Good Practices in Social Security

Good practice in operation since: 2016

Specialists in one click

A case of the Social Insurance Bank

Social Insurance Bank
Uruguay

Published 2017 www.issa.int
Summary

As part of its policies to promote a social security institution that is more effective and efficient and closer to the people, allowing their quality of life to be improved, a strategy for multi-channel services has been drawn up with the aim of offering citizens different channels of customer service depending on their needs.

For the purposes of this strategy, a new remote customer service channel via telepresence has been set up, allowing beneficiaries in locations with no Social Insurance Bank (Banco de Previsión Social – BPS) office to be served by specialists at the institution’s headquarters.

The client makes an appointment in advance, at which point they state the nature of their query. BPS then directs the request to an appropriate specialist, who looks into and prepares the case. On the day, the client reports to an agreed location where the infrastructure required for remote customer service is in place.

When technology is used to serve people in this way, access to specialist assistance is more equal, as the institution’s services enjoy better coverage and geographical distribution.

The issue or challenge

What was the issue or challenge addressed by your good practice? Please provide a short description.

The challenge was to offer access to social security specialists in provincial areas of the country where BPS has no presence or is only occasionally present. This is precisely where the population is most in need of access to services.

The aim of this is to broaden and even out coverage with a view to increasing gradually the inclusiveness, solidarity and universality of the system for the benefit of the population and the organization’s management.

This good practice is part of the strategy for multi-channel services which the organization has set out to improve communication and increase its presence.

Before the good practice was implemented, citizens living in the areas in question had to travel to a nearby office or to the national capital to gain access to specialist social security services, which would cost them time and money.

Addressing the challenge

What were the main objectives of the plan or strategy to resolve the issue or challenge? List and briefly describe the main elements of the plan or strategy, focusing especially on their innovative feature(s) and expected or intended effects.

The main objectives were:

- To improve access to specialist social security services;
• To develop a multi-channel strategy for offering services through the different channels selected and being able to tailor these to the population’s needs;
• To implement customer service processes using multiple channels (unplanned channel switching).

The innovative approach consisted of establishing a new channel for communication in the form of remote customer service, connecting clients in locations where the institution has no presence with an official at the organization’s headquarters.

One part of the challenge was to identify the locations where remote customer service should be offered. For this purpose, an agreement was signed with the Agency for Electronic Governance and the Information and Knowledge Society (Agencia de Gobierno Electrónico y Sociedad de la Información y del Conocimiento – AGESIC) establishing customer service centres (Centros de Atención Ciudadana – CAC) with the objective of decentralizing services relating to the administrative procedures of ministries, public-sector companies and government departments.

Beneficiaries must go to their local AGESIC-run CAC, thus avoiding a long journey to a BPS office. This spares beneficiaries and officials unnecessary travel and saves both parties time and money.

The measure enables beneficiaries to obtain information and guidance about the institution’s administrative procedures and services in real time by harnessing the potential of information technology. It is beneficiaries’ first port of call whenever they need guidance or assistance with one of the institution’s procedures or services. It also means that beneficiaries can resolve their problems more quickly.

The challenge also calls for two government bodies to work together to determine where the service should be offered, taking into account factors that can be categorized as demographic (area of influence, number of inhabitants, socio-economic circumstances), geographical (distance to BPS offices) and technological (connectivity, existing resources, how long the service will take to get up and running). AGESIC officials received basic training in BPS and its services and procedures to enable them to assist beneficiaries with their queries as successfully as possible.

The system was implemented using the existing infrastructure at BPS headquarters and existing Internet connections on AGESIC premises, with no need for additional measures to be taken.

The Internet connection relies on the BPS firewall traversal solution, which enables BPS headquarters to be connected securely with the remote site. The process uses desktop software installed on AGESIC and BPS computers, with multimedia devices (webcams and headsets) connected to this. The calls are made as if both computers were internal BPS phones.

**Targets to be achieved**

*What were the quantitative and/or qualitative targets or key performance indicators that were set for the plan or strategy? Please describe briefly.*

The first target was to evaluate the technology, tools and customer service processes set out in the strategy.
Another was to establish agreements between BPS and AGESIC so that the experience could not only be replicated in other locations, but also generate new proposals for outreach to the population.

From the outset of the project, it was decided that implementation would not call for changes to be made to the infrastructure at the sites involved, meaning no extra costs would be incurred.

It was necessary to ensure that both BPS and AGESIC officials and members of the public felt comfortable with this mode of customer service, while also ensuring that the communication was smooth and the advice effective. A high level of buy-in was required from all parties involved.

Quantitative statistics on the number remote consultations held in each location are available, along with measures of the quality and availability of the telecommunication platform.

**Evaluating the results**

*Has there been an evaluation of the good practice? Please provide data on the impact and outcomes of the good practice by comparing targets vs actual performance, before-and-after indicators, and/or other types of statistics or measurements.*

This new method of customer service has been used for a year, and consultations have been held with members of both the active and the inactive populations. The method has been evaluated positively, and the new method has now joined the ranks of the various customer service channels which the institution offers.

AGESIC officials received basic training in BPS, its services and processes, and both they and BPS officials were trained in how to use the platform and the desktop software used for the project.

The available metrics reveal that no incidents, breakdowns in communication or problems affecting the smoothness of conversations or officials’ or customers’ acceptance of the method have been reported during remote consultations.

The overall system is suitable for replication in other locations with no need for major adjustments.

**Lessons learned**

*Based on the organization’s experience, name up to three factors which you consider as indispensable to replicate this good practice. Name up to three risks that arose/could arise in implementing this good practice. Please explain these factors and/or risks briefly.*

Bearing in mind that the target audience of the new customer service modality is inhabitants of sparsely populated areas, meaning that the number of consultations will be low, the problem must be solved using the existing infrastructure without adding new components so as not to incur extra costs. The existing infrastructure must also guarantee a level of connectivity that ensures smooth communication without interruptions.
Both institutions involved, as well as their officials, must be committed to the measure, as they must rise to the challenge of a new type of customer service and communication.

The location where the service is to be offered must be selected based on demographic, geographical and technological factors, anticipating the problems that may arise in the location in question.

The main risk with implementation is that the selected location may be inappropriate if it is not far enough from a BPS office or does not have a sufficiently reliable Internet connection for communication to be smooth.