Hardship Reference Card for ORSP

http://eresearch.umich.edu

Access Hardship Requests in 3 ways

- All PAFs > Hardship Requests tab
- Home Workspace > Hardships tab
- PAF Workspace > Hardships tab

All PAFs > Hardships Requests

Hardships have their own:
- Workflow
- States
- Activities
- ID number

1. Click All PAFs.
2. Click the Hardship Requests tab.

Home Workspace > Hardships

1. Click the Hardships tab from your Home Workspace.

PAF Workspace > Hardships

1. After opening the applicable PAF Workspace, click the Hardships tab.
When a hardship has been reviewed and approved by the unit, the request must be approved by the PR before a PGN is requested.

**APPROVE**
- **State:** ORSP Reviewing Hardship Request
- **Activity:** ORSP Approve Hardship Request
- **State transition upon completion of activity:** ORSP Processing Hardship

PGNs must be requested and associated to the hardship request prior to PR approval. Staff have an activity to send the request to the PR when Shared Services Center (SSC) has completed the PGN request.

**REQUEST PGN**
- **State:** ORSP Processing Hardship
- **Activity:** Request PGN
- **State transition upon completion of activity:** SSC Processing PGN Request

Once a PGN is created/assigned, SSC will move the hardship request back into the state of ORSP Processing Hardship.

**Note:** If this is a second hardship request that will be using an existing PGN, you still must request a PGN. Please note in your PGN request to SSC that an existing PGN should be assigned.

**EDIT HPAN** (Hardship Project Authorization Notice)
- Use the Preview HPAN view to add notes
- **No state transition** as a result of this activity

The PR can review and add notes to the HPAN using the Preview HPAN view. The PI signature must be completed before PR approval.

**APPROVE**
- **States:** ORSP Processing Hardship, ORSP Approve Hardship Notification
- **Activity:** ORSP Approve Hardship Award
- **State Transition upon completion of activity:** Finance - Sponsored Programs Processing Hardship Award

Finance - Sponsored Programs will activate the hardship account which moves the hardship request to the state of Hardship Award Active.

**RELEASE HPAN** (Optional)
- **States:** ORSP Approve Hardship Notification, Finance - Sponsored Programs Processing Hardship Award
- **Activity:** Release Hardship Notification
- **No state transition** as a result of this activity

**Note:** The HPAN is automatically released when Finance - Sponsored Programs activates the hardship.
### Comments and Notes

#### Post a Comment

These comments are viewable by all under the Posted Comments tab in the Hardship Workspace.

- Email recipients can be selected on this activity.
- **State:** All states for all roles
- **Activity:** Post a Comment

#### Post Comment to ORSP Only

These comments are viewable by ORSP only under the ORSP Comments tab in the Hardship Workspace.

- **State:** All states for ORSP only
- **Activity:** Post a Comment to ORSP Only

#### Update ORSP Hardship Notes

These comments are viewable by ORSP only in the Hardship Workspace.

- **State:** All states for ORSP only
- **Activity:** Update ORSP Hardship Notes

### Other

#### Deny a Hardship Request

<table>
<thead>
<tr>
<th>State:</th>
<th>ORSP Reviewing Hardship Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity:</td>
<td>ORSP Deny Hardship Request</td>
</tr>
<tr>
<td>State Transition upon completion of activity:</td>
<td>Hardship Denied</td>
</tr>
<tr>
<td>Email notifications (includes comments entered on the activity) sent to contact PI, Primary Research Administrator and the department PAF notification contacts</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** ORSP can restore the hardship request from this state.

#### Cancel Hardship Request

<table>
<thead>
<tr>
<th>State:</th>
<th>All pre-award states</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity:</td>
<td>ORSP - Cancel Hardship Request</td>
</tr>
<tr>
<td>State Transition upon completion of activity:</td>
<td>Hardship Request Cancelled</td>
</tr>
<tr>
<td>Email notifications (includes comments entered on the activity) sent to contact PI, Primary Research Administrator and the department PAF notification contacts</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** ORSP can restore the hardship request from this state.

#### Restore Hardship Request

<table>
<thead>
<tr>
<th>State:</th>
<th>Hardship Request Cancelled, Hardship Request Denied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity:</td>
<td>Restore Hardship Request</td>
</tr>
<tr>
<td>State Transition upon completion of activity:</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** ORSP can restore the hardship request from this state.

#### ORSP Request Changes

<table>
<thead>
<tr>
<th>State:</th>
<th>ORSP Reviewing Hardship Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity:</td>
<td>ORSP Request Changes</td>
</tr>
<tr>
<td>State Transition:</td>
<td>ORSP Requests Hardship Changes</td>
</tr>
<tr>
<td>Email notifications (includes comments entered on the activity) sent to contact PI and Primary Research Administrator</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Project Team edits the request and uses the activity Submit Changes to return the hardship request to the state of ORSP Reviewing Hardship Request.

#### ORSP Route for Re-Approval

<table>
<thead>
<tr>
<th>State:</th>
<th>ORSP Reviewing Hardship Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity:</td>
<td>ORSP Route for Re-Approval</td>
</tr>
<tr>
<td>State Transition:</td>
<td>Unit Reviewing Hardship Request</td>
</tr>
<tr>
<td>Email notifications (includes comments entered on the activity) sent to contact PI and Primary Research Administrator and the department PAF notification contacts</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** When review and approval is complete, the Reviewer uses the activity Unit Approve Hardship Request to return the hardship request to the state of ORSP Reviewing Hardship Request.

#### ORSP Accept/Decline Request

<table>
<thead>
<tr>
<th>State:</th>
<th>Project Team Requests ORSP Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity:</td>
<td>Accept Request, Decline Request</td>
</tr>
<tr>
<td>State Transition upon completion of activity:</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Hardship Active

- If not previously unit approved, ORSP Reviewing Hardship Request
- If active, Hardship Award Active