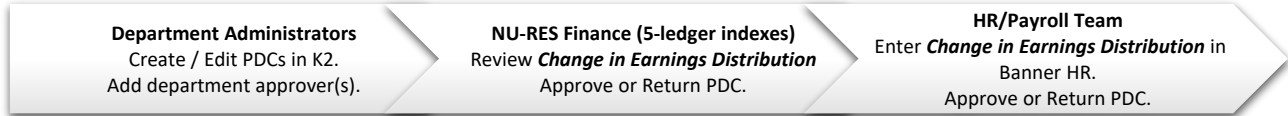


## K2 PDC Form: Tips & Tricks

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:**

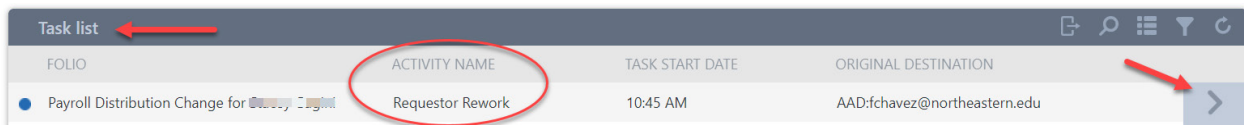
- Verify each index is active and has an available budget balance.
- Account for Key Personnel effort commitments, rebudgeting thresholds, and sponsor-mandated salary caps.
- Be cognizant of how a PDC will impact the overall budget:
  - Is PDC spending into budgeted Key Personnel salary, subawards, participant 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 1<sup>st</sup> or 16<sup>th</sup> and ends on the 15<sup>th</sup> 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):

REQUEST #	CREATED DATE	REQUESTOR	ON BEHALF OF	STATUS	
1939	5/12/2020	James, Logan	Christina Coonan (00000000)	Needs Approval	← Pending Department
1938	5/12/2020	Peterson, Betha	Michael Fitzgibbon (00000000)	Compliance Review	← Pending NU-RES
1941	5/12/2020	Schudson, Maena	Renee Amador (00000000)	Request Approved	← Pending HR/Payroll
1940	5/12/2020	Wright, Adrian	Debra Starnes (00000000)	Request Processed by HR	← PDC is processed Changes post in ~2 days
1937	5/12/2020	Miles, Louise	Alexis Mangaraj (00000000)	Request Canceled	

### K2 PDC Quick Guide

Go the PDC request landing page: [PDC - My Requests](#). Click New PDC Request to open form → New PDC Request

**General Information**

Requestor: Chavez, Fiorella

On behalf of:  Search for employee's last name or NU ID

Search by LastName or NUID only. A single result will resolve to a Full-name, multiple results might require use of the "search"/magnifying-glass icon.

Request Date:  Select correct position code from pre-populated options (HR requirement)

Position:

Change From Date: 3/1/2020 Enter PDC start date  
Weekly employees: date must be a Sunday  
Semimonthly employee: enter 1st or 16th day of month

Please note that Current Earnings are as of today and not distributions on this selected date, payroll is also aware of this.

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

Late Change Comment:  For all retro PDCs, provide a brief description of changes. If >120 days, include justification for delayed submission

We are hoping to capture the business process.

After Change To Date:  If Change To Date was specified, the After Change to Date is required. (Note: when multiple PDCs are requested, select "New Split - New PDC to be submitted")

Request Reason:  Select the reason for submitting PDC. (If "Other", additional comment is required in Request Reason Other field)

Request Reason Other:

Comments:  Include additional comments such as "PDC 1 of 3 for PI Smith", "NCE is in process", "NIH cap applied to fund 5xxxx"

**Current Earnings Distributions**

INDEX	ACCOUNT	PERCENT
505	61010 - Salary-FT Tenured/TenureTrack Fac.	50.00
505	61010 - Salary-FT Tenured/TenureTrack Fac.	30.97
505	61010 - Salary-FT Tenured/TenureTrack Fac.	19.03
<b>Total</b>		<b>100.00</b>

**Change in Earnings Distributions**

+ Add ✎ Edit ✖ Delete

INDEX	ACCOUNT	PERCENT	GRANT TYPE
555555	61130 - Salary-	100.00 %	
<b>Total</b>		<b>100.00 %</b>	

**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. *Note: Index may not be available if budget period has expired. If an extension is pending, contact NU-RES Finance for assistance.*
2. Enter the **Account** code displayed under the **Current Earnings Distribution**.
3. Enter the **Percent** allocation for each Index. Total should add to 100%.

**Request Approvers**

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

+ Add ✎ Edit ✖ Remove

**PDC Dept. Approvers:** 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.

*\*Please do not add NU-RES / Payroll teams to Approvers list\**

APPROVER #	APPROVER NAME
1	<input type="text" value="Search by Lastname or Email only."/>
2	<input type="text" value="Search by Lastname or Email only."/>

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.

Exit
Submit