



Finance Division  
Strategic Planning for Student Achievement

1. Employee visits the link below to access and **download** the Time and Effort Report from the Strategic Planning for Student Achievement webpage to their computer:  
[https://www.sandiegounified.org/departments/strategic\\_planning\\_for\\_student\\_achievement/time\\_and\\_effort\\_reporting\\_ter](https://www.sandiegounified.org/departments/strategic_planning_for_student_achievement/time_and_effort_reporting_ter)
2. Locate the downloaded document and open it in Excel. **Do not convert to Google Sheets to prevent losing embedded features.**
3. Select the school year from the dropdown menu in the “School Yr” section.

1	<b>San Diego Unified School District</b>	
2	TIME AND EFFORT REPORT	
3	Time Accounting Report for Multiple Cost Objective Employees	
4		
5	School Yr:	SY_2018_2019
6	Month:	SY_2019_2020
7	FTE:	SY_2020_2021
8	Programs:	SY_2021_2022 SY_2022_2023

4. Working your way across the top row, next enter your full name in the “Name” section.
5. Then, enter your title in the “Title” section.
6. Finally, select the appropriate department from the dropdown menu in the “Department” section.

1	<b>San Diego Unified School District</b>		3	4	5	6
2	TIME AND EFFORT REPORT					
3	Time Accounting Report for Multiple Cost Objective Employees					
4						
5	School Yr:	SY_2019_2020	Name:	Marilyn Monroe	Title:	Resource Teacher
6	Month:					Dept:
7	FTE:	1.0000	Mo. Work Days:			Controller
8	Programs:		Work Day:	8 Hours/Day		Counseling and Guidance
9	Activity Description(s):					Instructional Services / Leadership and Learning
10						Controller Services
11						Data Analysis & Reporting
12						Distribution Services
13						Drug/Alcohol Prevention
14						Early Childhood Education Program
15						

7. Back on the left side of the sheet, start in the next row and select the month from the dropdown menu in the “Month” section. This will automatically populate the number of workdays and the days of the month. Note that weekends and all Mandated/Declared Holidays are indicated in yellow and will not count towards the number of workdays.

1	<b>San Diego Unified School District</b>			
2	TIME AND EFFORT REPORT			
3	Time Accounting Report for Multiple Cost Objective Employees			
4				
5	School Yr:	SY_2019_2020	Name:	Marilyn Monroe
6	Month:	July 2019	Mo. Work Days:	22
7	FTE:	August 2019	Work Day:	8 Hours/Day
8	Programs:	September 2019	Activity Description(s):	Mon Tue Wed Thu Fri Sat Sun Mon



8. Select your FTE from the dropdown menu in the “FTE” section. This will automatically populate the number of hours an employee is paid to work in a day.

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2	TIME AND EFFORT REPORT			
3	Time Accounting Report for Multiple Cost Objective Employees			<b>8</b>
4				
5	School Yr:	SY_2019_2020		
6	Month:	August 2019	Mo. Work Days:	22
7	FTE:	1.0000	Work Day:	8 Hours/Day
8	Programs:	1.0000	Activity Description(s):	
9		0.9375		
10		0.8750		
		0.8125		
		0.8000		

9. Using supporting documents (Outlook Calendar, GoogleDocs, etc.), complete the report for each activity within the designated month by selecting an activity from the dropdown menu for each day and hour of the month the work was performed.
  - a. Select the federal Program (Title I, II or III) from which you are funded and for which the activity is allowable in the “Programs” section;
  - b. Select the description of the activity you conducted in the next column;
  - c. For the date on which the activity was conducted, enter the number of hours spent on the activity (report to the nearest quarter hour any time less than an hour).

1	<b>San Diego Unified School District</b>			
2	TIME AND EFFORT REPORT			
3	Time Accounting Report for Multiple Cost Objective Employees			
4				
5	School Yr:	SY_2019_2020	Name:	Marilyn
6	Month:	August 2019	Mo. Work Days:	22
7	FTE:	1.0000	Work Day:	8 Hours/Day
8	Programs:	Activity Description(s):		1 2 3 4 5 6
9	Title_I	Planned Professional Development		4
10	Title_I	Delivered Professional Development		4

10. As you work your way through the report, keep in mind you are **ONLY** reporting time spent on federally funded cost objectives and not work that you do that is funded by another source and not allowable under federal funding guidelines. In the screen capture from Step 9, Marilyn is showing that of her 8-hour workday on Thursday August 1 she did no work that was attributed to Title I funding. On Friday she did 4 hours of work that can be attributed to Title I funding and the other 4 hours of work was not allowable under Title I funding and/or part of her district mandated job such as attending a staff meeting and preparing a report about state testing.



- Any **non-work days** such as personal days, sick leave, and holidays will also need to be added to this reporting calendar. There is a “Program” for Non-Working and a variety of options to choose from under “Activity Description(s)”. Check to ensure the hours for this time are entered accurately.

<b>San Diego Unified School District</b>															
TIME AND EFFORT REPORT															
Time Accounting Report for Multiple Cost Objective Employees															
School Yr:	SY_2019_2020					Name:		Marilyn Monr							
Month:	August 2019	Mo. Work Days:		22											
FTE:	1.0000	Work Day:		8 Hours/Day											
Programs:	Activity Description(s):							1	2	3	4	5	6	7	8
							Thu	Fri	Sat	Sun	Mon	Tue	Wed	Th	
Title_I	Planned Professional Development								4			4			
Title_I	Delivered Professional Development												4		
Non_Working	Sick Day													8	

- When you have finished entering all of your federally funded hours, you will see your totals in the bottom right corner of the sheet. Note that ANY hours not reported on this sheet the program assumes to be part of your duties that are paid for through General Funds. Your percentage should always be automatically calculated to 100%. Your percentages for General and Program funding should match the allocation of your position. In this example, Marilyn is funded 50% from Title I and 50% from General funds so her hours align with her funding allocation.

Program Name	Hours Worked	%
General	89.00	50.57%
Title I	87.00	49.43%
Title II	0.00	0.00%
Title III	0.00	0.00%
<b>TOTAL</b>	<b>176.00</b>	<b>100.00%</b>

- When finished, print the Time and Effort Report and review it to ensure that all activities reported are accurate and an appropriate distribution of funding is indicated.
- Sign and date the form to indicate accuracy.
- Make a copy of the form plus any supporting documentation and keep in your records for seven (7) years;
- Submit signed original to supervisor for review, signature, and submission to Strategic Planning for Student Achievement. Provide your supporting documentation to your supervisor as needed. This documentation does not need to be sent to Strategic Planning for Student Achievement.

**For assistance or further information, please contact us at (619) 725-5605**