

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 Indian Affairs

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

- 1) Accessing 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 delivered in 2023:

- **Identified probate case backlog to inform backlog reduction strategy**
BIA analyzed operational data to outline each region's share of the overarching probate backlog – estimated at more than 32,000 cases heading into FY24 – and enable a data-driven prioritization effort focused on improving probate processes and reduce the backlog. The BIA submitted 1,407 cases for adjudication in 2023.
- **Outlined requirements to streamline digital trust asset distribution**
BIA issued a statement of work for the development of the trust asset management system module that will make it possible to distribute cash assets online. Once implemented, this functionality is expected to significantly reduce the wait time to receive trust assets.

What we commit to deliver in 2024:

- **Develop a journey map outlining the probate process**
With input from beneficiaries and employees, the journey map will help BIA to identify and prioritize pain points, collect beneficiary feedback, and improve training for probate staff.
- **Identify data sharing collaborations with government and Tribal agencies**
BIA will 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 of beneficiaries.
- **Improve the account closing process for distributing cash trust assets**
With the Bureau of Trust Funds Administration, BIA will implement a new module to distribute cash assets more quickly.