



Instructions for completing the Form G-2, Application for Transfer of Vacation and Sick Leave Credit or Payment in Lieu of Vacation

Please Note:

- Complete Form 7 before preparing the Form G-2.
- Sections A and B must be completed.
- Notate employee's initial service date on top right corner if different from UH appointment date (e.g., Employee's initial service date - _____).
- Print on **Blue** paper only

DEPARTMENT: Enter University of Hawai'i, Division/College/School, and Branch/Program.

POSITION NUMBER: Enter the position number. If employee is in more than one position, complete separate G-2 forms for each position.

BU: Enter the bargaining unit.

PAYROLL NUMBER: Enter the payroll number.

EMPLOYEE S.S. NO.: Enter the last 4-digits of the employee's social security number.

EMPLOYEE NAME (LAST, FIRST, MIDDLE INITIAL): Enter the employee's last name, first name, and middle initial.

EFFECTIVE DATE OF ACTION: Enter the close of business (COB) date.

Section A

REPORTED BY: Check HOURS

1 ACCUMULATIVE BALANCE REMAINING AS OF DECEMBER 31, 20__: Enter the prior year (e.g., EFFECTIVE DATE OF ACTION field is 6-30-2007 – enter the year 2006).

- Enter the accumulated vacation and sick leave credit hours as of December 31 of the prior year. (Hours to two decimal places)

2 LEAVE CREDITS EARNED FROM: Enter the current year (e.g., EFFECTIVE DATE OF ACTION field is 6-30-2007 – enter the year 2007).

- Enter the accumulated vacation and sick leave credit hours earned in the current year, up to the EFFECTIVE DATE OF ACTION. (Hours to two decimal places)

3 LEAVE TAKEN FROM: The current year is automatically filled.

- Enter the vacation and sick leave credit hours taken in the current year, up to the EFFECTIVE DATE OF ACTION.

4 VACATION LEAVE CREDITS FORFEITED: Enter any vacation leave credit hours that are forfeited.

5 BALANCE REMAINING AT EFFECTIVE DATE OF ACTION: The balance is automatically calculated.

6 MAXIMUM ACCUMULATION ALLOWED AT: Complete if applicable, and complete Section C.

- Enter the current year
- Enter 720 leave credit hours for separating/terminating employees.
- Enter 888 leave credit hours (720 + 168) for retiring employees.

7 EARNED VACATION IN EXCESS OF MAXIMUM ALLOWED: The amount is automatically calculated.

SIGNATURE OF APPLICANT OR AUTHORIZED AGENT. The employee's signature is required. However, if the employee is not available to sign, the program may type "Unavailable for signature."

AUDITED BY: and DATE: Individual responsible for auditing leave credits shall sign and date where indicated.

Section B

Check the applicable box(es) for Payment and/or Transfer.

PAYMENT FOR VACATION LEAVE CREDITS EARNED AT TERMINATION OF SERVICE: Applicable to employee retiring/terminating from State service with normal payout; or employee transferring from a vacation-accrual position to a non-vacation accrual position.

PAYMENT FOR VACATION LEAVE CREDITS EARNED AT TERMINATION OF SERVICE OF ___ HOURS AND TRANSFER THE REMAINING VACATION LEAVE CREDITS BALANCE OF ___ HOURS: Applicable to employees of Bargaining Unit 01, 02, 03, 04, 09, or 10 transferring to another jurisdiction (Judiciary, Hawai'i Health Systems and the county). Employee may request a partial payout and transfer the remaining balance of vacation leave credits to the jurisdiction transferring to. Also, complete the following box "TRANSFER OF VACATION AND SICK LEAVE CREDITS AND/OR THE AMOUNT(S) OF VACATION LEAVE CREDITS TO ___ FROM ___ TO ___:" (DOE and UH are considered part of the State Executive Branch)

TRANSFER OF VACATION AND SICK LEAVE CREDITS AND/OR THE AMOUNT(S) OF VACATION LEAVE CREDITS TO _____ FROM _____ TO _____: Applicable to employee transferring all earned vacation and/or sick leave credits to another agency or jurisdiction. **Note:** For employees with sick leave credits only, line out “~~VACATION AND~~”, “~~AND/OR THE AMOUNT(S) OF VACATION LEAVE CREDITS~~” and “~~FROM _____ TO _____~~.” Enter the Department or County that is receiving the sick leave credits.

EMPLOYEE PARTICIPATING IN THE PSVDP PROGRAM – TARGET VACATION PAYOUT DATE: _____: Applicable to employee participating in the Post- Separation Vacation Pay Deferral (PSVDP) program. Enter the vacation payout date.

AUDITED FOR RECORD PURPOSES ONLY: May be applicable to employee transferring from one college/school/unit to another within the University of Hawai'i system (Optional); and Temporary Appointment Outside the List (TAOL) employee who forfeits any unused vacation leave credits at the end of the appointment. The G-2 and Form 7 are completed for record purposes only.

THE DEPARTMENT HEAD'S AND EMPLOYEE'S SIGNATURE, AND THE DATE SIGNED, ARE REQUIRED. However, if the employee is not available to sign, the program may type “Unavailable for Signature.”

Section C

Complete only if applicable, requesting payment for vacation in excess of the maximum.

PAYMENT FOR VACATION IN EXCESS OF MAXIMUM: check box

Supporting document:

- Memo from the appointing authority denying the request for vacation leave

THE DEPARTMENT HEAD'S AND EMPLOYEE'S SIGNATURE, AND THE DATE SIGNED, ARE REQUIRED. However, if the employee is not available to sign, the program may type “Unavailable for Signature.”

Processing the G-2 Form:

- Check the form for completeness and accuracy.
- Print original on **blue** paper
 - Computer task bar / file / print
- Obtain required signatures. If the employee is not available to sign, the program may type "Unavailable for Signature".
- Print additional copies on **blue** paper
- Check the appropriate box on the bottom of the G-2 Form prior to distribution

Distribution of the G-2 Form

Lump Sum Payment of Vacation Credits

1. PAYROLL/FISCAL OFFICE (Original) – Payroll Office's copy

2. OFFICIAL PERSONNEL FILE – College/School/Unit copy
 - For Civil Service and Executive employees, please forward to OHR.
 - Attach supporting documents: Form 7 of current year and Leave Records for the past 4 years
3. ERS (FOR RETIREMENTS AND TERMINATIONS ONLY) – Send to Employees' Retirement System
4. EMPLOYEE – Employee's copy

Transfer from a Vacation-Accrual Position to a Non-Vacation Accrual Position (e.g. Executive to instructional faculty)

1. PAYROLL/FISCAL OFFICE (Original) – Losing College/School/Unit fiscal office
 - Attach supporting documents (as determined by fiscal office).
2. GAINING DEPARTMENT – College/School/Unit gaining employee
3. OFFICIAL PERSONNEL FILE – College/School/Unit copy
 - For Civil Service and Executive employees, please forward to OHR.
 - Attach supporting documents: Form 7 of current year and Leave Records for the past 4 years
4. EMPLOYEE – Employee's copy

Transfer to another Jurisdiction (Judiciary, Hawai'i Health System or counties)

1. PAYROLL/FISCAL OFFICE (Original) – Losing College/School/Unit fiscal office
 - Attach supporting documents (as determined by fiscal office).
2. GAINING DEPARTMENT – College/School/Unit gaining employee
3. OFFICIAL PERSONNEL FILE – College/School/Unit copy
 - For Civil Service and Executive employees, please forward to OHR.
 - Attach supporting documents: Form 7 of current year and Leave Records for the past 4 years
4. EMPLOYEE – Employee's copy

Transfer within the University System – Journal Voucher generated due to different funding source

1. PAYROLL/FISCAL OFFICE (Original) – Losing College/School/Unit fiscal office
 - Attach supporting documents (as determined by fiscal office).
2. LOSING DEPARTMENT – College/School/Unit losing employee
3. GAINING DEPARTMENT – College/School/Unit gaining employee
4. OFFICIAL PERSONNEL FILE – College/School/Unit copy
 - For Civil Service and Executive employees, please forward to OHR.
 - Attach supporting documents: Form 7 of current year and Leave Records for the past 4 years
5. EMPLOYEE – Employee's copy

Transfer to another State Agency (same funding source)

1. LOSING DEPARTMENT – Agency losing employee
2. GAINING DEPARTMENT – Agency gaining employee

3. OFFICIAL PERSONNEL FILE (Original) - College/School/Unit losing employee
 - For Civil Service and Executive employees, please forward to OHR.
 - Attach supporting documents: Form 7 of current year and Leave Records for the past 4 years
4. EMPLOYEE – Employee’s copy

Transfer to another State Agency (different funding source)

1. PAYROLL/FISCAL OFFICE (Original) – Losing College/School/Unit fiscal office
 - Attach supporting documents (as determined by fiscal office)
2. LOSING DEPARTMENT – Agency losing employee
3. GAINING DEPARTMENT – Agency gaining employee
4. OFFICIAL PERSONNEL FILE - College/School/Unit losing employee
 - For Civil Service and Executive employees, please forward to OHR.
 - Attach supporting documents: Form 7 of current year and Leave Records for the past 4 years
5. EMPLOYEE – Employee’s copy

Sick Leave Only

1. OFFICIAL PERSONNEL FILE (Original) – College/School/Unit copy
 - For Civil Service and Executive employees, please forward to OHR.
 - Attach supporting documents: Form 7 of current year and Leave Records for the past 4 years
2. ERS (FOR RETIREMENTS AND TERMINATIONS ONLY) – Send to Employees’ Retirement System (ERS)
3. EMPLOYEE – Employee’s copy

For Auditing Purposes Only

1. GAINING DEPARTMENT – Agency gaining employee
2. OFFICIAL PERSONNEL FILE (Original) – College/School/Unit copy
 - For Civil Service and Executive employees, please forward to the Office of Human Resources (OHR).
 - Attach supporting document: Form 7 of current year and Leave Records for the past 4 years
3. EMPLOYEE – Employee’s copy

Payment for Vacation in excess of Maximum

1. PAYROLL/FISCAL OFFICE (Original) – Payroll Office’s copy
2. OFFICIAL PERSONNEL FILE – College/School/Unit copy
 - For Civil Service and Executive employees, please forward to OHR.
 - Attach supporting documents: Memo denying the vacation request, Form 7 of current year
3. EMPLOYEE – Employee’s copy
 - Attach supporting documents: Memo denying the vacation request and Form 7 of current year

Form G-2 Distribution

| | Payroll Office | Fiscal Office | Losing Department | Gaining Department | Official Personnel File* | ERS | Employee |
|--|-----------------------|-----------------------|--------------------------|---------------------------|---------------------------------|----------------|-----------------|
| Lump sum payment of vacation (i.e., termination, separation) | original | | | | X ¹ | X | X |
| Transfer from a vacation-accrual position to a non-vacation accrual position (e.g., Executive to instructional faculty) | original | | | X | X ¹ | | X |
| Transfer to another Jurisdiction ² | | original ³ | | X | X ¹ | | X |
| Transfer within UH system; different funding source (Civil Service, Exec, APT and Faculty) | | original ³ | X | X | X ¹ | | X |
| Transfer to another State agency; same funding source | | | X | X | original ¹ | | X |
| Transfer to another State agency; different funding source | | original ³ | X | X | X ¹ | | X |
| Sick leave only (e.g., instructional faculty, TAOL) | | | | | original ¹ | X ⁴ | X |
| Auditing purposes | | | | X | original ¹ | | X |
| Payment for vacation in excess of maximum | original | | | | X ⁵ | | X |
| | | | | | | | |
| | | | | | | | |
| KEY: | | | | | | | |
| *OHR maintains official files for civil service and executive employees | | | | | | | |
| 1 - Attach Form 7 & leave records for past 4 years | | | | | | | |
| 2 - Judiciary, Hawai'i Health System and Counties | | | | | | | |
| 3 - Attach supporting documents (as determined by fiscal office); Fiscal Office prepares journal voucher or authorization for payment (AFP) for vacation pay out to gaining dept | | | | | | | |
| 4 - Separation from service only | | | | | | | |
| 5 - Attach memo denying vacation and Form 7 | | | | | | | |