

PDC FREQUENTLY ASKED QUESTIONS

How many Payroll Distribution Confirmation (PDC) periods are there in a fiscal year?

There are two PDC periods per fiscal year.

Period A: October 1 – March 31.

Period B: April 1 – September 30.

How long is the Review phase of the PDC process?

The Review phase is 90 business days. The Review date range varies each period.

How long is the Certification phase of the PDC process?

The Certification phase is 30 business days. The Certification date range varies each period.

How often are the PDC reports updated during the Review phase?

The PDC reports are updated weekly during the Review phase.

I need to process a labor distribution adjustment (LDA) to correct an error on my PIs PDC report. How soon will I see the change reflected on the PDC report?

During the Review phase, LDAs are reflected on the PDC report the following week. The PDC application is updated every Monday during the Review phase. LDAs processed during the Certification phase will not be reflected on the report.

What is a Designee?

A Designee is an individual that is assigned by the Award Manager, Faculty, or Project manager to certify the Payroll Distribution Confirmation Report on their behalf. This individual should have suitable means of verification that work was performed, and has the knowledge to confirm that payroll charges were reasonable in relation to the work performed.

Who can set up a Designee?

Payroll Coordinators (PC) can set up a designee.

I no longer handle Professor A's awards. How can I have PDCs reassigned to the correct grant manager?

PAA can update the PC role in Oracle to reflect the appropriate grant manager.

When is a PM Roll Up Report Created? Who can set one up?

The report is set up by the PC when project staff are under a Project Manager that is different than the Award Manager for an award. The Project Manager or designee has more direct knowledge of the work being performed by the people working on the project.

How do I set up someone as a Reviewer?

To set someone up as a Reviewer you would need to go into the PDC and click the three dots under Setup Reviewer, from there you can search and assign someone as a Reviewer.

When I logged into the PDC application, I received an error message that said “you do not currently have a role...” How do I log into the application?

Select the Home button in the upper right hand corner of the screen. This acts as a reset and should allow access to the application.

I cannot access the PDC application.

Only current/active Caltech employees can access the PDC application through access.caltech. If this is the first time the user is logging into the application, they may need to contact IMSS to get access. The user may not have the right security permissions.

My PI has left the Institute. How can they certify their PDC report?

The PC can scan a copy of the Award Manager or Faculty PDC report and send it to the PI via email. The PI can sign and date the report and send it back to the payroll coordinator. Or the PI can respond to the email stating “they have reviewed and approved the attached AMPDC and/or FPDC.”

The PC will then need to upload the signed PDC report and/or email to the PDC application along with a brief explanation stating why the PI could not certify the report online. The last step is for the PC to set themselves up as a Designee for the PI within the application, then certify the report on the PI’s behalf.

The information on my PI’s PDC report is incorrect. How do I correct it?

*During the **Review** phase, submit a LDA to correct the error. The change will be reflected on the PDC report the following week after the LDA has been approved and processed.*

*During the **Certification** phase, the PI or PC should print a copy of the report containing the error. On the report, the incorrect information should be crossed out and the correct information should be added. The PI will need to sign and date the corrected report. The PC must process a LDA so the corrected information on the PDC is reflected in Oracle. The correct report needs to be uploaded before the PI can certify the report.*

When I clicked on the link for the PDC application in the email I received, I got an error message that said “Bad Request”, how do I log into the application?

Log directly into access.caltech. The Payroll Distribution Confirmation application is located under Administrative Services.

Why don’t I see my Fellows listed on the PDC reports?

Only employees on Caltech’s payroll are listed on the PDC reports. Individuals receiving payment from fellowships or stipend do not appear on the report.

Why do bi-weekly staff have unusual percentages?

Employees paid bi-weekly may have pay periods that overlap PDC reporting periods. Refer to the payroll calendar to calculate the adjustments necessary to match the reporting period.

Can a Division Chair or Division Administrator certify a PDC report on behalf of a faculty member?

Under extenuating circumstances, (e.g., PI is deceased) a Division Chair or Division Administrator can certify a PDC on behalf of a PI. This individual should have suitable means of verification that work was performed, and have the knowledge to confirm that payroll charges were reasonable in relation to the work performed. The PC will need to upload a brief statement to the PDC application explaining why the PI could not certify the report online.

One of my faculty is not a PI on any sponsored project, but works on another faculty member's award. How will the FPDC report show up?

The PDC reports are generated based on the Award Manager role. Faculty members with a non-Award Manager role (e.g., Co-Investigator or Co-Principal Investigator) will have their FPDC report show up under the PC assigned to the Award Manager of the project they are working on. The PC's for both faculty will need to coordinate to have the FPDC report reviewed and certified in a timely manner.