

## Unit Review and Approve Hardship Request

- **Hardship Requestors:**  
Hardships can only be requested by the UM PI, Primary Research Administrator, and Reviewers from the Administrative Home Department.
- **Hardship Reviewers:**
  - Hardships need to be reviewed by either Administrative Home of a PAF or its parent.
  - The Dean’s office is not required to review the Hardship in eRPM. Business policies for individual units may vary.
  - Only one department signature is needed on a hardship. As soon as the Administrative Home or its parent approves the hardship, it is routed to DRDA for approval.

This procedure details how to:

- [Open a Hardship Workspace](#) Page 1
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### Open Hardship Workspace

#### PAF Workspace

The screenshot shows the eResearch Proposal Management interface. At the top, there is a navigation bar with the eResearch **M** logo and 'Proposal Management' text. On the right of the navigation bar, it says 'Andy Admin | My Home | Clipboard | Projects | Logoff'. Below the navigation bar, there is a breadcrumb trail: 'All PAFs > Beginning To End'. A 'Layout' button is visible in the top right corner. The main content area has a horizontal menu with tabs: 'Main', 'Contacts', 'Change Tracking', 'Activity History', 'Attachments', 'Hardships', 'Posted Comments', and 'DRDA Notes'. The 'Hardships' tab is selected and highlighted with a black box containing the number '1'. Below the tabs, there is a 'Create New Hardship Request' button. On the left side, there is a sidebar with sections: 'Current State' (with a 'Unit Review' sub-section), 'Hardships associated with this PAF', 'PAF Summary' (with a 'Display PAF Summary' link), and 'PAF Worksheet' (with an 'Edit PAF Worksheet' link). The 'Hardships Associated with this PAF' section contains a table with two columns: 'ID' and 'Name'. The first row shows 'HAR00000103' in the ID column and '09-PAF00579 Investigator-Hardship1' in the Name column. A black box with the number '2' is placed over the ID 'HAR00000103'.

1. Click the **Hardships** tab on the PAF Workspace.
2. Click the **Name** of the hardship.

Review and Approve Hardship Request

Hardship Workspace

3. Click View Hardship Request.

Hardship Request View

The Hardship Request is a one page view with links to attachments if any were uploaded.

4. Click **Exit** or **Finish** to close the view and return to the Hardship Workspace.

## Hardship Workspace

The screenshot shows the 'Hardship Workspace' in eResearch Proposal Management. The top navigation bar includes 'Unit Reviewer | My Home | Clipboard | Logoff'. The main content area displays details for a hardship request: Parent Project Title 'Beginning To End', Parent DRDA Number '09-PAF00579', and Hardship Title '09-PAF00579 Investigator - Hardship 1'. A sidebar on the left lists various actions, with 'Unit Approve Hardship Request' highlighted by a black box containing the number 5.

- Click the **Unit Approve Hardship Request** activity from the Hardship Workspace.

## Unit Approve Hardship Request

The screenshot shows the 'Unit Approve Hardship Request' dialog box. It includes the following elements:
 

- 6**: A checkbox labeled 'Approve Hardship Request'.
- 7**: A text area for 'Comments'.
- 8**: 'OK' and 'Cancel' buttons.

 The dialog also contains instructions: 'Enter Comments in the text box (optional). Select the checkbox and click OK to grant you approval of this Hardship Request. Click CANCEL to cancel this activity and close this window.' and a disclaimer: 'By selecting the checkbox below you are indicating your approval of this Hardship Request. Although DRDA will continue to do their best to ensure that hardship accounts are set up judiciously, it is ultimately the signing department that is financially responsible if for some reason the award is not received or is received later than ninety (90) days in the case of pre-award costs.'

- Select **Approve Hardship Request**.

### Important!

- Only one department signature is needed on a hardship. As soon as the Administrative Home or its parent approves the hardship, it is routed to DRDA for approval.
- The Dean's office is not required to review the Hardship in eRPM. Business policies for individual units may vary.

- Optional, enter **Comments**. These comments will be displayed in Recent Activity on the PAF Workspace.

- Click **OK**.

**Note:** An email notification, which includes your comments, is sent to the PI and Primary Research Administrator upon completion of the activity.

Hardship Workspace

**Recent Activity**  
See the Activity History tab for a list of all activities.

Activity	Author	Activity Date
Unit Approved Hardship Request	Unit Reviewer	6/10/2009 1:01 PM EDT
this hardship request is approved	Inez investigator	6/10/2009 10:50 AM EDT
Hardship Request Routed for Review	Inez investigator	6/10/2009 10:44 AM EDT

9. The hardship request moves to the state of **DRDA Reviewing Hardship Request** and the **Unit Approved Hardship Request** activity is recorded in **Recent Activity** on the PAF Workspace.

**Note:** Once the hardship request is approved, the activities to deny, cancel and request changes are no longer available.

10. To exit the Hardship Workspace, click the name of the PAF in the breadcrumb trail navigation. You will be returned to the PAF Workspace.

Cancel or Deny Hardship Request

Hardship Workspace

After reviewing the Hardship Request,

1. Click either the **Cancel Hardship Request** or **Unit Deny Hardship Request** activity from the Hardship Workspace. The activity window that appears works the same for both activities.

Unit Deny Hardship Request Activity Window

2. Enter **Comments** regarding your decision. These comments will be displayed in Recent Activity on the PAF Workspace.
3. Click **OK**.

**Note:** An email notification, which includes your comments, is sent to the PI and Primary Research Administrator upon completion of the activity.

The hardship request moves to the state of either Hardship Request Denied or Hardship Request Cancelled and the activity is recorded in Recent Activity on the PAF Workspace.

4. To exit the Hardship Workspace, click the name of the PAF in the breadcrumb trail navigation. You will be returned to the PAF Workspace.

## Reviewer Request Changes

### Hardship Workspace

The screenshot shows the 'Hardship Workspace' in the eResearch Proposal Management system. The breadcrumb trail is 'All PAFs > Beginning To End > 09-PAF00579\_Hardship - Wed Jun 10 10:17:20 EDT 2009'. The 'Current State' is '5'. The sidebar contains various actions like 'Edit Hardship', 'View Hardship Request', and 'Reviewer Request Changes' (highlighted with a red box and '1'). The main area displays project details: 'Parent Project Title: Beginning To End', 'Parent DRDA Number: 09-PAF00579', and 'Hardship Title: 09-PAF00579 Investigator - Hardship 1'. A 'DRDA Hardship Notes' field is present. The 'Personnel' section lists 'Inez Investigator' and 'UM Principal Investigator' with an email address 'inezinv@umich.edu' and a redacted phone number '734-'. A red box with '2' is over the 'Unit Reviewing Hardship Request' link. A red box with '3' is over the 'Parent DRDA Number' field. A red box with '4' is over the 'Post a Comment' link.

After reviewing the Hardship Request,

1. Click the **Reviewer Request Changes** activity from the Hardship Workspace.

### Reviewer Request Changes Activity Window

The screenshot shows the 'Reviewer Request Changes' activity window for 'Beginning To End (09-PAF00579)'. The instructions are: 'Enter comments in the text box (optional). Click OK to request changes. Click CANCEL to cancel this activity and close this window.' The 'Comments' text area is highlighted with a red box and the number '2'. The 'Documents' section has an 'Add' button highlighted with a red box and the number '3'. The table below is empty, with the text 'There are no items to display'. At the bottom right, the 'OK' button is highlighted with a red box and the number '4'.

2. Enter **Comments** describing the change you are requesting.
3. Optional, **Add** Documents.
4. Click **OK**.

**Note:** An email notification, which includes your comments, is sent to the PI and Primary Research Administrator upon completion of the activity.

The hardship request moves to the state **Unit Reviewer Requests Hardship Changes** and the activity is recorded in **Recent Activity** on the PAF Workspace.

5. To exit the Hardship Workspace, click the name of the PAF in the breadcrumb trail navigation. You will be returned to the PAF Workspace.

Post a Comment

Hardship Workspace

Unit Reviewer | My Home | Clipboard | Logoff

All PAFs

All PAFs > Beginning To End > 09-PAF00579\_Hardship - Wed Jun 10 10:17:20 EDT 2009

Current State

Unit Reviewing Hardship Request

Edit Hardship

View Hardship Request

Manage Hardship Information

Manage Project/Grants Information

Preview HPAN

Activities

Cancel Hardship Request

Unit Approve Hardship Request

Unit Deny Hardship Request

Reviewer Request Changes

Post a Comment **1**

Parent Project Title: Beginning To End

Parent DRDA Number: 09-PAF00579

Hardship Title: 09-PAF00579 Investigator - Hardship 1

DRDA Hardship Notes:

Personnel:

Inez Investigator UM Principal Investigator inezinv@umich.edu 734- [redacted]

1. Click the **Post a Comment** activity from the Hardship Workspace.

Post a Comment Activity Window

Post a Comment

**Beginning To End (09-PAF00579)**

Enter comments in the text box (optional).  
Click OK to post comments to this Hardship Request. **Comments are permanent**  
Click CANCEL to cancel this activity and close this window.

Comments:

**2**

**3** OK Cancel

2. Enter **Comments**. These comments will be displayed in Recent Activity on the PAF Workspace.
3. Click **OK**.