K2 PDC Form: Tips & Tricks

For instructions on completing the form, please review the K2 PDC Quick Guide on page 2. A detailed manual is also available from HRM’s website: K2 PDC Workflow Training Document.

Process:

Steps to Consider Prior to Submission:

- Verify each index is active and has an available budget balance.
- Account for Key Personnel effort commitments, rebudgeting thresholds, and sponsor-mandated salary caps.
- Be cognizant of how a PDC will impact the overall budget:
  - Is PDC spending into budgeted Key Personnel salary, subawards, participant support, or equipment?
  - If rebudgeting >25% of the award, is there a change to the scope of work?
  - If retro PDCs generate a spike in expenditures, sponsors may question monthly invoice/draw and request additional documentation. Be prepared to provide support if needed.
- PDCs should not impact a closed effort certification period (July to June).
- Provide justification for retroactive adjustments in the comments field. Comments stating that the PDC is needed “to correct error” or “to transfer to correct project” are not sufficient.

“Change From” and “Change To” Dates:

- PDC dates should fall within the awarded budget period of every Index listed under the Change in Earnings Distribution section. For anticipated continuations, additional information should be provided by the Department to confirm the agreement/extension is in process.
- Use whole pay periods when submitting PDCs (HR/Payroll cannot split pay periods):
  - Weekly employees – PDC starts on a Sunday and ends on a Saturday.
  - Semimonthly employees – PDC starts on the 1st or 16th and ends on the 15th or last day of the month.

Returned PDCs (Requestor Rework):

- PDCs with a “Requestor Rework” status have been returned to the Department Administrator for changes.
- Go to your Task List and click to open form. Review rejection comments, revise PDC, and resubmit.

Tracking Status of PDCs:

- The status of a PDC request can be viewed in the K2 PDC landing page (below Task List):
Go the PDC request landing page: PDC - My Requests. Click New PDC Request to open form →

**General Information**

- **Requestor:** Chaves, Fiorella
- **On behalf of:** Search by Lastname or NU ID
- **Position:** Select an item
- **Change From Date:** 3/1/2020
- **Change To Date:** 6/30/2020
- **Request Reason:** Select an item
- **Special Comment:** Type a value

**Current Earnings Distributions**

<table>
<thead>
<tr>
<th>INDEX</th>
<th>ACCOUNT</th>
<th>PERCENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>501:</td>
<td>57100 :</td>
<td>61010 :</td>
</tr>
<tr>
<td>Total</td>
<td>100.00</td>
<td></td>
</tr>
</tbody>
</table>

**Change in Earnings Distributions**

- **Add** button to create a new distribution.
- **Account:** Select an item
- **PERCENT:** 100.00%

**Request Approvers**

- **Approver Name:** Search by Lastname or Email only.
- **Add** button to display the search field.
- **Verify correct email address was selected for each approver.**

Once PDC form fields are complete, click the Submit button to submit the request.

*Note: form cannot be saved as a Draft, clicking Exit will delete your changes.*