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 →

**K2 PDC Quick Guide**

**General Information**
- **Requestor:** Chavez, Fiorella
- **On behalf of:**
- **Position:** Select an item

**Change From Date:** 3/1/2020
- **Please note that Current Earn as of today and not distribution on a selected date pays to be aware of this.**

**Change To Date:** 6/30/2020
- **Optional: Enter PDC end date**
  - (Leave date blank if allocation is ongoing)

**Late Change Comment:** Type a value
- **We are hoping to capture & business process.**

**Request Reason:** Select an item

**Request Reason Other:**

**Current Earnings Distributions**

<table>
<thead>
<tr>
<th>INDEX</th>
<th>ACCOUNT</th>
<th>PERCENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>501</td>
<td>61010</td>
<td>50.00</td>
</tr>
<tr>
<td>502</td>
<td>61010</td>
<td>30.97</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>100.00</td>
</tr>
</tbody>
</table>

**Change in Earnings Distributions**

<table>
<thead>
<tr>
<th>INDEX</th>
<th>ACCOUNT</th>
<th>PERCENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>55555</td>
<td>61130</td>
<td>100.00</td>
</tr>
</tbody>
</table>

- **Current Earnings Distribution:** Form auto-populates employee’s distribution as of today.
  - **Optional:** If the distribution during a retro period differs, the correct distribution can be added to the Comments field.

  **Note:** This information is not required by HR/Payroll to process PDCs. Once the Change in Earnings Distribution is entered in Banner, system will override the correct distribution.

- **Change Earnings Distribution:** Click **Add** to create a new distribution.
  1. Enter the Index # where salary should be charged. Verify the PDC Change From and Change To Dates are within the budget period for each index.
  2. Enter the Account code displayed under the Current Earnings Distribution.
  3. Enter the Percent allocation for each index. Total should add up to 100%.

**Request Approver**

- **Please do not add NU-Research and Payroll as Approvers as they are automatically added as processors**

<table>
<thead>
<tr>
<th>APPROVER #</th>
<th>APPROVER NAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

**PDC Dept. Approver:** Click **Add** to display the search field. Search by last name or email only. Multiple approvers can be added, a minimum of 1 is required.
- Click **Edit / Remove** to update Approvers prior to PDC submission.

**Verify the 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.