



Proactively released



## Summary

### Objective

To complete a change of legal entity and update business information when receiving advice that the business details are being changed.

**Owner** Name withheld

**Expert** Name withheld

## Procedure

### 1.0 Send an ACC5930

#### Contract Administrator

- a Send an ACC5930 - inform ACC of changes to your business to a supplier when advised that a supplier is making changes to their business or has bought a business.

ACC5930 Inform ACC of changes to your business

### 2.0 Receive ACC5930 and prepare Novation Checklist

#### Contract Administrator

- a Receive the completed form from the supplier and save it in the Novations folder.

**NOTE Where is the Novations folder located?**

The Novations folder is located here:  
PSD / 03 / Health Procurement / 04 standard terms and conditions / novations

- b Prepare the Novations checklist.

**NOTE Where is the Novations checklist located?**

The checklist is found under templates in word / file / new / novation / Novation checklist 2019.

- c Reconcile the terms and conditions number allocation and CLR's to confirm HW number, contract numbers the supplier holds (including Vendor IDs).

**NOTE How do you complete the reconciliations?**

Reconciliation is completed by reviewing the standard terms and conditions and checking CLR and MFP.

- d Note the date the oldest agreement was signed.

**NOTE Where do you find the date for the oldest agreement?**

The oldest agreement date can be located within MFP.

- e Check if the supplier has a current standard terms and conditions.

**NOTE How do you know if the supplier has a current standard terms and condition?**

Review the allocation spreadsheet located here:  
\\ACCfiles\Data\PSD\03 Health Procurement\04 Standard Terms & Conditions\01 Allocation of Numbers\TandC Number Allocation.2019.xlsx

If they do not, send them this form to complete. the form is located here: I:\PSD\03 Health Procurement\04 Standard Terms & Conditions\02 Novations\01 Application Response STCs - Final.docx.

When the form is received back, save it here: into I:\PSD\03 Health Procurement\04 Standard Terms & Conditions\02 Novations

- f Save the Novation checklist in the Novations folder, using current naming convention.

**NOTE What is the current naming convention?**

PSD/03 Health Procurement/09 Report Plan Procedure/File Path and Naming Conventions.xlsx

- g Forward to the lead Procurement Specialist for approval (include request/supporting documentation and completed standard terms and conditions application if applicable).

### 3.0 Receive approval

#### Contract Administrator

- a Embed any instructions from the Procurement Specialist into the Novation checklist and resave the document.

### 4.0 Complete Novation document and Cover letter

#### Contract Administrator

- a Update the Novation - Generic document with the necessary information.

**NOTE Where is the Novation - Generic document?**

- 1) In Word, go to [File], [New], [Personal] and click on Novation folder.
- 2) Select Novation - Generic document.

**NOTE What do you need to be aware of?**

Any editing changes within the fields, will not be reflected when printed and saved as 'fields', revert back to the original inputted data.

To prevent this from happening, highlight the entire document by clicking on [Ctrl] + [A] and [Ctrl]+[/Shift]+[F9]. This will change the fields to text so that if any editing needs to be done in those fields, they will be permanent.

- b Save into the 02 Novations folder using current naming conventions

**NOTE Where is the 02 Novations folder located?**

The Novations folder is located here:  
PSD / 03 / Health Procurement / 04 standard terms and conditions / novations

- c Print three copies (old supplier, new supplier and ACC).

- d Create the cover letter to send to the supplier.

**NOTE Where is the Cover letter located?**

In Word, go to [File], [New], [Personal] and click on Novation folder.

- e Select document Novations - Letters. Populate where necessary.

**NOTE What do you need to be aware of?**

Remember to highlight the entire document [Ctrl] + [A] and [Ctrl]+[Shift]+[F9]. This removes the fields so when you print the document, there are no bookmark errors.

- f Save the document into the 02 Novations folder using the current naming conventions.
- g Print one copy.
- h Post or courier Novation documents and covering letter to the seller.
- i Complete the request for new Vendor ID and add notes in all CLR's whilst waiting for the signed returned documents.

**NOTE How do you complete the new Vendor ID request?**

New suppliers must complete an ACC111, a bank account deposit slip and healthsecure forms for the organisation and user. ACC cannot request to update an already existing Vendor ID when there is a change of legal entity/new bank account.

**NOTE Ho do you add notes in CLR?**

- 1) Detail in [comments] column that a novation took place between old and new suppliers.
- 2) Copy old supplier's contract details from [current contracts] tab into the [Novations] tab.
- 3) Update contract details to reflect new supplier in the [current contracts] tab.

## 6.0 Update Systems

### Contract Administrator

- a Ensure the following is completed for all Novations.

**NOTE How do you update Provider registrations?**

New suppliers must complete an ACC111, a bank account deposit slip and healthsecure forms for the organisation and user. ACC cannot request to update an already existing Vendor ID when there is a change of legal entity/new bank account.

**NOTE What information needs to be added to MFP?**

- The end date of the old supplier's contract is the day before the start date of the new supplier's contract.
- Ensure continuity of suffixes for the contract (duplicate from the latest suffix).
- Comment in the notebook on both the old and new contract that a novation took place.

**NOTE What information needs to be updated in CLR?**

- Detail in comments column that a novation took place between old and new suppliers.
- Copy old supplier's contract details from current contracts tab into the Novations tab.
- Update contract details to reflect new supplier in the current contracts tab.

**NOTE What information needs to be updated in the standard terms and conditions database?**

Update details and add comment that a novation took place from and an effective date.

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## 5.0 Receive Signed Contract letters

### Contract Administrator

- a Continue with sign off process, when you have received the signed novation documents.
- b Check each page of the returned signed contract for any hand written amendments.

**NOTE What if there are hand written amendments?**

Review the amendments and discuss if needed. Reprint if needed and send for resigning.

- c Print Contract Brief Sheet and fill in all of the relevant details.
- d Update the CLR – tracking information.
- e Have contract signed by Health Procurement and Contracting Manager.
- f Select document Novation Return Letter and populate with necessary information.

**NOTE What do you need to be aware of?**

Remember to highlight the entire document [Ctrl] + [A] and [Ctrl] +[Shift]+[F9].

- g Save the document into the 02 Novations folder using the current naming conventions.

**NOTE Where is the 02 Novations folder located?**

The Novations folder is located here:  
PSD / 03 / Health Procurement / 04 standard terms and conditions / novations

- h Print one copy and send to the new owner.
  - i Post or courier Novation documents and their respective covering letter
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