

Access Hardship Requests

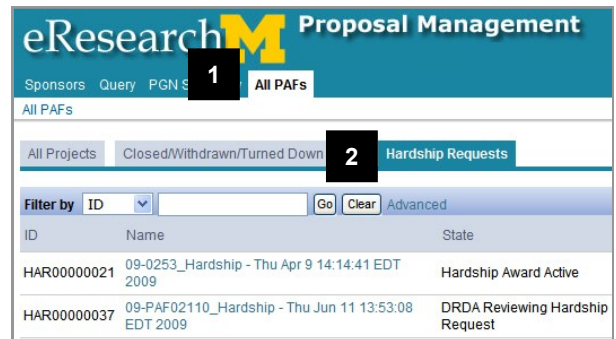
Access hardships in 3 ways:

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

Hardships have their own:

- Workflow
- States
- Activities
- ID number.

All PAFs > Hardship Requests



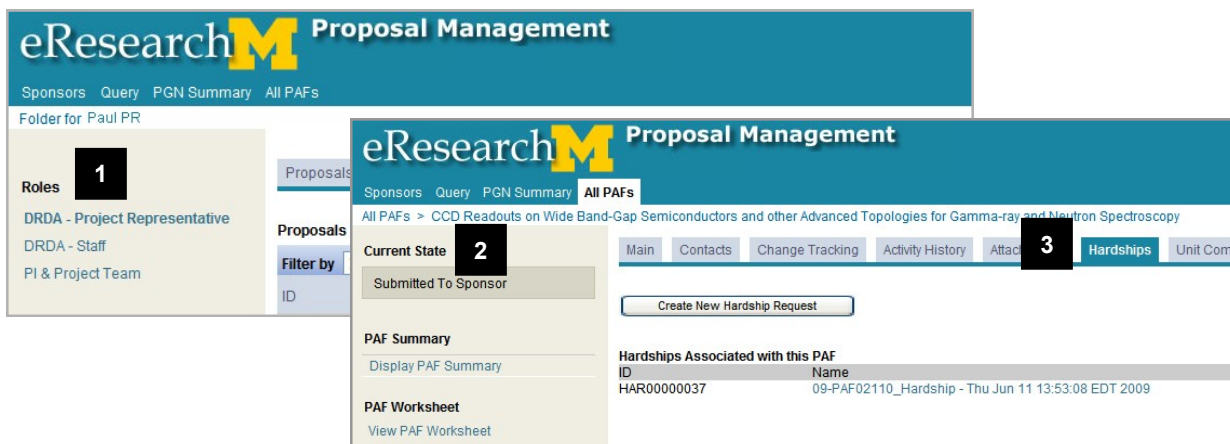
1. Click **All PAFs**.
2. Click **Hardship Requests**.

Home Workspace > Proposals Inbox



1. Login to eResearch.
2. Click **Proposals Inbox**. (Hardships available here for Project Representatives only).

PAF Workspace > Hardships



1. Login to eResearch.
2. Open PAF Workspace
3. Click **Hardships**.

Hardship Award Process

Create Hardship Request in eRPM (Paper Only)

Process to create a hardship is used:

- When the hardship request is submitted on paper to DRDA.
- Also used when the project team creates the hardship request in eRPM.

DRDA has the ability to skip the unit review and approval.

CREATE

1. Click **Hardships** tab in PAF Workspace.
2. Click **Create New Hardship Request**.
3. Complete Hardship Request form and click **Finish**. Clicking Finish creates a Hardship Workspace and assigns the initial state.

BYPASS UNIT APPROVAL

- **State:** Project Team Editing Hardship Request.
- **Activity:** DRDA - Bypass Unit Approval
- **State transition upon completion of activity:** DRDA Processing Hardship.

Approve Hardship Request (eRPM Only)

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

Process Hardship Request

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 FinOps have completed the PGN request.

REQUEST PGN

- **State:** DRDA Processing Hardship
- **Activity:** Request PGN
- **State transition upon completion of activity:** FinOps PGN Request

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

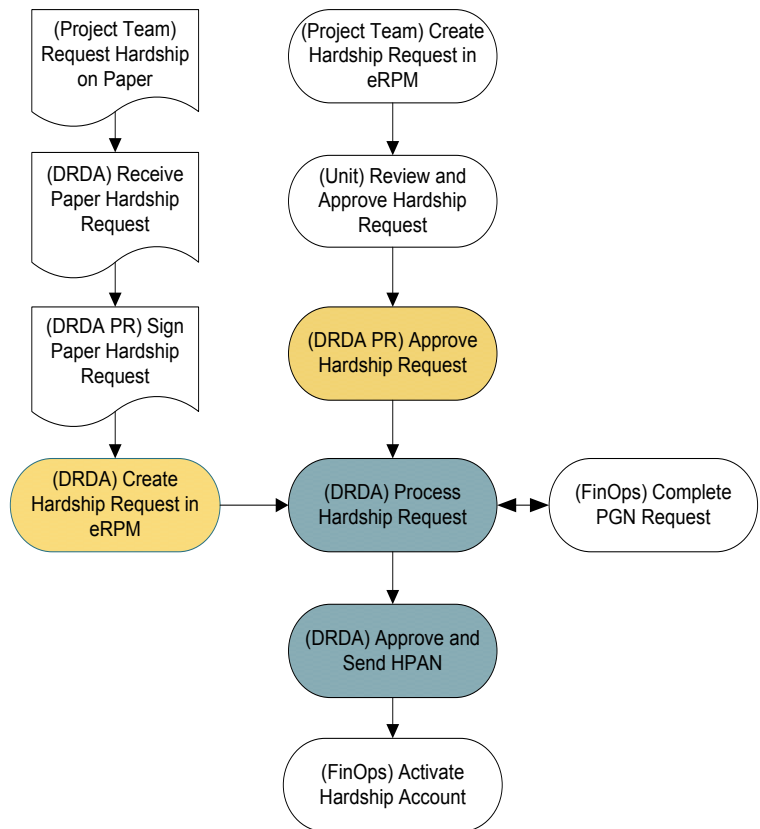
Note: If this is a second hardship request that will be using an existing PGN, you still must request a PGN from FinOps. Please note in your PGN request to FinOps that an existing PGN should be assigned.

EDIT HPAN

- Use the **Preview HPAN** view to add notes
- **No state transition** as a result of this activity

SEND TO PR (Optional)

- **State:** DRDA Processing Hardship
- **Activity:** Send Hardship for PR Approval
- **State Transition upon completion of activity:** DRDA Approve Hardship Notification



Approve and Send HPAN

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:** DRDA Processing Hardship, DRDA Approve Hardship Notification
 - **Activity:** DRDA Approve Hardship Award
 - **State Transition upon completion of activity:** FinOps Processing Hardship Award
- FinOps will activate the hardship account which moves the hardship request to the state of **Hardship Award Active**.

RELEASE HPAN (Optional)

- **States:** DRDA Approve Hardship Notification, FinOps Processing Hardship Award
- **Activity:** Release Hardship Notification
- **No state transition** as a result of this activity

Note: The HPAN is automatically released when FinOps 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 DRDA Only

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

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

Update DRDA Hardship Notes

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

- **State:** All states for DRDA only
 - **Activity:** Update DRDA Hardship Notes
- Note:** Documents attached on this activity will be added to the DRDA-only documents on Hardship.

Other

Deny a Hardship Request

- **State:** DRDA Reviewing Hardship Request
- **Activity:** DRDA Deny Hardship Request
- **State Transition upon completion of activity:** Hardship Denied
- **Email notifications** (which include comments entered on the activity) sent to contact PI, Primary Research Administrator and the department PAF notification contacts

Note: DRDA can restore the hardship request from this state.

DRDA Request Changes

- **State:** DRDA Reviewing Hardship Request
- **Activity:** DRDA Request Changes
- **State Transition:** DRDA Requests Hardship Changes
- **Email notifications** (which include comments entered on the activity) sent to contact PI and Primary Research Administrator

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

Cancel Hardship Request

- **State:** All pre-award states
- **Activity:** DRDA –Cancel Hardship Request
- **State Transition upon completion of activity:** Hardship Request Cancelled
- **Email notifications** (which include comments entered on the activity) sent to contact PI, Primary Research Administrator and the department PAF notification contacts

DRDA Route for Re-Approval

- **State:** DRDA Reviewing Hardship Request
- **Activity:** DRDA Route for Re-Approval
- **State Transition:** Unit Reviewing Hardship Request
- **Email notifications** (which include comments entered on the activity) sent to the department PAF notification contacts

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 **DRDA Reviewing Hardship Request**.

Restore Hardship Request

- **State:** Hardship Request Cancelled, Hardship Request Denied
- **Activity:** Restore Hardship Request
- **State Transition upon completion of activity:**
 - If not previously unit approved, **Project Team Editing Hardship Request**
 - If previously unit approved, **DRDA Reviewing Hardship Request**

DRDA Accept/Decline Request

- **State:** Project Team Requests DRDA Action
- **Activity:** DRDA Accept Request, DRDA Decline Request
- **State Transition upon completion of activity:**
 - If not hardship active, **DRDA Reviewing Hardship Request**
 - If active, **Hardship Award Active**

Manage Documents

Add a NEW document,

1. Click **Manage Documents** (listed under **Manage Data**).
2. Click **Browse** in the empty line*
3. Find and add document.
4. Enter **Title**.
5. Select **Type**.
6. Click **Attach**.
7. Click **OK**.

*Add a new VERSION to an existing document, click **Browse** in the existing line and follow steps 2-5.

Delete removes/deletes all versions of a document & cannot be restored.

Delete Document(s),

1. Click delete in front of a document.
2. Click OK to confirm you want to delete the document(s).