



Copy Past Objectives to a Current Appraisal

Step-by-Step Instructions

Step 1 Navigate to eportal.montgomerycountymd.gov.

Step 2 Navigate to your [Oracle Homepage](#)..

Step 3 Sign In to [accessMCG](#).



Step 4 Click the [Employee Self-Service](#) option.



Step 5 Click the blue [Go to Employee Self-Service](#) button.



Your *Oracle Homepage* opens.

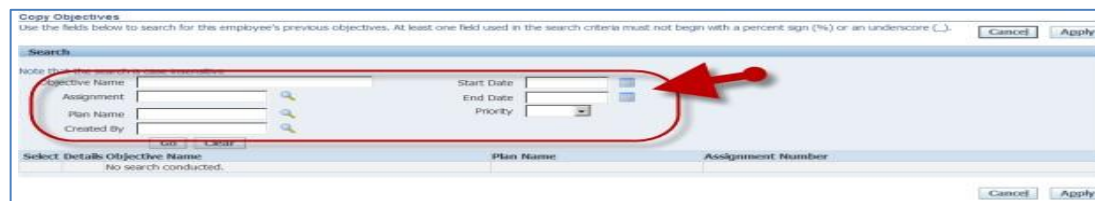
Step 6 Navigate to the [Objectives](#) section of the appraisal. It is located immediately below the Competencies section.



Step 7 Click the [Copy Past Objectives](#) button.

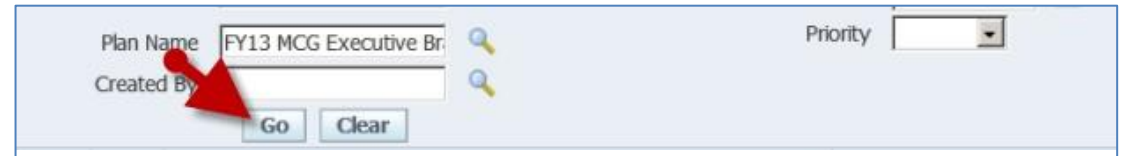
Step 8 Enter [Search Criteria](#) using one or more of the fields provided.

TIP: To review Objectives from multiple years, search by Employee ID ('Assignment') or the 'Created By' field.



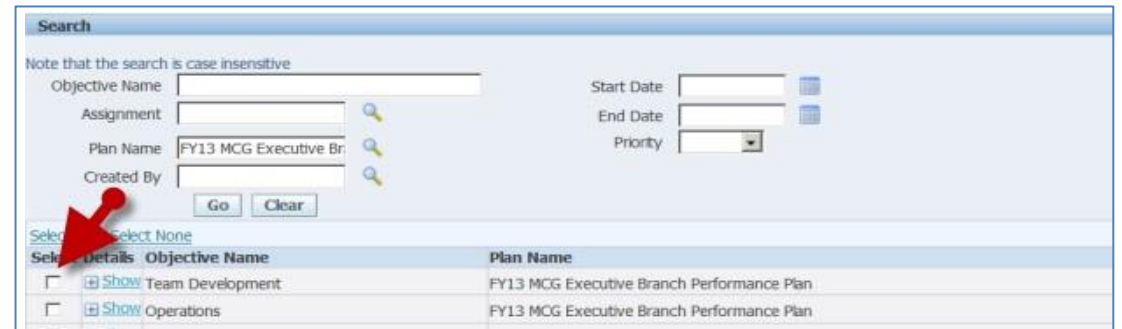
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Step 9 Click the **Go** button. The objectives that match the criteria will display.



A screenshot of a search form. The 'Plan Name' field contains 'FY13 MCG Executive Br'. The 'Created By' field is empty. There are 'Go' and 'Clear' buttons at the bottom. A red arrow points to the 'Go' button.

Step 10 Click the **Checkbox(s)** left of each desired Objective.
NOTE: If desired, use the **+Show** link next to each past Objective to review details.



A screenshot of search results. The search criteria are the same as in Step 9. Below the search criteria is a table with two rows of results. Each row has a checkbox, a '+Show' link, an 'Objective Name', and a 'Plan Name'. A red arrow points to the first checkbox.

Select	Details	Objective Name	Plan Name
<input type="checkbox"/>	+Show	Team Development	FY13 MCG Executive Branch Performance Plan
<input type="checkbox"/>	+Show	Operations	FY13 MCG Executive Branch Performance Plan

Step 11 Click the **Apply** button.



A screenshot of a dialog box titled 'Copy Objectives'. It contains the text: 'Use the fields below to search for this employee's previous objectives. At least one field used in the search criteria must not begin with a percent sign (%) or an underscore (_).' There are 'Cancel' and 'Apply' buttons at the bottom right. A red arrow points to the 'Apply' button.

Step 12 You've returned to the **Update Standard Appraisal: Overview** page where the selected past Objectives have been added to the Objectives section of the appraisal.

Step 13 [Read the paragraph at right](#)

The date range **must** be modified to fall at or within the correct 12-month plan cycle for the employee. For example, the Start and End Dates for fiscal employees is July 1 - Jun 30. Therefore, the date range for fiscal employee objectives must be either on or after July 1st but before or no later than Jun 30th.

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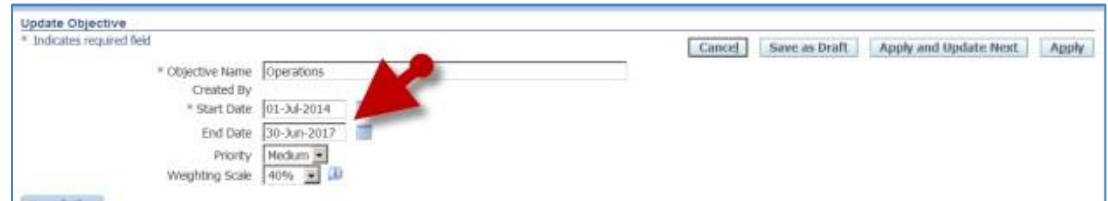
Step 14 Click the **Update** pencil icon next to each copied objective to correct the date range and update any other desired details.



Objective Name	Start Date	End Date	Performance Rating	Update Details	Delete
Operations	01-Jul-2014	30-Jun-2017	[Dropdown]	[Pencil]	[Trash]
Team Development	01-Jul-2014	30-Jun-2017	[Dropdown]	[Pencil]	[Trash]

Step 15 Correct the **Start Date** and/or **End Date** fields.

REMINDER: At this time, you may also update any other details (such as the Objective name, Details, etc.) for the Objective.



Update Objective
* Indicates required field

Objective Name: Operations
Created By: [Text]
* Start Date: 01-Jul-2014
End Date: 30-Jun-2017
Priority: Medium
Weighting Scale: 40%

Buttons: Cancel, Save as Draft, Apply and Update Next, Apply

Step 16 Click the **Apply** button to save changes you've made to the Objectives and return to the appraisal.

TIP: To update more than one Objective, click the 'Apply and Update Next' button to advance to the next Objective. When you've completed your updates, then click the Apply button.



Update Objective
* Indicates required field

Objective Name: Operations

Buttons: Cancel, Save as Draft, Apply and Update Next, Apply

Step 17 You've returned to the **Update Standard Appraisal: Overview** page where the past Objectives you selected are included in the current appraisal with the correct date range and any other updated information.

End of Procedure