

University of Hawai'i

Instructions for Completing the Early Payout of Accumulated Vacation Leave Credits, Form G-2A

This form should only be used for those employees requesting the early payout of the employee's accumulated vacation leave credits for deferral to the State of Hawai'i Deferred Compensation Plan or 403(b) Tax Deferred Annuity Program. The early vacation payout program is restricted to employees planning to retire.

Use this form to process (1) the initial payout for vacation leave credits earned prior to the employee's termination date (complete Section A only); and (2) the final payout for the remaining vacation leave credits earned at the employee's termination date (complete Section B). Completion of Section B may be done on a copy of the initial payout form. Refer to the current Early Vacation Payout Schedule for form filing/submittal dates.

Begin by reviewing and performing an audit of the employee's leave records from the last five (5) years, including the current year's record. Complete the top portion of the Form G-2A with the employee information. NOTE: The effective date of separation must coincide with the COB date on the PNF.

For Section A — Initial Payment for Vacation Leave Credits Earned Prior to Termination of Service

1. Leave Balances Remaining as of Date – Use the leave balances as of December 31 of the prior calendar year.
2. Leave Credits Earned from January 1 of the current year - Enter the date in column C "Vacation Leave Balance as of Date – For Payout" of the Early Vacation Payout (EVP) Schedule based on the employee's planned retirement date, and calculate the leave credits earned/accrued from January 1st through the date in column C.
3. Leave Credits Taken from January 1 of the current year - Enter the leave credits taken from January 1st through the date in column C "Vacation Leave Balance as of Date – For Payout" of the Early Vacation Payout (EVP) Schedule based on the employee's planned retirement date (the month and day will be automatically populated).
4. Vacation Leave Credits Held in Reserve (at least 10 vacation days) - Enter at least 80 hours or its equivalence to 10 vacation days that will be withheld from the early vacation payout.
5. Balance Remaining At Effective Date of Action (Early Vacation Payout) - Balance will be automatically calculated.
6. Pay Date of Early Vacation Payout – Refer to the column H of the Early Vacation Payout Schedule and enter the target pay date of the employee's early vacation payout according to the employee's planned retirement date.
7. Print the Form G-2A and obtain required signatures.
8. The individual auditing the leave credits must sign and date the form.

9. The employee's signature is required. No substitute signatures will be accepted.
10. The Department Head or Designee must sign and date the form.
11. Make 4 copies of the Form G-2A and check the appropriate box on the bottom of the G-2A form for distribution:
 - a. Original Copy of the Form G-2A is sent to the Payroll Office for the initial vacation balance payout;
 - b. Copy #1 of the Form G-2A is to be filed in the employee's personnel folder;
 - c. Copy #2 of the Form G-2A is given to the employee;
 - d. Copy #3 of the Form G-2A is sent to the Employees' Retirement System; and
 - e. Copy #4 of the Form G-2A is kept for future use if manually completing Section B when the employee terminates.

Section B — Final Payment for Vacation Leave Credits Earned at Termination of Service

Before completing Section B of the Form G-2A, conduct a **final audit** of the employees leave record for the current year.

In completing Section B, you may either re-enter Section A of the form-fillable Form G-2A and then complete Section B, or you may complete Section B on the copy of the initial Form G-2A.

Using the form-fillable Form G2-A to complete Section B:

1. Re-enter employee information and Section A before entering information in Section B.
2. Leave Balance Remaining As of Date - The date and vacation and sick leave balances will be automatically populated.
3. Leave Credits Earned from Date - The from date will be automatically populated. Enter the to date which is the COB date. Calculate and enter the leave credits earned/accrued to the separation date.
4. Leave Credits Taken from Date - The from and to dates will be automatically populated. Calculate and enter the leave credits taken/used to the separation date.
5. Balance Remaining at Effective Date at Action - The remaining vacation and sick leave hours will be automatically calculated.
6. Pay Date of Final Vacation Payout – If the employee is participating in the Post-Separation Vacation Pay Deferral Program, enter the pay date of the final vacation payout in accordance with the applicable Schedule for Post-Separation Vacation Pay Deferrals. Otherwise, the date may be left blank.
7. If the employee is not available to sign, the program may type "Unavailable for Signature" and date the form.
8. Print the G-2A and obtain required signatures.
9. The individual auditing the leave credits must sign and date form.

10. The Department Head or Designee must sign and date the form.
11. Make 3 copies of the Form G2A and check the appropriate box on the bottom of the G-2A form for distribution:
 - a. Original Copy of the Form G-2A is sent to the Payroll Office;
 - b. Copy #1 of the Form G 2A is to be filed in the employee's personnel folder;
 - c. Copy #2 of the Form G 2A is given or sent to the employee; and
 - d. Copy #3 of the Form G-2A is sent to the Employees' Retirement System.

Using the copy of the initial Form G2-A to complete Section B:

1. Leave Balance Remaining As of Date - The date and vacation and sick leave balances have been populated.
2. Leave Credits Earned from Date - The from date has been populated. Enter the to date which is the COB date. Calculate and enter the leave credits earned/accrued to the separation date.
3. Leave Credits Taken from Date - The from date has been populated. Enter the to date which is the COB date. Calculate and enter the leave credits taken/used to separation date.
4. Balance Remaining at Effective Date at Action - Calculate and enter the remaining vacation and sick leave hours.
5. Pay Date of Final Vacation Payout – If the employee is participating in the Post-Separation Vacation Pay Deferral Program, enter the pay date of the final vacation payout in accordance with the applicable Schedule for Post-Separation Vacation Pay Deferrals. Otherwise, the date may be left blank.
6. If the employee is not available to sign, the program may type "Unavailable for Signature" and date the form.
7. Print the G-2A and obtain required signatures.
8. The individual auditing the leave credits must sign and date form.
9. The Department Head or Designee must sign and date the form.
10. Make 3 copies of the Form G2A and check the appropriate box on the bottom of the G-2A form for distribution:
 - a. Original Copy of the Form G-2A is sent to the Payroll Office;
 - b. Copy #1 of the Form G 2A is to be filed in the employee's personnel folder;
 - c. Copy #2 of the Form G 2A is given or sent to the employee; and
 - d. Copy #3 of the Form G-2A is sent to the Employees' Retirement System.