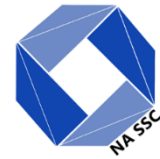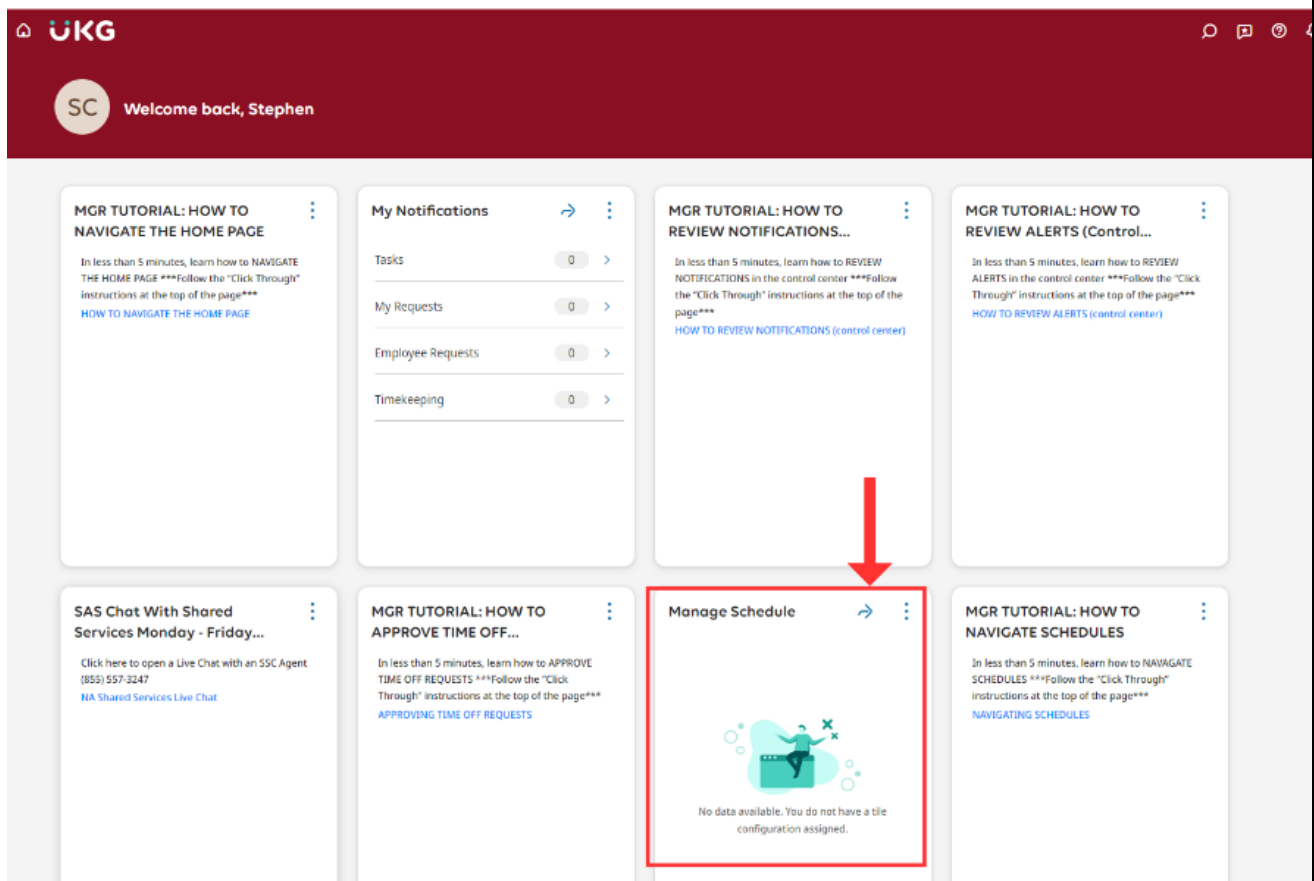# How to Apply PTO/Adjust PTO on Behalf of an Employee

Reliable – Personal – Patient
Respectful – Empowering – Responsive

Tools/Systems	UKG Dimensions
Notes:	Please use the following guide to assist you with how to apply PTO or adjust PTO on behalf of an Employee. (This includes bereavement, jury duty, LOA, etc.)

1. Navigate to the homepage of Dimensions
   a. Select the "Manage Schedule" tile by clicking the arrow

2. You will now be viewing the Schedule Planner
    a. The Schedule Planner will list all of your employees
    b. Here you can change your date range

    c. You can select a preset option, or select your own date range

 OR

3. Locate the employee you would like to apply PTO too and right-click on the desired schedule
   a. EX. Robertson Jr., Jessie for 03/28

4. Select "Enter Time Off"

5. A sidebar will populate to the right
   a. Select the desired Type of Time Off and click "Apply"

Enter Time Off   ✕

Assign To

Employee Name

Robertson Jr., Jessie ▾

Job
Job
.../C3800012/Job   ⓘ

Type of Time Off   ☑ Auto Approve

C380 ACL REQUEST

C380 SARC REQUEST

SAS SARC PTO Cascade

C380 SAS REQUEST

Apply

6. Confirm the desired date and select desired bank

Enter Time Off   ☒

C380 SARC REQUEST

==Dates==

📅   3/28/2024

Duration

Full

Hours

Half

==Deduct from==

SARC PTO

SARC BEREAVEMENT

SARC FLOATING HOLIDAY

SARC JURY DUTY

SARC SICK

SARC VOLUNTEER TIME

SARC VOTING

7. Select Review

Enter Time Off   ✕

C380 SARC REQUEST

Dates

📅 3/28/2024

Duration

Full

Hours

Half

Deduct from

SARC PTO

SARC BEREAVEMENT

SARC FLOATING HOLIDAY

SARC JURY DUTY

SARC SICK

SARC VOLUNTEER TIME

SARC VOTING

Review

8. Input desired comments and select Submit

Enter Time Off ×
C380 SARC REQUEST

SARC PTO (Full)
🖉 Thursday 3/28/2024 ⊖

Comments [0]
⊖ [Select a Comment ▼]

Type a note (optional).

Submit

9. The PTO applied will automatically be approved and applied to the employee's timecard

How to Adjust PTO on Behalf of an Employee

1. Navigate to the homepage of Dimensions
   a. Select the "Manage Schedule" tile by clicking the arrow

2. You will now be viewing the Schedule Planner
   a. The Schedule Planner will list all of your employees
   b. Here you can change your date range

   c. You can select a preset option, or select your own date range

Timeframe
Previous Schedule Period
Current Schedule Period
Next Schedule Period
Next Schedule Period + 1
Next Schedule Period + 2
Today
Select Range

OR

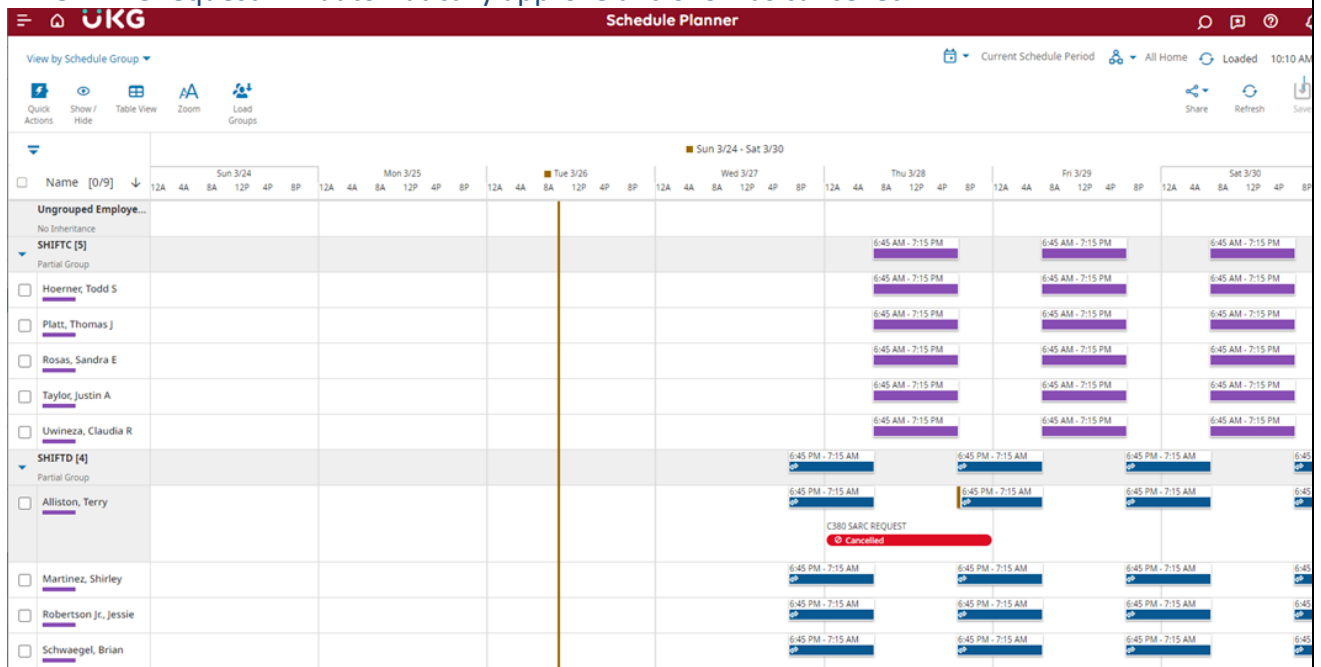| Timeframe |
| --- |
| Previous Schedule Period |
| Current Schedule Period |
| Next Schedule Period |
| Next Schedule Period + 1 |
| Next Schedule Period + 2 |
| Today |
| Select Range |

3. Locate the employee you would like to adjust PTO to and right-click on the desired PTO request

    a. EX. Robertson Jr., Jessie for 03/28
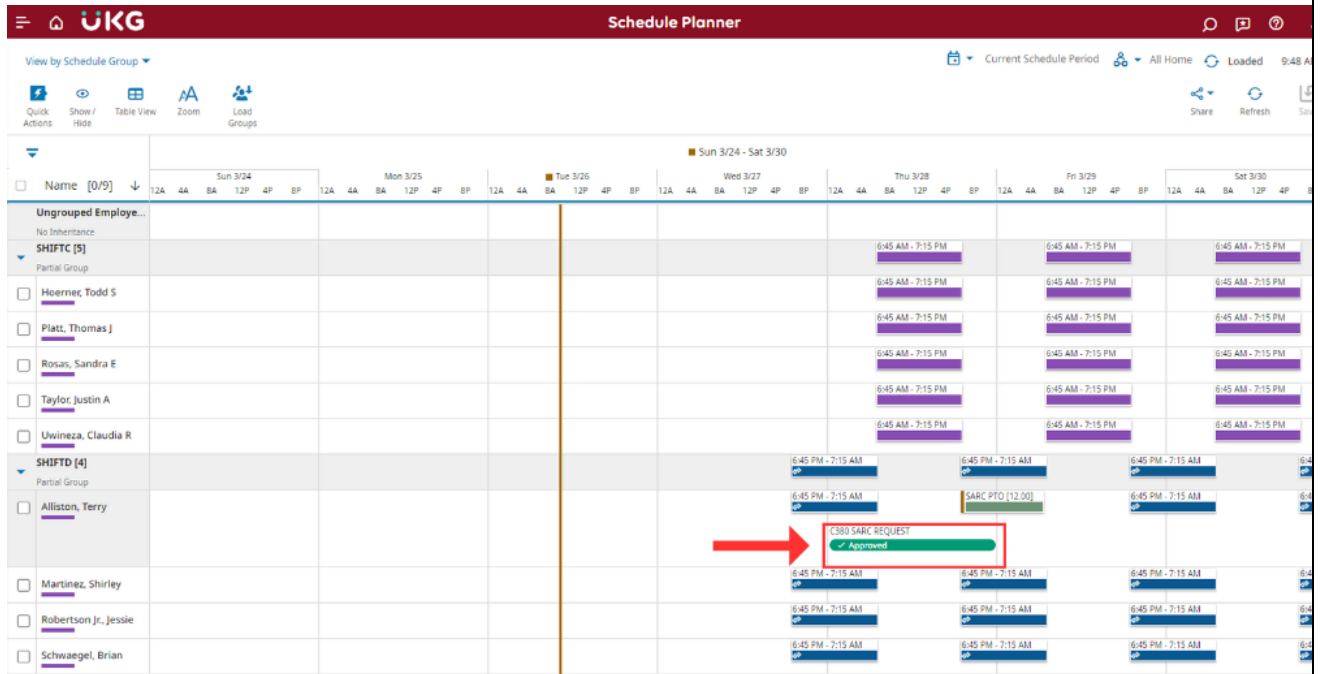
4. Select Cancel
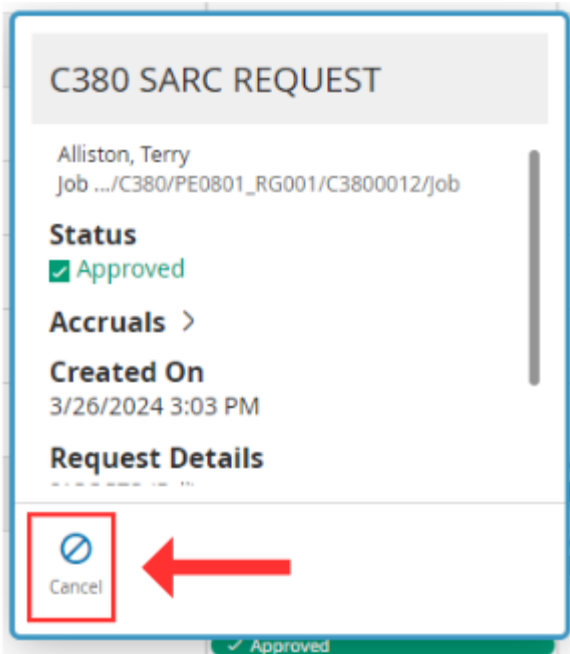
5. The request will automatically approve and show as cancelled

6. Follow steps from How to Apply PTO on behalf of an Employee and make the desired changes.