

OneSource Virtual's 24-Hour response to CARES act drives business continuity



ORGANIZATION PROFILE

Founded in 2008, OneSource Virtual is the pioneer of Business Process as a Service (BPaaS) outsourcing. As a Workday partner, it has helped more than 1,300 companies with everything from deployment to maintenance to payroll and more. The company of 950 employees is based in Dallas, TX and has additional locations across North America and Europe.

CHALLENGE

OSV began looking into implementing Robotic Process Automation (RPA) to support customers within the Workday ecosystem in late 2018. The company wanted to utilize automation to increase efficiency and accuracy with predefined processes with the goal of providing more benefits to end-users. When looking at solutions, OSV not only investigated which platform would deliver the best technology, but also which partner would be committed to providing expertise and support.

SOLUTION

After conducting a Request for Information (RFI) and Request for Proposal (RFP), the company chose Automation Anywhere as its RPA partner in December 2018 because its values and culture aligned with OSV's. By January 2019, internal development around automation had started and was already running full speed.

BENEFITS

24

Hours to implement RPA solution in response to CARES Act

3,500+

Cases created and 2,700+ cases closed for tax codes and deferral amounts

\$724.6M+

Deferred

\$40.4M+

Total tax credits applied

99%

Cases created completely with bots

1,500+

Hours saved in three months

Processes Automated

- Garnishments withholding orders processing
- Tax reconciliation
- End of year and end of quarter finance & accounting outsourcing for 1099 audits
- Finance & accounting supplier detail audits
- FedEx shipping prep for Workday tenant upload
- Year-end W2 processing
- Tax profile and tax liability deferral reporting, case creation and closure
- Tax credit tracking reporting, case creation and closure

Industry

Technology

"Automation Anywhere has proven time and again why they are a leader in the market. COVID-19 has created a situation no one globally was prepared for. Our ability to be very nimble and rapidly support a government tax relief program within four days was truly market leading."

— **Cay Gliebe**,
SVP Marketing and
Product Management
at OSV

STORY DETAILS

The company began using IQ Bot to extract garnishment notifications received through local, state, and federal jurisdiction levels. Then, RPA was used to get business rules to complete XMLs into Salesforce and Workday. Many other automations in production help support processes such as tax reconciliation, end of year and end of quarter finance and accounting outsourcing for 1099 audits, and FedEx shipping prep for Workday tenant upload.

In March 2020, as the United States began feeling the economic impact of the COVID-19 pandemic, OSV pivoted from its current automated processes and turned to RPA to help with new payroll tax legislation, such as the CARES Act, passed to provide financial assistance to businesses. This required multi-system updates to the company's proprietary tax software to prepare for a whole new level of data and tracking that wasn't needed before.

While interpreting the new law provided some challenges, the team did not face any technology-related issues when implementing the new tax credit automation. Partnering with the tax and business departments, requirements such as what communication was required and what activities the bots would process were gathered. Then, using Task Bots and Meta Bots, as well as Salesforce APIs to do a mass case creation, a solution was created and up and running in only 24 hours.

A COVID-19 MetaBot (C# based) was developed to:

- Extract data from the proprietary payroll tax system.
- Generate OSV customer support cases using Salesforce REST APIs.
- Attach password protected extracts to generated cases.
- Track and audit activities in a dedicated secure SQL server database.
- Generate internal reporting for business stakeholders.

Within three business days, OSV was able to start managing tax deferrals and credits that needed to be tracked. This quick action helped give customers, who were living in the uncertainty brought about by the pandemic, some peace of mind. Without automation, it could have taken up to 10 days to manually complete the updates.

Another way RPA was used was to manage communications. Every Sunday night, a bot closes out the prior week's case and opens a new one. A message is communicated to customers informing them what liabilities have been deferred and what they have chosen. As long as COVID-19 deferrals are happening, this automation will continue to run.

To date, \$724,597,120 in tax deferrals and \$40,424,598 in tax credits have been processed with automation by OSV. 99% of cases have been completely by bots, with only 25 requiring manual checks. In just three months, 1,500 hours in processing time has been saved.

"Especially with IQ Bot implementation, the dedication of the Automation Anywhere consultants made us really feel like part of the RPA business. They walked into the building at OSV and became our team members and they continued to be even after they were done with the work. That dedication and customer support was amazing."

— **Yasmine Rodriguez,**
VP Product Management
& RPA at OSV

"The ability to create dynamic-link library based MetaBots within Automation Anywhere gave us more scope and flexibility in developing various solutions, ability to interact with external systems using REST API, and the ability to use various cloud services."

— **Dinesh Boinpally,**
Sr. Software Architect
(RPA) at OSV

THE FUTURE

OSV's compliance team monitors COVID-19-related legislation which changes almost every week. As the pandemic continues to impact businesses across the United States, the more the government is aggressively providing financial aid.

With more and more customers taking advantage of economic assistance, a bot will be used to extract information about each different kind of tax credit or deferral case. The company will also leverage automation to communicate any changes.

"The Automation Anywhere Enterprise platform can interact with so many different tools that it offers so many different possibilities. It allows you to be creative with the solution you want to provide."

— **Chris Newman,**
Automation Design
Analyst at OSV

"We're able use SQL as our data engine and present the information in Excel because that's what end-users are most comfortable with. We've got the flexibility to pull any level of audit tracking and analysis with platforms like Workday as well as our own tax systems and portals, then integrate with Salesforce very easily because of the adaptability of the Task Bots."

— **Brittany Tei,**
RPA Program Manager
at OSV

About Automation Anywhere

Automation Anywhere empowers people whose ideas, thought and focus make the companies they work for great. We deliver the world's most sophisticated Digital Workforce platform making work more human by automating business processes and liberating people.

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