

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 Trust Funds Administration

As a High Impact Service Provider (HISP), BTFA focuses on improving customer experience and delivery for the following 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.
- 2) Managing Tribal Trust Funds accounts:** With Tribes, BTFA identifies and generates relevant financial opportunities; executes servicing of assets, investments, and transactions; and manages the overarching trust funds portfolio performance aligned with the Tribe's financial objectives.

What we will deliver in 2025:

- **Conduct customer research to better understand beneficiary needs and develop a digital experience strategy**
BTFA will participate in a pilot project to understand the overarching journey, needs, and wants of beneficiaries as they oversee their IIM account; the research will identify pain points and opportunities for service improvements. Additionally, as part of the pilot, BTFA will develop a digital experience strategy for a new website for beneficiaries that makes it easier to accomplish account oversight, complete transactions, and access critical information and services related to the management of their trust assets.
- **Improve beneficiary experience by optimizing the Trust Funds Accounting System (TFAS)**
BTFA will analyze beneficiary feedback, user experience data, as well as readily available internal data, to inform the plans for re-design and functionality of the Trust Funds Accounting System (TFAS) for improved service delivery and accessibility for beneficiaries and facilitate other possible improvements.
- **Streamline the beneficiary change of address form**
BTFA will review and redesign the IIM Disbursement and Change of Address Form to improve beneficiary usability, ease of processing, and opportunities to move the form to digital submission. BTFA anticipates the new form will be accessible in FY2026.

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2024 HISP CX Action Plan (Page 2)

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What we will deliver in 2025:

- **Start Pilot of Online Account Access for Individual IIM account holders**

BTFA will pilot and test online account access for a select group of IIM account holders prior to offering the ability to all (expected in FY 2026). BTFA estimates that the option and ability to access account information online, anytime, anywhere, will improve beneficiary experience and reduce the highest-volume call center topics such as account balance and last disbursement information.

- **Conduct discovery activities to better understand the Tribal trust funds account management journey**

BTFA will review current practices for management of Tribal Trust Accounts to identify opportunities, trends, pain points and best practices. BTFA will launch a feedback survey for Tribal Trust Account holders and develop an outreach plan for gathering additional feedback from Tribal Trust Account holders that will be used to validate learning and inform prioritization of CX improvement actions.

- **Continue pilot of Online Account Access for Tribal Account Holders***

BTFA plans to continue the pilot of the remaining five of six Tribes identified to test online account enrollment and access. Based on learnings from the pilot, BTFA will adjust and improve the rollout strategy that will expand online accounts to all Tribes with Tribal Trust Accounts by the end of FY2025. BTFA estimates that the option and ability to access account information online will improve Tribal experience by providing the information at any time of day and any day of the week, rather than waiting for a Periodic Statement of Performance.

**This delivery commitment is a continuation of a 2024 Delivery Commitment that was first included in [BTFA's 2023 HISP CX Action Plan](#).*