



Payroll Services  
Year-End Vacation Carry Forward Request

**Eligibility**

Under the provisions of the collective bargaining agreements and the Management Personnel Plan, an employee **may** be permitted to carry forward more than the allowable vacation credits when the employee was prevented from using enough vacation to reduce the credits because the employee:

- Was required to work as a result of fire, flood, or other extreme emergency; or
- Was assigned work of priority or critical nature over an extended period of time; or
- Was absent on full salary for compensable injury; or
- Was prevented from using vacation previously scheduled to be taken in December due to being on paid sick leave.

**Instructions**

- **Employee:** Complete Section I, sign, date, and submit the request form to your Manager or Chair.
- **Manager/Chair:** Complete Section II. If you concur with this request, sign, date, and forward it to the appropriate Vice President. If you do not concur with this request, return the form to the Employee and retain a copy for your records.
- **Vice President:** Complete Section III. If the request is approved, sign, date, and forward it to Payroll Services by January 31<sup>st</sup>. If not approved, return this form to the Employee with a copy to the Employee's Manager/Chair and retain a copy for your records.

**Completed forms must be submitted to Payroll Services by January 31<sup>st</sup>**

*Please note: Vacation hours over the maximum are automatically deducted when Absence Management is processed for the month of December (on or around January 10<sup>th</sup>). Carry-forward adjustments will be reflected when Absence Management has been processed for January (on or around February 10<sup>th</sup>).*

**SECTION I - EMPLOYEE**

Name: \_\_\_\_\_ Empl ID #: \_\_\_\_\_  
Department: \_\_\_\_\_ Amount of vacation hours to carry forward: \_\_\_\_\_

REASON FOR REQUEST: \_\_\_\_\_

PLAN FOR USING EXCESS HOURS: \_\_\_\_\_

I understand that, if approved, the carry-forward hours must be used within the following timeframes:

- **Non-management employee:** Within one (1) year from January 1st (e.g., excess vacation credits on January 1st, must be used by December 31<sup>st</sup>). (Education Code, Title 5 42909)
- **Management employee:** Within the first quarter of the next calendar year (e.g., excess vacation credits on January 1st, must be used by March 31<sup>st</sup>). (Education Code, Title 5 42726)

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

**SECTION II – MANAGER/DEPARTMENT CHAIR**

Concur with Request: ☐ Yes ☐ No

\_\_\_\_\_  
Manager/Chair Name

\_\_\_\_\_  
Manager/Chair Signature

\_\_\_\_\_  
Date

**SECTION III – VICE PRESIDENT**

Request Approved: ☐ Yes ☐ No

\_\_\_\_\_  
Vice President Name

\_\_\_\_\_  
Vice President Signature

\_\_\_\_\_  
Date

**FOR PAYROLL SERVICES USE:**

Pay Tech: \_\_\_\_\_

Date Received: \_\_\_\_\_

Calendar Group: \_\_\_\_\_