

## Case Study

# Agreement of Balances



Trust  
**Norther Care Alliance**

Address  
**HQ Salford, Greater Manchester**

ELFS Business Services has worked with Northern Care Alliance (NCA) for a number of years and we provide a range of services to the Trust.

As part of our regular reviews it was highlighted by NCA that the standard format of information provided by ELFS for Agreement of Balances was confusing to them, which was causing NCA delays in completing the Agreement of Balances task.

## Delivering More

NCA made a specific request to ELFS for us to bespoke the information provided for Agreement of Balances as NCA wanted to only see the data they needed to complete the TAC form.



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## Case Study Overview

NCA reached out to ELFS in our regular reviews with a request to adapt the Agreement of Balances information, as the standard format of the AOB information provided by ELFS was confusing to them. NCA stated that a lot of the information on the report was not required by them, leading to confusion in NCA over which figures they needed to use in the statutory reporting.



## Challenges

- Time pressures impacting NCA deadlines when completing the Agreement of Balances task.
- NCA felt that ELFS were providing too much information which wasn't required by them.
- Lack of understanding by NCA on which figures to use for reporting purposes.

## Solutions

ELFS arranged an on-site visit at NCA's offices and listened to the Trust request with regards to changes to the standard Agreement of Balances reporting. ELFS worked with NCA to ascertain where changes could be made and what elements of the processes were fixed. In discussion, we developed a solution for NCA where ELFS agreed to undertake changes in the format of the data once it was exported from Systems. ELFS and NCA jointly trialled the changes resulting in a revised format which makes the task run more smoothly for NCA.

## Results

The outcome from the change has been very positive for NCA and the Trust is happy with the flexibility and support ELFS have provided. The revised reporting for Agreement of Balances makes completion of the AOB exercise easier and Quicker for NCA. In addition, the revised reporting also reduces the number of queries from the Trust on the data provided by ELFS.

## Future Plans

The changes made to Agreement of Balances reporting for NCA was subsequently shared with other clients who have also requested we use the revised format for their reporting. We have provided demonstrations to all of ELFS client base and are working with our clients to move them onto this revised format.