

# STREAMLYNE TIP SHEET

## ENTERING SUB BUDGETS

### 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, or 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.

The screenshot shows the 'Budget Overview (Period 1)' section in Streamlyne. A warning message states: 'The Total Direct Cost Limit has been exceeded.' Below this, a table displays budget details for Period 1:

Category	Value	Category	Value
Period 1 Start Date	09/01/2023	Cost Limit	0.00
Period 1 End Date	08/31/2024	Total Cost Limit	0.00
Direct Cost	910,038.60	Direct Cost Limit	0.00
F&A Cost	330,210.45	Total Direct Cost Limit	1,000,000.00
Unrecovered F&A	0.00	Cost Sharing	0.00
Total Sponsor Cost	1,240,249.05		

Below the table, a list of budget categories is shown with expandable arrows:

- Equipment (1 line item)
- Travel (2 line items)
- Participant Support (2 line items)
- Other Direct (2 line items) ←

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

The screenshot shows the 'Other Direct (2 line items)' section. A dropdown menu for 'Object Code Name' is open, listing various options. The following options are highlighted in blue:

- Subawards - Direct Costs Burdenable
- Subawards - Direct Costs Nonburdenable
- Subawards - Indirect Costs Burdenable
- Subawards - Indirect Costs Nonburdenable

The table below shows the current entries:

Line Item	Object Code Name	Description	Total Base Cost	Action
1	materials and supplies	materials and supplies	10,000.00	Delete
2			12,000.00	Delete

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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Object Code Name	Description	Total Base Cost	Action
User Fees - Equipment or Facility Rental		0.00	Add
Subawards - Direct Costs Burdenable	materials and supplies	10,000.00	Delete

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.

Subawards - Direct Costs Burdenable SBDIR	UC Davis Sub	20,000.00
Subawards - Indirect Costs Burdenable SBIDC	UC Davis Sub	5,000.00
Subawards - Indirect Costs Nonburdenable SNIDC	UC Davis Sub	11,000.00

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.

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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)

The screenshot shows the S2S section of the Streamlyne interface. On the left is a navigation menu with items like Proposal, S2S, Key Personnel, Special Review, Custom Data, Abstracts & Attachments, Questions, Budget Versions, Proposal Summary, Webforms, Proposal Actions, Permissions, and Streams. The S2S section is active, displaying a search bar and a list of forms. The forms listed are: SF424 (R & R) V5.0, NIFA Supplemental Information V1.2, Project/Performance Site Location(s) V4.0, Research & Related Budget (Total Fed + Non-Fed) V2.0, Research & Related Personal Data V1.2, Research And Related Other Project Information V1.4, Research and Related Senior/Key Person Profile (Expanded) V4.0, and Research & Related Subaward Budget (Total Fed + Non-Fed) 5 YR 30 ATT V2.0. The last form is highlighted with a red box. A notification at the top right says 'Document was successfully reloaded.'

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

The screenshot shows the 'R&R Subaward Budget (Fed/Non-Fed) Attachment(s) Form' page. The title is 'R&R Subaward Budget (Fed/Non-Fed) Attachment(s) Form'. Below the title are instructions: 'Instructions: On this form, you will attach the R&R Subaward Budget (Fed/Non-Fed) files for your grant application. Complete the subawardee budget(s) in accordance with the R&R (Fed/Non-Fed) budget instructions. Please remember that any files you attach must be a PDF document.' A button labeled 'Click here to extract the R&R Budget (Fed/Non-Fed) Attachment' is circled in red. Below the instructions is an 'Important' note: 'Please attach your subawardee budget file(s) with the file name of the subawardee organization. Each file name must be unique.' At the bottom, there is a section for attachments with the text '1) Please attach Attachment 1' followed by an input field and three buttons: 'Add Attachment', 'Delete Attachment', and 'View 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:** Ulowa\_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.



A screenshot of a budget form with several fields highlighted in yellow. The fields include: \* UEI, Enter name of Organization, Budget Type (with checkboxes for Project and Subaward/Consortium), Budget Period: 1, \* Start Date, and \* End Date.

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.

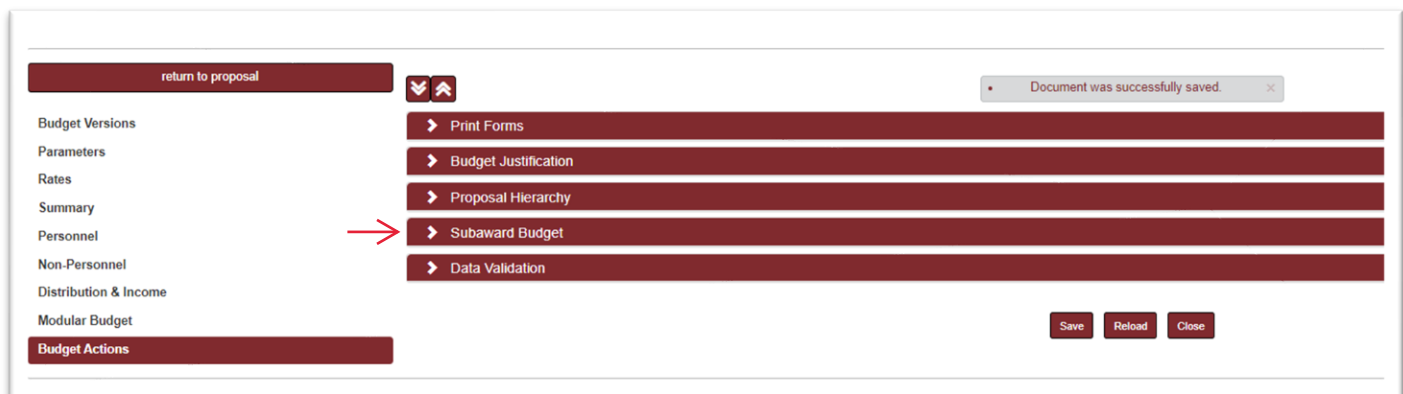


A screenshot of the 'L. \* Budget Justification' section of the form. It features a text input field (highlighted in yellow) with the instruction '(Only attach one file.)' to its left. To the right of the input field are three buttons: 'Add Attachment', 'Delete Attachment', and 'View Attachment'.

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**.



A screenshot of the 'Budget Actions' menu in the Streamlyne system. The menu is a vertical list of options: Budget Versions, Parameters, Rates, Summary, Personnel, Non-Personnel, Distribution & Income, Modular Budget, and Budget Actions. The 'Subaward Budget' option is highlighted with a red arrow pointing to it. At the top of the menu, there is a 'return to proposal' button and a notification that says 'Document was successfully saved.' At the bottom of the menu, there are 'Save', 'Reload', and 'Close' buttons.

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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.

The screenshot shows the 'Subaward Budget' form. At the top, there is a 'Subaward Budget' header. Below it, there is a 'Subaward Budget' sub-header. The form contains several fields: 'Organization Name' with a search icon, 'Comments' with a plus icon, 'Form Name', 'Subaward PDF File Name' with a 'Choose File' button and 'No file chosen' text, and 'Actions' with an 'Add' button. A red circle highlights the 'Sync Collaborators' button located above the 'Form Name' field.

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.

The screenshot shows the 'Subaward Budget' form. The 'Organization Name' field now contains the text '000357 UNIVERSITY OF CALIFORNIA DAVIS'. A red circle highlights the magnifying glass search icon next to the 'Organization Name' field.

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

The screenshot shows the 'Subaward Budget' form. The 'Subaward PDF File Name' field has a 'Choose File' button and 'No file chosen' text. A red circle highlights the 'Choose File' button. Another red circle highlights the 'Add' button in the 'Actions' column.

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.

The screenshot shows the budget details section. It includes a search bar with '000313' and 'SOUTH DAKOTA STATE UNIVERSITY'. Below it, there is a table with columns for 'Organization Name', 'Comments', 'Form Name', and 'Subaward PDF File Name'. The first row contains 'SDSA sub budget', 'RR\_Budget10\_3\_0', and 'SDSU\_RR\_Budget10\_3\_0-V3.0.pdf'. Below the table, there are two 'Show' buttons. The first 'Show' button is circled in red.

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

000313 SOUTH DAKOTA STATE UNIVERSITY SDSA sub budget RR\_Budget10\_3\_0 SDSU\_RR\_Budget10\_3\_0-V3.0.pdf

View PDF View XML Sync from PDF Delete

Show Attachment Details

Hide Details

	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.