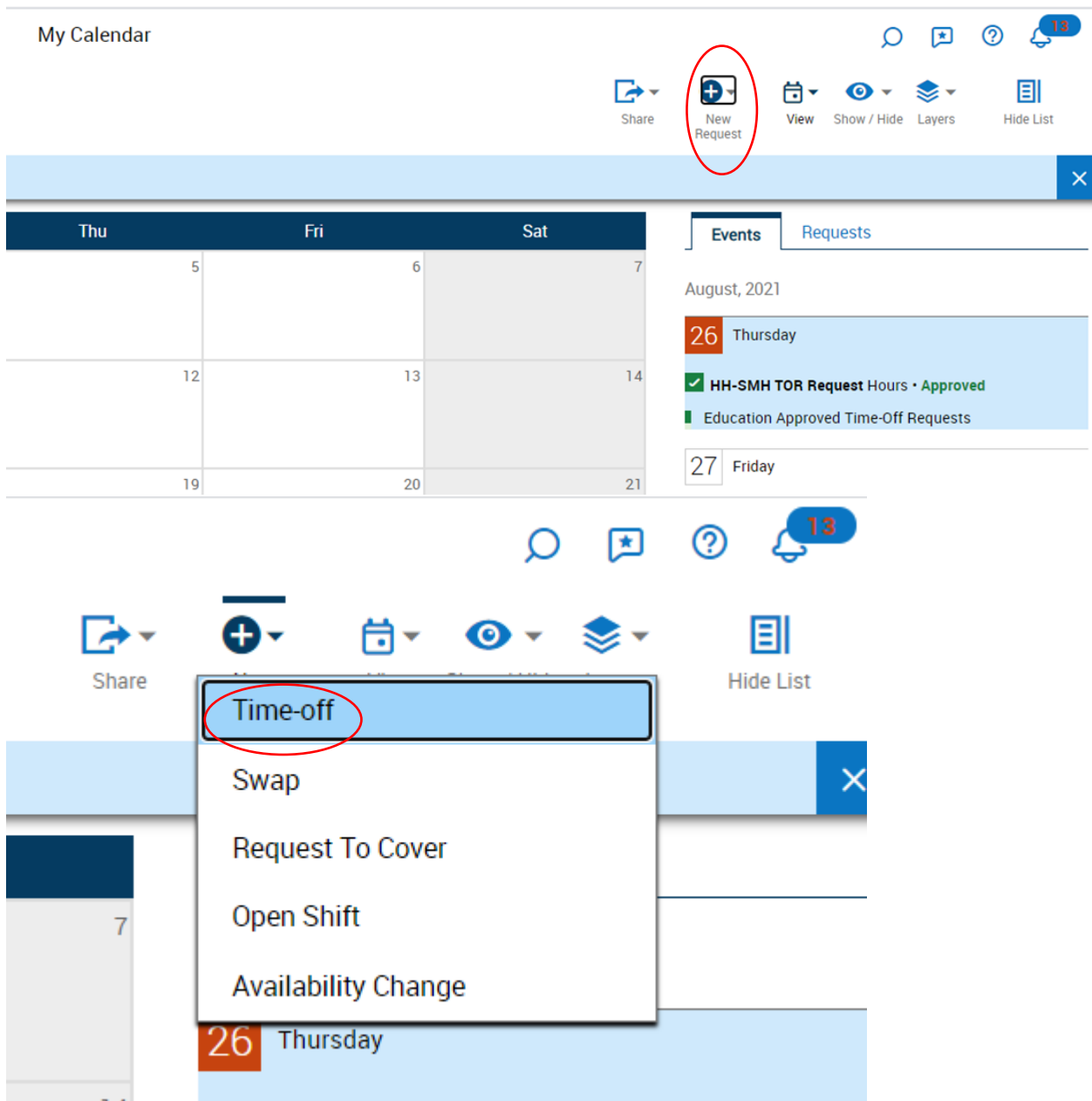


Scheduling Tips for Employees/Associates

- [Entering Requests \(PTO, Vacation, EDU, etc.\)](#)
- [Collaborative/Self-Scheduling \(includes using the Refine feature\)](#)
- [Shift Swaps](#)

Entering Time Off Requests

- 1) Click on the main menu
- 2) Choose the option under **My Information > My Schedule**
- 3) Click **New Request** and choose type i.e. Time-off



The screenshot displays the 'My Calendar' interface. At the top right, there is a navigation bar with icons for 'Share', 'New Request' (circled in red), 'View', 'Show / Hide', 'Layers', and 'Hide List'. Below this is a calendar grid showing dates from Thursday 5th to Saturday 7th. To the right of the calendar, there are tabs for 'Events' and 'Requests'. Under 'Requests', there is a list of approved requests for August 2021, including 'HH-SMH TOR Request Hours - Approved' and 'Education Approved Time-Off Requests'. At the bottom, a dropdown menu is open from the 'New Request' icon, with 'Time-off' selected and circled in red. Other options in the menu include 'Swap', 'Request To Cover', 'Open Shift', and 'Availability Change'.

Thu	Fri	Sat
5	6	7
12	13	14
19	20	21

Events Requests

August, 2021

26 Thursday

- ✓ HH-SMH TOR Request Hours - Approved
- Education Approved Time-Off Requests

27 Friday

Share New Request View Show / Hide Layers Hide List

Time-off

Swap

Request To Cover

Open Shift

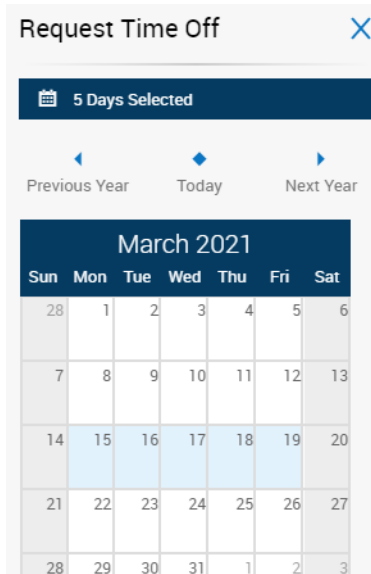
Availability Change

4) Click on the Dates box:

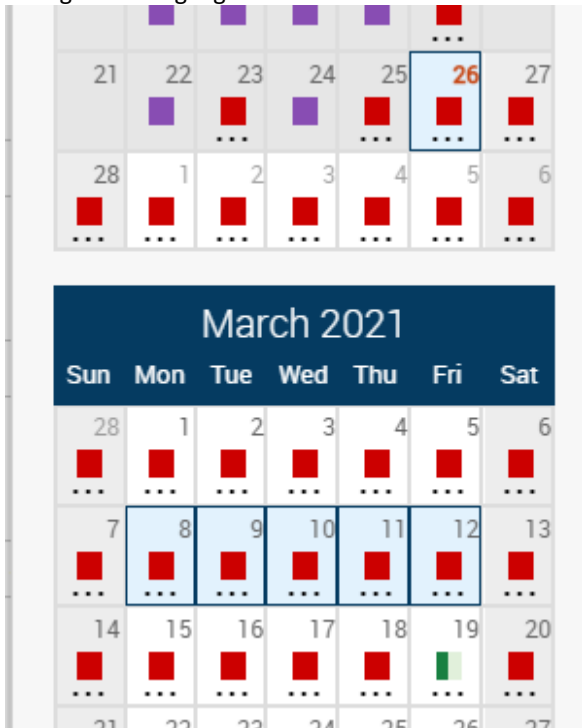


5) From the calendar, highlight appropriate dates for your request

- Click and drag to select multiple dates if you have multiple dates in a row. If you have dates that are not in a row, enter each in separate requests.
- Review number of dates selected (if dates are in a row) prior to clicking **Apply**



HINT: Dimensions often picks up the current date and includes it in your request. To remove it from the request, click on the date – the light blue highlight will be removed.



Validate your dates by looking at the total number included in your list (In the example: March 8th – 12th).

- 6) Select a start time. In general, 7 a.m. or 8 a.m. works for all.
- 7) Select the appropriate Pay Code request (for example: HH-SMH TOR Request). In the example below, the request is for Education time off.
- 8) Click **Review**

My Calendar

Request Time Off
HH-SMH TOR Request

Dates
8/26/2021

Duration
4.00

Hours
Start hours * 8:00 AM
Duration hh:mm * 4:00

Pay Code
Education

Conflict Day
HH-SMH School Conflict
Vacation
PTO

Cancel Submit **Review**

- System confirms the request was submitted and displays the request on their calendar:

Request Time Off
HH-SMH TOR Request

Information Your time-off request has been submitted.

Summary
Education (Hours)
Thursday 8/26/2021
8:00 AM [4:00]

- 9) Double-check the submission, and add a Comment if needed, and click **Submit**.

Request Time Off
HH-SMH TOR Request

Review

Education (Hours)
Friday 9/03/2021
8:00 AM [8:00]

Comments [0]

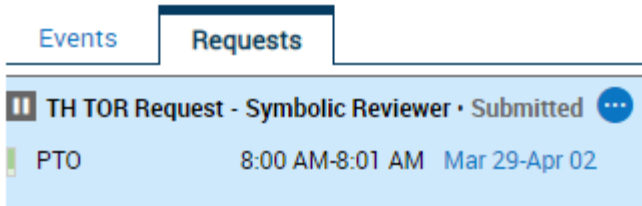
Select a Comment

Type a note (optional).

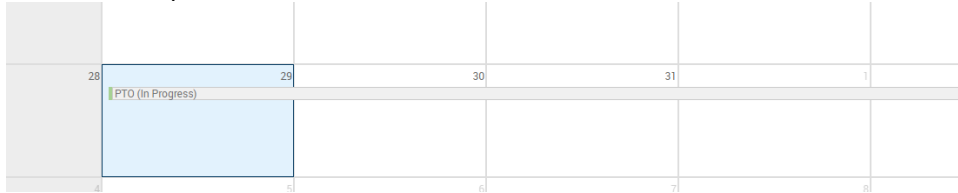
Cancel Add **Submit**

In all cases, refer to policies and unit scheduling guidelines for submitting requests. (For example, there may be a limit to the number of Conflict Days which can be requested in a scheduling period.)

The status of your request can be viewed from the **My Schedule** tab on the **Requests** page:



OR from the **My Schedule** tab on the calendar:

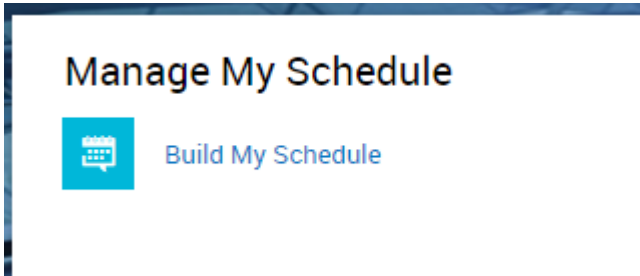


Note: The status of requests will be updated when reviewed and either approved or declined by the manager or scheduler.

Collaborative/Self-Scheduling

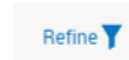
Notifications of an open collaborative scheduling period will be in your **Control Center** or on your phone app, if you choose to use Dimensions on your mobile device. It is recommended that you use a PC to build your schedule. The mobile app is best for tasks such as checking your schedule or sending/responding to requests.

- 1) From the Home page on the **Manage My Schedule** tile, click **Build My Schedule**:

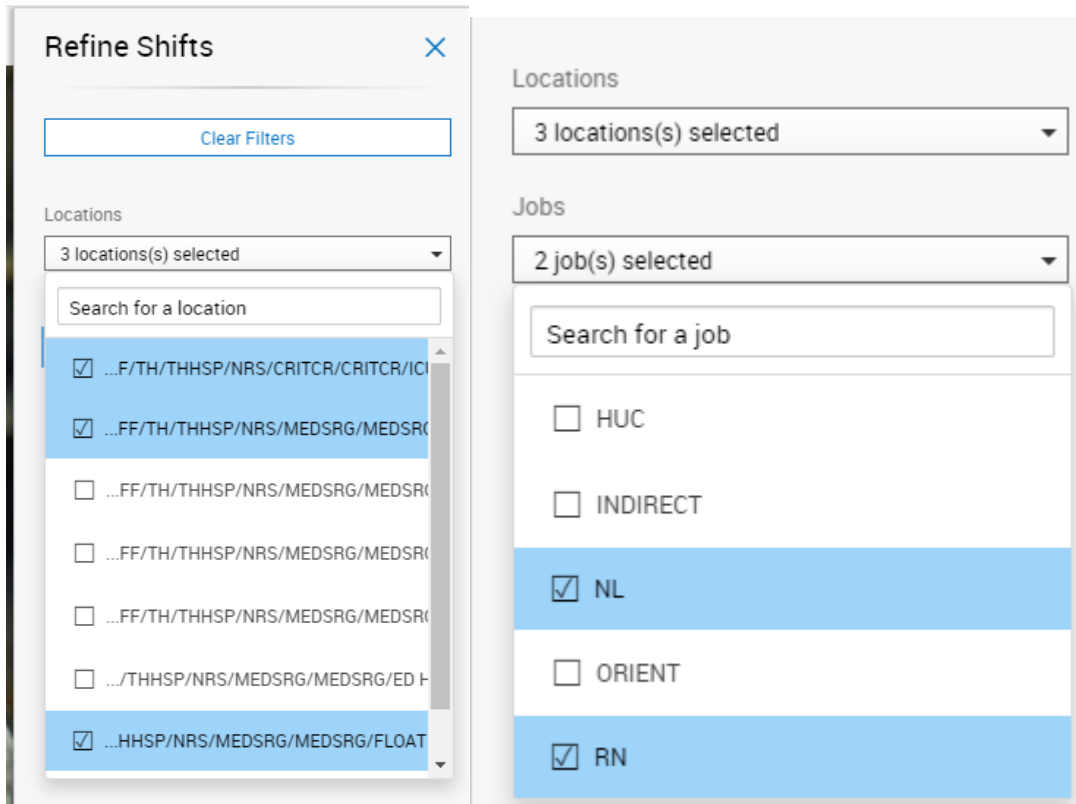


- 2) The **Request Self-Schedule** window will open and will include available shifts by day and time.

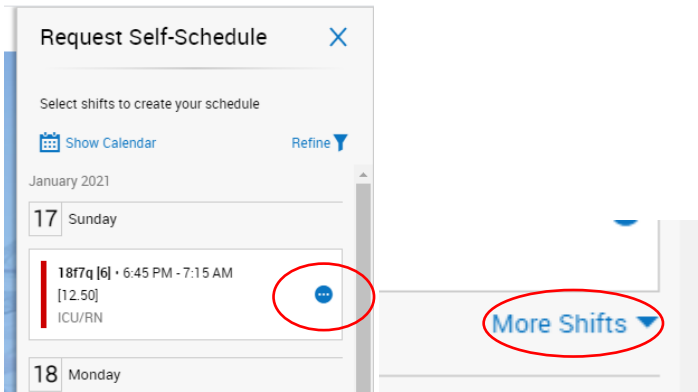
Note: Using the **Refine** icon allows you narrow the available shifts by Location and/or Job.



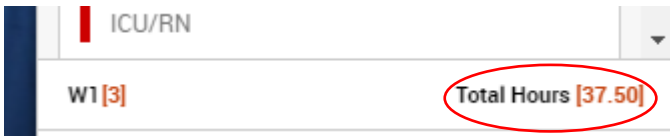
- 3) You can select more than one location and/or job by clicking the boxes to the left.



- 4) Click the blue icon with 3 dots next to a shift to see additional details for a specific day
- 5) Click **More Shifts** to see the list of all shifts available on a particular day



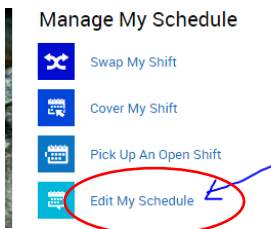
- 6) You can see the summary of shifts and hours as they are selected at the bottom of the screen. Note: Dimensions will not allow scheduling of overtime during collaborative scheduling periods



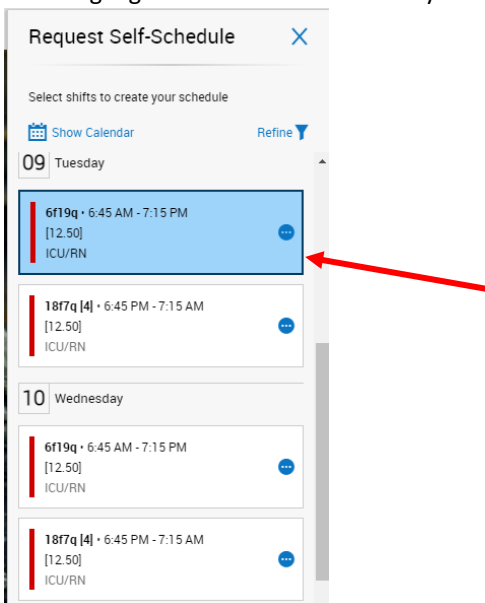
- 7) Click **Review**, then **Submit**

You can go back to collaborative/self-scheduling as long as the period is open to edit your collaborative/self-schedule requests:

- 1) From the **Manage My Schedule** tile, select **Edit My Schedule**

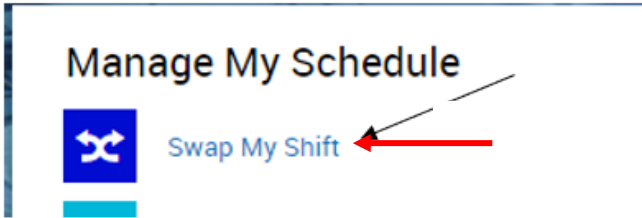


- 2) Shifts highlighted in blue are the shifts you have requested. Click to deselect and then click a new shift to select.

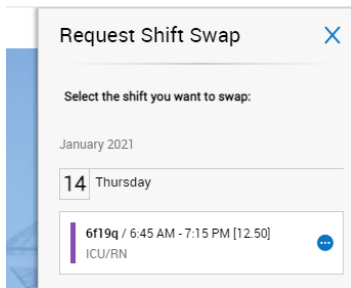


Shift Swaps

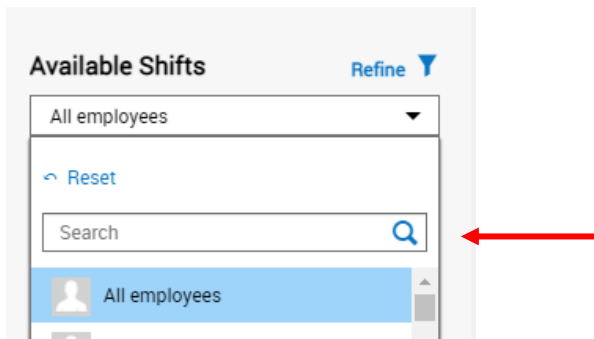
- 1) From the **Manage My Schedule** tile, select **Swap My Shift**:



- 2) **Request Shift Swap** panel will open and includes all of your scheduled shifts for the posted schedule period:



- 3) Click the scheduled shift you want to trade
- 4) Select a recommended employee or search for an employee by name



- 5) Click **Submit**

Note: In order for a shift swap to be complete it must be:

- Sent through Dimensions to the employee you want to swap with and approved by them.
- Approved by the Nurse Leader, Director or Supervisor