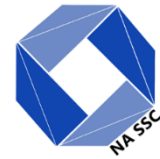


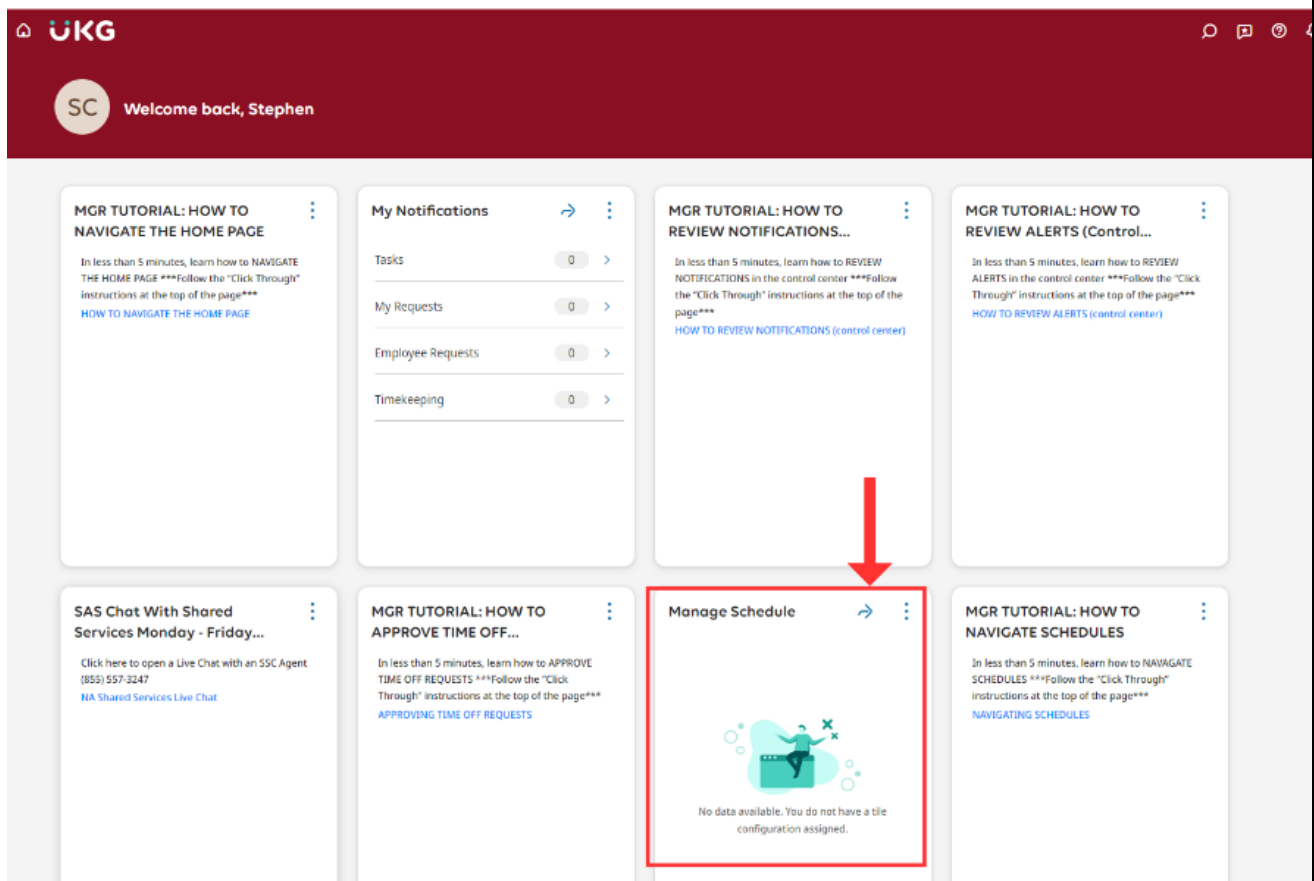
How to Apply PTO/Adjust PTO on Behalf of an Employee



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

The screenshot shows the UKG Schedule Planner interface. At the top, there's a navigation bar with the UKG logo and the title 'Schedule Planner'. Below this, there's a 'View by Schedule Group' dropdown and a date range selector. A red arrow points to the date range selector, which currently shows 'Yesterday Plus 6 Days'. The main area displays a grid of employee schedules for the week of March 25th to 31st. Employees are listed on the left, and their shift times are shown in the grid cells.

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

The image shows two side-by-side screenshots of the 'Timeframe' dropdown menu in the UKG Schedule Planner. The left screenshot shows the menu with options: 'Previous Schedule Period', 'Current Schedule Period', 'Next Schedule Period', 'Next Schedule Period + 1', 'Next Schedule Period + 2', 'Today', 'Yesterday', and 'Select Range'. The right screenshot shows the same menu, but with a red arrow pointing to the 'Select Range' option at the bottom.

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

UKG Schedule Planner

View by Schedule Group

Quick Actions Show / Hide Table View Zoom Load Groups

Current Schedule Period All Home Loaded

Share Refresh

Unassigned Employee...

SHIFTC [5]

Partial Group

Hoerner, Todd S

Platt, Thomas J

Rosari, Sandra E

Taylor, Justin A

Uwinea, Claudia R

SHIFTD [4]

Partial Group

Allison, Terry

Martinez, Shirley

Robertson Jr., Jessie

Schwaegel, Brian

6:45 PM - 7:15 AM [12.50] Robertson Jr., Jessie

6:45 PM 7:15 AM

1 6:45 PM - 7:15 AM [12.50] Samsung/C380/PE0801_RG001/C3800012/Job SAS CWW D Long Week

Edit Add Paycode Assign Breaks Enter Time Off Unassign Delete Reinherit Lock More Actions

4. Select "Enter Time Off"

6:45 PM - 7:15 AM [12.50] Robertson Jr., Jessie

6:45 PM 7:15 AM

1 6:45 PM - 7:15 AM [12.50] Samsung/C380/PE0801_RG001/C3800012/Job SAS CWW D Long Week

Edit Add Paycode Assign Breaks Enter Time Off Unassign Delete Reinherit Lock More Actions

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

<

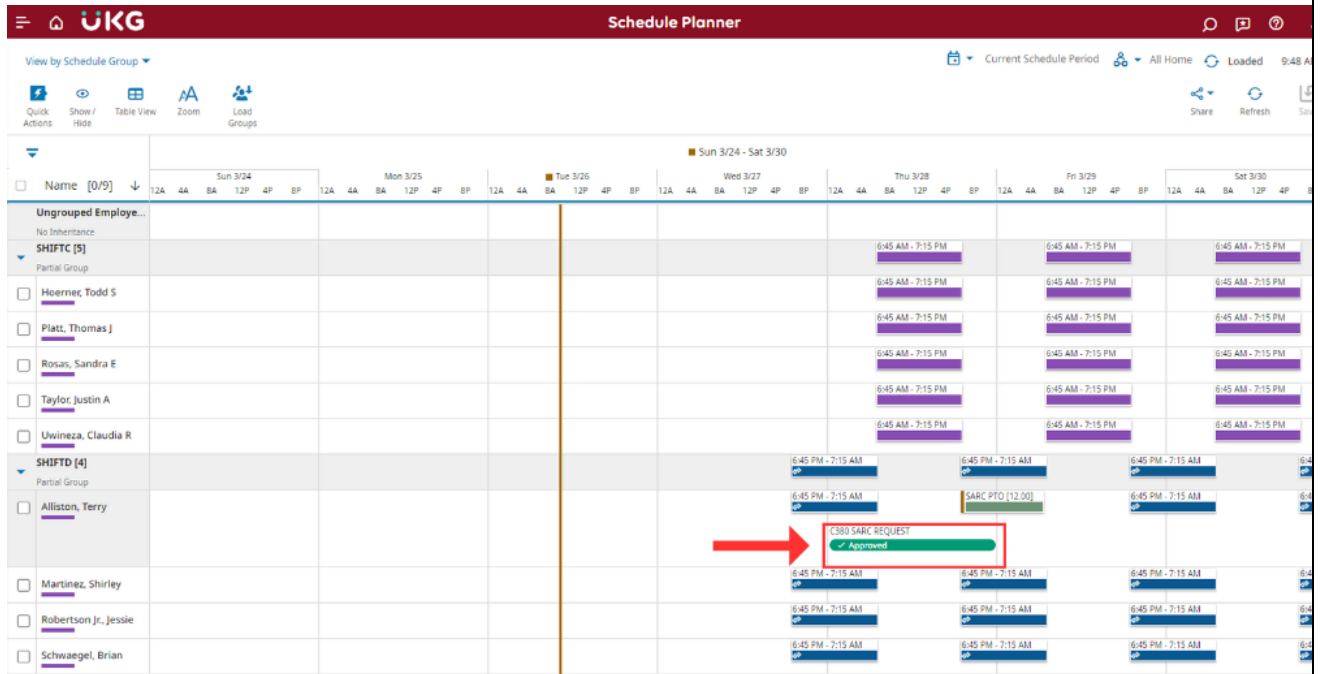
2. You will now be viewing the Schedule Planner
 - a. The Schedule Planner will list all of your employees
 - b. Here you can change your date range

The screenshot shows the UKG Schedule Planner interface. At the top, there's a navigation bar with the UKG logo and the title 'Schedule Planner'. Below this, there's a 'View by Schedule Group' dropdown and a date range selector. A red arrow points to the date range selector, which currently shows 'Yesterday Plus 6 Days'. The main area displays a grid of employee schedules for the week of March 25th to 31st. Employees are listed on the left, and their shift times are shown in the grid cells.

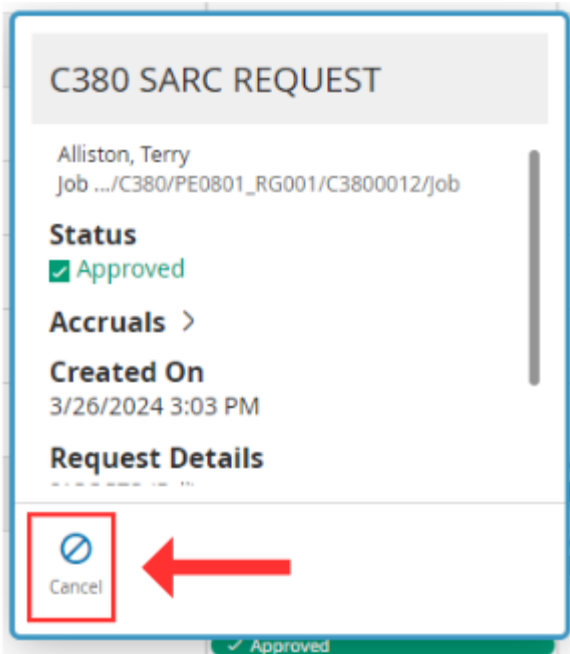
- c. You can select a preset option, or select your own date range

The image shows two side-by-side screenshots of the 'Timeframe' dropdown menu in the UKG Schedule Planner. The left menu shows preset options: 'Previous Schedule Period', 'Current Schedule Period', 'Next Schedule Period', 'Next Schedule Period + 1', 'Next Schedule Period + 2', 'Today', 'Yesterday', and 'Select Range'. The right menu shows the same options, but with 'Select Range' highlighted by a red box and a red arrow pointing to it.

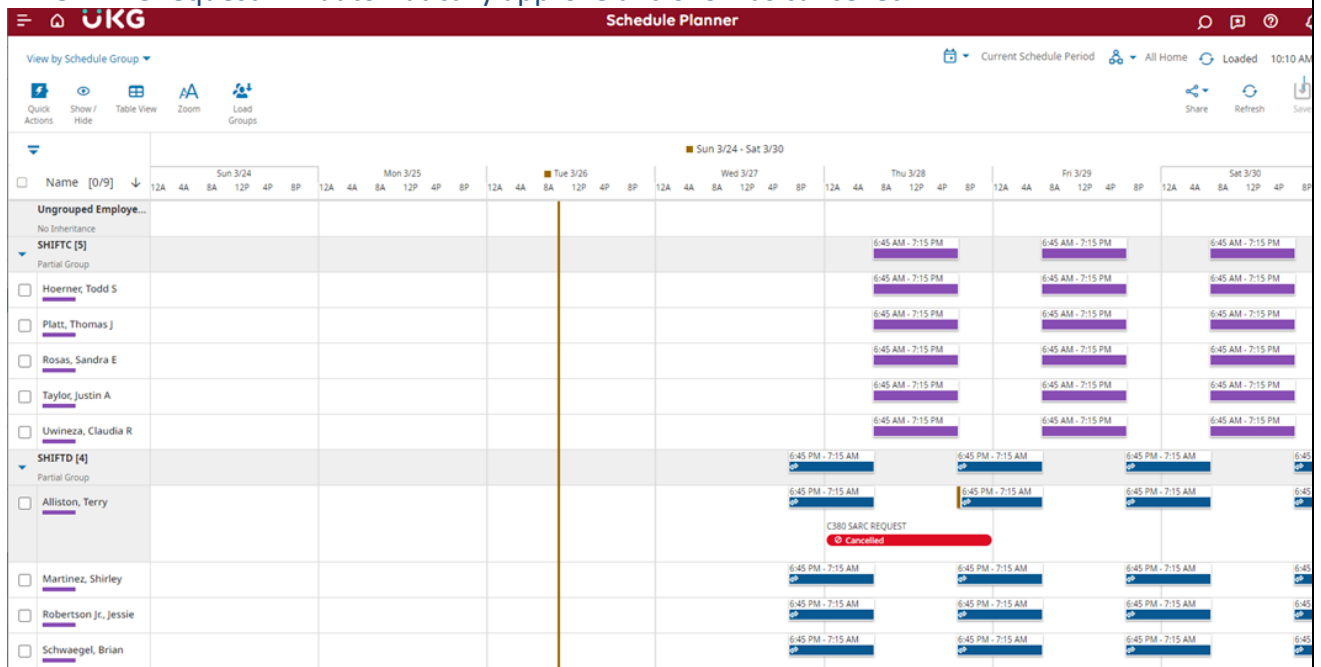
3. Locate the employee you would like to adjust PTO to and right-click on the desired PTO request
 - a. EX. Robertson Jr., Jessie for 03/28



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.