

**Order Form**

**Prequalification Scheme: Financial Assessment Services**

This form is to be completed by the Agency officer responsible for the project/engagement or with appropriate delegated authority. Please submit this form directly to the selected Service Provider. A list of prequalified Service Providers and capabilities can be found at <https://buy.nsw.gov.au/schemes/financial-assessment-services-scheme>

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| **A: SERVICE PROVIDER DETAILS** – Who is undertaking the Financial Assessment? |
| Service Provider  | Choose an item.  |

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| **B: COMPANY DETAILS** – Which organisation is being assessed? |
| ABN |  |
| ACN |  |
| Name of organisation |  |
| Trading name of organisation |  |
| Business address |  |
| Contact person |  |
| Phone number |  |
| Mobile number |  |
| E-mail address |  |

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| **C: ENGAGEMENT DETAILS** – What engagement is the company being assessed for? |
| Project or engagement name |  |
| Contract / Prequalification value | $ |
| RFT number |  |
| Contract description |  |
| Contract duration |  |
| Proposed start date |  |

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| --- | --- |
| Proposed end date |  |
| Purchase Order No. for report |  |

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| **D: ASSESSMENT DETAILS** – Please confirm the type of assessment required |
| Type of assessment | Prequalification [ ] Tender [ ] Other [ ]  |
| Level of assessment \* | Basic [ ] Medium [ ] Comprehensive [ ]  |
| Priority level \*\* | Standard [ ] Priority [ ]  |
| *Comments or special instructions to the Service Provider.*Insert comments or special instructions here. Where a comprehensive report is ordered please detail the scope of the report. |

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| **E: REQUESTING AGENCY DETAILS** – Please provide your Agency’s contact information |
| Agency name |  |
| Division/Branch/Unit |  |
| Postal address |  |
| Person requesting report |  |
| Position title |  |
| Telephone number |  |
| E-mail address |  |
| Date and time order sent | Date: Time:  |

**Notes**

**\***  The Scheme documentation provides the definition of each level of assessment as well as the template Financial Assessment reports to be provided by the Service Provider under each level. Refer to <https://buy.nsw.gov.au/schemes/financial-assessment-services-scheme>

Agencies are responsible for determining the appropriate level of assessment they require for their orders. For comprehensive financial assessments, the Service Provider should return a quote to the Agency detailing the estimated hours and total cost of the assessment based on the scope provided by the Agency in the Order form.

**\*\***  The turnaround time commences from the date and time that order is received by the Service Provider. Agencies are responsible for determining the priority level they require for their orders. Please note that for comprehensive financial assessments, the priority level is negotiated and agreed between the Agency and the Service Provider.