Quick Guide to Processing a New Assignment through PEARS

Introduction

This document is a quick guide to show you the steps you need to go through to process a New Assignment through the PEARS system. If you require further details on these steps I have included the relevant section reference from the main User Guide document.

Starting Application (section 4.2.1)

- You need to have the Application Manager role to start a new application
- Click Start Application (left hand menu option)
- Enter your unique reference
- Select the organisation you are making the application on behalf of
- Enter the planned date (date you expect these changes to apply)

Setting up Application Team (section 2.2.4)

- Once an Application has been created the Application Manager will be required to populate the team with whoever will process this application. You can enter one or more people into this team with one or more roles

Add Licence (section 4.2.1)

- Once you have setup your team you need to select the licence(s) you wish to make this application for

Assigning Application (section 2.2.4)

- Once you have added your License(s) you need to assign the case to an Application Editor to be completed (they will receive an email notification informing them that they have been assigned this application)

Tailor Application (section 4.2.2)

- The Application Editor will need to specify which changes are to be made to the licence(s) by answering a series of questions
- Once you have specified which changes you wish to make the system will check to see if this data has been part of a data check before allowing you to continue with your application

Setting up a Data Check Team (section 2.2.4)

- If a data check is required the Data Check Manager will be required to populate the data check team with whoever will process this data check. You can enter one or more people into this team with one or more roles

Assigning Data Check (section 2.2.4)

- Once you have added setup your team you need to assign the case to a Data Check Editor to be completed (they will receive an email notification informing them that they have been assigned this data check)

Processing Data Check (section 5.2.2)

- You will be required to check that the data we hold on the database is correct by either confirming or amending each section
- If you confirm that all data is correct the data check will be submitted to DECC and once DECC have processed your data check you will be able to continue with your application

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- If you find any data that is incorrect, you will have the option to amend this data, however once you submit this data check it will go on a 'Licence Review' so that your licence partners can confirm or dispute you amendments. Once all licence partners have responded or the 10 day review period has elapsed (whichever is first) the data check will be submitted to DECC and once DECC have reviewed the licence review responses and processed your data check you will be able to continue with your application

Processing Application (section 4.2.3)
- You will have a workbasket action where you can resume your application.
- Enter a Contractual Effective Date (date the sale/transfer takes effect)
- Add a brief description
- Complete the licence changes by going through the individual licence stages
- Complete the additional licence questions and review your changes before submitting to DECC

Consent (section 10.1)
- Once DECC have processed you application you will receive either a consent or rejection letter based on whether they approve or reject your changes
- The consent is valid for 90 days

Execution (section 11.2)
- Once DECC have issued your consent, those user(s) who had been given the Application Executor role for this application will have a Submit Execution Notification workbasket entry
- This will list the changes that have been consented and you will be required to enter the date that the execution (signing) of the paper work took place
- Once you have submitted these to DECC they will process these changes onto the live licence