YOU@PSU
Step Two: Mid-Year Check-In

The Mid-Year Check-In keeps you and your supervisor engaged in the performance management process by ensuring that you meet **at least once** during the year to have a conversation regarding your job responsibilities, competencies and progress towards goals.

The Mid-Year Check-In is the only required performance management conversation in addition to the beginning- of-the-year and the end-of-year discussions. However, you are encouraged to meet more frequently with your supervisor throughout the year to discuss your performance.

The mid-year check in is important because it:

- Allows your supervisor to more easily monitor your performance and progress
- Gives you the opportunity to understand how you are performing and discuss expectations

Please meet briefly with your supervisor to walk through the Mid-Year Check-In process as it is outlined below:

1. Schedule time with your supervisor for a brief check-in meeting.

2. Prior to your meeting, review your Job Responsibilities Worksheet (JRW) and each component of your Performance Management Worksheet (PMW). You may enter examples, professional development activities and progress within the notes section for each component of the PMW to discuss with your supervisor during your meeting.

3. If you need to adjust something in your JRW after your Mid-Year Check-In, ask your supervisor to:
   - Log into the YOU@PSU system: [https://app3.ohr.psu.edu/jrwpm/](https://app3.ohr.psu.edu/jrwpm/)
   - Click on “Subordinates Table”
   - Find your name and under “JRW Status” click on the green “Completed” button
   - Click on the “Open JRW” button and hit Submit

   After making changes, you will re-submit your JRW for approval by your supervisor.

4. If you need to adjust your PMW (goals) after your Mid-Year Check-In, ask your supervisor to:
   - Log into the YOU@PSU system: [https://app3.ohr.psu.edu/jrwpm/](https://app3.ohr.psu.edu/jrwpm/)
   - Click on “Subordinates Table”
   - Find the your name, and under “PMW Status” click on the green “Notes” button
   - Click on the “Open PMW” button and hit Submit

   After making changes, you will re-submit your PMW for approval by your supervisor.
5. You and your supervisor will both acknowledge that the Mid-Year Check-In occurred and document the date in the YOU@PSU online system. **The process starts with your supervisor who will:**

   - Log into the YOU@PSU system: [https://app3.ohr.psu.edu/jrwpm/](https://app3.ohr.psu.edu/jrwpm/)
   - Click on “Subordinates Table”
   - Click on the blue “Set Mid Year” button next to your name (or, if everyone is ready—click on the button at the top to set it for all of their direct reports).
   - Change the PMW Stage to “Mid Year Check In period” and hit Submit. Your Mid-Year Check-In status will change to a yellow “Not Set” button.

**Next, you will receive an email from the YOU@PSU system prompting you to acknowledge that the Mid-Year Check In occurred. You will:**

   - Log into the YOU@PSU system: [https://app3.ohr.psu.edu/jrwpm/](https://app3.ohr.psu.edu/jrwpm/)
   - Click on your “Performance Management Worksheet (PMW)” tab found on the left hand side menu
   - Click on the green “Mid-Year Check-In Confirmed” button found under the heading “Acknowledge Mid-Year Check-In”
   - Add the date that the Mid-Year Check-In occurred and hit Submit

**Lastly, your supervisor will receive an email from the YOU@PSU system prompting them to acknowledge that they Mid-Year Check-In occurred and will:**

   - Log into the YOU@PSU system: [https://app3.ohr.psu.edu/jrwpm/](https://app3.ohr.psu.edu/jrwpm/)
   - Click on “Subordinates Table”
   - Find your name and under “PMW Status” click on the green “Mid-Year” button
   - Click on the green “Mid-Year Check-In Confirmed” button found under the heading “Acknowledge Mid-Year Check-In”
   - Add the date that the Mid-Year Check-In occurred and hit Submit

Congratulations, you are now done with the Mid-Year Check-In portion of the YOU@PSU program! The Mid-Year Check-In button will turn green and reflect the date the conversation occurred.

**IMPORTANT:** These YOU@PSU steps MUST be completed in this order or you will not be able to follow the steps mentioned above:

1) JRW completed and approved
2) PMW complete and approved
3) Mid-Year “set” by supervisor
4) Employee confirms Mid-Year Check-In
5) Supervisor confirms Mid-Year Check-In

If you have any questions regarding how to complete the Mid-Year Check-In—or how to use the YOU@PSU online system to acknowledge that the conversation happened, please feel free to reach out to the YOU@PSU team by calling 814-867-5904 or emailing you@psu.edu.