements', and '4. \$25 to open account'. The second preview is titled 'How to deposit a check on the mobile app' and includes a section 'Background on the mobile app' with placeholder text and a sub-section 'Log in and select Deposit Checks'.

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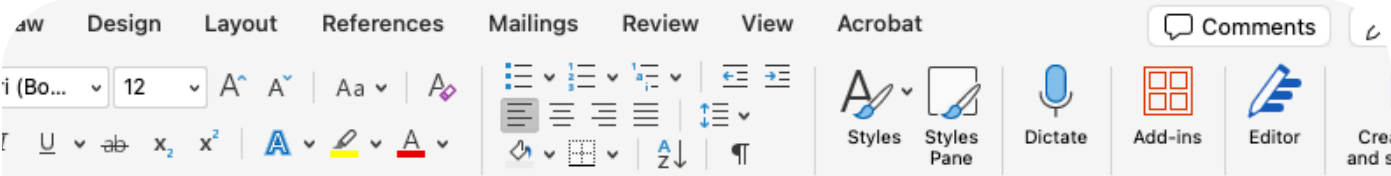
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What Goes In



Bank Loan Processing Procedure with nCino Implementation

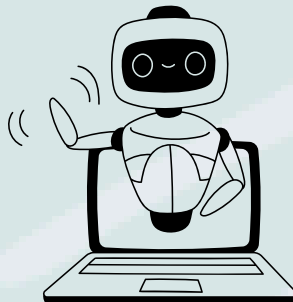
Initial Application and Customer Onboarding

The loan processing procedure begins when a customer submits a loan application through any channel, whether in-branch, online, or through a loan officer. Upon receiving the application, the loan processor must immediately create a new opportunity record in nCino by navigating to the Opportunities tab and selecting "New Opportunity." The processor enters all customer-provided information including loan amount, purpose, collateral details, and basic borrower information into the nCino system. During this initial stage, the processor must verify the customer's identity in compliance with the Customer Identification Program (CIP) requirements under the USA PATRIOT Act by collecting and documenting government-issued photo identification, verifying the customer's name, address, date of birth, and identification number. This information is recorded in nCino's Customer Information File (CIF) section, and the system automatically checks against Office of Foreign Assets Control (OFAC) watchlists to ensure compliance with anti-money laundering regulations.

Credit Analysis and Documentation Collection

Following the initial application entry, the loan processor initiates the credit analysis phase by ordering a credit report through nCino's integrated credit reporting system, typically Experian or other approved vendors configured within the platform. The processor navigates to the Credit tab within the opportunity record and requests the credit report, which automatically populates the borrower's credit score, payment history, and existing debt obligations. Simultaneously, the processor creates a document checklist in nCino based on the loan type and amount, ensuring compliance with regulatory documentation requirements. For consumer loans, this includes income verification through tax returns, pay stubs, and bank statements, while commercial loans require business financial statements, tax returns, and cash flow projections. The processor uploads all received documents to nCino's document management system, categorizing each document according to the predefined taxonomy to ensure proper organization and regulatory compliance. The system maintains an audit trail of all document uploads, modifications, and access, supporting examination readiness under federal banking regulations.

Underwriting and Decision Process



What Comes Out









Bank Loan Processing Procedure nCino Implementation

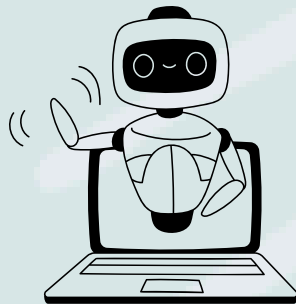
Updated on Jul 29, 2025

You will **process a bank loan** using nCino from application to post-closing.

- 1 Start Application and Onboard Customer**
 - **Create** a new opportunity in nCino.
 - **Enter** customer details: loan amount, purpose, collateral, borrower info.
 - **Verify** identity (CIP): collect and document photo ID, name, address, DOB, ID number.
 - **Record** info in nCino's Customer Information File (CIF).
 - System **checks** OFAC watchlists for compliance.
- 2 Collect Credit and Documentation**
 - **Order** credit report in nCino (Credit tab).
 - **Create** document checklist based on loan type/amount.
 - **Upload** required documents (income, financials, etc.) to nCino.
 - System **tracks** all uploads and changes for audit.
- 3 Underwrite and Make Decision**
 - **Assign** application to underwriter in nCino.
 - **Review** credit, ratios, and documents.
 - nCino **runs** automated risk assessment.
 - **Document** analysis and recommendations in underwriting section.
 - If needed, **schedule** committee review in nCino.
 - System **records** all decisions and discussions.
- 4 Review Compliance and Fair Lending**

What Goes In

-  Procedure_for_this.pdf
-  Procedure_for_that.docx
-  Webinar_for_new_System.mp4
-  New-hire_training_slides-1-14-24.ppt
-  Procedure_for_this.pdf
-  Procedure_for_that.docx
-  Procedure_for_this.pdf
-  Procedure_for_that.docx



What Comes Out

CU Starter

Online & Mobile Banking

Overview

5 Articles

What is Online and Mobile Banking?

Overview of Online Banking for Credit Unions

What is Plaid and Why Would a Member Use it?

What is Bill Pay and Why Would a Member Use it?

Which Browsers Support Online Banking?

Online Banking Account Management

17 Articles 1 Workflow

How to Log in to Online Banking

Why Should a Member Register Their Device for Online Banking?

Why Does Member Need to Enter Verification Code?

What to do if member didn't receive log in code for online banking

What to do if member does not have

What to do if member forgot their

Tellers/MSRs/Call Center

Share Draft/Debit Cards

View 49 Articles

Electronic Fund Transfer (EFT)

View 27 Articles

Loan Payments

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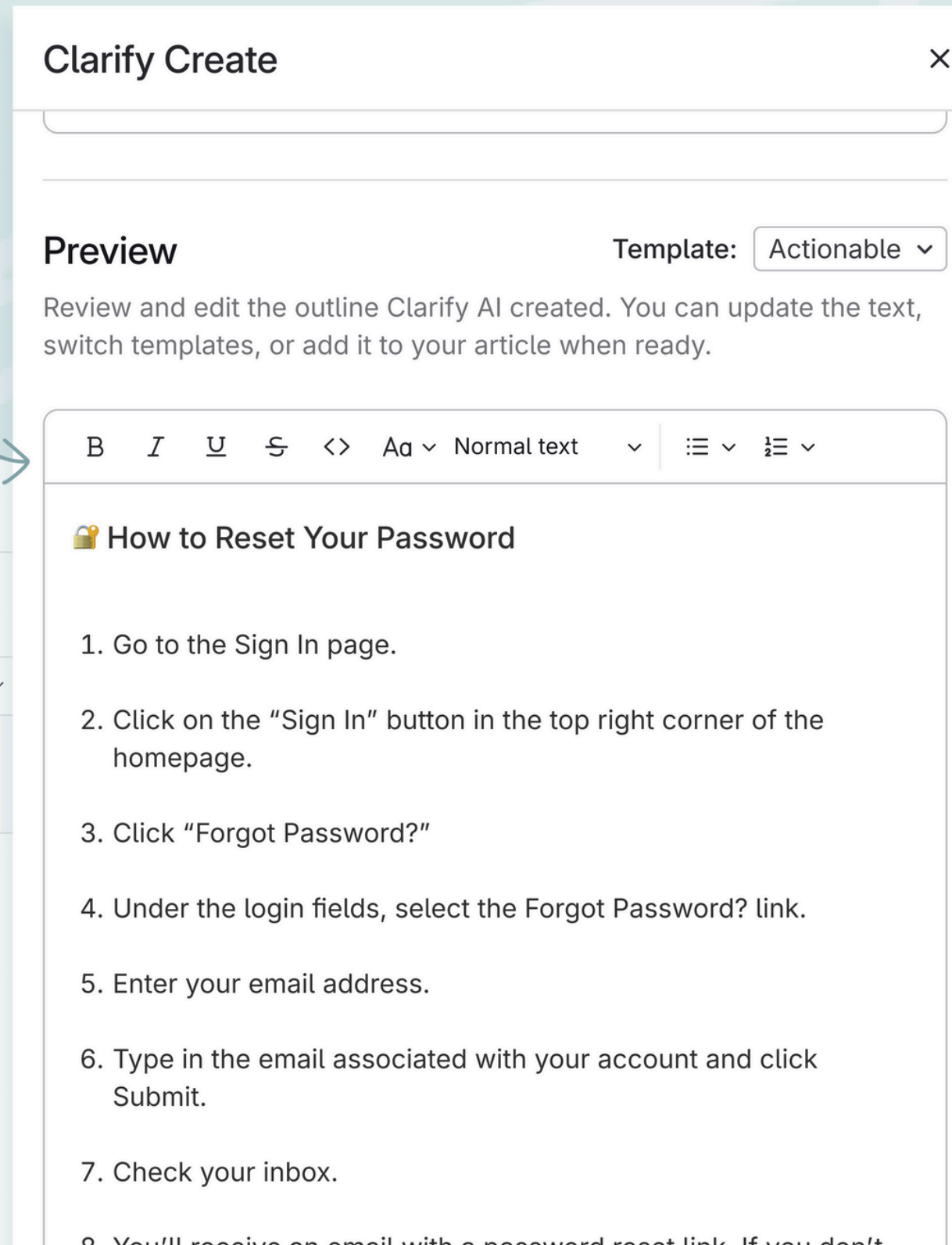
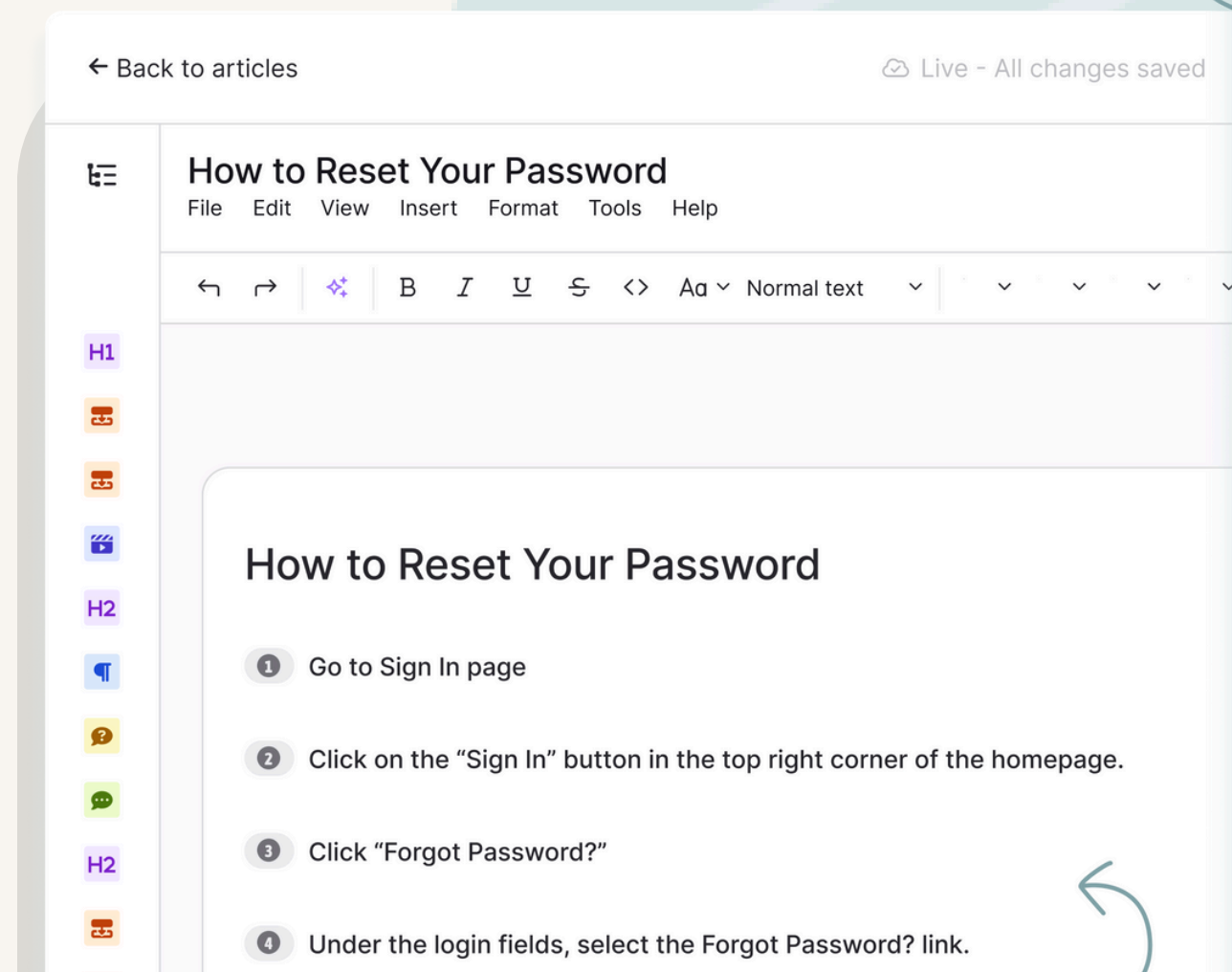
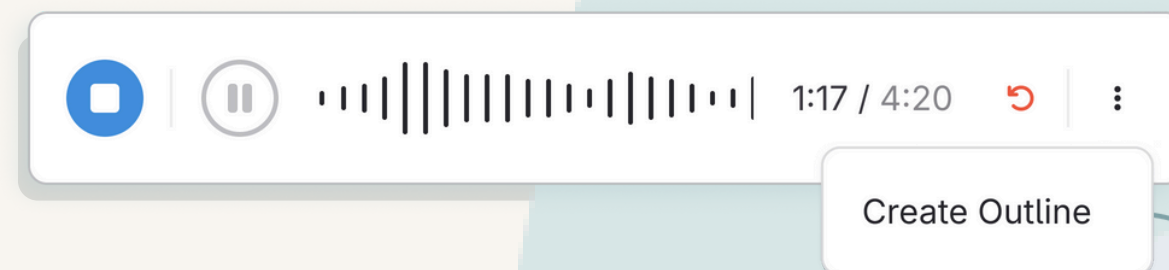


The screenshot displays the 'screensteps' content management system interface. On the left is a sidebar with navigation options: Search, Content, Table of contents (selected), Articles, Courses, Feedback, Reporting, Design, Site, Settings, and Support. The main area shows a 'Table of contents' page with a search bar and a table with columns: Title, Permissions, Contents, and Status. Below this, there are two article preview cards. The first card is titled 'Opening a New Account' and shows a list of requirements: '1. Current Driver's License with Address', '2. SSN or TIN', '3. Meet Eligibility Requirements', and '4. \$25 to open account'. The second card is titled 'How to deposit a check on the mobile app' and includes a section 'Background on the mobile app' with placeholder text and a link: 'What types of checks can I deposit with my mobile device?'. The interface also includes buttons for 'View site', 'Create article', 'Reorder', 'Refresh preview', and 'Update'.

Use Case #2

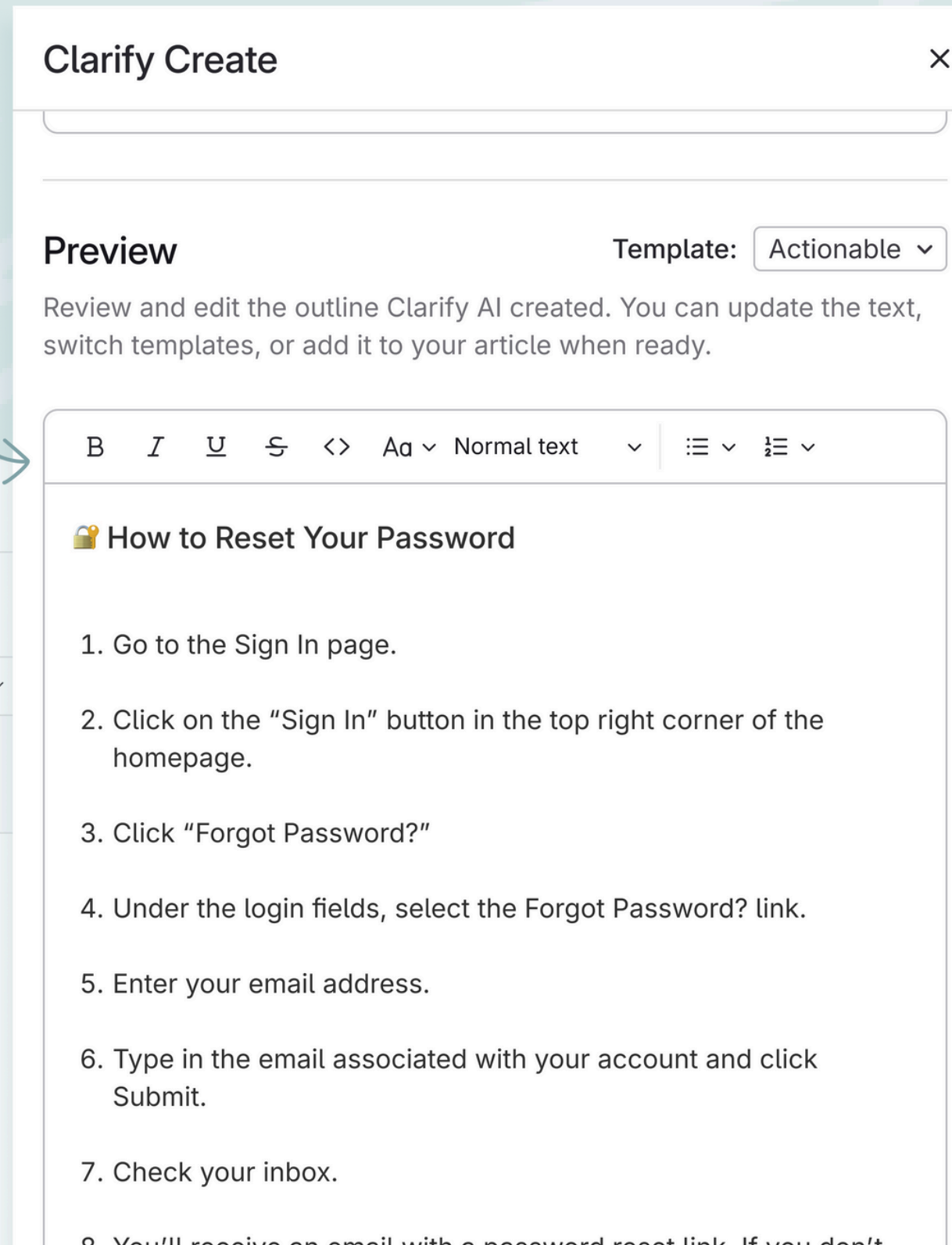
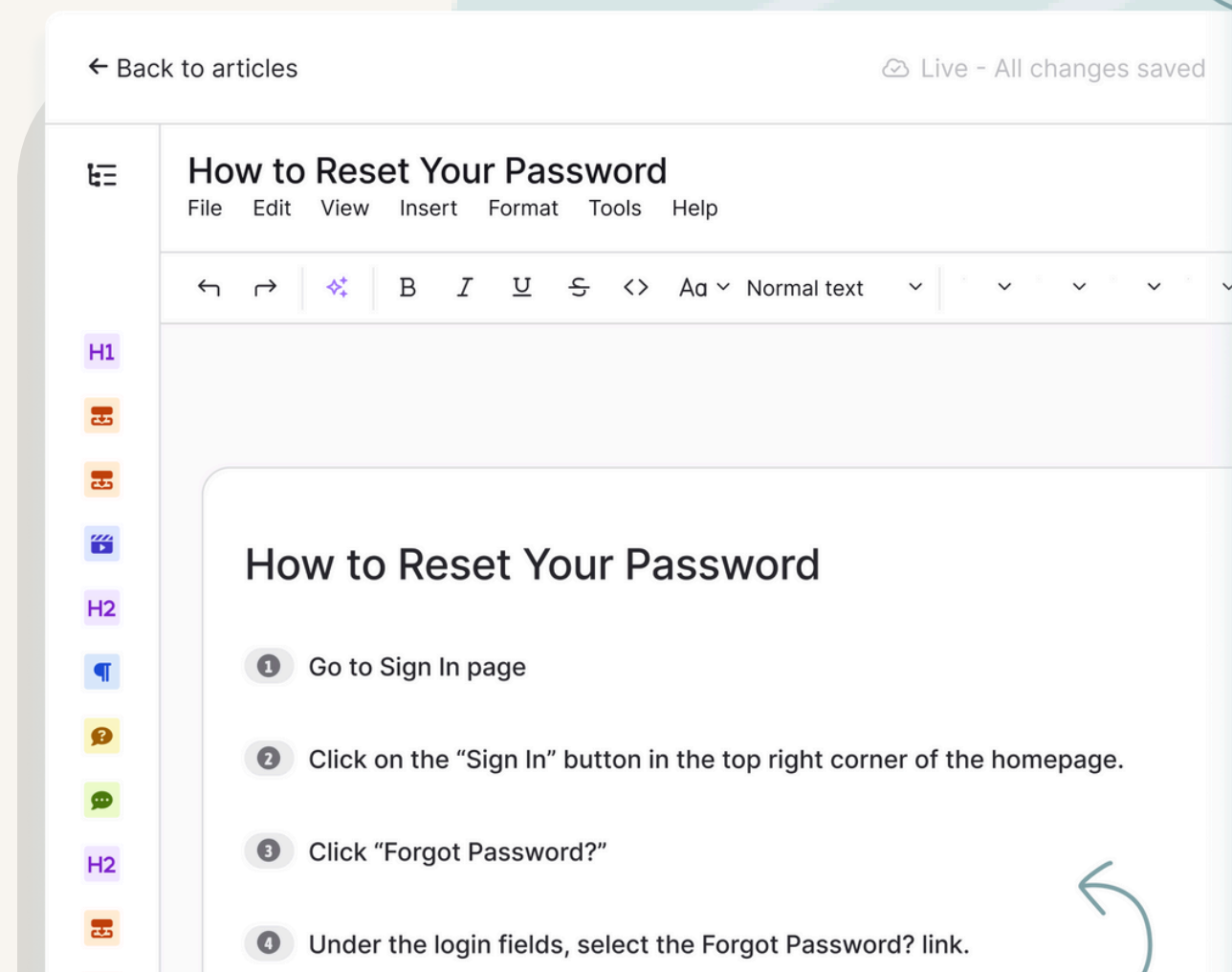
“Nothing is Documented”

1. Identify Inputs
2. Interview SMEs
3. SME explains what to do
4. Transcribe audio
5. Identify core flow
6. Break steps apart
7. Apply Formatting
8. Have SME review



“Nothing is Documented”

1. **Identify Inputs**
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What Goes In



What Comes Out

Clarify create



Preview

Template: Actionable ▾

Review and edit the outline Clarify AI created. You can update the text, switch templates, or add it to your article when ready.

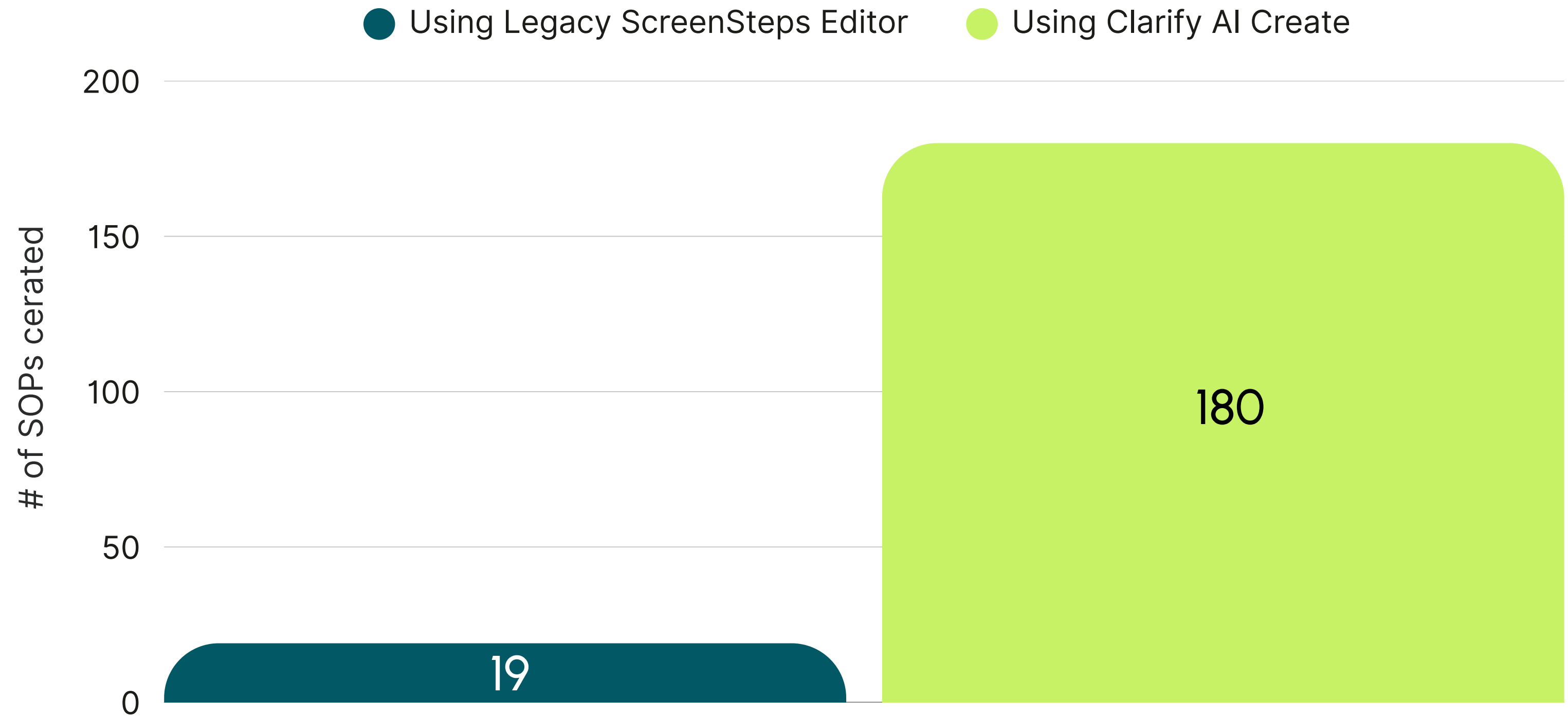
B *I* U ~~ABC~~ <> Aa ▾ Normal text ▾



How to Reset Your Password

1. Go to the Sign In page.
2. Click on the "Sign In" button in the top right corner of the homepage.
3. Click "Forgot Password?"

Clarify AI Create



Use Case #3

Existing Content in ScreenSteps Isn't Find & Follow Ready

1. Identify core message
2. Break it apart into steps
3. Add headings
4. Convert sections into lists
5. Bold keywords
6. Have SME review/approve

The screenshot displays the ScreenSteps editor interface. At the top, there's a navigation bar with a 'Back to articles' link, a 'Live - All changes saved' status indicator, and a 'Refresh preview' button. Below this is a menu bar with options: File, Edit, View, Insert, Format, Tools, and Help. A toolbar contains various editing icons like undo, redo, bold, italic, underline, link, unlink, and text color. The main content area shows a document titled 'How to cancel a check' with several paragraphs of text. A context menu is open over the text, offering options: 'Find & Follow' (with sub-options 'Make actionable', 'Make foundational', and 'Summarize'), 'Convert', and 'Custom prompts'. On the left side, there's a sidebar with a list of steps, each represented by a colored icon and a heading (H1, H2, H2, H2, H2, H2). On the right side, there's a 'Clarify Assistant' sidebar with a text input field, a 'What will I accomplish?' section, a 'Gather check details' section with a list of items (Check number, Date number), and buttons for 'Insert', 'Insert below', 'Try again', and 'Stop'. At the bottom of the sidebar, there's a link to 'Ask Clarify to improve generated text'.

Use Case #3

Existing Content in ScreenSteps Isn't Find & Follow Ready

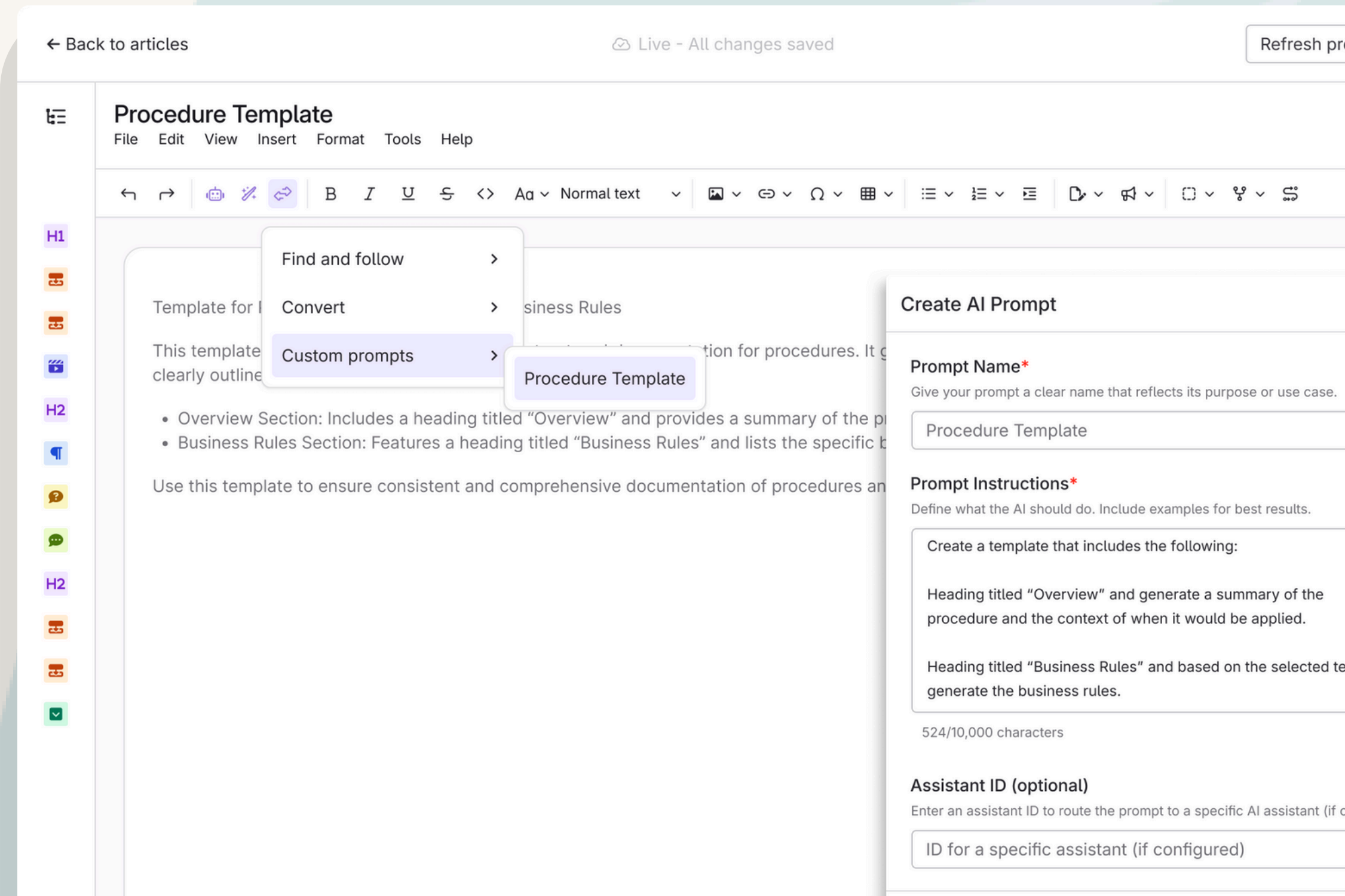
1. ~~Identify core message~~
2. ~~Break it apart into steps~~
3. ~~Add headings~~
4. ~~Convert sections into lists~~
5. ~~Bold keywords~~
6. **Have SME review/approve**

The screenshot shows a document editor interface. At the top, there's a navigation bar with a 'Back to articles' link, a 'Live - All changes saved' status, and a 'Refresh preview' button. The main content area displays an article titled 'How to cancel a check' with a menu bar (File, Edit, View, Insert, Format, Tools, Help) and a rich text toolbar. A 'Find & Follow' menu is open, showing options: 'Find & Follow' (selected), 'Convert', 'Custom prompts', 'Make actionable', 'Make foundational', and 'Summarize'. The article text is highlighted in blue, indicating it's selected for editing. On the right, a 'Clarify Assistant' sidebar is visible, asking 'What will I accomplish?' and providing a list of actions: 'Gather check details' (Check number, Date number). Below this, there are buttons for 'Insert', 'Insert below', 'Try again', and 'Stop'. At the bottom of the sidebar, there's a text input field with the placeholder 'Ask Clarify to improve generated text'.

Use Case #4

Preparing Documentation for a Formal Review

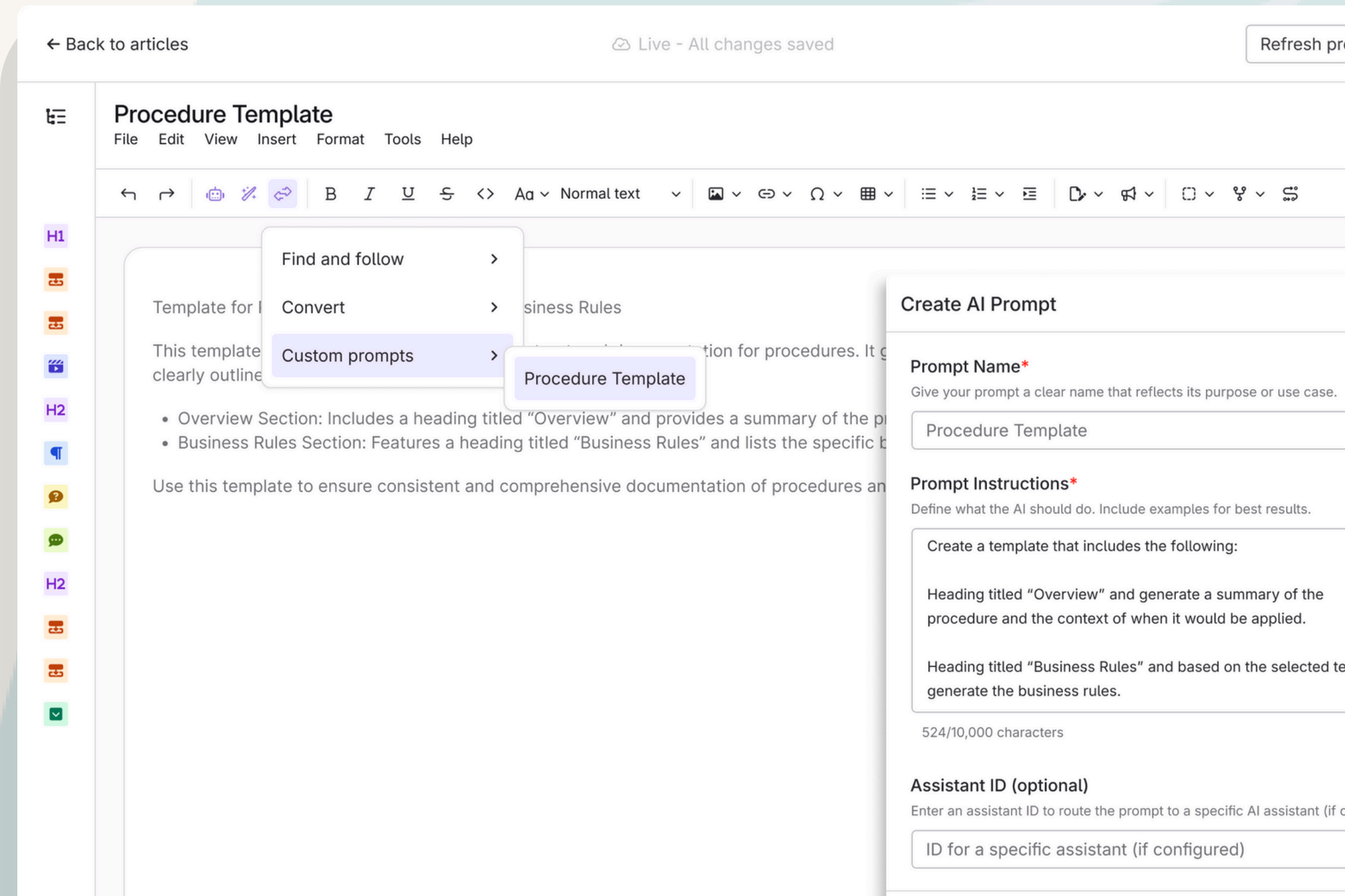
1. Identify core message
2. Copy/Paste Template
3. Manually apply style guide
4. Fill in gaps of template
5. Review, edit, and approve



Use Case #4

Preparing Documentation for a Formal Review

- ~~1. Identify core message~~
- ~~2. Copy/Paste Template~~
- ~~3. Manually apply style guide~~
- ~~4. Fill in gaps of template~~
- 5. Use AI to apply style/template**
- 6. Review, edit, and approve**



Things that are coming soon

- New desktop editor with integrated screen capture
- AI comparisons
- *What can you imagine?*



Plan Availability

	Answer	Guide	Enterprise
Clarify AI Transform	✓	✓	✓
Clarify AI Create	✓	✓	✓
Clarify AI Templates			✓
Clarify AI Assistant			✓
Clarify AI Bulk Importer and Optimizer	Project-based fee with our Services team		

Next Steps

- **New Customers:** Can access this right now
- **Existing Customers:** Reach out about migration options and timelines