

# LIRA Budget Guide

Updated January 2, 2024

## Overview

The LIRA budget module serves as the budget of record on a sponsored project. It includes capabilities to include cost-share and outgoing subaward budgets.

For every LIRA funding proposal record, ORSP **requires** developing your budget on the coded internal Lehigh budget template. Once finalized, the internal spreadsheet must be uploaded to the LIRA record as an attachment. To ensure consistency between the detailed budget template and the LIRA budget of record, we are only requiring total direct costs and indirect costs to be entered into the LIRA budget module. PIs and department study staff are responsible for the development of the budget. ORSP is available for guidance and can offer review, as needed, before the proposal routes for departmental and ORSP Review.

### Reference Videos:

- The video below offers a demonstration and explanation of how to navigate the budget module: <https://vimeopro.com/user43881429/click-grants/video/467467416>
- Additionally, the video below offers a demonstration of completing a budget in the LIRA module: <https://vimeopro.com/user43881429/grants-101/video/467467908>

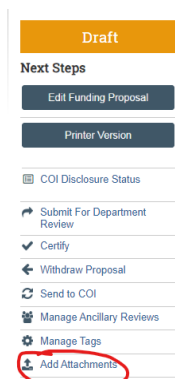
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## Completing a Budget in LIRA

### Complete the Internal Template and Budget Justification

1. The first step to completing the LIRA budget, is to use Lehigh's internal budget template to develop and finalize your budget details. A budget justification per the sponsor solicitation is also required. Both documents must be uploaded to your funding proposal record using the "Add Attachments" activity on your funding proposal workspace.

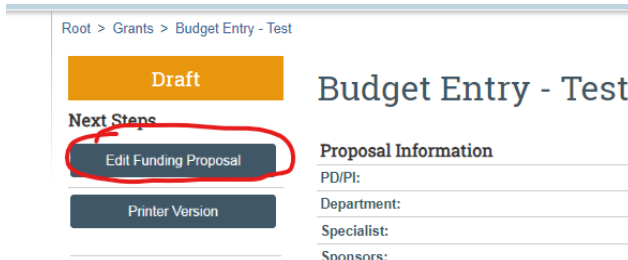
- [Lehigh Internal Budget Template](#)



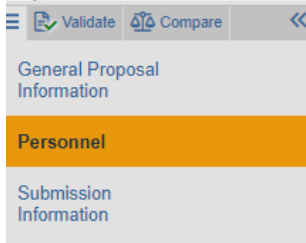
## Confirm your budget Smartform is set up correctly

2. Next, you need to confirm your funding proposal record data is accurate so your budget workspace is set up correctly.

Click on the the “Edit Funding Proposal” button on your Funding Proposal workspace:



3. Select the “Personnel” form



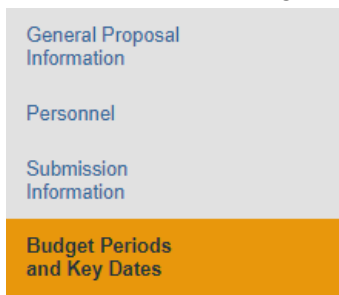
4. In Q3 of the Personnel form, confirm that **all** project Senior Personnel other than the PI have been added here. This list should include all those who have measurable effort on the project, whether or not they are included in the budget. This includes all Co-PIs and Senior Persons.

### 3. Project personnel:

- a. Add other institutional key, non-key or other significant contributor personnel:

	Last Name	First Name	Key	Role
<input type="button" value="+ Add"/>				
<input type="button" value="Update"/>	Disidore	Susan	yes	Co-PD/PI
<input type="button" value="Update"/>	Hudock	Tara	yes	Co-PD/PI

5. Next, Select the “Budget Periods and Key Dates” form



Confirm Q6 is answered correctly. Select “Yes” only if your proposal uses a modular budget.

**6. \* Modular budget?**  
 Yes  No [Clear](#)

6. For Q7 the system defaults to 5 project years. Click “Add Period” or “Remove Period” as necessary to ensure your budget has the correct number of budget periods.

7. [Add Period](#) [Remove Period](#) [Update Periods](#)

**Budget periods:**

Period Number	Name	Duration (Months)	Start Date	End Date
1	Period 1	12	9/1/2024	8/31/2025
2	Period 2	12	9/1/2025	8/31/2026
3	Period 3	12	9/1/2026	8/31/2027
4	Period 4	12	9/1/2027	8/31/2028
5	Period 5	12	9/1/2028	8/31/2029

7. Click “Save”

8. Click “Exit”

9. You should now be back on the Funding Proposal Workspace. It is time now to enter your proposed budget in the LIRA Budget SmartForm.

Start by clicking on the link under Working Budgets in your workspace to access the Budget SmartForm



Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	Reviewer Notes	Related Projects
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**Working Budgets**

Name	SmartForm	Date Modified
National Science Foundation	[Edit] ▾	12/12/2023 9:31 AM

1 items

◀ page 1 of 1 ▶

10. Next, select “Edit Budget”

**Draft**

**National Science Foundation**

**Next Steps**

[Edit Budget](#)

[Print or Version](#)

[Create Subaward](#)

[Create Cost Share](#)

Sponsor: National Science Foundation  
 PI: Sarah Riccaboni  
 Funding Proposal: Budget Entry - Test

Financials | Subaward | Documents | Snapshots | History

Current All-Period Totals  
 Personnel:

11. Confirm that you are now on the “General Budget Information” form

12. A series of questions will open up. Below is guidance on how to respond to the General Budget Information Questions:

- a. Q1: Title pulled from proposal - No change needed
- b. Q2: Confirm PI is correct
- c. Q3: Select “Yes” if the standard Modified Total Direct Costs (MTDC) F&A rate is used for the budget and “No” if a different rate is used. If “No” is selected, complete the table with the F&A Cost Base and rate that will be used for your budget.

Non-standard F&A cost base and rates

F&A Cost Base	Period	1	2	3	4	5	
	Start:	9/1/2024	9/1/2025	9/1/2026	9/1/2027	9/1/2028	
	End:	8/31/2025	8/31/2026	8/31/2027	8/31/2028	8/31/2029	
TDC	Rate:	10%	10%	10%	10%	10%	Clear

- d. Q4: answer “No”
- e. Q5: answer “Yes”
- f. Q6: Salary Cap: If the sponsor has a salary cap, enter the 12 month salary cap amount here.
- g. Q7: answer “No”
- h. Q8: No change needed

13. Click “Continue”

14. You will now be on the ‘Personnel Cost Definition’ form

15. Click on “Import Proposal Personnel”. This action will pull over the listed PI and all the Senior personnel entered on the funding proposal for whom effort will be reported.

## Personnel Cost Definition

[Go to additional personnel on funding proposal](#)

1. **Import Proposal Personnel**

Personnel costs:

Staff Member	Appointment
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There are no items to display

1. Personnel costs:

	Staff Member	Appointment	Role	Is Key
<input type="button" value="Update"/>	Sarah Riccaboni	12 months	PD/PI	yes
<input type="button" value="Update"/>	Susan Disidore	12 months	Co-PD/PI	yes
<input type="button" value="Update"/>	Tara Hudock	12 months	Co-PD/PI	yes

16. Click “continue”
17. You will now be on the “Personnel Costs” form. This is where you will need to enter effort for **all** senior personnel. This data will be used for the faculty-generated Current and Pending report.  
*Reminder: Lehigh has a de minimis effort. Even if someone is not paid on a grant, the de minimis effort % of .42 must be entered. Effort cannot be entered as 0%.*
18. Click “Show Effort”

### Personnel Costs

#### Budget Summary

	Period 1 9/1/2024 8/31/2025	Period 2 9/1/2025 8/31/2026	Period 3 9/1/2026 8/31/2027	Period 4 9/1/2027 8/31/2028	Period 5 9/1/2028 8/31/2029	Budget Totals
Personnel Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Indirect Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Grand Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

#### Personnel Costs

	Period 1 9/1/2024 8/31/2025	Period 2 9/1/2025 8/31/2026	Period 3 9/1/2026 8/31/2027	Period 4 9/1/2027 8/31/2028	Period 5 9/1/2028 8/31/2029
<b>Show Effort</b>					
Person: Sarah Riccaboni Role: PD/PI	Salary: \$0.00 Benefits: \$0.00 Total: \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00
Person: Susan Disidore Role: Co-PD/PI	Salary: \$0.00 Benefits: \$0.00 Total: \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00
Person: Tara Hudock Role: Co-PD/PI	Salary: \$0.00 Benefits: \$0.00 Total: \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00
Salary Cost Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Benefits Cost Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Personnel Cost Total:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

19. In the effort section **only**, put the % effort for each project period for every senior person. You will not put anything for Sal Req or base salary and you can leave the FB Rate as is. The only data entered is effort %.

#### Personnel Costs

	Period 1 9/1/2024 8/31/2025	Period 2 9/1/2025 8/31/2026	Period 3 9/1/2026 8/31/2027	Period 4 9/1/2027 8/31/2028	Period 5 9/1/2028 8/31/2029
<b>Show Totals</b>					
Person: Sarah Riccaboni Role: PD/PI	Effort: 8.33 %	8.33 %	8.33 %	8.33 %	8.33 %
	Sal Req: 0 %	0 %	0 %	0 %	0 %
	FB Rate: 31.1 %	31.1 %	31.1 %	31.1 %	31.1 %
	Base: \$0.00	\$0.00	\$0.00	\$0.00	\$0.00

20. Click “Continue”
21. You will now be on the “General Cost Definition” form
22. Click “+Add”

### General Cost Definition

#### 1. General costs:

+ Add

Cost Type

There are no items to display

23. A popout screen will appear for you to add the general cost definitions. If using a MTDC base, you will only be adding two total definitions - one for all direct costs with IC and one for all direct costs without IC.

For Direct costs with IC:

- a. Q1: General Cost type - select "Other"
- b. Q2: Leave as "\$0.00"
- c. Q3: "Direct Costs With IC"
- d. Q4: Select "No"
- e. Q5: Select "Yes"

24. Click "Ok and Add Another" for direct costs without IC

- a. Q1: General Cost type - select "Other"
- b. Q2: Leave as "\$0.00"
- c. Q3: Direct Costs Without IC"
- d. Q4: Select "No"
- e. Q5: Select "No"

1. \* General cost type:

2. Cost:

3. Description:

4. Apply inflation?

 Yes  No [Clear](#)

5. Include in indirect calculations?

 Yes  No [Clear](#)

1. \* General cost type:

2. Cost:

3. Description:

4. Apply inflation?

 Yes  No [Clear](#)

5. Include in indirect calculations?

 Yes  No [Clear](#)

25. Click "OK"

26. Click "Continue"

27. You will now be on the "General Costs" form. Using your Lehigh Internal budget, enter the per period total directs with IC and the per period total directs without IC that are calculated on the template. See below:

*Information from Internal Budget:*

LIRA - General Cost Definition						
	Year 1	Year 2	Year 3	Year 4	Year 5	
Total Directs With IC	\$ 128,757	\$ 132,620	\$ 136,597	\$ 140,696	\$ 144,917	
Total Directs Without IC	\$ 13,905	\$ 14,265	\$ 14,625	\$ 14,985	\$ 15,345	
Indirect Cost Total	\$ 78,542	\$ 80,898	\$ 83,324	\$ 85,825	\$ 88,399	
<b>Project Total:</b>	<b>\$ 221,204</b>	<b>\$ 227,783</b>	<b>\$ 234,546</b>	<b>\$ 241,506</b>	<b>\$ 248,661</b>	<b>\$ 1,173,700</b>

*Information entered into LIRA:*

**General Costs**

**Budget Summary**

	Period 1 9/1/2024 8/31/2025	Period 2 9/1/2025 8/31/2026	Period 3 9/1/2026 8/31/2027	Period 4 9/1/2027 8/31/2028	Period 5 9/1/2028 8/31/2029	Budget Totals
General Total:	\$142,662.00	\$146,885.00	\$151,222.00	\$155,681.00	\$160,262.00	\$756,712.00
Direct Total:	\$142,662.00	\$146,885.00	\$151,222.00	\$155,681.00	\$160,262.00	\$756,712.00
Indirect Total:	\$78,542.00	\$80,898.00	\$83,324.00	\$85,825.00	\$88,399.00	\$416,988.00
Grand Total:	\$221,204.00	\$227,783.00	\$234,546.00	\$241,506.00	\$248,661.00	\$1,173,700.00

**General Costs**

	Period 1 9/1/2024 8/31/2025	Period 2 9/1/2025 8/31/2026	Period 3 9/1/2026 8/31/2027	Period 4 9/1/2027 8/31/2028	Period 5 9/1/2028 8/31/2029
<input type="button" value="Save"/>					
Cost Type: Other Description: direct costs with IC	\$128,757.00	\$132,620.00	\$136,597.00	\$140,696.00	\$144,917.00
Cost Type: Other Description: direct costs without ic	\$13,905.00	\$14,265.00	\$14,625.00	\$14,985.00	\$15,345.00
General Cost Total:	\$142,662.00	\$146,885.00	\$151,222.00	\$155,681.00	\$160,262.00

28. Once the information is entered, click "Save"
29. Then, click "Continue". You will now be on the F&A Cost Overrides page. You can skip this page.
30. Click "Continue"
31. Click "Finish". You will be taken back to the budget workspace where you will see the total direct and indirect cost amounts.
32. Confirm the total project amount matches your internal Lehigh budget spreadsheet. You have now completed the LIRA budget of record for your proposal.