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Good Practices in Social Security

Good practice in operation since: 2012

ZUS E-services Platform – a modern and comfortable channel of communication

A case of the Social Insurance Institution

Special mention, ISSA Good Practice Award - Europe competition 2016

Social Insurance Institution

Poland

Summary

*Electronic Services Platform (PUE) is a set of advanced services **for all ZUS' customers** who contact ZUS through electronic means, by phone or directly, visiting a ZUS unit.*

The web portal pue.zus.pl is its heart. It gives 24/24 h access to information available on a ZUS account and allows someone to deal - via Internet - with many social security issues without leaving home.

The Platform also offers the services of a nationwide call centre Centrum Obslugi Telefonicznej (COT). It is possible to contact the call centre by phone, e-mail, chat or on Skype. COT consultants provide general and personalized information.

In addition, 159 self-service interactive kiosks were set up, offering customers the possibility to send documents/correspondence, to give access to PUE and free connection with the COT.

All reception areas in ZUS' units have been equipped with the electronic Customer Traffic Management System, helping to streamline customer traffic.

The PUE project was co-financed by the EU with the European Regional Development Fund (ERDF) within Priority Axis 7 - Information Society - development of electronic administration and the Innovative Economy Operational Programme 2007-2013.

CRITERIA 1

What was the issue/problem/challenge addressed by your good practice?

Before the PUE became operational, customers could contact ZUS only within the ZUS working hours. Applications and requests could be filed only on paper directly in a Reception Area of a ZUS branch or sent by post. Contact by phone was limited to specific, thematic helplines which provided only general information. Answering helplines was an additional task for ZUS employees, carried out during ZUS working hours. Only a standard telephone service was available i.e. by contacting the helpline by phone. It was not possible to manage the customer traffic or the waiting time in ZUS units. Information on the number of customers visiting ZUS was collected manually and there were no tools allowing for monitoring the quality of customer service.

CRITERIA 2

What were the main objectives and the expected outcomes?

The main objective was to improve the access to ZUS services by making them available electronically and by offering customers different channels of communication.

The main objective was refined with a list of the following strategic objectives:

- streamline customer service in ZUS branches;
- limit the number of visits in ZUS organizational units;
- improve and strengthen the ZUS image as modern institution applying the most advanced communication tools;
- combating digital exclusion and ensuring access to all ZUS services via various communication channels (telephone, Internet, interactive kiosk).

These objectives were then translated into technical objectives:

- Create a modern infrastructure with different communication channels (electronically, via ZUS automatic office machines, in ZUS units, via call centre).
- Give users an easy access to data recorded on individual ZUS accounts;
- Allow customers with no computer access to contact ZUS without the necessity to visit a ZUS office;
- Integrate ZUS services with external systems, especially with the platforms of other public administrations.

ZUS also expected, as outcomes:

- More companies using available public registers;
- More companies using applications and ICT services;
- More individuals using on-line services.

CRITERIA 3

What is the innovative approach/strategy followed to achieve the objectives?

The innovative approach did not only consist of using modern technologies and IT tools but also of a multifaceted approach to facilities offered to ZUS customers: access to information and data by electronic means, by phone and through a direct service.

The main outcome of the innovative solutions implemented within the project is the availability of electronic services providing **information of general interest** (by e-mail, on a chat with a COT consultant, on Skype and through the "Virtual Advisor"s avatar replying in real time) and personalised i.e. designed for customers who have a profile on the PUE portal.

Personalized services allow for a 24/24 h access to information recorded on the customer's ZUS account and give the possibility to carry out many social security operations without leaving home - on the Internet (also to make an appointment with ZUS).

In addition PUE has special functions for professionals i.e. physicians (writing medical leave certificates) and bailiffs (information for debt collection).

Thanks to the PUE project, customers can carry out many operations through the call centre. The COT consultants are available from 7:00 am until 6:00 pm on weekdays. In addition there is an automated telephone information system available 24/24/7 giving general information on different aspects of ZUS' activity.

Also multi-function, self-service information machines (interactive kiosks) were created within the project that give a 24/24/7 access to ZUS services through which customers can file documents and receive confirmation thereof, use Internet services of ZUS, including the PUE portal and contact a COT consultant for free.

The interactive kiosks were designed to meet also the needs of people with disabilities: wheelchair users, visually impaired/blind or with hearing impairments. Its implementation was necessary to give citizens a direct and fast access to data recorded on individual ZUS accounts - and especially for citizens who do not have internet access.

The solutions applied for PUE also allow for communication with other public administrations' systems.

CRITERIA 4

Have the resources and inputs been used in an optimal way to achieve the set objectives and the expected outcomes? Please specify what internal or external evaluations of the practice have taken place and what impact/results have been identified/achieved so far.

PUE is the ZUS' reaction to social and economic developments connected with the growth of the information society and better awareness of the need to optimize public spending. The information society requires the creation of comprehensive services. On the one hand, it is necessary to use modern technologies and IT tools offering a wider scope of services available through electronic channels. On the other hand, and together with the growing social awareness, the social security institution is required to optimize costs while maintaining a high customer service standard.

A positive opinion of ZUS' customers confirms that the adopted approach was correct and the resources were used in an optimal way. ZUS is conducting a cyclical customer satisfaction survey that shows a steady increase of customer satisfaction.

Platform of Electronic Services PUE gained wide recognition in Poland, confirmed by several awards granted by business and IT milieus (Quality International 2014 award, Wektor 2012 – award granted by Polish employers, Software AG Poland award and 2012 IT Leader award from the monthly Computerworld).

PUE also underwent usability audits aimed at verifying whether the service fulfils internet application and website standards as well as the conditions for an electronic Inbox of a public institution. Conclusions from the audits led to further improvements. The clear result of the implementation of PUE Project is that more customers use modern communication channels. Right now more than 1.3 million ZUS customers have a PUE profile. Based on the figures of November 2015, since the launch of the service, 8.5 million applications have been filed electronically; 1.5 million insurance documents have been submitted through the application e-Platnik /e-Payer/, almost 20,000 appointments were made through PUE, there were 7.5 million calls to COT and 500,000 emails were sent. COT consultants conducted 350,000 chats, 420,000 customers used services offered by interactive kiosks, 62.5 million customers benefited from the Customer Traffic Management System.

Various PUE functions keep being developed.

The implementation of PUE also essentially impacted ZUS as an institution - i.e. it affected both its human resources and its functioning, including costs of services provided to customers.

A new group of ZUS employees, dedicated to telephone customer service, was created. It consisted of more than 300 professional consultants trained in the techniques of telephone customer service and having professional competences required to be able to make use of electronic tools put at the disposal of ZUS customers.

The staff of direct customer service, employees answering ZUS customer requests / applications, as well as employees providing IT support, had to acquire new skills and knowledge. Those additional skills and knowledge were particularly relevant when it comes to the establishment and operation of customer profile on PUE, to the explanation of PUE functionalities offered to ZUS' customers and to explanation of the use of electronic signature.

For certain types of customers' applications - processed with full electronic flow - it was possible to shorten the time required for handling the file. Thanks to the possibility of electronic communication with ZUS' customers the administration costs, related to mailing traditional letters, could be reduced. Concrete cost savings are also expected, as paper mass mailings to customers (which ZUS is obliged to do) can be replaced with the information distributed electronically to ZUS customers having the individual PUE profile.

CRITERIA 5

What lessons have been learned? To what extent would your good practice be appropriate for replication by other social security institutions?

Constant development of new technologies, of the internet and telecommunication networks has enabled a new approach to communication to be created between citizens and the administration and for new ways for the provision of services to be implemented. In many countries the administrations try to limit the circulation of paper documents and prioritize the citizens' access to services through the net. Both the digital revolution and societal changes led to a situation where e-administration has started to play a more and more important role for the State - citizens communication.

ZUS' Electronic Services Platform is an example of ICT use in public administration and of a new approach to customer service in the public sector. Such a practice leads, on the one hand, to time-saving, the reduction of public spending and of civil servants' workload and, on the other, is beneficial to customers, as it improves the quality of the relationship "citizen – administration".