

Time & Effort Reporting (TER) for Administrators and Project Leads

Guidance, Roles, Responsibilities, and Staff Training Materials

Introduction

- Grants help Palomar meet the needs of our students!
- Behind every grant, is the real work of faculty and staff.
- Time and Effort Reporting helps us document that work, meet our commitments to funders, and sustain the grant's funding.
- This guide supports for Grant Administrators and Project Leads in their roles overseeing Time and Effort Reporting for grant-funded personnel.

What is Time and Effort Reporting (TER)

- Time & Effort Reporting (TER) is how the College documents the actual work performed by employees whose compensation is paid, in whole or in part, with grant funds.
- Federal regulations¹ require this documentation for federally funded salaries. To create one clear and consistent standard, Palomar College applies TER to all competitive grant-funded employees, not just those paid with federal funds.

¹ Uniform Guidance, 2 CFR Part 200

Forms Overview by Assignment Type

Three forms correspond to different types of grant-funded assignments:

Permanent Employee 100% Assigned	Permanent Employee Partial / Multi-Funded	Hourly/Extra Duty/NOHE
Full-time permanent personnel (including classified non-exempt employees) assigned 100% to one grant.	Full-time permanent personnel (including classified non-exempt employees) assigned to a grant or multiple grants as part of their base assignment (includes providing in-kind effort)	Personnel paid for actual hours worked: • Faculty paid on NOHE • Adjunct faculty hourly • Classified staff extra hours • Short term hourly • Student worker
Competitive Grant Biannual Effort Certification	Multi-Funded Effort Report	Payroll Time & Effort Form

TER for Hourly/Extra Duty/NOHE Staff

Employees who are paid based on actual hours worked using grant funds complete the Payroll Time and Effort Form.

For example:

Adjuncts and Counselors hired specifically for grant-funded work (No base assignment - paid hourly for the grant)

- Paid via Notice of Hourly Employment (NOHE)
- Paid via stipends

Faculty performing grant work in addition to their base assignment (Extra service beyond their regular load)

- Non-instructional extra duty hours – Paid via Notice of Hourly Employment (NOHE)
- Stipend-based work outside the regular assignment

TER for Hourly Staff (continued - 1)

Examples (continued)

Classified staff working additional grant-funded hours (Beyond their regular paid assignment)

- Overtime
- Part-time extra hours
- 10- or 11-month off-salary hours

Other hourly personnel

- Short-term hourly employees
- Student workers

Administrator / Project Lead Responsibilities

Administrators and Project Leads ensure that Time & Effort Reporting is:

- Accurate and compliant with federal, state, and institutional requirements.
- Submitted on time and supported by reliable documentation.
- Completed using the correct form for each employee assignment.

Administrator vs. Project Lead Roles

Administrator Responsibilities (Supervising Administrator)	Project Lead Responsibilities
• Confirm the correct form is used • Confirm that the employee's assigned tasks are allowable, appropriate, and directly tied to the grant-funded objectives • Review all forms for completeness and accuracy • Certify Time & Effort forms • Maintain oversight of project staffing and effort alignment	• Provide employees with the correct form • Ensure staff receive training on how to complete the form • Review forms for alignment with scope of work, completeness, and accuracy • Ensure timely submission of effort reports • Certify the form or route it to the Supervising Administrator for certification whenever the Project Lead is not the designated certifier • File certified forms in grant project records • Serve as primary point of contact for questions about TER

What Attestation Means

When employees sign their Time & Effort form, they are confirming that:

- The effort and activities they reported accurately reflect the actual work performed during the reporting period.
- Their effort is in compliance with federal, state, and institutional requirements.
- They are providing an after-the-fact confirmation, not an estimate or projection.

What Certification Means

When the Supervising Administrator signs the form, they are confirming that:

- They have first-hand knowledge of the work performed, or have verified it through reliable records.
- The form reasonably reflects the employee's time and activities for the reporting period.
- Their certification serves as the College's formal verification of accuracy and compliance.

TER Workflow - Biannual Effort Certification

1. Employee completes and signs the form.
2. Employee submits to Project Lead.
3. Project Lead reviews for alignment.
4. Project Lead signs or routes it to the Supervising Administrator for certification whenever the Project Lead is not the designated certifier.
5. Supervising Administrator certifies.
6. Project Lead files original in project records.
7. Employee receives a copy.

TER Workflow - Multi-Funded Effort Report Workflow

1. Employee completes monthly report.
2. Employee submits to Project Lead.
3. Project Lead reviews for accuracy and split funding alignment.
4. Project Lead signs or routes it to the Supervising Administrator for certification whenever the Project Lead is not the designated certifier.
5. Supervising Administrator certifies.
6. Project Lead files original.
7. Employee receives a copy.

TER Workflow - Payroll Time & Effort Form

1. Employee fills out Payroll Time & Effort Form on a monthly basis.
2. Employee signs and submits to Project Lead.
3. Project Lead reviews.
4. Project Lead signs or routes it to the Supervising Administrator for certification whenever the Project Lead is not the designated certifier.
5. Supervising Administrator certifies.
6. Certified form is sent to Payroll.
7. Copies maintained in grant files and shared with employee.

Staff Training Materials Overview

- The following slides provide the training materials that Administrators and Project Leads can share with grant-funded staff.
- Use them as reference material so you understand what staff are instructed to do.
 - Staff who are 100% assigned to a single grant complete the [Competitive Biannual Form](#).
 - Staff who are assigned part of their regular contract time to a grant complete the [Multi-Funded Effort Report](#).
 - Staff who work on an hourly basis for a grant complete the [Payroll Time and Effort Form](#).

Staff Training Slides

The following slides provide the same training employees receive. Use them as reference material so you understand what staff are instructed to do.

Time & Effort Reporting (TER) for Permanent (inc. Non-Exempt Classified Staff) Employees

Guidance and Form Completion

Introduction

- Grants help Palomar meet the needs of our students!
- Behind every grant, is the real work of faculty and staff.
- Time and Effort Reporting helps us document that work, meet our commitments to funders, and sustain the grant's funding.
- This guide provides support on how to complete **Time and Effort Reporting for permanent employees (including non-exempt classified staff)**.

What is Time and Effort Reporting (TER)

- Time & Effort Reporting (TER) is how the College documents the actual work performed by employees whose compensation is paid, in whole or in part, with grant funds.
- Federal regulations¹ require this documentation for federally funded salaries. To create one clear and consistent standard, Palomar College applies TER to all competitive grant-funded employees, not just those paid with federal funds.

¹ Uniform Guidance, 2 CFR Part 200

TER for Permanent Employees (Including Non-Exempt Classified Staff)

- If you are a permanent employee (including non-exempt classified staff) and working on a federal grant you will complete one of the following forms:
 - Competitive Grant Biannual Effort Certification
 - Multi-Funded Effort Report

TER for Permanent Employees (Including Non-Exempt Classified Staff) (Continued)

- If 100% of your time is assigned to a single grant, you will complete the Competitive Biannual Form.
 - [Click here](#) to navigate to the **Competitive Biannual Form instructions**.
- If only part of your time is assigned to a grant (i.e., you also complete your other Palomar work or work on more than one grant) you will complete the Multi-Funded Effort Report.
 - [Click here](#) to navigate to the **Multi-Funded Effort Report instructions**

Biannual Effort Certification

For permanent employees (including non-exempt classified staff) assigned 100% to a single grant

Biannual Effort Certification Form

- This section provides an overview of the Biannual Effort Certification Form.
- In the next few slides, you will learn:
 - Who completes this form and when it is required
 - What to include on the form
 - An example of a completed form
 - What to do with your completed form
 - Helpful reminders to ensure your form is accurate and compliant

Biannual Effort Certification Form (continued)

- The Biannual Effort Certification Form is completed by permanent employees (including non-exempt classified staff) who are assigned 100% of time to a single grant or program **or** employees who have been hired to solely work on one grant.
- For example:
 - A faculty member who is fully reassigned to work on one grant-funded project.
 - A project coordinator or manager whose position is paid entirely from one grant.
 - A counselor, researcher, or specialist whose full assignment is supported by one grant or program.

Biannual Effort Certification Form (continued-2)

- This form is completed either biannually (twice per year) or at the end of each semester (summer, fall, spring).
- A completed form includes the following:
 - Your grant and project information.
 - A summary of the major activities you performed during the reporting period.
 - Your signature attesting that your reported activities reflect what you did and are in alignment with the project's goals.
 - The Grant's supervising administrator's signature.
- The next slide introduces the form and how to complete it.

Biannual Effort Certification Form Examples

Last Name: M'Abcd	First Name: Pauline	Employee ID#: 123123
Department: Counseling Services	Supervisor: Dr. Marcus Hill	
Position: Outreach Specialist	Certification Period: From: 7/1/2025 To: 12/31/2025	

Grant/Contract Number: P01231234	Grant Name: HSI Student Success & Access Initiative
Project Number: 1111234	Name of Funding Agency: U.S. Dept of Education

Distribution of Time: 100%

Description of activities completed (attach additional pages if needed):

Conducted outreach and recruitment activities at partner high schools and community events; facilitated informational sessions and workshops promoting college access; coordinated campus tours and HSI program orientations; maintained contact with prospective students and families; collaborated with project staff on outreach strategies and reporting; supported development of outreach materials aligned with grant goals.

Position: Project Director	Certification Period: From: 1/1/2025 To: 6/30/2025
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Description of activities completed (attach additional pages if needed):

Provided overall leadership and management for the TRIO Talent Search program; oversaw implementation of grant objectives, student services, and annual performance benchmarks; supervised program staff and coordinated outreach, advising, and workshop activities; built and maintained partnerships with target schools and community organizations; monitored student participation and progress; managed federal compliance requirements, including reporting, budgeting, and documentation; collaborated with institutional departments to support college access and persistence activities aligned with Talent Search goals.

Biannual Effort Certification Form Workflow

1. After completing your form, sign and submit it by the deadline.
2. Your Project Lead reviews the form to ensure the activities and effort align with the grant.
3. If the Project Lead and Supervising Administrator are different people, the form is then routed to the Supervising Administrator for certification.
4. Once certified, the Project Lead files the original in the project's grant documentation.
5. A copy of the certified form is shared back with you for your records.

Competitive Grant Biannual Effort Certification: Guidance, Reminders, and Helpful Tips!

- The certification reflects actual work performed, not planned or budgeted effort.
- Complete the form after the work is completed (no estimates).
- Report your effort using broad categories, not every individual task.
- You do not need to provide a monthly or hourly breakdown of your work.
- Ensure your reported effort:
 - Matches your assignment.
 - Falls within the approved scope of work for the grant.

Multi-Funded Effort Report

For permanent employees (including non-exempt classified staff) who work part of their regular contract time assigned to a grant (i.e., you also complete other Palomar work or work on more than one grant)

Multi-Funded Effort Report

- This section provides an overview of the Multi-Funded Effort Report.
- In the next few slides, you will learn:
 - Who completes this form and when it is required
 - What to include on the form
 - An example of a completed form
 - What to do with your completed form
 - Helpful reminders to ensure your form is accurate and compliant

Multi-Funded Effort Report (continued)

The Multi-funded Effort Report is completed by permanent employees whose:

- Work is funded by more than one grant.

Example: A project coordinator whose position is split between two grants.

- Work is funded by a combination of grant and non-grant sources

Example: A faculty member who teaches partly under a grant and partly under general funds during their normal contract hours (reassigned time).

- Assignment includes a mix of paid and in-kind effort

Example: An employee who contributes some in-kind effort to the grant in addition to paid time.

Multi-Funded Effort Report (continued-2)

- This form is completed at the end of each month and includes documentation of your hours across all funding sources.
- When completing the form you will list:
 - Each funding source you worked on during the month
 - The associated activities performed for each funding source
 - The hours for each assignment, totaling 100% of your effort
- The next slide introduces the form and how to complete it.

Multi-Funded Effort Report Example

Employee Name: Test Someone

Position: Faculty 20% Reassign to Grant #1234123 (NSF ATE)

Department/Division: CTEE

Month: February

ID: 1231234

Activity Category	
A	Regular Contract Activities
B	Curriculum development
C	Community outreach and engagement
D	Project Lead grant management
E	
F	
G	
H	
I	

Instructions:

1. For each week, select the Project, identify the Activity, and document the number of hours worked.
2. Total hours must equal your total contracted hours. Round to the 1/2 hour.
3. Document Compensated Time Off with the number of hours for (H)oliday, (J)ury Duty, (V)acation, (S)ick Leave, (O)ther
4. At the end of the month, 'Save as PDF' and select sheet (Actual Size). Print, sign and date, and route to your supervisor.
5. Supervisor to sign and date. Original to remain with project files.

Grant List	Activity	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	
Regular Contract	A		6.0		2.0	4.0	4.0																	
NSF ATE 1234123	B		2.0		4.0		1.0																	
NSF ATE 1234123	C			8.0	2.0	4.0	1.0																	
NSF ATE 1234123	D						2.0																	

Effort Reconciliation

Program	% Time Worked	% Time Funded	On Track	
Regular Contract	40%	80%	-40%	Check
NSF ATE 1234123	60%	20%	40%	Check

Multi-Funded Effort Report Workflow

1. Sign your form once you've finished documenting your effort each month.
2. Your Project Lead reviews the form to ensure the activities and effort align with the grant.
3. If the Project Lead and Supervising Administrator are different people, the form is then routed to the Supervising Administrator for certification.
4. Once certified, the Project Lead files the original in the project's grant documentation.
5. A copy of the certified form is shared back with you for your records.

Multi-Funded Effort Report: Guidance, Reminders, and Helpful Tips!

- Complete the form monthly, after the month ends (no estimates or submission before the end of the month).
- Report effort using broad activity categories, not every individual task.
- List each funding source and activity separately.
- Ensure your reported effort:
 - Matches your assignments.
 - Falls within the approved scope of work for the grant.

Multi-Funded Effort Report: Guidance, Reminders, and Helpful Tips! (continued)

- Ensure your total effort adds up to 100% across all assignments.
- Remember, your non-grant funded work does not need a description. It is listed only so your total effort reaches 100%.

Time & Effort Reporting (TER) for Grant-Funded Hourly or Extra Work

Guidance and Form Completion

Introduction

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- Behind every grant, is the real work of faculty and staff.
- Time and Effort Reporting helps us document that work, meet our commitments to funders, and sustain the grant's funding.
- This guide provides support on how to complete **Time and Effort Reporting for personnel being paid with grant funds on an hourly basis.**

What is Time and Effort Reporting (TER)

- Time & Effort Reporting (TER) is how the College documents the actual work performed by employees whose compensation is paid, in whole or in part, with grant funds.
- Federal regulations¹ require this documentation for federally funded salaries. To create one clear and consistent standard, Palomar College applies TER to all competitive grant-funded employees, not just those paid with federal funds.

¹ Uniform Guidance, 2 CFR Part 200

Payroll Time and Effort Form

- In the next few slides, you will learn:
 - Who completes this form and when it is required
 - What to include on the form
 - Some examples of a completed forms
 - What to do with your completed form
 - Helpful reminders to ensure your form is accurate and compliant

Payroll Time and Effort Form (continued)

Employees working on a grant whose pay is based on the actual hours worked complete the monthly Payroll Time and Effort Form.

For example:

Adjuncts and Counselors hired specifically for grant-funded work (No base assignment - paid hourly for the grant)

- Paid via Notice of Hourly Employment (NOHE)
- Paid via stipends

Faculty performing grant work in addition to their base assignment (Extra service beyond their regular load)

- Non-instructional extra duty hours – Paid via Notice of Hourly Employment (NOHE)
- Stipend-based work outside the regular assignment

Payroll Time and Effort Form (continued -2)

Examples (continued)

Classified staff working additional grant-funded hours (Beyond their regular paid assignment)

- Overtime
- Part-time extra hours
- 10- or 11-month off-salary hours

Other hourly personnel

- Short-term hourly employees
- Student workers

Payroll Time and Effort Form (continued -3)

- This form is completed in accordance with payroll deadlines.
- It may replace certain timesheet documentation, as approved by Fiscal Services (check with your supervisor on this).
- A completed form includes the following:
 - Your actual hours worked on grant-funded assignments after the work is performed (no estimates or projections).
 - A brief description of the activities performed, sufficient to show alignment with approved grant activities.
 - Your signature confirming the information is accurate.

Payroll Time and Effort Form Example 1

CLEAR REPORT

Payroll Time and Effort Report *(Pilot V1.1 for Federal Project 1112XXX)*

Last Name: M'DEEG				First Name: ABCD				Employee ID: 1231234			
Position: Biology Professor				Department: Biology							
Pay Group: FAC OL (Full-Time Faculty Overload) ▼				Period Start Date: 01/01/26				Period End Date: 01/31/26			

Actg. String	Code (Ltr)	Acct (6 #s)	Dept. (6 #s)	Program (5 #s)	Project (7 #s)	Project Name	STM/STU Hrly Rate	Total Hours	Total Excess	Total Sick
1	K	123123	789789	98765	2345678	NSAF ATE Grant		17.00	0.00	0.00
2								0.00	0.00	0.00
3								0.00	0.00	0.00

Instruction: Send original to Payroll. Copies to (1) Employee; (2) Supervisor; (3) Grant Project Lead.

Pay Group	Hours Worked	Excess Hours	Sick Hours	Reporting Period	Report Due Date (Subject to change)	Preauthorization Document (Must be readily available for audit)
ADJ	✓		✓	21st – 20th	4th of each month	NOHE
CLS Extra Hours (EH)*		✓		16th – 15th	16th of each month	Prior written approval from Dean/VP
CLS Overtime (OT)**		✓		16th – 15th	16th of each month	Prior written approval from Dean/VP
FAC Overload (OL)		✓		1st – 31st	13th of each month	NOHE
STM	✓		✓	25th – 24th	25th of each month	None
STU	✓		✓	16th – 15th	16th of each month	None

*For part-time CLS, 10-mo., & 11-mo. employees to report hours in **excess** of scheduled hours, or hours worked during off-salary time.

For full-time CLS to report overtime and holiday pay hours in **excess of 8 hours per day or 40 hours per week.

Date	Actg. String	Hours Worked	Excess Hours	Sick Hours	Activity Description (Example: Reviewed applications to select eligible students)
1/5/26	1 ▼	2.00			Professional development - Led STEM workshop for MSE faculty
1/6/26	1 ▼	3.00			Met with 5 students participating in the CyberTech Career Bridge Program
1/14/26	1 ▼	5.00			Participated in the Advanced Manufacturing Career Exploration Event
1/15/26	1 ▼	5.00			Represented the program at the Palomar STEM Open House
1/28/26	1 ▼	2.00			Attended grant project management team meeting to discuss progress
	▼				

Payroll Time and Effort Form Example 2

CLEAR REPORT

Payroll Time and Effort Report *(Pilot V1.1 for Federal Project 1112XXX)*

Last Name: XYZA				First Name: ABCD				Employee ID: 1231234			
Position: TRIO Assistant				Department: Counseling Services							
Pay Group: STM (Short-Term Employee) ▼				Period Start Date: 01/01/26				Period End Date: 01/31/26			

Actg. String	Code (Ltr)	Acct. (6 #s)	Dept. (6 #s)	Program (5 #s)	Project (7 #s)	Project Name	STM/STU Hrly Rate	Total Hours	Total Excess	Total Sick
1	K	20000	789789	98765	1112xxx	TRIO Upward Bound - Escondido	\$ 17.00	8.00	0.00	2.00
2	K	20000	789789	45454	1113xxx	TRIO Upward Bound - Fallbrook	\$ 17.00	4.00	0.00	0.00
3								0.00	0.00	0.00

Instruction: Send original to Payroll. Copies to (1) Employee; (2) Supervisor; (3) Grant Project Lead.

Pay Group	Hours Worked	Excess Hours	Sick Hours	Reporting Period	Report Due Date (Subject to change)	Preauthorization Document (Must be readily available for audit)
ADJ	✓		✓	21st – 20th	4th of each month	NOHE
CLS Extra Hours (EH)*		✓		16th – 15th	16th of each month	Prior written approval from Dean/VP
CLS Overtime (OT)**		✓		16th – 15th	16th of each month	Prior written approval from Dean/VP
FAC Overload (OL)		✓		1st – 31st	13th of each month	NOHE
STM	✓		✓	25th – 24th	25th of each month	None
STU	✓		✓	16th – 15th	16th of each month	None

*For part-time CLS, 10-mo., & 11-mo. employees to report hours in **excess** of scheduled hours, or hours worked during off-salary time.

For full-time CLS to report overtime and holiday pay hours in **excess of 8 hours per day or 40 hours per week.

Date	Actg. String	Hours Worked	Excess Hours	Sick Hours	Activity Description (Example: Reviewed applications to select eligible students)
1/5/26	2	2.00			Staffed the outreach table at the Student Welcome Center
1/6/26	1	3.00			Assisted with the EUHS outreach visit (greeting attendees/distributing flyers)
1/14/26	1	3.00			Set up for the Early College Access Night
1/15/26	1	2.00			Date entry for program participants at the Early College Access Night
1/28/26	2	2.00			Helped prepare content for social media outreach in Fallbrook schools
1/29/26	1			2.00	Scheduled work day

Payroll Time and Effort Form Workflow

1. After completing your form, sign and submit it to your Project Lead.
2. Your Project Lead reviews the form to ensure the activities and effort align with the grant.
3. If the Project Lead and Supervising Administrator are different people, the form is then routed to the Supervising Administrator for certification.
4. Once certified, the document is sent to Payroll for processing.
5. A copy of the certified form is shared back with you for your records and a copy kept in the project's files.

Payroll Time and Effort: Guidance, Reminders, and Helpful Tips

- Make sure you report actual hours worked and not estimated hours.
- Reporting hours should not exceed the approved NOHE, stipend, or assignment time.
- Use good descriptors of the work performed, but do not over-describe or provide task-by-task details.
- Do not report activities that fall outside the approved scope of work.