

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

## 2023 HISP CX Action Plan

# Bureau of Trust Funds

## Administration

As a High Impact Service Provider (HISP), BTFA focuses on service assessments, collecting customer feedback, and making measured improvements for two designated services:

- 1) *Managing Individual Indian Monies (IIM) Accounts:*** An IIM account is an interest-bearing account established by BTFA and managed on behalf of an individual with monetary assets generated from assets held in trust by the Federal government. When a beneficiary relies on trust income, accurate and timely account management services are critically important. BTFA manages approximately 408,000 IIM accounts with \$1.6 billion in assets.
- 2) *Accessing Beneficiary Services:*** IIM account holders have access to a suite of beneficiary services, which can currently be accessed in-person at field offices, calling the local field office, and/or by calling the Trust Beneficiary Call Center. BTFA responds to an average of 200,000 requests annually.

### ***What we delivered in 2023:***

- **Set the foundation to provide beneficiaries with online account access**  
BTFA worked alongside multiple Agencies and programs to enhance an option for beneficiaries and Tribes to access their IIM account information online. BTFA gathered feedback and placed beneficiaries and Tribes at the center of the effort to design a process that is secure and easy to use. The online account access will be piloted in FY24 to gather additional feedback prior to opening access to all users.
- **Deployed new virtual cloud call center (VCCCS)**  
BTFA launched an improved virtual call center, which included basic Interactive Voice Response (IVR), to more effectively meet the needs of IIM account holders. By moving to a cloud-based system, BTFA can provide reliable access to the Trust Beneficiary Call Center and build towards 24/7/365 access to account information.

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## **2023 HISP CX Action Plan (Page 2)**

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### ***What we commit to deliver in 2024:***

- **Develop the Customer Relationship Management System (CRMS)**  
BTFA plans to improve the call center by implementing a new CRMS. The CRMS will enhance the Interactive Voice Response (IVR) functionality and enable 24/7/365 access for beneficiaries to receive answers to high-volume inquiries such as account balance information.
- **Pilot online account access for individual and Tribal beneficiaries**  
BTFA plans to work with a small subset of beneficiaries to first pilot the ability for IIM account holders and Tribal beneficiaries to access their accounts online, and then will move to expand the offering of online account access to all beneficiaries following the completion of the pilot. BTFA estimates that the option and ability to access account information online will improve customer experience and reduce the highest-volume call center topics.
- **Streamline the probate closing process to more quickly distribute cash assets**  
In partnership with the Bureau of Indian Affairs, BTFA is co-designing and will implement a process to reduce the timeline for distributing probate cash assets. Initial estimates indicate that a new streamlined process could significantly reduce current average time to distribute assets.
- **Outline a Beneficiary Services Plan to improve beneficiary experience**  
BTFA will finalize a strategic Beneficiary Services Plan that outlines activities, milestones, metrics, and feedback collection to improve the overarching approach to beneficiary experience and service delivery.