LIRA Department Review Guide

LIRA will take the place of Lehigh’s Internal Transmittal form and will require Department Review prior to the submission of a funding proposal.

As you can see, the Department Review step in the Funding Proposal workflow comes early in the process, before the Specialist Review state which is where the proposal is submitted to the sponsor.

How do I know a proposal is ready for review?

1. When a proposal in Draft state is completed by the study staff (PI/Dept. Support), it is then routed to the assigned Department Reviewer. You will receive a notification via your Lehigh email that you have a proposal to review. Click on the link in the email and it will take you directly to the funding proposal you need to review. You can also login to LIRA and will see the proposal you need to review listed in your “Inbox”

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To: Sarah Riccaboni; Susan Disidore; Cynthia Kane

Link: FP00000139

PI: Susan Disidore

Title: Subaward Process Test - Part 2

The above proposal has been submitted by Susan Disidore for your review. Click the link to review

Contact the PI with any questions.
When I get to the Funding Proposal workspace, what am I looking for as a department reviewer?

The Department review consists of looking at both the Funding Proposal SmartForm and Budget SmartForms. While each department approver can set their own parameters on what they want to review, the following are all that is required per Lehigh’s process:

1. Review LIRA Funding Proposal SmartForm
   a. Space/Location - Review the space/location

2. LIRA Budget SmartForm
   a. PI Effort - Confirm effort is appropriate
   b. Cost Share - If applicable, confirm cost share is approved
   c. Equipment Use - does the PI have access to the equipment and are they permitted to use it for this project OR if they are purchasing necessary equipment, is there space for the equipment to be set up?

How do I find what I need to review?

Now that it is time to review, you will navigate to the left hand side of the Funding Proposal workspace and click on the “Review Funding Proposal” button:

The Funding Proposal SmartForm will open up. Click on “Additional Proposal Information” to locate Question 10 where the Building/Location of Research will be listed:
When done reviewing, click "Exit". This will return you to the workspace.

Next, locate the associated proposal budgets under the “Budgets” tab. Click on the name of the budget you would like to review:

The proposal budget workspace will open up.

Click on “View Budget” to access the budget SmartForms:
Click on “Personnel Costs” to review PI effort:

Click on “General Costs” to review any equipment:

Lastly, return to the funding proposal workspace and, if there is a cost share budget, select that and
open up the cost share budget workspace:

You will “View” the cost share budget and review the “Personnel” and “General Costs” tabs to see any Academic Year (AY) time committed or additional cost share commitments.

How do I make a comment?

While reviewing the proposal, any place where you see a callout icon ( ) you can click on that and write a Reviewer Note. Once you enter your note, you can then select “Response Required” if the PI/Study staff need to reply or, if it is a comment that does not require a response, you do not need to select this option:
On the budget workspaces, there is an option to make a general comment if needed:

Log General Comments

You would use this to enter any comments necessary for the budget.

What if there are additional departments on the proposal?
If you are the lead department on a multi-department proposal, the PI/Study will send out Ancillary Reviews while the proposal is in Draft state to the additional departments so they also can review the proposal. Using the “Manage Ancillary Reviews” Activity, you can track to see if the other departments have completed their reviews.

1. Identify each organization or person who should provide additional review.

Ancillary Reviews will not hold up the proposal workflow, but it is recommended to monitor these ancillary reviews to ensure they have been completed before approving the proposal.

If you are not the lead, please review the Ancillary Review Process documentation on the LIRA training website on how to submit an Ancillary Review.
What do I do after I have finished my review of the proposal?

Once the proposal has been reviewed, you will select either “Approve” or “request changes” from the Activities listed on the Funding Proposal workspace.

- **Approve** will send the proposal to the CGS for review
- **Request Changes** will allow you to send clarification requests back to the PI/Study staff to make any required updates

If you select “Approve” the Funding Proposal will move to the “Specialist Review” state and ORSP will begin their review of the proposal.

If you select “Request Changes” any comments you made to the funding proposal will be sent back to the PI/Study staff so they can update the proposal as requested. The proposal will move to “Clarifications Requested” state and will open up for edits by the PI/Study Staff. Once the PI/Study Staff have completed their updates, they will send it back to the Department again for review. You will receive another email and will review the updates. When ready, select “Approve” to move the proposal forward in the workflow.