

REVIEW OF PROBATE BUSINESS



Final Report

April 2004

REVIEW OF PROBATE BUSINESS



Final Report

April 2004

Principal Registry of the Family Division
First Avenue House
42 – 49 High Holborn
London WC1V 6NP

Contact

Any queries concerning this report may be addressed to:

Wesley Edwards
Probate Service Group Manager's Office
Principal Registry of the Family Division
First Avenue House
42 – 49 High Holborn
London WC1V 6NP

Tel: 020 7947 7159

Email: Wesley.Edwards@courtservice.gsi.gov.uk

Further copies of this report can be obtained from Mr Edwards.
It is also available on the Court Service website at:
<http://www.courtservice.gov.uk/cms/wills.htm>

Contents

Section	Page
1. Introduction	7
2. Background	9
3. Decisions	11
4. A summary of the changes	21
5. Implementation	23
6. Funding	25
Annex A - Table of Proposals and Decisions	27

1. Introduction

In 2001, under the auspices of the Modernising the Civil Courts Programme (now the Courts & Tribunals Modernisation Programme) a wide-ranging review of the Probate Service, (supported by independent management and IT consultants, PA Consulting Group), was conducted.

In November 2002, a public consultation sought views on the proposals made. A detailed report on the responses we received to the consultation, is set out in a separate paper, entitled 'Review of Probate Business – Responses to the Consultation,' copies of which are available from Wesley Edwards (see page 2); and also the Court Service's website at <http://www.courtservice.gov.uk/cms/wills.htm>

Our customers welcomed the majority of the proposals, and we have listened to what they said.

The Ministers responsible for the Court Service have now considered the recommendations of the review, and the views expressed. Their decisions, and our plans for implementing those decisions, are set out in sections 3 and 5 of this report. These lay the foundations for a more modern and outward-looking service, providing a greater number of more easily accessible sources of information to customers, as well as making better use of modern information technology, and the development of best practice procedures.

2. Background

2.1 The context in which the review took place

Surveys showed that the majority of customers were satisfied with most aspects of the Probate Service, but the Government's *Modernising Government* agenda and *Information Age* targets demanded that a fresh look be taken at services to examine how they could be improved, and made more convenient, by placing the main focus on the needs of the customer.

The Modernising Government initiative calls for departments to join up their services, to provide processes that meet the needs of customers, breaking down boundaries and allowing them to interact with other government departments efficiently, and without unnecessary duplication.

Information Age Targets require that more public services be made available to customers on-line, using new technology in imaginative ways, to increase choice, and access to the services.

The Government's *Better Quality Services* initiative requires all Departments to review how services are delivered; primarily, are they best managed from within the public sector, or is there scope for private/public partnership?

The Court Service's buildings (which include those of the Probate Service), account for a growing proportion of its expenditure. The review examined the scope to improve the utilisation of premises occupied by the probate registries.

2.2 Rural Proofing

The Government is committed to ensuring that its policies take account of specific rural circumstances and needs. We will assess whether the outcome of the review will have a different impact in rural areas from that elsewhere, because of the particular characteristics of rural areas, and where necessary, we will consider what policy adjustments or compensations might need to be made to accommodate rural needs and circumstances, to ensure adequate and fair access to services.

2.3 Regulatory Impact Assessment

A partial Regulatory Impact Assessment was carried out prior to the consultation. In implementing the decisions contained in this report, a full Regulatory Impact Assessment will be developed.

2.4 The scope of the review

The review was wide ranging, and covered all aspects of the service, to ensure a thorough and searching examination of existing procedures and services, and to advise how these could be modernised, improved and made more cost effective in the coming years. Paramount, was the requirement to build upon and improve the quality of the existing service.

2.5 The main proposals

Proposals centred around recommendations for:

New ways of serving customers:

- Working in partnership with the local Registration Service (Births Marriages & Deaths), to provide information, forms and assistance to members of the public in every local authority area throughout England & Wales,
- Information, forms and leaflets to be available on the Internet, allowing twenty-four hour, seven days a week access
- An increase in choice of ways for customers to communicate with the registries, through e-mail and Internet services.
- The introduction of modern methods of payment such as debit cards and credit cards, and the development of account facilities for frequent customers.
- Publication of the indexes of probate records on the Internet, to allow for on-line ordering of copies of Wills and probates.
- Closer links with Inland Revenue, in relation to Inheritance Tax procedures

A new way of handling applications:

- Sworn oaths to be replaced by signed “Statements of Truth” with the use of plain language, (wherever possible), to replace legal terminology
- Personal Applicants (those applying without the help of a solicitor) no longer required to attend for interview, except in complex cases, or where the customer requests it
- Better use of up to date computer systems to create an electronic file for every application

A new way of organising the provision of services:

- The service to be concentrated in six registries spread across England & Wales
- The establishment of a telephone helpline

2.6 Responses to the Consultation

A detailed analysis of the responses is set out in a separate report, entitled ‘Review of Probate Business – Responses to the Consultation’ available from Wesley Edwards, (see page 2), or from the Court Service’s website at <http://www.courtservice.gov.uk.cms/wills.htm>

3. Decisions

The main proposals are set out in this section, (in the same order in which they appeared in the consultation paper), followed by the decisions made, the reasons for those decisions, and brief comment on the views expressed in the consultation.

A chart showing a summary of the main proposals, and the decisions made, is set out at Annex A.

3.1 Working in partnership with the Registration Service

Proposal: The local Registration Service (Births Marriages & Deaths), should become the public's first point of contact for information regarding probate supplying leaflets and forms, providing general information and assistance, and acting as a signpost for potential applicants regarding where to go for detailed advice and guidance.

Decision – Accepted

The consultation showed that a large majority supported the provision of information through registration offices. The Court Service will respond to this by working closely with the Registrars of Births Marriages and Deaths to provide a more 'joined-up' service to the bereaved.

We have already agreed that the Registrars will display information about the Probate & Capital Taxes telephone help-line (see 2 below) in all local registration offices, and we will develop a leaflet, to be made available to people registering deaths, explaining the circumstances in which probate might be needed, what options are available for obtaining this, and how to access the services. Information in the leaflets will be factual and neutral, setting out the choices available, but not making recommendations. We will also explore how the Registration Service can offer basic, face-to-face assistance with personal application forms, within clearly defined limits.

This will make the provision of face-to-face information and assistance available to the bereaved in many more locations than at present, in every local authority area throughout England & Wales.

The detail and the resource implications of all this will be subject to agreement with the Local Authorities and the Office for National Statistics.

3.2 A Telephone Help-line

Proposal: There should be a nationally advertised telephone help-line. A help-line number will be publicised, and included in the literature about the Probate Service. Callers will be able to obtain application forms, and information and guidance about probate procedures, and it is hoped that by working more closely with Inland Revenue, information and guidance about Inheritance Tax matters may also be provided.

Decision - Accepted

Whilst 60% of respondents overall, were in favour of a help-line, the proportion of members of the public who were in favour, rose to 88%.

A helpline operated by Inland Revenue (Capital Taxes), providing information and guidance on Inheritance Tax matters, has already been extended to include information about probate, to members of the public. The help-line embodies the principle of joined-up government, by providing information and guidance about the work of two separate departments (whose work overlaps in some areas), from a single source.

A number of concerns about help-lines and call-centres in general, were raised during the consultation (please refer to the separate report on the responses for details), but we are confident that the help-line service provided, satisfactorily addresses all of the major concerns.

3.3 A Probate Service Website

Proposal:

- ***A website dedicated to the Probate Service should be established***
- ***All staff should have e-mail access and addresses, to improve communications within the service, and with customers.***

Decision - Accepted

80% of respondents to the consultation were in favour of establishing an official website, purely for the Probate Service, and for using e-mail and the Internet to contact registries or access services. Although customers may already obtain forms from the Court Service website, a general view was that customers do not usually associate Probate with the Court Service, and that information about Probate is not easy to locate on the Court Service website.

A dedicated Probate Service website will be developed, taking account of the comments and suggestions about its content. This will improve customer service and more importantly, will provide wider and easier access to information, forms, and services, 24 hours a day.

The use of e-mail will provide a further channel of communication for customers; faster, more efficient, and cheaper than normal correspondence. The Court Service's LINK (Civil & Family) roll-out, providing new computers with modern software tools such as e-mail, will be extended to include the probate registries.

Work will begin during financial year 2004/2005, and our aim is to have all this completed by the end of Financial Year 2005/2006.

3.4 Personal Applications

3.4.1 Proposal: Customers should attend for interview, only in exceptional circumstances, or where the customer wants it.

Decision – Rejected

Overall, 65% of respondents were opposed to the proposal, although 75% of members of the public were in favour of it.

Whilst most members of the public, (those for whom the personal application service exists), were in favour of the proposal, and whilst one of the main aims of the consultation is to respond to the views of customers by providing the kind of services they want, Ministers noted the wide range of views expressed, and were concerned that other modernisations, (such as better-developed partnerships with the Registration Service, the establishment of a dedicated website, better IT provision, and the development of statements of truth), should be in place and shown to be working satisfactorily, before considering such a radical change to a well-established procedure.

3.4.2 Proposal: *Queries to be taken up by telephone or letter*

Decision - Accepted

Almost 80% of all respondents were in favour of this recommendation.

Many queries are already handled in these ways, but for the sake of greater consistency throughout the service, procedures will be standardised, and best-practice guidelines developed. Also, the use of e-mail will further extend the range of ways in which queries may be taken up and resolved. The Court Service's LINK roll-out, will be extended to all probate registries, allowing access to the ProbateMan system, and modern software tools such as e-mail.

3.4.3 Proposal: *The sworn oath should be replaced by a signed statement of truth*

Decision - Accepted

More than half of the respondents were in favour of this.

The use of statements of truth will bring procedures in the Probate Service, into line with the other civil jurisdictions, following the implementation of the Woolf reforms. The use of plain language, (wherever possible), to replace legal terminology, will make the process easier to understand for most applicants. This change will require some amendments to the statutory rules governing probate procedures, we expect these to be in place by mid 2005.

3.4.4 Proposal: *Customers should provide evidence of their identity*

Decision - Accepted

98% of respondents agreed that customers should be asked to provide proof of their identity.

The Senior District Judge has issued an instruction requiring personal applicants to provide documentary evidence of their identities. Acceptable items of proof are broadly similar to those required by financial organisations to satisfy money-laundering regulations. Where this causes particular difficulty to customers, staff may exercise discretion as to what other items may be accepted.

3.5 Raising awareness of Wills and probate

Proposal: *The service should develop an ‘awareness-raising’ strategy to increase knowledge of probate. It should work with its partners and other Government Departments, to inform individuals of the benefits of making a Will, and to consider the creation of leaflets giving basic information and guidance on writing Wills.*

Decision - Accepted

The Probate Service’s dedicated website (described at 3.3 above) will help to improve public awareness of probate generally.

It is clear from the responses, that there is a need for people to be more aware, of the benefits of making a Will, and just as importantly, the possible consequences of *not* making a Will. Changes in the make-up of family structures, such as greater incidences of divorce, re-marriage and co-habitation; and the increase in property values, all make the need to have a Will, more important than ever before.

In a House of Commons speech on the 15th September 2003, David Lammy, minister for the Court Service said *‘The whole thrust of Government policy in this area is, properly, to encourage people to make Wills - to set out their precise intent during their lifetime, to avoid family disputes’.*

A factual, unbiased information leaflet about Wills, will be produced, and made freely available to members of the public through a variety of outlets, including the website. A poster setting out this information, will also be developed for display in Courts, Citizens Advice Bureaux, Registration Offices, libraries, and other appropriate places. It is not envisaged that the leaflet will include guidance or instructions for preparing a Will, but will concentrate on informing people about sources of advice. The Court Service will consult a number of other bodies (both public and private), about the wording and distribution of such a leaflet.

In order to provide comprehensive information to the public about the services available to them, the leaflet must also include information about ‘Lodging Wills for Safe Custody’ (a facility which allows people to deposit their Wills with the Probate Service for safe-keeping). The main benefits are that this keeps the will safe during the person’s lifetime, and prevents any grant being taken in the estate, without the existence of the Will coming to light.

The leaflet will be developed during financial year 2004/2005.

3.6 Applications for grants of representation made by solicitors:

Proposal: *Replace the Oath with an application form and Statement of Truth. The Probate Service should work closely with the legal professions to develop an application form written in plain language*

Decision – Accepted

Over 70% of legal professionals were in favour of the development of a standardised form. A number of respondents expressed concern that it would be impossible to design a single form that could cover every set of circumstances; however, the proposal concerned the *layout* of the form, which was intended principally, to facilitate data from application forms being electronically scanned into registry

computer systems, with the additional benefit of improving the quality of applications, resulting in less time being spent resolving queries, and omissions of vital information.

As at 3.4.3 (above) in personal applications, the use of a statement of truth will bring procedures in the Probate Service, into line with other civil jurisdictions following the implementation of the Woolf reforms. Its use will mean that solicitors will no longer need to arrange for their clients to attend before a commissioner in a different firm to swear the oath.

During financial year 2004/2005, the Probate Service will work in consultation with legal professional organisations, and legal stationers to develop a plain language form, incorporating a statement of truth.

There were several other recommendations in relation to the handling and processing of applications:

Recommendation - Customers should use nominated registries.

Decision - Rejected

The majority were opposed to the recommendation, which would remove the element of customer choice.

Recommendation - Applications should be examined by staff with appropriate expertise in Probate practice

Decision - Accepted

This is current practice

Recommendation - Applications should be examined according to a service-wide checklist of issues to consider, and unless specified otherwise, queries should be resolved by telephone

Decision: Accepted.

A working party will be set up to develop Best-practice guidelines, to ensure greater consistency in the application of rules and procedures, and in the resolution of queries.

Recommendation - The settling service (the approval of draft documents), should be administered through Customer Contact Centres.

Decision – Drafts will continue to be settled in the registry of choice

3.7 Caveats & Standing Searches

Proposal:

- ***Caveats¹ and standing searches² should be required in a standard format, which can be submitted by post, fax, e-mail or in person.***

¹ A caveat prevents the issue of a grant until any disputes or outstanding matters are resolved.

² The standing search procedure allows customers to place requests for copies, in advance of the grant issuing.

- ***The reason for entering a caveat should be required.***
- ***The original applicant³ should have the right to nominate where a hearing should take place.***

Decision – Accepted

Whilst more than 80% of respondents were in favour of reforming caveat procedures, comments indicate that more work is needed, to clarify and determine the extent of the change needed. A working party will be established to examine this and (taking into account the views expressed in the consultation), make detailed recommendations to the President of the Family Division by the end of financial year 2004/2005.

3.8 Obtaining copies of Probate Records

Proposal:

- ***Probate Calendars (indexes of probate records) should be digitised and made available on the Internet to be used by staff and customers, to search for and order copies of Wills and Grants.***
- ***Search facilities should also be provided at probate registries, the Family Record Centre, and local Registration Offices.***

Decision - Accepted (in part)

85% of respondents were in favour of publishing the indexes of records on the Internet, and 73% said they would use the Internet to search for records, and obtain copies. Copies of probate records are increasingly in demand for family history research, as well as for legal purposes in connection with the administration of estates.

We will invite tenders for this work, and we hope that work on digitising the indexes in preparation for publication, will begin very soon. Our aim, during Financial Year 2004/2005, is to make the indexes available on-line, from 1996 to the current date. We will then work back from 1995 to 1858, making sections available on-line, as and when they are digitised, so that by the end of the following year (2005/2006), all records back to 1858 will be published on the Internet.

We do not propose to make computer facilities for searching the indexes, available at the local registration Offices (Births Marriages & Deaths) as originally recommended, because there are sufficient numbers of computer terminals with Internet access, available for public use, through other public bodies such as libraries and the Family Records Centre.

Where public demand justifies it, we will consider installing terminal on probate registries for public search purposes. The Internet service will not replace the existing 'manual' service, but will operate alongside it.

3.9 The Payment of Fees

Proposal:

- ***Credit and debit card facilities for payment of fees should be available.***
- ***Account facilities should be available to frequent or high volume customers.***

³ Either the person who entered the caveat, or the applicant for the grant; whoever made his entry or application first.

Decision - Accepted

Over 80% of respondents said that they would welcome the choice of additional methods of payment.

The use of credit and debit cards will be essential to support the provision of any services on-line. Policy is currently being developed in the use of credit and debit cards, and a number of courts are already operating pilot schemes.

Following the assessment of the pilots on the use of debit and credit cards, we will conduct a detailed investigation into the options for the provision of account facilities for frequent customers.

3.10 e-business

Although not a specific proposal, the consultation asked whether electronic submission of applications for Letters of Administration (i.e. where the deceased did not leave a Will) should be allowed.

Decision – Rejected

For the time being, applications for Letters of Administration will not be accepted electronically. Less than half of all respondents were in favour of this, and there was concern that it would exclude the majority of applications, which involve Wills.

3.11 Electronic register of grants

Proposal: The Grant of Probate (or Letters of Administration) should be recorded in a secure electronic register, and assigned a unique reference number.

Decision – Deferred

It is clear from the responses to the consultation, that customers are not ready for electronic grants of representation. Less than 10% of respondents were in favour of the proposal, but many who were opposed, recognised that for the future, it was probably the way ahead.

The main obstacles perceived, were the need for all asset holders to have access to an electronic database, and concerns surrounding security and the robustness of the system.

The proposal may be considered again, when suitable IT infrastructure is in place, and when customers are more supportive of it.

3.12 The network of Probate Registries

Proposal:

- ***The number of registries should be reduced to six larger, regional registries, (spread throughout England & Wales).***

Decision – Rejected

The existing network of the Principal Registry in London; and eleven District Probate Registries, together with the expertise of the staff in those registries, is essential to the provision of services to customers.

Proposal:

- ***Sub-Registries and part time probate offices should close.***

Decision – Not to be taken forward at the present time

For the time being, we will retain premises in all our existing locations, but there may be a need to downgrade a small number of Probate Sub Registries from full-time, to part-time offices, balancing the needs of our customers with the requirement to achieve value for money. Where any such change to the status of a sub-registry is proposed, it will be subject to local consultation taking place.

The proposal may be considered in the future, when the other modernisations and changes (such as better-developed partnerships with the Registration Service, the establishment of a dedicated website, better IT provision, and the development of statements of truth), have been effected.

3.13 Customer Service strategy and performance standards

Proposal:

- ***A Customer Charter and Customer Care Strategy, incorporating a clear statement of its standards of service and a commitment to a regular survey of customer opinion should be developed.***
- ***A Probate Service Users Group made up of representatives of its customers and principal stakeholders should be created.***

Decision - Accepted

65% of respondents were in favour of the establishment of User Groups.

The Probate Service recognises that relationships with its customers are key to meeting their expectations, and providing a service that fulfils its objectives. The Probate Service supports the Court Service's *PSA Target 4*, which sets out the aims, objectives and key priorities for the department, incorporating a clear statement of standards. The aim of the PSA 4 Target, is to increase, year on year, the level of satisfaction of users by taking speedy, high quality decisions and reducing unnecessary delay and cost, and by ensuring that outcomes are enforced effectively. . The target includes an annual customer satisfaction survey

As part of the strategy for meeting this target, and in preparation for Charter Mark accreditation, local User Groups have already been established in a number of registries. Local User Groups will be established in all District Probate Registries by the end of this year. The working party, which is to recommend best practice in the handling of applications, will also consider best practice in relation to customer service issues, providing advice to registries to ensure a consistent approach, and effective representation of all customers.

A *National User Group*, (including representatives of probate practitioners, members of the public, genealogists, advice agencies, the Registration Service, Capital Taxes, District Probate Registrars and Probate Managers) will also be set up this year.

3.14 Services Suggested by Customers, and Other Issues

A survey conducted during the review, asked customers to identify additional services they would welcome. The consultation sought views upon the following suggestion:

Confirmation that an existing Will meets the formal requirements of a valid Will.

Decision - Rejected

Only 31% of all respondents were in favour of this, (although amongst members of the public, 60% approved the suggestion).

Although Members of the public clearly see benefits in such a service, giving information, on just one of a number of important considerations, could be disadvantageous to many customers, by providing a false sense of security. People might rely on confirmation that a Will appears to have been properly executed, as confirmation that it is satisfactory in all respects, which would not necessarily be the case. This might discourage them from seeking the professional, legal advice they might need and benefit from.

Important matters, upon which the Probate Service would be unable to comment, include:

- Whether the provisions of the Will achieve the testator's intentions, and whether they are appropriate to his circumstances
- Whether advantage of tax planning has been taken
- Whether possible claims under the Inheritance Act have been considered
- Whether undue influence was exercised
- Whether the testator had testamentary capacity
- Whether the witnesses or their spouses are beneficiaries under the Will

Other issues.

The consultation paper provided the opportunity to raise other ideas or suggestions for improving services.

Many respondents made helpful suggestions and observations, some of which were already under consideration by the Department for Constitutional Affairs (e.g. changes to intestacy law, the threshold at which grants are needed, and Wills in electronic form). Suggestions relating to these and other matters of policy will be referred to the Department for consideration.

Suggestions concerning procedural matters will be considered by the Group Manager, and taken forward in conjunction with the development of best practice guidelines.

4. A summary of the changes

The major benefits to customers lie in the better availability of information about the service. Many people are unaware of the need for probate when a relative dies, and are often at a loss to know where to go for help or guidance. New procedures based upon the principles of joined-up government will ensure that those registering a death are automatically informed about what needs to be done, and how to obtain help.

There will be more ways to get information about probate services and forms:

- Locally, through the Registration Service , whenever a death is registered
- Through the telephone helpline, with calls charged at local rate
- Through a dedicated Website, 24 hours a day

Information from these sources will contain no recommendation as to whether the application should be made personally, or through a solicitor or probate practitioner; leaflets and posters will simply set out the choices available to the customer.

Easier and faster communication with the registries

The use of e-mail will offer quicker and more efficient communication than the exchange of letters.

Forms will be modernised:

- signed statements will take the place of sworn oaths
- wherever possible, plain language will replace legal terminology.

These changes will make the procedures more convenient, and easier to understand.

Greater consistency in the way that applications are handled

The development of best-practice guidelines will provide customers with an assurance that their applications will be dealt with in the same way, irrespective of their choice of registry.

More ways to pay fees:

- Credit or debit card
- Accounts for frequent customers

An on-line index of probate records with the facility to order copies

The details of how this service operates, will be worked out in the coming months. The new service will be faster, more flexible, more responsive and more convenient. It is likely that different levels of service will be available and these may attract different levels of charges; however, it is envisaged that the cost of identifying a record and obtaining a copy, will be no more than the current fees for the existing service.

A Clearer Focus on Customers

A clear statement of standards of service, and regular surveys of opinion
User groups in all areas

In the longer term, proposals that are not being taken forward at present, may be re-examined when the supporting procedures or infrastructures are in place, eg:

Provision for applications to be submitted electronically
Grants to be recorded in a secure electronic register

5. Implementation

This table sets out our plans for carrying out the decisions detailed in section 3.

Decision	Plan
Work in partnership with the Registration Service (Births Marriages & Deaths)	During 2004, we will continue discussions with the Office for National Statistics and the organisations representing Local Authorities, to agree the scope of the partnership between our organisations, and how this is to be resourced. By mid 2005 our aim is to have the working arrangements agreed and in place.
Establish a telephone helpline	We have already established a telephone helpline, in partnership with Capital Taxes.
Establish a dedicated website.	By the beginning of April, we will begin work, with the aim of launching a website by the end of financial year 2005/2006.
Use of E-mail	We will extend the LINK roll-out, to all probate registries (including sub-registries), by the end of financial year 2005/2006, giving all staff access to modern software tools such as e-mail.
Personal application procedures	
Use of telephone, letter & e-mail to resolve queries	Best practice guidelines will be introduced into personal application procedures, by the end of financial year 2004/2005. The LINK roll-out of new computer equipment, will be extended to all probate registries during financial years 2004/2005, and 2005/2006, giving all staff access to the ProbateMan system, and modern software tools such as e-mail.
Statement of truth to replace the oath	A statement of truth will be developed and brought into use by mid 2005.
Proof of identity	Personal applicants are currently required to provide evidence of their identity
Better awareness of Probate and the need to make Wills	In conjunction with other agencies, and legal professional organisations, the Court Service will develop an information leaflet aimed at members of the public, and will devise a strategy for its distribution during financial year 2004/2005.
Standardised solicitors' application forms (templates), incorporating statements of truth	During the financial year 2004/2005, we will devise the template of an application form/statement of truth (in consultation with practitioners and legal stationers).
Reasons to be given for entry of caveats	A working party will be set up to consider the responses to the consultation, and report with recommendations to the President of the Family Division, by the end of financial year 2004/2005.
Publication of Probate Calendar on Internet	This will go ahead under the Wider Markets Initiative. It is hoped that part of the indexes will be published by the end of financial year 2004/2005, with the full index (from 1858), available on-line by the end of the following year.
Credit/debit cards & accounts	Following the assessment of current pilot schemes, we plan to accept credit and debit cards. At that time, we will also investigate the options for account facilities for frequent customers.

<p>Establish a customer charter and customer care strategy</p> <p>Establish User Groups</p>	<p>The Court Service's <i>PSA Target 4</i> to which the Probate Service subscribes, includes clear statements of standards of service and a commitment to regular surveys</p> <p>Every District Probate Registry will have established its own User Group by the end of 2004. A <i>national</i> user group will also be established by the end of the year.</p>
<p>Other suggestions arising from the consultation</p>	<p>Suggestions concerning issues of policy will be referred to the Civil & Family Policy Division of the Department for Constitutional Affairs</p> <p>Suggestions concerning issues of an operational nature will be considered alongside the development of the best practice guidelines during 2004.</p>

6. Funding

The Probate Service is funded by the fees it charges customers for its services. A review of those fees has been carried out to provide an assurance that the cost of providing the service is met by the fee income.

The outcome is that the costs of implementing the improvements set out in this report will be met from fee income, and that the levels of fees charged to customers, will be reduced overall, after allowing a sum of £1m, in each of the next two financial years, to fund these developments.

Summary of Main Proposals and Decisions

Proposal	Decision
1. Work in partnership with the Registration Service (Births Marriages & Deaths)	Accepted
2. Establish a telephone helpline	Accepted
3. Establish a dedicated website. E-mail access	Accepted
4. Personal application procedures –	
a. Remove interview from the process	Rejected
b. Use of phone/letter & e-mail to resolve queries	Accepted
c. Statement of truth	Accepted
d. Proof of identity	Accepted
5. Better awareness of Probate and the need to make Wills	Accepted
Solicitors applications –	
6. Statement of truth & standard format for applications	Accepted
7. Reasons to be given for entry of caveats	Accepted – implementation to take place following a report to the President of the Family Division
8. Publication of Probate Calendar on Internet	Accepted
9. Credit/debit cards & accounts	Accepted
10. Electronic applications for grants	Rejected
11. Electronic register of grants	Deferred
12a. Reduce network to 6 regional registries	Rejected
12b. Close Probate Sub Registries, and part-time Probate Offices	May be considered in future, when other modernisations effected.
12c. Customers mandated to use specific registries	Rejected
13. Establish Customer Care Strategy and User Groups	Accepted
14. Confirmation that Wills are valid	Rejected
15. Respondents own suggestions	Refer to Department for Constitutional Affairs, or take forward in conjunction with the development of best practice, as appropriate.