

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

The screenshot shows the UKG Dimensions homepage with a dark red header. The header includes the UKG logo and a welcome message: "Welcome back, Stephen". Below the header, there are several tiles:

- MGR TUTORIAL: HOW TO NAVIGATE THE HOME PAGE**
In less than 5 minutes, learn how to NAVIGATE THE HOME PAGE ***Follow the "Click Through" instructions at the top of the page***
[HOW TO NAVIGATE THE HOME PAGE](#)
- My Notifications**
Tasks: 0
My Requests: 0
Employee Requests: 0
Timekeeping: 0
- MGR TUTORIAL: HOW TO REVIEW NOTIFICATIONS...**
In less than 5 minutes, learn how to REVIEW NOTIFICATIONS in the control center ***Follow the "Click Through" instructions at the top of the page***
[HOW TO REVIEW NOTIFICATIONS \(control center\)](#)
- MGR TUTORIAL: HOW TO REVIEW ALERTS (Control...**
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[HOW TO REVIEW ALERTS \(control center\)](#)
- SAS Chat With Shared Services Monday - Friday...**
Click here to open a Live Chat with an SSC Agent (855) 557-3247
[NA Shared Services Live Chat](#)
- MGR TUTORIAL: HOW TO APPROVE TIME OFF...**
In less than 5 minutes, learn how to APPROVE TIME OFF REQUESTS ***Follow the "Click Through" instructions at the top of the page***
[APPROVING TIME OFF REQUESTS](#)
- Manage Schedule**
No data available. You do not have a tile configuration assigned.
- MGR TUTORIAL: HOW TO NAVIGATE SCHEDULES**
In less than 5 minutes, learn how to NAVIGATE SCHEDULES ***Follow the "Click Through" instructions at the top of the page***
[NAVIGATING SCHEDULES](#)

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 are navigation icons for 'Quick Actions', 'Show / Hide', 'Table View', 'Zoom', and 'Load Groups'. The title 'Schedule Planner' is centered. On the right, there are buttons for 'Share', 'Refresh', and a search icon. A red arrow points to a dropdown menu labeled 'Yesterday Plus 6 Days'.

The main area is a grid representing a weekly schedule. The columns are labeled with days of the week: Mon 3/25, Tue 3/26, Wed 3/27, Thu 3/28, Fri 3/29, Sat 3/30, Sun 3/31. The rows are labeled with employee names. Each cell in the grid represents a shift, color-coded by start and end times. A vertical orange line is positioned in the middle of the grid.

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

The image shows two identical dropdown menus for selecting a date range. Both menus list the following options:

- Previous Schedule Period
- Current Schedule Period
- Next Schedule Period
- Next Schedule Period + 1
- Next Schedule Period + 2
- Today

At the bottom of each menu, there is a button labeled 'Select Range'. A red box highlights the 'Select Range' button in the right-hand menu, and a red arrow points to it from the bottom right.

OR

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

a. EX. Robertson Jr., Jessie for 03/28

UKG Schedule Planner

View by Schedule Group ▾

Current Schedule Period

Quick Actions

Share

	Sun 3/24				Mon 3/25				Tue 3/26				Wed 3/27				Thu 3/28				Fri 3/29				Sat 3/30										
	12A	4A	8A	12P	4P	8P		12A	4A	8A	12P	4P	8P		12A	4A	8A	12P	4P	8P		12A	4A	8A	12P	4P	8P		12A	4A	8A	12P	4P	8P	
<input type="checkbox"/> Name [0/9] <input type="button" value="▼"/>	12A	4A	8A	12P	4P	8P		12A	4A	8A	12P	4P	8P		12A	4A	8A	12P	4P	8P		12A	4A	8A	12P	4P	8P		12A	4A	8A	12P	4P	8P	
Ungrouped Employee...																																			
No Inheritance																																			
SHIFT0 [5]																																			
Partial Group																																			
<input type="checkbox"/> Hoerner, Todd S																																			
<input type="checkbox"/> Platt, Thomas J																																			
<input type="checkbox"/> Rosas, Sandra E																																			
<input type="checkbox"/> Taylor, Justin A																																			
<input type="checkbox"/> Uwineza, Claudia R																																			
SHIFT0 [4]																																			
Partial Group																																			
<input type="checkbox"/> Alliston, Terry																																			
<input type="checkbox"/> Martinez, Shirley																																			
<input checked="" type="checkbox"/> Robertson Jr, Jessie																																			
<input type="checkbox"/> Schwegel, 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

6:45 PM - 7:15 AM 6:45 PM - 7:15 AM 6:45 PM - 7:15 AM

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
Assign
Delete
Reinherit
Lock
More Actions

5. A sidebar will populate to the right

- Select the desired Type of Time Off and click “Apply”

Enter Time Off X

Assign To

Employee Name:

Job: i

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 X

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 X

C380 SARC REQUEST

Dates

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 X

C380 SARC REQUEST

SARC PTO (Full) -

P 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

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UKG

Welcome back, Stephen

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My Notifications

- Tasks 0 >
- My Requests 0 >
- Employee Requests 0 >
- Timekeeping 0 >

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Manage Schedule



No data available. You do not have a tile configuration assigned.

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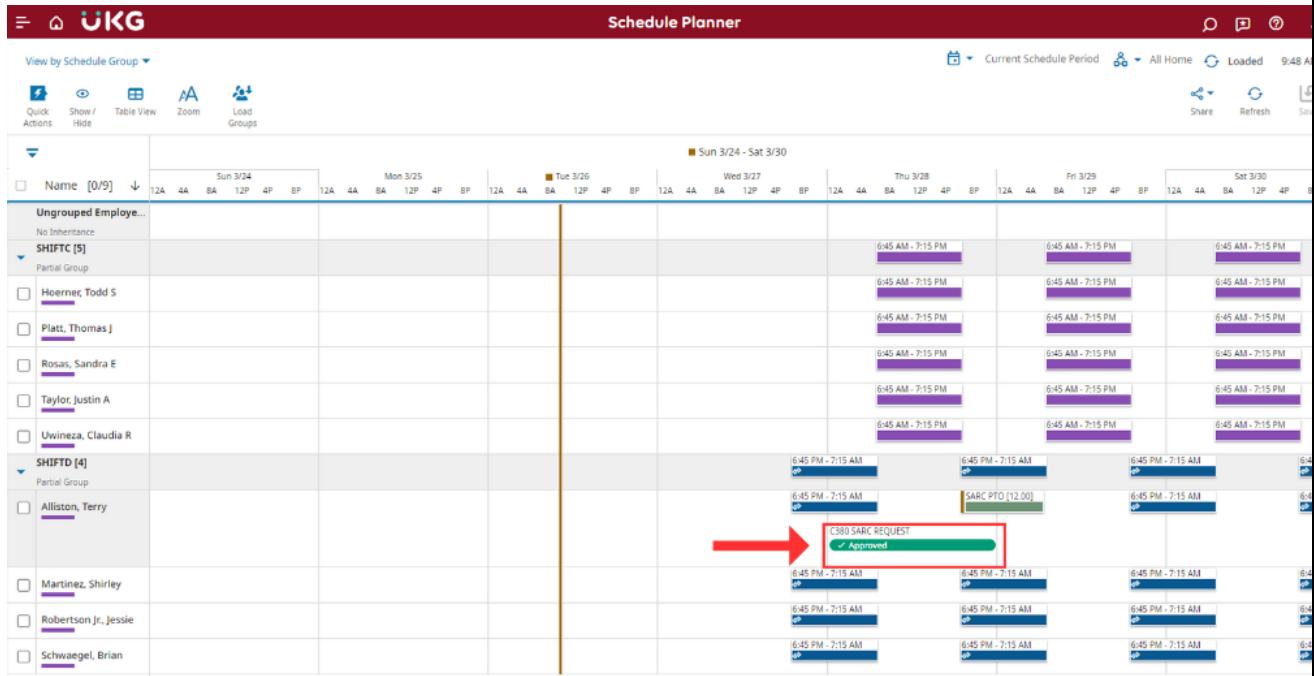
The screenshot shows the UKG Schedule Planner interface. At the top, there are navigation buttons for 'Quick Actions', 'Show / Hide', 'Table View', 'Zoom', and 'Load Groups'. The date range is set to 'Yesterday Plus 6 Days'. The main area is a grid showing employee shifts for the week of March 25-31, 2024. The grid has columns for Mon 3/25 through Sun 3/31, and rows for employees grouped into 'Unassigned Employees' and 'SHIFT C [5]' and 'SHIFT D [4]'. Each cell in the grid represents a shift, with specific start and end times listed.

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

The image shows two side-by-side dropdown menus for selecting a date range. Both menus list the following options: 'Previous Schedule Period', 'Current Schedule Period', 'Next Schedule Period', 'Next Schedule Period + 1', 'Next Schedule Period + 2', and 'Today'. Below these, there is a 'More...' option and a 'Select Range' button. A red arrow points to the 'Select Range' button in the right menu, which is highlighted with a red box.

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

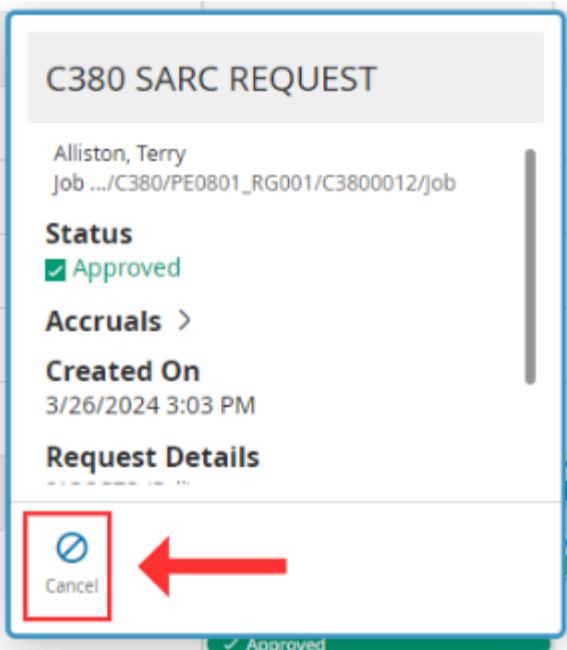


Schedule Planner

Sun 3/24 - Sat 3/30

	12A	4A	8A	12P	4P	8P	12A	4A	8A	12P	4P	8P	12A	4A	8A	12P	4P	8P	12A	4A	8A	12P	4P	8P	
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Partial Group																									
Alliston, Terry																									
Martinez, Shirley																									
Robertson Jr., Jessie																									
Schwaegel, Brian																									

4. Select Cancel



C380 SARC REQUEST

Alliston, Terry
Job .../C380/PE0801_RG001/C3800012/job

Status
 Approved

Accruals >

Created On
3/26/2024 3:03 PM

Request Details

5. The request will automatically approve and show as cancelled

The screenshot shows the UKG Schedule Planner interface. The left sidebar lists employees under 'Ungrouped Employee...' and 'SHIFTC [5]' (Partial Group). The main area is a grid showing work schedules for the week of March 24-30, 2024. A vertical orange line marks the start of the shift. A red bar labeled 'C380 SARC REQUEST' with a 'Cancelled' status is visible on Tuesday, March 26, from 6:45 AM to 7:15 AM. The grid includes columns for Sun 3/24 through Sat 3/30, and rows for 12A, 4A, 8A, 12P, 4P, and 8P shifts.

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