

The Office of Indian Education (OIE)
OIE Professional Development Program
Data Collection System (PDPDCS)

ANNUAL CHECKLIST

This document lists the steps that each OIE PDP grantee must take during *each year of funding* to ensure their grant is properly updated in the PDPDCS. The tasks listed in this checklist are required to fulfill the grant under regulations [34 CFR §263.12](#).

Instructions for Using this Checklist:

1. Beginning with Step 1, review each of the steps and supplementary information. If your project has not yet enrolled participants, only complete Steps 1–3.
2. Check the box when you have completed each task.
3. If this is the final year of your grant, please complete these steps and **then** follow the PDPDCS Grant Closeout Checklist to ensure compliance in closing out your grant.
4. For more information, please review the [FAQs](#) or contact the Help Desk if you have any questions or concerns at any point of the process. The Help Desk is staffed Monday–Friday 8am–8pm EST and is available via email at paybackobligations@ed.gov or by phone at 1-888-884-7110.
5. Retain a copy of the checklist with your grant records.

Number	Task	Checkbox	Important Information
Step 1	Set up an account in the PDPDCS if you have not already done so.		Project Directors with older PD grants will see a new FY grant added to their list of grants, if applicable. Project Directors with a new PD grant award will receive an email with a link to set up their account.
Step 2	Attend or watch the recorded grantee training webinar .		The webinar is typically hosted in January prior to the data collection period. The most recently recorded webinars are available on the Training and Resources page .
Step 3	Add or change the Secondary User if applicable.		Secondary users have a unique login and can enter participant information into the system to assist the Project Director. Only one Secondary User is permitted access to make changes to the grant at a time. Project Directors can change the Secondary User at any time.
Step 4	Add all new participants who have received funding within 30 days of enrollment.		Follow all steps below to add each new participant: <ol style="list-style-type: none">a. Click on “Add New Participant Record”.b. Search for the participant’s SSN to determine if there is a pre-existing record for this participant.c. Ensure that a completed Payback Agreement is submitted or uploaded for each participant receiving funding. If uploading a document, redact the participant’s SSN from the agreement before uploading.



More Questions?

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Number	Task	Checkbox	Important Information
Step 4 (cont.)			<ul style="list-style-type: none"> d. Enter participant contact, demographic, and training data into the PDPDCS. e. Submit the participant record. OIE requires that a participant record must be completed within 30 days of that participant receiving funding. f. Make sure all participants receiving funding are entered and submitted into the system by the close of the data collection period in April.
<p><i>Update information in the PDPDCS for all participants within 30 days of a change in the participant's status (e.g., graduates) or, if there is no change, during the data collection period.</i></p>			
Step 5	Update Section G. Participant Status information for each participant who is enrolled in project training or if there has been a change in the participant's enrollment status.		Update the date the participant is expected to complete the training program.
Step 6	Update Section H. Service Payback Information for each participant who is enrolled in project training or if there has been a change.		<ul style="list-style-type: none"> a. Update the total number of months the participant has been enrolled in the program as of that day. b. Update the total training costs if there has been a change.
Step 7	Fill out Section I. Participant Exit Information for each participant who has completed project training or exited prior to completion.		<ul style="list-style-type: none"> a. Enter the participant's completion or exit before completion date. b. Select the subject area(s) emphasized in the training program.
Step 8	Contact all participants with a reminder to login to the PDPDCS every 6 months and ensure they understand their payback obligation requirements.		Participants should review and update their contact information (especially email addresses) and enter eligible employment if applicable.
<p><i>Complete all updates to the PDPDCS system for the previous grant budget year by the close of the annual data collection period. Data collection period dates will be announced annually to Project Directors via email before the start of the period and will be included in both the New Grantees Webinar and Continuing Grantees Webinar.</i></p>			
Step 9	Follow up with participants who have a status of "Fulfillment not in progress."		<p>Participant statuses can be found on the "View on Participant Records" page.</p> <p>Contact participants who are eligible to begin fulfilling their payback obligation, and either request the participant enter any employment information, or request the participant follow-up with the employer to verify their employment.</p>
Step 10	Review the Grant Final Year Closeout Checklist if you are in the last year of your grant.		



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