ENTERING A SUBRECIPIENT BUDGET AND JUSTIFICATION (S2S and Non-S2S)

ENTERING A NON-S2S SUBRECIPIENT BUDGET (WITHOUT AN R&R BUDGET):

When a Subrecipient Budget needs to be in Streamlyne, is not for a S2S submission, <u>or</u> you are entering amounts as a placeholder while you wait for a detailed S2S subrecipient R&R budget, it can be entered into the **Non-Personnel** section of the budget.

In Other Direct, Under Object Code Name, select one of four options (highlighted below):

When using MTDC, the first 25,000 of the sub amount is **Burdenable:** that amount is included in the F&A base on the Iowa State Budget. **Nonburdenable** is any amount that exceeds that 25,000 and is not charged F&A in ISU's budget, or in some cases, this could be selected because a sponsor does not allow IDC charged on the sub amount.

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For example, in a MTDC budget, if UC Davis is requesting 36,000 in year one [20,000 is in direct costs, and 16,000 is indirect costs] this is how this should be entered.

The first $25,000 is Burdenable, and the remaining $11,000 is Nonburdenable. In this case, since the Burdenable Amount (first $25K) has already been met, future year amounts for this sub will all be entered as Nonburdenable.

NOTE: For some sponsors, the distinction between the sub's direct and indirect costs is needed. For example, in many NIH proposals, the amount for the sub's direct costs is included in a funding cap, but not their indirect costs. For USDA, the overall proposal's F&A calculation can be dependent on how much IDC is charged by the sub. It is best to distinguish between the sub's indirect and direct costs, along with the Burdenable and Nonburdenable, if you are not sure how the distinction will interact with the sponsor requirements.

When a sub amount is entered directly into the Other Direct Costs the corresponding budget justification is uploaded in the Attachments section: Internal Attachments > Subrecipient Documentation.

**ENTERING AN R&R SUBRECIPIENT BUDGET WITH BUDGET JUSTIFICATION
(REQUIRED FOR S2S SUBMISSION, BUT MAY ALSO BE USED WITH NON-S2S PDs)**

Before starting steps to add the sub budget in Streamlyne, first **locate the correct R&R budget form** for the sub(s) or collect this form from the sub(s). If the budget is provided by the sub, it is important to be sure it matches the budget form found using the instructions below.

The correct budget form can be found in the S2S section of the PD, under Forms. Click on the **Research & Related Subaward Budget** form name to open the document.   (Note: The exact name may differ per opportunity)

Once this form is open, select "Click here to extract the R&R Budget Attachment".

Once this subaward budget form has been extracted, **save it to a file**. Different web browsers or Adobe settings may affect your ability to extract, download or save this extracted file. You may need to check with IT support to assist if your settings require adjustments.

Note: The individual sub budgets are not uploaded directly into the attachments form above. As long as you select "Yes" to Include this form in the submission, the sub budgets are pulled in automatically from their uploaded locations- described later in this tip sheet.

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OSPA requests that you keep as much of the original file name as possible in order for this budget form to be recognized as the correct type/version. However, each name must be unique, so when uploading this completed budget at a later time, make sure the file name includes the subaward organization name (may be abbreviated). An example of preferred naming is below:

Form Name: RR_FedNonFedBudget_2_0   **File Name**: UIowa_RR_FedNonFedBudget_2_0

For instructions on how to complete the R&R budget form, go to https://www.grants.gov/forms/forms-repository/r-r-family and select **Form Instructions** (if available) for the budget you are working on.

Be sure the budget info you enter in this budget form matches the **budget periods** of the ISU budget, or this budget info will not be integrated into the Streamlyne budget correctly. Enter all budget fields completely, including the sub's UEI and be sure to check the box for Subaward/Consortium.

When uploading the **budget justification into Field L of this budget form**, be sure it is a **flattened** PDF.
Important! If the budget is uploaded into Streamlyne without the inclusion of the budget justification in this form, there will be an error.
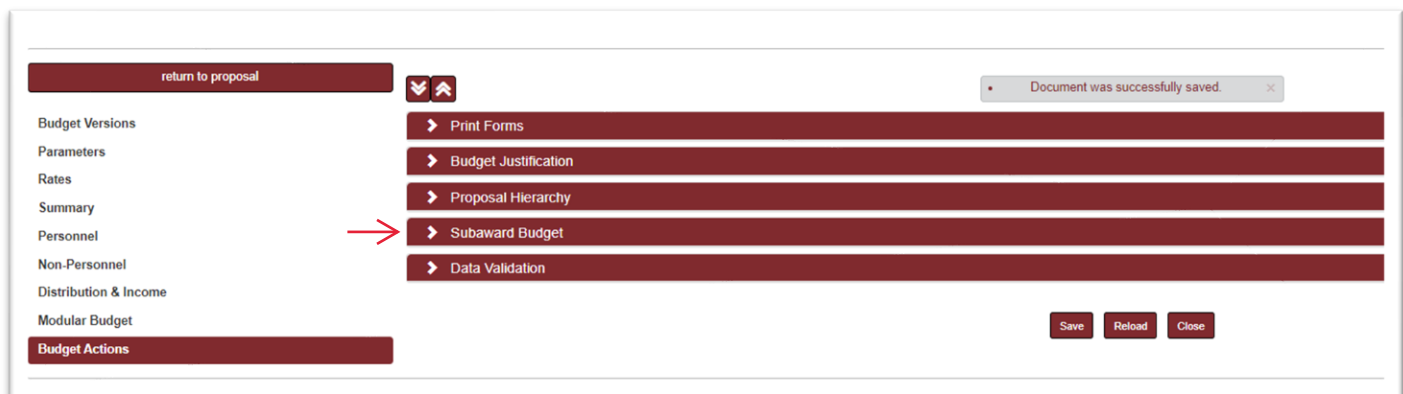

The amounts contained in the budget upload will automatically be added to the sub budget (non-personnel) category of the ISU budget. To avoid duplication, If you have entered amounts into this category for initial review as a placeholder, you will want to clear out these amounts *prior* to uploading the sub budget.

UPLOADING THE SUBRECIPIENT BUDGET WITH THE BUDGET JUSTIFICATION
With the correct budget open, go to **Budget Actions** and select **Subaward Budget**.

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If the sub organization has already been added under Proposal: Organizations, Performance Sites & Collaborators, you can pull in those subs simply by selecting **Sync Collaborators**. Check that any subs identified in this area have complete profiles (addresses, UEI numbers, etc.) BEFORE you use the Sync Collaborators feature.

Alternately, you can add the Organization Name by selecting the magnifying glass symbol near the empty field. Search for the organization and return value when located.

Next, add the R&R budget(s) by selecting <u>choose file</u>, and select <u>Add.</u>

You can quickly see if the budget amounts were successfully pulled into the budget by selecting "show" in the Details section, below the subaward budget. This will categorize the amounts by direct cost, F&A cost and year.

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This will then show the Direct Cost, F&A Cost, Cost Sharing and Total Cost by year.

	Direct Cost	F&A Cost	Cost Sharing	Total Cost
1	0.00	0.00	0.00	0.00
2	3,875.00	1,124.00	0.00	4,999.00

In the detailed part of the Non-Personnel budget, you can also check that the subaward budget amounts are represented accurately by Burdenable and Nonburdenable.

If amounts are not represented accurately in any of these locations, check again that the correct budget form was used, and that the budget info was entered correctly.

You can now move forward with finalizing the rest of the budget. Once the budget is complete, turn on Data Validation which is found in the Budget Actions Tab to check for errors in the budget. As a reminder, once you have noted and corrected any outstanding errors or warnings, turn off Data Validation to avoid longer loading times when navigating between screens.