

# 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:  
$$([\text{total direct costs}] / (1 - [\text{cost share percentage}]]) * [\text{cost share percentage}]$$

The formula for cost share as a percentage of total project costs is:  
$$[\text{total project costs}] * [\text{cost share percentage}]$$

#### 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."

Hide Salary/Wages - Faculty

Person James M Reecy - F3850	* Start Date 01/01/2024	* End Date 12/31/2024	% Effort 0.00000	% Charged 0.00000		
Period Type Calendar	Requested Salary 0.00	Calculated Fringe 0.00	Calculate	Sync to Requested Salary	Details	Delete

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

Personnel Budget Sync to Requested Salary

Personnel Budget Details - James M Reecy

Effective Period : 01/01/2024 to 12/31/2024

% Effort : 0.00000

% Charged : 7.50000

Requested Salary : 7,500.00

Calculate Set % Charged Close

# STREAMLYNE TIP SHEET COST SHARE (CONT.)

## CALCULATING COST SHARE IN THE BUDGET (CONT.)

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.

Hide Salary/Wages - Faculty

Person James M Reecy - F3850	* Start Date 01/01/2024	* End Date 12/31/2024	% Effort 7.50000	% Charged 0.00000
Period Type Calendar	Requested Salary 0.00	Calculated Fringe 0.00	<span style="background-color: #808080; color: white; padding: 2px 5px; border-radius: 3px;">Calculate</span> <span style="background-color: #808080; color: white; padding: 2px 5px; border-radius: 3px;">Sync to Requested Salary</span> <span style="background-color: #808080; color: white; padding: 2px 5px; border-radius: 3px;">Details</span> <span style="background-color: #808080; color: white; padding: 2px 5px; border-radius: 3px;">Delete</span>	
	0.00	0.00		

Hide Salary/Wages - Faculty Details

Budget Category Senior Personnel/Key Pers	# of Person(s) 1
Unrecovered F&A 0.00	Cost Sharing 7,500.00
Apply Inflation? <input checked="" type="checkbox"/>	On/Off Campus Yes
Submit Cost Sharing? <input checked="" type="checkbox"/>	
Budget Justification Notes <div style="border: 1px solid #ccc; height: 30px; width: 100%;"></div>	Group Description <div style="border: 1px solid #ccc; height: 30px; width: 100%;"></div>

Hide Rate Classes

Rate Class	Rate Type	Apply Rate?	Rate Cost	Rate Cost Sharing
Employee Benefits	Faculty	<input checked="" type="checkbox"/>	0.00	2,100.00
MTDC	MTDC	<input checked="" type="checkbox"/>	0.00	5,088.00

### 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.)

HELP EMAIL: [streamlyne@iastate.edu](mailto:streamlyne@iastate.edu)

WEBSITE: <https://www.ospa.iastate.edu/streamlyne>

UPDATED: 02/2024

IOWA STATE UNIVERSITY  
Office of Sponsored Programs Administration

IOWA STATE UNIVERSITY  
FOUNDATION

IOWA STATE UNIVERSITY  
Office of Innovation Commercialization

# STREAMLYNE TIP SHEET COST SHARE (CONT.)

## CALCULATING COST SHARE IN THE BUDGET (CONT.)

Hide Salary/Wages - Professional and Scientific

Person Rebecca J Musselman - PM3-0300	* Start Date 01/01/2024	* End Date 12/31/2024	% Effort 4.33000	% Charged 4.33000
Period Type Calendar	Requested Salary 5,345.64	Calculated Fringe 2,004.62	<input type="button" value="Calculate"/> <input type="button" value="Sync to Requested Salary"/> <input type="button" value="Details"/> <input type="button" value="Delete"/>	

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**

Personnel Budget Sync to Requested Salary

Personnel Budget Details - Rebecca J Musselman

Effective Period : 01/01/2024 to 12/31/2024

% Effort : 4.33000

% Charged :

Requested Salary :

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.

Person Rebecca J Musselman - PM3-0300	* Start Date 01/01/2024	* End Date 12/31/2024	% Effort 7.57002	% Charged 4.33000
Period Type Calendar	Requested Salary 5,345.64	Calculated Fringe 2,004.62	<input type="button" value="Calculate"/> <input type="button" value="Sync to Requested Salary"/> <input type="button" value="Details"/> <input type="button" value="Delete"/>	
		5,345.64	2,004.62	

Hide Salary/Wages - Professional and Scientific Details

Budget Category

# of Person(s)

Unrecovered F&A 0.00

Cost Sharing 4,000.00

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.)

# STREAMLYNE TIP SHEET COST SHARE (CONT.)

## CALCULATING COST SHARE IN THE BUDGET (CONT.)

**Hide** Salary/Wages - Faculty

Person: James M Reecy - F3850  
 \* Start Date: 01/01/2024  
 \* End Date: 12/31/2024  
 % Effort: 7.50000  
 % Charged: 0.00000

Period Type: Calendar  
 Requested Salary: 0.00  
 Calculated Fringe: 0.00  
 Buttons: Calculate, Sync to Requested Salary, Details, Delete

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**Hide** Salary/Wages - Faculty Details

Budget Category: Senior Personnel/Key Pers  
 # of Person(s): 1  
 Unrecovered F&A: 0.00  
 Cost Sharing: 7,500.00  
 Apply Inflation?   
 On/Off Campus: Yes

### 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."

Add:  \* Object Code Name

Description

Total Base Cost: 0.00

Action: 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.

**Hide** Line Item Details

\* Start Date: 01/01/2024  
 \* End Date: 12/31/2024  
 Apply Inflation?   
 Budget Category: Other Direct Costs  
 Budget Justification Notes:

Unrecovered F&A: 0.00  
 Cost Sharing: 5,000.00  
 On/Off Campus: Yes  
 Submit Cost Sharing?

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**Hide** Rate Classes

Rate Class	Rate Type	Apply Rate?	Rate Cost Override	Rate Cost	Rate Cost Sharing
MTDC	MTDC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0.00	2,650.00

Buttons: Apply To Later Periods, Sync To Period Cost Limit, Sync To Period Direct Cost Limit

Buttons: Calculate Current Period, Save, Reload, Close

# STREAMLYNE TIP SHEET COST SHARE (CONT.)

## CALCULATING COST SHARE IN THE BUDGET (CONT.)

### 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.

Budget Periods & Totals											
Budget Periods											
Actions	#	Period Start Date	Period End Date	No. of Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit	Direct Cost Limit
<a href="#">Add</a>					0.00	0.00	0.00	0.00	0.00	0.00	0.00
<a href="#">Delete</a>	1	01/01/2024	12/31/2024	12.0	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 7,650.00	\$ 0.00	\$ 0.00

#### 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."

Period Total:\$11,245.90	Budget Total:\$47,048.66	Budget Period: 2: 01/01/2025 - 12/31/2025	View: Full Detail	<a href="#">Update View</a>
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3. Expand the Budget Overview panel.
4. View the cost share for the period on the Cost Sharing line.

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

#### 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."

Period Total:\$11,245.90	Budget Total:\$47,048.66	Budget Period: 2: 01/01/2025 - 12/31/2025	View: Full Detail	<a href="#">Update View</a>
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3. Expand the Budget Overview panel.

# STREAMLYNE TIP SHEET COST SHARE (CONT.)

## CALCULATING COST SHARE IN THE BUDGET (CONT.)

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

### 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										
<span style="float: left;">&lt; back</span> <span style="float: right;">next &gt;</span>										
	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
<b>Personnel</b> <span style="float: right;">Edit</span>										
<span>show</span> 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
<span>show</span> 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
<span>show</span> Calculated Direct Costs	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Personnel Subtotal</b>	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
<b>Non-Personnel</b> <span style="float: right;">Edit</span>										
<span>show</span> Equipment	0.00	0.00	34,400.00	0.00	10,000.00	0.00	0.00	0.00	44,400.00	0.00
<span>show</span> 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
<span>show</span> 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
<span>show</span> Calculated Direct Costs	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Non-Personnel Subtotal</b>	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
<b>Totals</b>										
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	0.00	400,228.00	400,228.75	324,646.00	324,646.30	325,126.00	325,126.02	1,050,000.00	1,050,001.07
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%

HELP EMAIL: [streamlyne@iastate.edu](mailto:streamlyne@iastate.edu)

WEBSITE: <https://www.ospa.iastate.edu/streamlyne>

UPDATED: 02/2024

# STREAMLYNE TIP SHEET COST SHARE (CONT.)

## CALCULATING COST SHARE IN THE BUDGET (CONT.)

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
<input checked="" type="checkbox"/>	<span>Complete</span>

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.

56	3	#####	#####	P	27	Graduate	Graduate	FN	0	25	SWGA
56	3	#####	#####	O	3	Material	N/A	N/A	N/A	N/A	MS
Instructions											
Streamlyne Budget Export to Exc											
Summary											
Editable Summary											
Version Record											
+											

Accessibility: Investigate