HMCTS DELIVERS EASY-TO-USE WILL AND PROBATE SEARCH SERVICE WITH IRON MOUNTAIN INSIGHT ON AWS

"Our SLA target is to deliver wills within five days from point of order. Since moving to Iron Mountain InSight®, we've seen average delivery time for both paper-based and digital wills reduce to just three days."

Stephen Burgess, Family Probate Jurisdictional and Operational Support Manager, HM Courts & Tribunals Service

CHALLENGE

In its role to deliver probate services across England and Wales, HMCTS wanted to improve the experience for users of its online will search-and-order service, while increasing scope for future innovation.

SOLUTION

Iron Mountain InSight uses Amazon Textract ML to read, process and sort wills, extracting content accurately from typed and handwritten text.

RESULTS

Along with a transformed website, HMCTS can deliver better, faster outcomes for probate users, genealogists, solicitors, and the public.

Instantly available
pre-digitised wills

A single records interface
and simplified user experience

Meeting GOV.UK site standards
with increased search accuracy and speed

Constantly-evolving capabilities
for wider integration and search functions

CHALLENGE   SOLUTION   RESULTS

CONSTANT QUEST FOR SERVICE INNOVATION

"We're always keen to learn about emerging technologies and Iron Mountain are very good at coming to us with interesting ideas."

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PRESERVING LEGAL DOCUMENTS DATING BACK TO 1858

Over 41 million records and growing

Under UK law wills must be kept in perpetuity and made available to anyone who wants to see them. That could be for an individual or solicitor involved with probate, a genealogist or relative researching a family tree, or those curious about the last wishes of popular figures like Charles Dickens, Sir Winston Churchill, and Lady Diana.

In England and Wales, the responsibility to securely store and provide access to these legal documents falls to the Probate Service, which is part of HM Courts and Tribunals Service (HMCTS). "The archive dates back to 1858," explains Stephen Burgess, Family Probate Jurisdictional and Operational Support Manager at HMCTS. "It comprises over 41 million probate records and is growing by around 250,000 wills each year."

Always looking to improve

Proud to partner HMCTS for over two decades, Iron Mountain created the Probate Records Centre, a purpose-built facility in Birmingham to centralise and standardise records management. As well as storage, the service includes the retrieval and fulfilment of copy documents for orders placed via the Probate Service website.

Between 1858 and 1972 every Probate Registry maintained a calendar in book form (known as the Ledger, in which grants of Probate were recorded). Over the years, Iron Mountain scanning specialists digitised some of those records, but many remained in fragile paper form.

To digitise the Ledger, Iron Mountain's solution would look at surnames in the top right-hand corner of the page and scan and capture those details as metadata. That meant search results might contain a list of names, which website users would then have to physically trawl through for the correct will. Users would then place the will retrieval order. While this system was effective, there was plenty of scope for improvement.

"We're always keen to learn about emerging technologies and Iron Mountain are very good at coming to us with interesting ideas," says Burgess. "So, we wanted to hear more about their Iron Mountain InSight platform and how it could be applied to our online wills service to improve efficiency and furnish a better user experience."
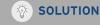
Probate Service files would stretch over 38 kilometres if arranged in a straight line

CHALLENGE   SOLUTION   RESULTS

EMPLOYING ADVANCED TECHNIQUES LIKE MACHINE LEARNING AND ARTIFICIAL INTELLIGENCE

"When a will is requested online, Iron Mountain InSight checks to see if it has already been digitised and, if so, delivers the document within minutes."

Stephen Burgess, Family Probate Jurisdictional and Operational Support Manager, HM Courts & Tribunals Service

A READY SPRINGBOARD FOR DIGITAL TRANSFORMATION

Behind-the-scenes magic

Iron Mountain InSight is an information management and content services SaaS platform running on AWS. It combines the scanning of physical documents and digital storage on Amazon S3 with optical character recognition (OCR) capabilities leveraged from Amazon Textract, a Machine Learning (ML) service that automatically extracts text, handwriting, and data from scanned documents.

Much of that tech magic happens behind the scenes. Using Amazon Textract, Iron Mountain converted all 870,000 pages from the Ledger into rapidly searchable records over an intensive two-week period, far less time than it would have taken using traditional approaches. This information is then hosted on an instance of Iron Mountain InSight as part of the HMCTS public-facing website.

"Unless you are a genealogist or probate expert, the chances are you may be using our website for the first time," says Burgess. "Previously, we had three different record repositories, which made it hard for users to search and locate the specific will they were seeking. With Iron Mountain InSight we've been able to simplify navigation and move to a single records interface, bringing our website up to the standards of other .gov.uk sites."

Automated workflows

Those improvements continue into the Probate Records Centre where will retrieval orders are now processed much faster thanks to workflow automation. "When a will is requested, Iron Mountain InSight checks to see if it has already been digitised and, if so, delivers the document within minutes," adds Burgess. "Likewise, popular wills held in the Ledger only need to be scanned once and can then be automatically picked up."

In addition, will orders that do still require human intervention by Iron Mountain are managed with greater efficiency. For example, information from internal systems no longer needs to be exported and manipulated to make it is user-friendly for the warehouse team.

Ongoing development

Importantly, the Iron Mountain InSight platform that the data and ordering system sits on is more than just a one-off service and never stands still. Looking to constantly improve experience, Iron Mountain reacts fast and makes system changes to address feedback from HMCTS user groups. For example, a new feature allows users to enter the town where the person lived, narrowing down and speeding-up searches further still.

870,000 pages converted to fully searchable records in just two weeks

CHALLENGE · SOLUTION · RESULTS

FASTER WILL SEARCHES AND ASSURED DELIVERY

"We've always found Iron Mountain people to be hugely knowledgeable and supportive. They're always available if there's an issue and they respond very quickly."

Stephen Burgess, Family Probate Jurisdictional and Operational Support Manager, HM Courts & Tribunals Service

Delivering better value and business outcomes

A RESTful, modern web application, Iron Mountain InSight enables HMCTS to deliver better value and business outcomes. And, unlike human-based scanning operations its AI and ML capabilities don't tire or make mistakes. They just work, improving the service for probate users, genealogists, solicitors, and the public.

"Our SLA target is to deliver wills within five days from point of order," says Burgess. "Since moving to Iron Mountain InSight, we've seen average delivery time for paper-based and digital wills reduce to three days."

Serving all requirements in a single pass

HMCTS has also opened new possibilities for cross-department systems integration and the potential to transform other citizen journeys. HMCTS also benefits from a single repository, common processes and faster system changes.

Burgess concludes: "We've always found Iron Mountain people to be hugely knowledgeable and supportive. They're always available if there's an issue and they respond very quickly."

👍 **Better experience for probate users, genealogists, solicitors, and the public**

📅 **Average five-day delivery target beaten by 40%**

✓ **Delivering on digital government ambitions**

⚙️ **More possibilities for cross-departmental systems integration**

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