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.

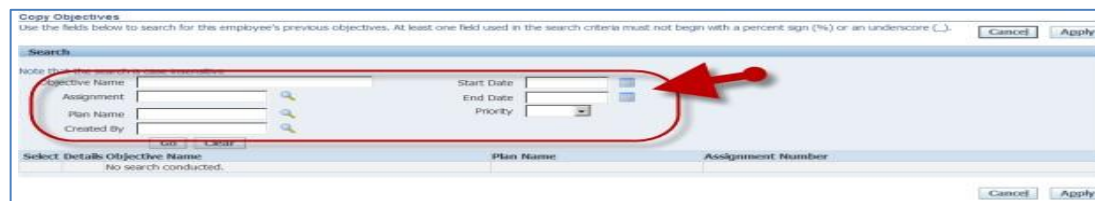**Step 6**   Navigate to the **Objectives** section of the appraisal. It is located immediately below the Competencies section.

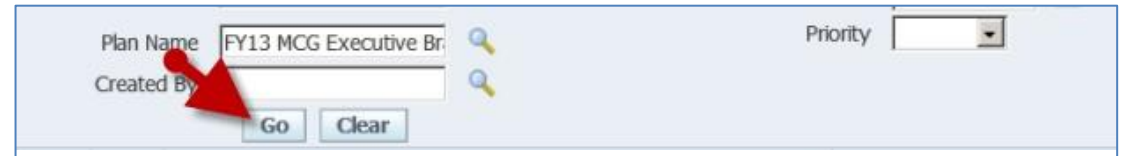**Step 7**   Click the **Copy Past Objectives** button.

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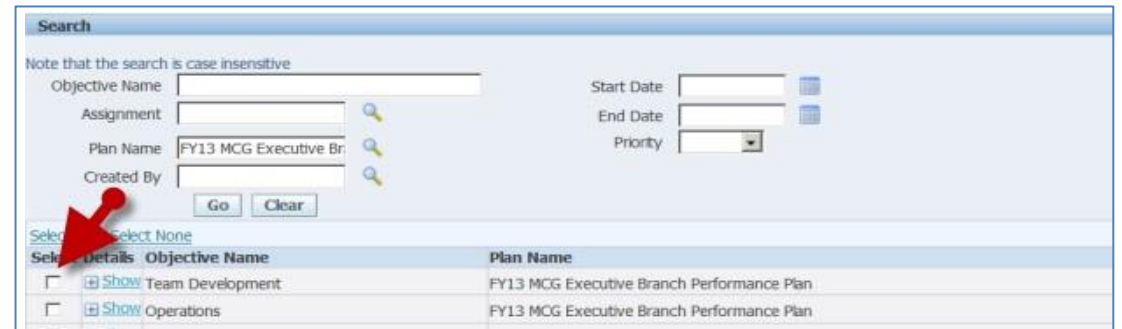
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Step 9   Click the **Go** button. The objectives that match the criteria will display.

Step 10   Click the **Checkbox(s)** left of each desired Objective.

                      NOTE: If desired, use the <u>+Show</u> link next to each past Objective to review details.

Step 11   Click 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.
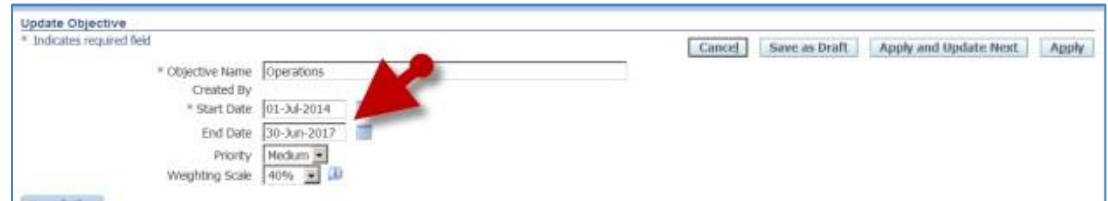
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Step 14   Click the **Update** pencil icon next to each copied objective to correct the date range and update any other desired details.

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.

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.

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