

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%.