onesource
VIRTUAL

# AI and automation at OSV

Delivering smart service with human oversight, built for Workday customers.

## Human-led, automation-powered

At OneSource Virtual, automation enhances human expertise; it never replaces it. Our Workday-native approach keeps a human in the loop at every step, ensuring accuracy, accountability, and a seamless experience. We use AI and automation to streamline processes, reduce risk, and deliver faster, smarter service without losing the personal touch our customers rely on.

## Automation vs. AI: What's the difference?

| Technology | Function | Is it AI? |
|---|---|---|
| Machine Learning (ML) | Learns from data, finds patterns, improves over time | ✓ |
| Agentic AI | Acts autonomously within set boundaries and adapts | ✓ |
| Robotic Process Automation | Follows strict rules to complete tasks like file uploads | ✗ |
| Traditional Automation | Uses scripts, triggers, and workflows to perform actions | ✗ |
| Optical Character Recogniton | Extracts text from images/PDFs for faster processing | ✗ |

## Our approach to automation

### Data safety
We operate within Workday's secure environment, with role-based controls and SOC 2 audits. We do not use customer data for public model training.

### Cost savings
By reducing manual rework and compliance risks, AI shortens processing cycles, lowers admin costs, and improves resource allocation.

### Customer control
Automation supports behind-the-scenes efficiency, but customers can configure workflows, opt in/out of features, and define approval thresholds.

### Human oversight
AI accelerates workflows, but final decisions — especially in payroll, benefits, and payments — always involve OSV experts. Automation supports our people, it doesn't replace them.

# What's automated, how it works, and where humans step in

| Service | Technology used | Function | Human oversight |
|---------|-----------------|----------|-----------------|
| Payroll | RPA, early-stage ML | Flags data issues pre-payroll run | Yes – All approvals/validations |
| Garnishments | RPA, OCR, logic-based rules | Uploads orders to Workday | Yes – All approvals |
| Payroll Tax Filing | RPA, OCR, rules-based | Tracks SUI rates and due dates | Yes – Experts file returns |
| Accounts Payable | ML, RPA, OCR | Matches invoices, flags fraud | Yes – Final checks by people |
| Benefits Administration | Rules-based, chatbot | Flags enrollment mismatches | Yes – Admins review issues |
| Leave Administration | Rules-based | Triggers required notices | Yes – Cases handled manually |
| myFlexSpend / Wallet | Rules-based | Sends alerts & usage tips | Yes – Configs + oversight |
| Treasury | RPA, logic-based, OCR | Validates routing payments | Yes – Final review by OSV |
| Direct Deposit Switching | Logic-based | Updates account details | Yes – OSV confirms switch |
| Loan Deduction (Bill Pay) | Logic-based | Deducts/routes loan payments | Yes – Monitoring/reconciliation |
| VOE/VOI (Equifax) | Rules-based | Automates verifications | Yes – if exceptions arise |

## Frequently asked questions

**Is my employee data used to train AI models?**
No. OSV and Workday never use customer data to train public models. Your data stays secure and private.

**What happens if automation gets something wrong?**
There's always a human in the loop. OSV experts review flagged issues before anything is finalized.

**Is OSV using generative AI like ChatGPT?**
No. We do not use generative AI in our services. All automation is rules- or process-based, with plans for governed ML where it adds value.

**Can we audit what automation is doing in our environment?**
Yes. OSV maintains traceable audit trails for all automation-assisted actions, aligning with SOC 2 requirements.

**Will automation ever replace our OSV service team?**
No. Automation handles repetitive tasks, but OSV experts lead service, support, and decisions.

**Can automation be updated if something changes?**
OSV's automation is built with agility in mind. Whether it's a regulation change, new internal policy, or process tweak, our teams can quickly adjust automation logic, always with testing and human review before deployment.

Partner
workday