

MOH Agreement Request Form Completion Guide

Agreement Summary Page

Section	Comment	WWA Page
Agreement Request Form relates to	<ul style="list-style-type: none"> New agreement Variation of an existing agreement 	
Does this replace a previous Request Form?	<ul style="list-style-type: none"> Select Yes if request for same agreement or variation submitted previously and information has changed 	
Variation relates to	<ul style="list-style-type: none"> Required for variations. Selection determines what wording is inserted into A3 of the variation document. You can select multiple options. <ul style="list-style-type: none"> Term - select if 'end date' changing Price - select if change to service/s price Volume - select if service volume changing Add Service - select if new service being added Modify Service - select if change to terms and conditions of service. Either provider specific terms and conditions or a service specification required 	15
Legal Entity Name	<ul style="list-style-type: none"> New agreements - enter name from Companies or Charities register. Should match name on bank account verification Variations - must match previous request unless name has changed on Companies or Charities register 	12
Trading as	<ul style="list-style-type: none"> Different from legal entity name (eg, name of a residential facility) – the 'trading as' name will appear after the legal entity name throughout the document 	
Postal Address	<ul style="list-style-type: none"> If the address entered on the ARF differs from what we have on record, we will query it when the draft agreement is sent to you for checking Enter postcode if it needs to show on agreement document Permanent changes of address require a completed Perorg form 	12
Physical Address	<ul style="list-style-type: none"> Only enter if Outcome agreement type 	
Provider Contact Name	<ul style="list-style-type: none"> Name of provider contact. Shows on the front of the agreement 	
Provider Email Address	<ul style="list-style-type: none"> Email address for the Provider Contact Name 	
Performance Reporting Contact Name	<ul style="list-style-type: none"> Only enter if reporting to be collected by Sector Operations 	26-28
Performance Reporting Email Address	<ul style="list-style-type: none"> Only enter if reporting to be collected by Sector Operations. Used for sending out Performance Monitoring Return templates to providers 	26-28
Provider Number	<ul style="list-style-type: none"> Agreement with new provider – attach completed Perorg form and bank account verification with ARF Variation - must be the same as previous request/s 	12
Agreement Manager Name	<ul style="list-style-type: none"> Usually a senior manager 	
Agreement Deputy Name	<ul style="list-style-type: none"> Contact person with day-to-day responsibility for the agreement Shows on the front of the agreement 	
Agreement Receptor Name	<ul style="list-style-type: none"> Person responsible for receipting invoices in Oracle 	
Agreement Service Area/Business Unit	<ul style="list-style-type: none"> Used to identify groups of agreements 	
Agreement Name	<ul style="list-style-type: none"> Shows on agreement document 	
Original Agreement No	<ul style="list-style-type: none"> Compulsory if request is for variation. Leave blank if request for a new agreement 	
Agreement/Variation Start Date	<ul style="list-style-type: none"> Variations – you can't have a gap between the end date of the previous version and the variation start date 	
Agreement/Variation End Date	<ul style="list-style-type: none"> Must be after the agreement/variation start date 	
Increased/Decreased Dollars (Net Change)	<ul style="list-style-type: none"> New Agreements - total amount (GST ex) Variations - increase/decrease amount (GST ex) only. Don't enter new overall total 	
Agreement Type	<ul style="list-style-type: none"> New Agreements – compulsory, determines type of agreement template used by Purchasing Team Variations - not compulsory, variation template relating to original agreement type will be used 	12
Ethnic Classification	<ul style="list-style-type: none"> Enter General, Maori or Pacific Island. If nothing entered, defaults to General 	

Service Details Page		
Service Detail Page relates to	<ul style="list-style-type: none"> Only required for variations If adding a new service, a service specification is required if the purchase unit (PU) code hasn't been used in the agreement previously 	
Purchase Unit Code	<ul style="list-style-type: none"> New Agreements / new services in variations - see Purchase Unit Data Dictionary (PUDD) https://nsfl.health.govt.nz/purchase-units for appropriate code Variation to an existing service - must match existing service's PU code 	16 23-25
Purchase Unit Description	<ul style="list-style-type: none"> Your description of the service being purchased. If nothing entered, generic description from PUDD used. Helps to distinguish between services using same PU code. Shows in agreement document and reporting template (if reporting collected by Sector Operations) 	
Description of Change Occurring	<ul style="list-style-type: none"> Variations only – describes changes to the service (eg, 'extension of term', 'price increase', 'change to volume') 	
Ethnic Classification	<ul style="list-style-type: none"> Enter General, Maori or Pacific Island. If nothing entered, defaults to General 	
GST Percentage	<ul style="list-style-type: none"> Enter 15% or 0%, dependent on service being purchased. Appears on document. Disability Business Unit only - Enter 12.9% for residential private and specialised hospital services or 12.3% for residential rest home and dementia services 	22
Payment System	<ul style="list-style-type: none"> Enter CMS Disability Business Unit only - services linked to a client eligibility may be paid through CCPS 	17
Purchase Method	<ul style="list-style-type: none"> Enter Block, Capacity, Price Volume Block, Price Volume Capped, Price Volume Uncapped, dependent on how you want to pay the provider 	17-21
Price Per Unit (GST Ex)	<ul style="list-style-type: none"> Required if the purchase method is PV Block, PV Capped or PV Uncapped. Leave blank if Block or Capacity purchase method used 	
Volume	<ul style="list-style-type: none"> Volume required if purchase method is PV Block or PV Capped. Add unit of measure (eg, FTE, bed days) if you want this shown in the agreement document 	
Increased/Decreased Service Dollars Net Change (GST Ex)	<ul style="list-style-type: none"> New agreements/new services - enter total for service Variations (term extension) - enter total for variation period only Variations (change to existing funding) – enter increased/decreased total only – not new overall service total PV Uncapped is the only purchase method that doesn't require this section to be completed 	
Payment Frequency	<ul style="list-style-type: none"> Enter fortnightly, monthly, quarterly, six monthly, one-off, annually or 'on invoice' For other payment frequencies complete the Payment Schedule 	21-22
Payment Date	<ul style="list-style-type: none"> Enter the date of the first payment if payments evenly distributed. If not, complete Payment Schedule 	
Service Start Date	<ul style="list-style-type: none"> Enter start date of new service or the date from which the service is being varied 	
Service End Date	<ul style="list-style-type: none"> Enter service end date 	
GL Code	<ul style="list-style-type: none"> Only needed for CMS paid services Refer to Finance on MOH@WK or your financial analyst 	22-23
Is this service eligible for Pay Equity?	<ul style="list-style-type: none"> Enter Yes or No 	
Pay Equity Component (GST ex)	<ul style="list-style-type: none"> Compulsory for Pay Equity eligible services 	
Pay Equity Category	<ul style="list-style-type: none"> Compulsory for Pay Equity eligible services 	
Payment Schedule	<ul style="list-style-type: none"> Must be completed for services with irregular payment periods, payment dates, and/or amounts 	
Purchasing Agency Postal Address	<ul style="list-style-type: none"> Only enter if Outcome agreement type - enter applicable MOH office postal address 	
Purchasing Agency Physical Address	<ul style="list-style-type: none"> Only enter if Outcome agreement type - enter applicable MOH office physical address 	
Appendix 3 - Reporting Option	<ul style="list-style-type: none"> Only enter if Outcome agreement type - Select from drop down 	
Appendix 6 – New IP	<ul style="list-style-type: none"> Only enter if Outcome agreement type - Select from drop down 	
Appendix 8 – Changes to Framework Terms & Conditions	<ul style="list-style-type: none"> Only enter if Outcome agreement type - Select from drop down 	
Appendix 9 – Additional Terms to the Framework Terms & Conditions	<ul style="list-style-type: none"> Only enter if Outcome agreement type - Select from drop down 	
Appendix 10 – Performance measures & reporting	<ul style="list-style-type: none"> Only enter if Outcome agreement type - Select from drop down 	
Appendix 11 - Service Specification	<ul style="list-style-type: none"> Only enter if Outcome agreement type - Select from drop down 	