

Pursuant to Executive Order 14058 (December 13, 2021)
on *Transforming Federal Customer Experience and
Service Delivery to Rebuild Trust in Government*

2024 HISP CX Action Plan

Bureau of Indian Affairs

As a High Impact Service Provider (HISP), BIA focuses on improving customer experience and delivery for the following services:

- 1) Inquiring about a probate order:** Upon the death of a loved one who owned trust assets, family members of the decedent, Tribes, or any party with interest in the estate can begin a probate hearing. This service upholds the trust responsibilities of the Department of the Interior, and ensures heirs who will inherit can exercise their rights when making decisions about assets.
- 2) Receiving trust assets:** Once a probate order is issued, heirs of an estate, along with any claimants, receive distributions of assets that allow them to benefit from new holdings and receive some sense of closure following the passing of a loved one

What we will deliver in 2025:

- **Identify data sharing collaborations with government and Tribal agencies to streamline probate processing**

BIA will continue to identify and review potential collaborations with states, Tribal governments, and Federal entities (e.g., Social Security Administration, Indian Health Service) to share data and documents to streamline the probate process and minimize burden to beneficiaries.

- **Continue development of probate journey map to inform process improvements**

BIA will develop a journey map that outlines the full probate process. This journey map will be used to identify and prioritize pain points, inform strategies for feedback collection, and improve staff training.

- **Update outdated policies and procedures to improve beneficiary experience**

Develop training curriculum to empower staff the confidence to work a case with minimal errors and interruptions with the goal of streamlining the probate process and improving beneficiary experience. The revised curriculum will be incorporated into the existing training program for probate staff.

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What we will deliver in 2025:

- **Initiate development of online document submission module**

Develop Statement of Objective to expand the Trust Portal to allow Interested parties of a probate case to submit required documents online. This will eliminate the need for customers to drive to a BIA Office or put their trust in the USPS by submitting documents via mail or some type of delivery service.

- **Take steps to decrease cash distribution timeframe for probate accounts**

BIA will work to enhance the functionality of the Probate Tacking System to decrease the time frame for cash distribution from an IIM account, helping to ensure beneficiaries have access to their assets in a timely manner. While at times this process has taken as long as one year, the current average is approximately 90 days between decision and disbursement. The goal with this enhancement is to decrease the distribution time to approximately 30 days by the end of FY 2026.