

# STREAMLYNE TIP SHEET

## COST SHARE

### CALCULATING COST SHARE & ENTERING INTO STREAMLYNE

#### CALCULATING TOTAL COST SHARE

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

The formula for cost share as a percentage of total sponsored funding is:

$$[\text{total sponsored funding}] * [\text{cost share percentage}]$$

The formula for cost share as a percentage of total project costs (sponsored funding + cost share) is:

$$[\text{total project costs}] * [\text{cost share percentage}]$$

#### PERSONNEL COST SHARE

For personnel, cost share is the difference between effort incurred and salary paid and includes fringe benefits. Cost share can be entered for personnel without salary and with salary.

#### ADDING COST SHARE 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".

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

3. Enter the requested cost share amount for the person in the Requested Salary field in that pop-up.
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

Buttons: Calculate, Set % Charged, Close

# STREAMLYNE TIP SHEET COST SHARE (CONT.)

## CALCULATING COST SHARE & ENTERING INTO STREAMLYNE (CONT.)

7. In the Salary/Wages subsection, paste the % Charged from step 5 into 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 is shown in the Cost Sharing field. See red box below.
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: #800000; color: white; padding: 2px 10px; border-radius: 3px;">Calculate</span> <span style="background-color: #800000; color: white; padding: 2px 10px; border-radius: 3px;">Sync to Requested Salary</span> <span style="background-color: #800000; color: white; padding: 2px 10px; border-radius: 3px;">Details</span> <span style="background-color: #800000; color: white; padding: 2px 10px; 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

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

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

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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 & ENTERING INTO STREAMLYNE (CONT.)

### ADDING COST SHARE WITH PREVIOUSLY ENTERED SALARY

- From within the Salary/Wages subsection, click “Show,” and locate the person for cost share entry.

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"/>	

- Click on “Sync to Requested Salary”.
- Enter the desired cost share amount into the Requested Salary field.
- Click on “Calculate”.
- Note the % Charged generated.
- Add the % Effort to the % Charged, which equals the new % Effort amount to be entered.
- Click on “Close”.
- In the % Effort field, enter the new % Effort which now includes the cost share.
- Leave the % Charged as previously entered.
- Click on “Calculate”.
- Click on “Show” next to the Salary/Wages – Details subsection to confirm the cost share amount on the Cost Sharing field.

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 : 3.24002

Requested Salary : 4,000.00

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"/>	

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Hide Salary/Wages - Professional and Scientific Details

Budget Category Other Professionals # of Person(s) 1

Unrecovered F&A 0.00 Cost Sharing 4,000.00

- Click on “Show” next to the Rate Classes subsection to view the associated:
  - Employee Benefits (Fringe) cost share amount in the Rate Cost Sharing column.
  - F&A cost share amount in the Rate Cost Sharing column.

# STREAMLYNE TIP SHEET COST SHARE (CONT.)

## CALCULATING COST SHARE & ENTERING INTO STREAMLYNE (CONT.)

### 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.)

The screenshot shows the 'Salary/Wages - Faculty' entry form. It includes fields for Person (James M Reecy - F3850), Start Date (01/01/2024), End Date (12/31/2024), % Effort (7.50000), and % Charged (0.00000). Below these are fields for Period Type (Calendar), Requested Salary (0.00), and Calculated Fringe (0.00). Action buttons include Calculate, Sync to Requested Salary, Details, and Delete. A 'Salary/Wages - Faculty Details' section is also visible, containing Budget Category (Senior Personnel/Key Pers), # of Person(s) (1), Unrecovered F&A (0.00), Cost Sharing (7,500.00), Apply Inflation? (checked), and 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."

The screenshot shows the 'Object Code Name' selection interface. It features a search bar with 'Add:' and a dropdown menu. The dropdown menu is open, showing options: 'select', 'Alterations and Renovations', and 'Computer Services'. To the right, there is a 'Description' field, a 'Total Base Cost' field with the value '0.00', and an 'Add' button.

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

# STREAMLYNE TIP SHEET COST SHARE (CONT.)

## CALCULATING COST SHARE & ENTERING INTO STREAMLYNE (CONT.)

The screenshot displays the Streamlyne interface for entering cost share. It is divided into two main sections: "Line Item Details" and "Rate Classes".

**Line Item Details:**

- Start Date: 01/01/2024
- End Date: 12/31/2024
- Unrecovered F&A: 0.00
- Cost Sharing: 5,000.00
- Apply Inflation?
- Budget Category: Other Direct Costs
- On/Off Campus: Yes
- Submit Cost Sharing?
- Budget Justification Notes: (empty text area)

**Rate Classes:**

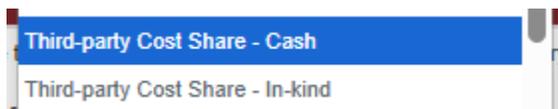
Rate Class	Rate Type	Apply Rate?	Rate Cost Override	Rate Cost	Rate Cost Sharing
MTDC	MTDC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0.00	2,650.00

Buttons at the bottom of the Rate Classes section: Apply To Later Periods, Sync To Period Cost Limit, Sync To Period Direct Cost Limit.

Buttons at the bottom of the entire form: Calculate Current Period, Save, Reload, Close.

### Third Party Cost Share NOTE:

Two categories are available in Other Direct Costs to enter Third-party Cost Share as a separate object code.



- "Third-party Cost Share - In-kind" is allowable to be entered as a lump sum by budget period.
- "Third-party Cost Share - Cash" may be entered as a lump sum by period. If required by the sponsor, Third-party Cost Share - Cash may require entry into specific cost categories, such as personnel or travel. If the project requiring cost share is funded, a separate PD will need to be routed (or may already exist) for the Third-party Cost Share - Cash contribution.

### 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.

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# STREAMLYNE TIP SHEET COST SHARE (CONT.)

## CALCULATING COST SHARE & ENTERING INTO STREAMLYNE (CONT.)

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>		<input type="text"/>	<input type="text"/>		<input type="text" value="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: <input type="text" value="2: 01/01/2025 - 12/31/2025"/>	View: <input type="text" value="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 in the Cost Sharing field.

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 Non-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: <input type="text" value="2: 01/01/2025 - 12/31/2025"/>	View: <input type="text" value="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 in the Cost Sharing field.

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

# STREAMLYNE TIP SHEET COST SHARE (CONT.)

## CALCULATING COST SHARE & ENTERING INTO STREAMLYNE (CONT.)

### VIEW FULL BUDGET COST SHARE DETAIL

To view, go to the SUMMARY tab of the BUDGET. The Summary tab details the Cost Share for each budget category, and the percentage for each period.

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						
<b>Personnel</b> <span>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>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		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%

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