STREAMLYNE TIP SHEET
COST SHARE

CALCULATING COST SHARE IN THE BUDGET

CALCULATING TOTAL COST SHARE

Total cost share required can be a specific amount or can be calculated as a percentage of total direct costs (sponsored funding) or total project costs.

The formula for cost share as a percentage of total project costs using the total direct cost is:
 ([total direct costs] / (1 - [cost share percentage])) * [cost share percentage]

The formula for cost share as a percentage of total project costs is:
 [total project costs] * [cost share percentage]

PERSONNEL COST SHARE

In personnel, cost share is the difference between effort and salary, and includes fringe benefits and F&A. Cost share can be entered for personnel without salary and with salary.

WITHOUT SALARY

1. Add a person by selecting their name and object code and clicking "Add" in the Personnel Detail panel of the Personnel Tab.
2. From within the Salary/Wages subsection, click "Show," then click on "Sync to Requested Salary."

3. Enter the requested cost share amount in the Requested Salary field.
4. Click on "Calculate."
5. Copy the % Charged.
6. Click on "Close."

7. In the Salary/Wages Subsection, paste the % Charged in the % Effort field.
8. Leave the % Charged field as zero.
9. Click on "Calculate."
10. Click on "Show" next to the Salary/Wages – Details Subsection to confirm the cost share amount on the Cost Sharing line.
11. Click on "Show" next to the Rate Classes Subsection to view the associated:
    a. Employee Benefits (Fringe) cost share amount in the Rate Cost Sharing column.
    b. F&A cost share amount in the Rate Cost Sharing column.

WITH PREVIOUSLY ENTERED SALARY

1. From within the Salary/Wages subsection, click "Show," and locate the person for cost share entry.
2. Document the percent listed in the % Effort field. (This can be done by pasting the % Effort into the Budget Justification Notes in the Salary/Wages – Details Subsection, or by documenting outside of Streamlyne.)

3. Click on "Sync to Requested Salary.
4. Enter the requested salary.
5. Click on "Calculate."
6. Document the % Charged (see #2 above).
7. Click on "Close."
8. Add the previously documented:

   % EFFORT AMOUNT

   % CHARGED AMOUNT

9. To equal the **NEW % EFFORT**
10. Enter the new % Effort into the % Effort field.
11. Leave the % Charged as previously entered.
12. Click on "Calculate."
13. Click on "Show" next to the Salary/Wages – Details Subsection to confirm the cost share amount on the Cost Sharing line.

14. Click on "Show" next to the Rate Classes Subsection to view the associated:
    a. Employee Benefits (Fringe) cost share amount in the Rate Cost Sharing column.
    b. F&A cost share amount in the Rate Cost Sharing column.

FUTURE YEARS

If future periods have not been generated, and the personnel cost share entry does not include a requested salary amount, the "Apply Inflation" indicator can be unchecked to keep cost share amounts the same in future periods. (PLEASE NOTE: The "Apply Inflation" indicator should NOT be changed if a requested salary amount is included on the line item, as the indicator applies to BOTH the cost sharing amount and the requested salary amount.)

NON-PERSONNEL COST SHARE

1. From the Non-Personnel tab, expand the panel of the budget category where cost share will be added.
2. Select the cost share item from the Object Code Name field and click on "Add."

3. From within the Line Item Details subsection, click "Show."
4. Enter the cost share amount in the Cost Sharing field.
5. Click "Calculate Current Period" at the bottom of the page.
6. Click "Show" on the Rate Classes subsection line to see the cost sharing F&A amount.

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FUTURE YEARS

If future periods have not been generated, the "Apply Inflation" indicator can be unchecked to keep cost share amounts the same in future periods.

VIEW COST SHARE BY PERIOD

IN THE PARAMETERS TAB

1. Go to the Parameters tab.
2. See the cost share by budget period in the Cost Sharing column of the Budget Periods & Totals panel.

IN THE PERSONNEL TAB

1. Go to the Personnel tab.
2. Select the Budget Period at the top of the page and click "Update View."

3. Expand the Budget Overview panel.
4. View the cost share for the period on the Cost Sharing line.

IN THE NON-PERSONNEL TAB

1. Go to the Personnel tab.
2. Select the Budget Period at the top of the page and click "Update View."

3. Expand the Budget Overview panel.

4. View the cost share for the period on the Cost Sharing line.

Budget Overview (Period 2)

Budget Overview (Period 2)

Period 2 Start Date	01/01/2025	Cost Limit	0.00
Period 2 End Date	12/31/2025	Total Cost Limit	0.00
Direct Cost	7,570.77	Direct Cost Limit	0.00
F&A Cost	4,012.52	Total Direct Cost Limit	0.00
Unrecovered F&A	0.00	Cost Sharing	23,355.46
Total Sponsor Cost	11,583.29		

VIEW FULL BUDGET COST SHARE DETAIL

The summary portion of the Streamlyne budget details the Cost Share by the total amount and the percentages, and also by individual project period and total costs. To see this, go to the SUMMARY tab of the BUDGET.

Summary

Summary

	Period 1 10/20/2023 - 09/14/2024		Period 2 09/15/2024 - 09/14/2025		Period 3 09/15/2025 - 09/14/2026		Period 4 09/15/2026 - 09/14/2027		Total	
	Sponsor Costs	Cost Share	Sponsor Costs	Cost Share	Sponsor Costs	Cost Share	Sponsor Costs	Cost Share	Sponsor Costs	Cost Share
Personnel Edit										
show Salary	0.00	0.00	110,388.01	168,646.99	133,064.52	154,341.98	140,511.98	155,515.49	383,964.51	478,504.46
show Fringe	0.00	0.00	32,824.64	43,894.69	36,500.88	42,520.31	38,076.13	43,315.25	107,401.65	129,730.25
show Calculated Direct Costs	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Personnel Subtotal	0.00	0.00	143,212.65	212,541.68	169,565.40	196,862.29	178,588.11	198,830.74	491,366.16	608,234.71
Non-Personnel Edit										
show Equipment	0.00	0.00	34,400.00	0.00	10,000.00	0.00	0.00	0.00	44,400.00	0.00
show Travel	0.00	0.00	76,438.00	0.00	18,050.00	0.00	13,891.00	0.00	108,379.00	0.00
show Other Direct	0.00	0.00	24,462.51	64,493.00	27,594.45	23,182.00	30,632.97	20,915.00	82,689.93	108,590.00
show Calculated Direct Costs	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Non-Personnel Subtotal	0.00	0.00	135,300.51	64,493.00	55,644.45	23,182.00	44,523.97	20,915.00	235,468.93	108,590.00
Totals										
TOTAL DIRECT COSTS	0.00	0.00	278,513.16	277,034.68	225,209.85	220,044.29	223,112.08	219,745.74	726,835.09	716,824.71
TOTAL F&A COSTS	0.00	0.00	121,714.84	123,194.07	99,436.15	104,602.01	102,013.92	105,380.28	323,164.91	333,176.36
TOTAL SPONSOR COSTS	0.00		400,228.00		324,646.00		325,126.00		1,050,000.00	
COST SHARE (SUBMITTED TO SPONSOR)		0.00		400,228.75		324,646.30		325,126.02		1,050,001.07
TOTAL PROJECT COSTS	0.00		800,456.75		649,292.30		650,252.02		2,100,001.07	
COST SHARE % - TOTAL SPONSOR COSTS		0.0%		100.0%		100.0%		100.0%		100.0%
COST SHARE % - TOTAL PROJECT COSTS		0.0%		50.0%		50.0%		50.0%		50.0%

Another method to view the full budget cost share information, is by using the Excel budget report from Streamlyne. To view the cost share expenses entered into the budget as a whole, download the Excel budget report from Streamlyne. Follow the directions below to view that Excel report.

IN THE PD

1. Mark the Budget Status Final and Complete in the budget. (this can be marked as incomplete again and unchecked as final if more modifications need to be made later)

Final	Budget Status
☑	Complete ∨

2. Export this budget to Excel, by following the Exporting Streamlyne Budget to Excel tip sheet to export this PD's Excel budget. This tip sheet can be found on the OSPA Streamlyne [PD Job Aids and Calculators webpage](#).

3. Select and view the editable summary tab to view the cost share entries.

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Instructions | **Streamlyne Budget Export to Exc** | Summary | Editable Summary | Version Record | ⊕

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