Create a Proposal in LIRA

February 10, 2023
Agenda for today

- Introductions and housekeeping
- Why LIRA? Benefits of the new system
- Key Terms in LIRA - Funding Proposal
- Funding Proposal Overview
- Demo of creating a funding proposal in LIRA
- Q&A
- What’s next?
Intros and Housekeeping
What is LIRA?

• Online system that will be used to develop, route, review, and submit sponsored project proposals
  ○ System communicates directly to some Federal sponsors through grants.gov for system-to-system proposal submission
• Create, negotiate, and track agreements
• Funded award set up
• Create and track subawards
• Request modifications to funded awards
Why LIRA?

- Lack of system for research administration; Paper based, email exchange process
- Current processes are outdated, not integrated and are not sustainable
- LIRA (Huron Research Suite) is used by more top research universities than any other research administration technology and is implemented at more than 50% of R1s
Benefits of LIRA

- Better user experience for faculty
- Workflow transparency to track status of a record, who has it and next steps
- Dynamic SmartForms only request required data (Sponsor and Lehigh)
- System validations reduces rework
- Integrated modules allow for more efficient and automated processing (Integration with Banner for award setup and modifications)
- Clear roles and responsibilities and streamlined business process will improve overall efficiency
- Improved data capture results in more robust reporting capabilities
LIRA is not....

- LIRA is not a replacement for Desktop Finance or Banner
- All financial transactions and related reporting will continue to be in Banner, not LIRA
- You will still use Desktop Finance, Argos, or related tools to access your grant financial data
LIRA Go-Live Date

- Cutover weekend begins March 3
- After we go live on March 6, all proposals will be submitted through the system, and all data will integrate with Banner
- We are importing:
  - All pending proposals
  - (5) years of award history
  - All active awards
- We are not importing unsuccessful proposals
Key Terms in LIRA
Key Terms in LIRA

- Dashboard - My Inbox & My Reviews
  - Landing page that contains to-do list for any user

- Workspace
  - View that contains summary, links, status images, and tabs of info regarding a submission

- SmartForm
  - Electronic form that contains a series of questions that are answered by a PI/team member/submitter
  - “Smart” in SmartForm refers to the system’s ability to hide/show additional questions based on how users answer so all necessary info is captured
Key Terms in LIRA

- **Workflow**
  - LIRA approval process

- **State**
  - Status of a submission in the workflow

- **Activities**
  - Actions that can be executed by a user
  - Some actions move a submission through the workflow

- **Notification**
  - An email sent to your Lehigh email from the system

- **System to System (S2S)**
  - The capability to develop a compliant application package for submission **only** to grants.gov directly from LIRA.
## Terminology Example - Dashboard - Inbox

### My Inbox

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Date Created</th>
<th>Date Modified</th>
<th>State</th>
<th>Coordinator</th>
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<tbody>
<tr>
<td>FO00000057</td>
<td>Sarah - Test 2</td>
<td>1/8/2023 1:38 PM</td>
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<td>Draft</td>
<td>ORSP Proposals</td>
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<tr>
<td>FO00000056</td>
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<td>1/8/2023 1:23 PM</td>
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<td>ORSP Proposals</td>
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<td>FO00000050</td>
<td>Test - sf424 creation</td>
<td>12/21/2022 2:36 PM</td>
<td>12/8/2022 1:03 PM</td>
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<td>Jennifer Liao</td>
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<tr>
<td>AID00000013</td>
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<td>12/23/2022 8:40 AM</td>
<td>12/28/2022 2:51 PM</td>
<td>Draft</td>
<td>Sarah Riccaboni</td>
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<tr>
<td>AID00000005-MOD010</td>
<td>Modification #10</td>
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<td>FO00000021</td>
<td>SR-Test</td>
<td>11/28/2022 10:49 AM</td>
<td>12/8/2022 0:49 AM</td>
<td>Draft</td>
<td>Sarah Riccaboni</td>
</tr>
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</table>
Terminology Example - Dashboard - My Reviews
SmartForm

General Proposal Information

1. **Type of application:**
   - New

   a. Is this award being transferred from another institution?
      - Yes
      - No

2. **Short title of proposal:**
   - Sarah - NIH test

3. **Long title of proposal:**
   - Sarah - NIH test

4. **Program director / Principal Investigator / Project lead / Fellow:**
   - Sarah Riccobon

5. **Select the direct sponsor:**
   - U.S. Department of Health and Human Services

   a. If the direct sponsor is not listed, type their name here:

   b. If this will be a flow-through, select prime sponsor:

6. **Instrument type:**
   - Grant
   - Contract
   - Cooperative Agreement
Workspace - Grant Proposal

Sarah - NIH test

Proposal Information

- **PDA**: Sarah Rocca
- **Department**: Office of Research & Sponsored Programs
- **Specialist**: ORSP Proposals
- **Sponsors**: U.S. Department of Health and Human Services
- **Internal Submission Deadline**: 2/22/2023
- **Certified**: No

Budget Information

- **Starting Date**: 3/6/2023
- **Number of Periods**: 5
- **Total Direct**: $0
- **Total Indirect**: $0
- **Total**: $0

SF424 Link:

Working Budgets

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<th>Name</th>
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<th>Date Modified</th>
<th>State</th>
<th>Funding Source</th>
<th>Total</th>
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<td>1/6/2023 1:29 PM</td>
<td>Draft</td>
<td>Federal</td>
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<td>yes</td>
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</table>
Workflow
Funding Proposal Workflow

We are here
Workflow
Funding Proposal Workflow

Diagram showing the workflow from Draft to Complete, including stages such as Department Review, Specialist Review, Sponsor Review, Clarification Requested, Changes Required, and the flow between these stages.
Workflow
Funding Proposal Workflow

Current Proposal Submission
Policy applies
Activities and States

- Available activities will be based on user role assigned to proposal
- Some activities will transition proposal into a new state
PI Certification

● Required for submission of proposal - will get notified when proposal moves to Department Review
● CGS will review and ensure this is done prior to submission

This process takes place of the transmittal form! Will no longer receive or need to sign a transmittal!
PI Certification

- Required for submission of proposal - will get notified when proposal moves to Department Review
- CGS will review and ensure this is done prior to submission

Certify

As PI for this project, I certify the following:

1. All statements and information provided in this proposal are true, complete, and accurate to the best of my knowledge.
2. I understand that any false, fictitious, or fraudulent statements or claims in this proposal may subject me to criminal, civil, or administrative penalties.
3. I am responsible for the conduct of the project and agree to provide all required progress reports and the final report for any resulting award.
4. I agree to comply with any resulting award terms and conditions and to manage the project in accordance with University and Sponsor policies and procedures.
5. I will report to my Division Director any outside activity or significant financial interest which may arise during the course of this study that could potentially result in a conflict with the work performed under this proposal.
6. If this proposal is for a fellowship, I further certify that I have read and agree to abide by the National Research Service Award Payback Assurance (PDF), and agree that the award will not support residency training.
Add Comment

- Comments are visible to all individuals that have access to read or edit the proposal.
# History

<table>
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<th>Activity</th>
<th>Author</th>
<th>Activity Date</th>
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<tr>
<td>Ownership Assigned</td>
<td>DiPietro, Susan</td>
<td>12/26/2022 2:16 PM</td>
</tr>
<tr>
<td>JIT Changes Requested</td>
<td>Riccaboni, Sarah</td>
<td>12/6/2022 12:16 PM</td>
</tr>
<tr>
<td>need other support and updated budget</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submitted to Non-grants.gov Sponsor</td>
<td>Riccaboni, Sarah</td>
<td>12/6/2022 12:15 PM</td>
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<tr>
<td>Final Review</td>
<td>Riccaboni, Sarah</td>
<td>12/6/2022 12:14 PM</td>
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<tr>
<td>Approved by Department</td>
<td>Smith, Brett</td>
<td>10/31/2022 3:22 PM</td>
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<tr>
<td>Submit Changes To Department Reviewer</td>
<td>Sydlo, Mary</td>
<td>10/31/2022 3:21 PM</td>
</tr>
<tr>
<td>Changes Requested By Department</td>
<td>Smith, Brett</td>
<td>10/31/2022 3:17 PM</td>
</tr>
<tr>
<td>1 Reviewer Note(s) Logged. See notes in personnel</td>
<td></td>
<td></td>
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<tr>
<td>Submitted for Department Review</td>
<td>Sydlo, Mary</td>
<td>10/31/2022 1:24 PM</td>
</tr>
<tr>
<td>Created</td>
<td>Sydlo, Mary</td>
<td>10/26/2022 10:14 AM</td>
</tr>
</tbody>
</table>
Notifications

- Notifications are emails generated by system that are triggered by an Activity or a State Change

```
From: DoNotReply-GRAMS@Grants.unsystem.edu
Subject: FP00000209: What IDC rate can I use?
Received: Thu 5/13/2021 5:04 PM

To: Amanda Thomas
Link: FP00000209
PI: Arup Neogi
Title: DSM Test Default Neogi

Comments:
Preparing budget and I am not sure what IDC rate I should be using. Can you please assist?

Supporting Documents:
Test Attachment.docx
```
Funding Proposal
Overview
Current Process for Initiating a Proposal

No more Notice of Intent!
Initiate a Proposal in LIRA
Submission Types

• The Funding Proposal SmartForm can be used to support submission to various sponsor types
  ○ Federal (System-to-System) and non S2S
  ○ Foundations
  ○ State/Local
  ○ Industry
  ○ Internal
Proposal Components

**Project Types**

- **Funding Proposal**: Main Component. Contains all the data and relationships necessary to describe the full scope of a Proposal.

- **Budget**: Includes Sponsor, Cost Share and Subaward budgets.

- **SF424**: Contains the application information that is submitted to Grants.gov
Funding Proposal
SmartForm Demo
Q&A
What’s Next?

• Sign up for the next recommended training, LIRA Proposal Budget Development

• Quick Reference Guides and User Guide will be sent out after the training and posted to the LIRA training website: https://research.cc.lehigh.edu/lira-training

• Questions - please send to Francie at x23922@lehigh.edu
Thanks!