



DMEC AI Think Tank: Defining Ethical and Effective Workforce Integration

Executive Summary



PERKY



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DMEC AI Think Tank

Artificial intelligence (AI) is reshaping how employers approach workplace leave and accommodation management. To help leaders adopt AI with clarity and care, DMEC convened a multidisciplinary AI Think Tank to develop practical guidance that aligns efficiency with ethics, compliance, and the employee experience. This white paper synthesizes interviews, pulse survey insights, and expert roundtables into an actionable framework employers can put to work now.



About the Think Tank

An industry collaboration between DMEC and PERKY to define the responsible use of artificial intelligence in workplace leave and accommodation management.

The DMEC and PERKY, an AI-driven benefits communication and decision-support platform, partnered to launch the first-ever AI Think Tank exploring how artificial intelligence is transforming workplace leave and accommodation management. This collaboration brought together employer representatives, consultants, service providers, and compliance experts to examine practical, ethical, and legal considerations for implementing AI in workforce programs.

Through a series of structured interviews, facilitated roundtables, and member input, the Think Tank identified both opportunities and risks as employers and vendors explore automation, data analytics, and predictive

tools to improve efficiency and the employee experience. The resulting white paper translates these insights into actionable guidance for organizations seeking to integrate AI responsibly across workplace leave and accommodation processes.

This initiative builds on DMEC's legacy of providing research, benchmarking, and practical tools for the workplace leave and accommodation management community. Together, DMEC and PERKY aim to help employers harness the benefits of AI while maintaining compliance, transparency, and trust in the human-centered systems that support today's workforce.

Purpose and Scope of White Paper

The paper defines core AI concepts and distinguishes AI from rule-based automation so leaders can select the right solution for the job. It focuses on how AI can support intake, case management, documentation, and stay-at-work/return-to-work (SAW/RTW) workflows while maintaining transparency, fairness, and trust. The resource also clarifies differences in how employers and service providers deploy AI, which affects data needs, risk posture, and oversight.

Who Participated in the Think Tank

Participants represented large and mid-size employers, insurance carriers, third-party administrators (TPAs), consultants, brokers, and technology leaders. Their collective perspectives inform the guidance, examples, and tools provided throughout the report.

Top Challenges

Leaders identified five recurring hurdles to responsible AI adoption in workplace leave and accommodation programs:

- 1 System integration across legacy platforms and payroll
- 2 Compliance across evolving state and federal requirements
- 3 Data privacy and security
- 4 Understanding and explaining AI outputs
- 5 Building organizational buy-in through change management

The paper details how silos, variable data quality, skills gaps, and cost uncertainty slow progress; and how baseline metrics, human oversight, and transparent communication mitigate risk.

AI Capability Evaluation Rubric for Vendors

AI Strategy and Vision

Technical Maturity

Data Foundation

Business Impact

Scalability and Innovation

Risk Management
and Controls

AI Transparency
and Explainability

Operational
Reliability

Client Risk
Assessment

Scalability and
Future Readiness

Evidence and
Track Record

What Good Looks Like

Successful technology integration boosts accuracy, efficiency, and employee experience while minimizing workflow disruption. Effective programs connect workplace leave and accommodation systems with payroll to reduce errors, streamline intake through portals, and define clear points where humans review and decide. Tracking return on investment (ROI) and outcomes keeps investments aligned to business goals.

Data Privacy and Governance

The paper outlines a privacy posture grounded in documented due diligence, role-based access, encryption, monitoring, and vendor accountability. It also addresses financial unpredictability, cybersecurity threats, and multi-jurisdictional rules, noting that ongoing audits and transparent disclosures to employees are essential to maintaining trust.

Case Examples: Efficiency with Empathy

A featured case profile shows how a large TPA built an AI document-summarization agent within a gated network to accelerate case review while preserving human decision-making and privacy. Centralized governance, diverse training data, audits, and legal oversight anchor the program, and predictive modeling flags complex cases early for nurse intervention and identifies return-to-work opportunities.

Tools You Can Use

The appendix includes a sample AI Request For Proposal (RFP) and a weighted capability evaluation rubric to help teams compare vendors on governance, integration, data quality, explainability, and measurable business impact. These tools support consistent, accountable selection and monitoring practices.

What Employers Should Do Next

1 Establish a cross-functional governance group to set objectives, risk thresholds, and oversight protocols

2 Start small with high-value, low-risk use cases and define human-in-the-loop checkpoints

Intake

Triage

Decision

RTW

3 Document model design, updates, and fairness metrics

4 Align data practices to privacy requirements and communicate plainly with employees

5 Baseline outcomes and track ROI to guide scale-up

Responsible AI in workplace leave and accommodation management is achievable with clear governance, strong privacy practices, and measured integration that centers the employee experience. Technology should elevate, not replace, the human element in workforce support.

To access the full DMEC AI Think Tank: Defining Ethical and Effective Workforce Integration white paper (a DMEC member-only exclusive), visit dmec.org/resources/white-papers.