



INDUSTRY

Public Sector

CHALLENGE

Provide an online index with search and ordering facilities for wills held by the Probate Service dating back to 1858

SOLUTION

Purpose-built outsourced storage facility housing physical documents with scan-on-demand of online customer orders for wills

VALUE

- › Substantially enhanced accessibility to historic files
- › Customers enjoy a more sustainable and convenient process
- › Significantly reduced service lead times

CASE STUDY

HM COURTS AND TRIBUNALS SERVICE

INTERNET ACCESS TO OVER 150 YEARS OF WILLS

OVER 41 MILLION RECORDS

Not only is a Last Will and Testament of vital significance to the departed's beneficiaries, it offers a potent reference source for generations to come. In the UK, law dictates that such documents must be kept in perpetuity and made available to anyone who wants to see them. That could be a solicitor acting for an individual, a relative researching a family tree, or the merely curious.

In England and Wales the responsibility to securely store and provide access to the documents falls to the Probate Service - part of HM Courts and Tribunals Service (HMCTS). The archive dates back to 1858. It comprises over 41 million records and is growing by around 250,000 new probate additions each year.

FULLY MANAGED SERVICE

Iron Mountain® has been the service provider of off-site records management to the Probate Service for over 15 years. A special facility was created in Birmingham to centralise and standardise records management. Known as the Probate Records Centre it is highly secure and has a climate-controlled environment, compliant with BS 5454, to store the records in optimum condition.

As well as storage, the Iron Mountain service includes retrieval and provision of copy documents against customer orders. Mark Burden, Northern Probate Manager at HMCTS, says: "We've had

a joint objective to provide an online ordering service for some time. This would help us better serve our customers, make records more accessible and transparent, and fit perfectly with the UK Government digital agenda."

GOING DIGITAL

Iron Mountain created an online portal that would allow customers to search, order and pay for a copy of a will. The task had added complexity because Probate Service records were held in different forms.

Mark Burden explains: "Between 1858 and 1972 every Probate Registry maintained a calendar in book form. Between 1972 and 1996 those records were stored on microfiche. From that point forward, they have been held in digital form."

There were also some wills not indexed at all and still held by HMCTS. The bulk of these records are from the First World War, but some date back to the Crimean War and others are as recent as the Falklands conflict.

MAKING WILLS EASIER TO SEARCH AND ORDER

There was a strong desire to make these records available to genealogists and people researching family histories. The soldiers' wills would also provide a pilot to help build and test the portal.

“OVER THE YEARS WE’VE BUILT A HIGH DEGREE OF TRUST AND IT’S BEEN A VERY ENJOYABLE EXPERIENCE WORKING TOGETHER.”

Mark Burden
Northern Probate Manager
HMCTS

Many of the wills of the soldiers who lost their lives during World War One are extremely fragile. After discussion with HMCTS, Iron Mountain decided to scan the entire collection in order to minimise subsequent handling.

DELIGHTING CUSTOMERS

Customers searching for a will from a specific registry and year can now simply enter a surname and year of death, and then flick through pages containing the relevant alphabetical entries.

Having wills available for search and order online has transformed the customer experience. The order lead time has been reduced to a maximum of 10 working days. And with Iron Mountain providing the initial investment for the online portal this has been achieved without the need for government funding and at no cost to the taxpayer.

With customers able to search and order wills online, visits to registries are decreasing. There are fewer postal requests to be processed, freeing staff for other work. “It’s a much more sustainable process,” confirms Mark Burden. “Our customers no longer need to travel to a probate registry, while online ordering and payment has simplified the process particularly for our overseas customers.”

ONGOING IMPROVEMENTS

On the first day following launch the service received 5,500 orders, more than 15 times the norm. In the month following over six million customer searches were conducted and now hundreds of orders are processed every day. Iron Mountain regularly receives wills associated with new grants, which are indexed and scanned. The original records are stored in the repository whereas the digital record is available for order.

Customer feedback has been very positive. “You only have to look to Twitter,” says Mark Burden. “It’s fair to say lots of people are really pleased and encouraged that these records are now online and more accessible.” A number of service enhancements are planned. These include improvements to indexation data for post-1996 wills, a continuing reduction in service lead times, and different payment arrangements for bulk users such as professional genealogists and solicitors.

Mark Burden sums up; “Iron Mountain has done a great job. They’ve got a very professional team that understands our business. Over the years we’ve built a high degree of trust and it’s been a very enjoyable experience working together.”

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ABOUT IRON MOUNTAIN

Iron Mountain operates in major markets worldwide, serving thousands of customers throughout the UK, Europe, US, Canada, Asia Pacific and Latin America. For more information, visit our website at www.ironmountain.co.uk or at www.ironmountain.ie

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