

QM Easy

QMS MADE EASY

TRAINING MANUAL

Post Level 1

A complete guide for classroom educators — self appraisals, QMS appraisals, lesson observations, classroom reviews and score sheets.

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1. Before you begin

1.1 Who this manual is for

This manual is for **Post Level 1 educators** — classroom teachers who are appraised but who do not appraise other educators.

As a PL1 educator you will use QM Easy to:

- ✓ Complete your own **Self Appraisal** twice a year
- ✓ View and sign off your **QMS Appraisal** completed by your appraiser
- ✓ View and sign off **Lesson Observations** and **Classroom Reviews** conducted about you
- ✓ View and download your **Score Sheet** and other documents as PDFs

Good to know. As a PL1 educator you do not appraise anyone else, so you will not see the **Appraisals** or **Workplan** tiles on your dashboard. Workplans apply to School Management Team members only.

1.2 What you will need

Item	Detail
Your school email address	The address your school captured for you in QM Easy. This is your username.
A password	You create this yourself the first time you use the system (see section 2.1).
A device	Any desktop, laptop, tablet or phone with an internet connection.
A web browser	Chrome, Edge, Firefox or Safari. Keep it up to date.

2. Getting started

2.1 Setting your password for the first time

Your school creates your profile, but you choose your own password. You only do this once.

- 1 Go to the QM Easy website and click **Log In**.
- 2 On the login screen, click **“No password yet? Get started here”**.
- 3 Enter the **email address your school has on record** for you and click **Go find me**.
- 4 QM Easy finds your school and your profile, and guides you through setting your password.
- 5 Choose a password you will remember, confirm it, and save.

Email address not found? QM Easy can only find you if your school has captured your email address correctly. If you get a “not found” message, ask your Principal or Super User to check the spelling of your email address in **Settings → Users**.

← Back to home

Welcome back

Log in to administer your school's QMS.

Email address

you@school.co.za

Password

Your password [Show](#)

Log In

NEW TO QM EASY?

No password yet? Start here.

We'll find your school and set up your profile — it only takes a minute.

[Get started here →](#)

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Activate Windows
Go to Settings to activate Windows.

The QM Easy login screen.

2.2 Logging in

- 1 Enter your **email address**.
- 2 Enter your **password**. Tap **Show** if you want to check what you typed.
- 3 Click **Log In**.

If your details are correct you land on your dashboard. If not, you will see *“Invalid credentials, please try again”* — check your typing, and remember that passwords are case-sensitive.

2.3 If you have more than one profile

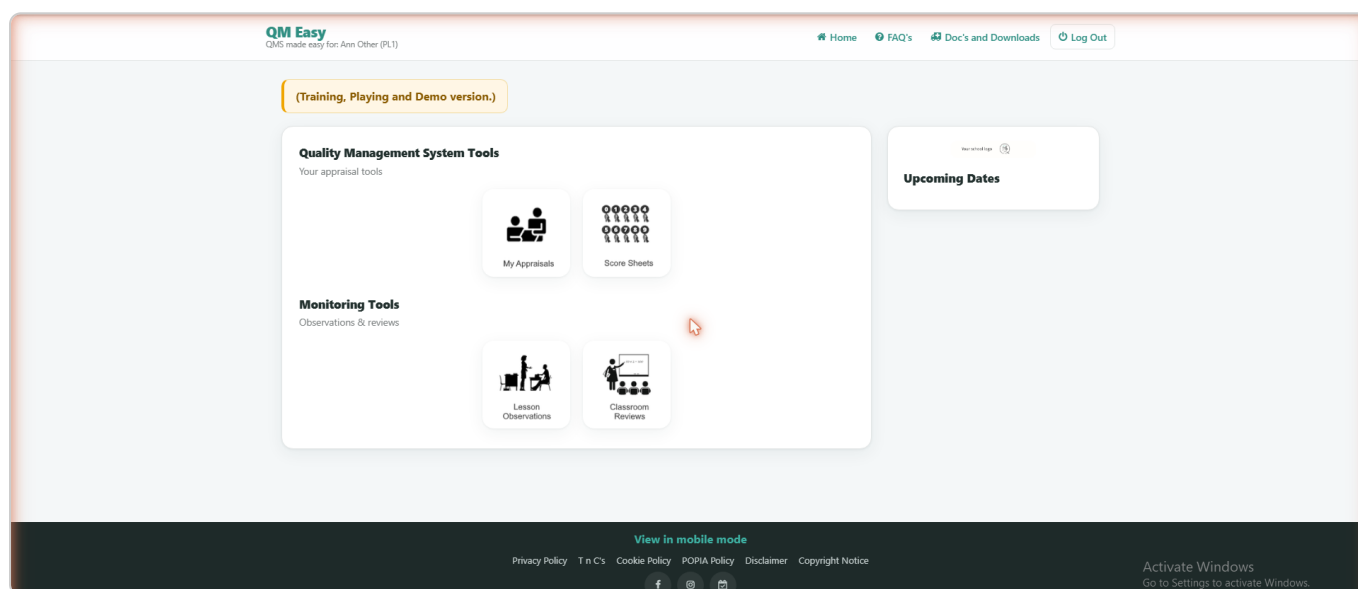
Some staff hold more than one role at a school — for example an educator who is also support staff. If your email address is linked to more than one profile, QM Easy shows a **Multiple profiles detected** window after you log in.

- 1 Choose the profile you want to work as from the drop-down list.
- 2 QM Easy takes you straight to the dashboard for that profile.

Tip. To switch to your other profile, simply log out and log in again, then pick the other one.

2.4 Your dashboard explained

The dashboard is your home screen. Everything you need is one click away.



The Post Level 1 dashboard.

Tile	What it does
My Appraisals	Opens your own Self and QMS appraisal history. This is where you start a new self appraisal.
Awaiting Approval	Appears when something is waiting for you to review and sign off.
Score Sheets	Your personal score sheet (Annexure A2).
Lesson Observations	Lesson observations carried out about you (Annexure E2).
Classroom Reviews	Classroom reviews carried out about you.

The teal border. When a tile has a **teal border around it**, that means there is something waiting for your attention — an appraisal to complete, or a document to sign off. Always deal with bordered tiles first.

The top menu

Menu item	What it does
Home	Returns you to the dashboard from anywhere.
FAQ's	Answers to common QMS questions.
Doc's and Downloads	Training manuals and official QMS documents.
Log Out	Ends your session. Always log out on a shared computer.

3. Understanding the QMS cycle

3.1 The appraisal year

QM Easy follows the QMS cycle set out in Collective Agreement No. 2 of 2020. There are two kinds of appraisal in a year, and they happen at different times.

When	What happens	Who completes it
Term 1	Self Appraisal	You rate yourself.
Term 2	QMS Appraisal (mid-year)	Your appraiser rates you. Compulsory.
Term 3	Self Appraisal	You rate yourself.
Term 4 (Annual)	QMS Appraisal (annual)	Your appraiser rates you. Compulsory.

Mid-year and annual appraisals are compulsory for all educators. The Term 2 scores are shown alongside the Annual appraisal as a guide, so you and your appraiser can see how performance has moved during the year.

3.2 The rating scale

Every descriptor in QM Easy is scored on the same four-point scale.

Score	Meaning	Guidance
1	Needs Attention	Performance falls short of the standard and development is required.
2	Average	Performance meets the minimum standard.
3	Good	Performance is consistently sound and meets the standard well.
4	Excellent	Performance consistently exceeds the standard.

QM Easy adds up your scores automatically as you go — per criterion, per performance standard, and as an overall total. You never have to calculate anything yourself.

3.3 Your performance standards

As a Post Level 1 educator you are appraised against **five performance standards**:

PS	Performance standard
1	Creation of a positive learning and teaching environment
2	Curriculum knowledge, lesson planning and presentation
3	Learner assessment and achievement
4	Professional development
5	Extra-mural and co-curricular participation

Each performance standard contains one or more **criteria**, and each criterion contains several **descriptors** that you score from 1 to 4.

Lesson observation covers standards 1, 2 and 3 only. The remaining standards are assessed on a continuous basis through observation, monitoring, feedback and the evidence you provide — they do not have to be evaluated on a single day.

3.4 Your annexures

The official QMS documents QM Easy generates for you at Post Level 1:

Annexure	Document
A1	Appraisal instrument for Post Level 1 educators
A2	Score sheet for Post Level 1 educators
E2	Lesson observation instrument

Tip. You do not need to create any templates. Every document layout has been accepted by the Department of Basic Education and is generated automatically.

4. Your Self Appraisal (Terms 1 and 3)

A self appraisal is your own honest rating of your performance. It prepares you for the discussion with your appraiser and is completed in Term 1 and again in Term 3.

4.1 Starting a self appraisal

- 1 From the dashboard, click **My Appraisals**.
- 2 The **My Appraisals** screen opens with two lists: **Self Appraisals** on the left and **QMS Appraisals** on the right.
- 3 Click the **New** button at the top of the Self Appraisals list to open a new self appraisal.
- 4 Check that the **Term** and **Year** shown are correct.

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Home Log Out

My Appraisals
Your self and QMS appraisal history

Self Appraisals [New](#)

Term	Year	Status
1	2024	Approved

QMS Appraisals

Term	Year	Status
2	2023	Approved
4	2023	Approved
4	2024	Approved
2	2025	Approved

Activate Windows
Go to Settings to activate Windows.

The My Appraisals screen, listing every appraisal by term, year and status.

4.2 Completing Section A — your information

Section A carries your details, your appraiser's details and your school's details. Most of this is filled in for you from your profile. Check it is correct before you continue.

You complete the responsibilities blocks in your own words:

- ✓ **Teaching and assessment responsibilities** — the grades, subjects and assessment duties you carry.
- ✓ **Extra-mural activities** — sport, culture, clubs and other activities you run or assist with.
- ✓ **Administrative duties** — any administrative roles you hold.
- ✓ **Other** — anything else relevant to your workload.

4.3 Scoring the performance standards

- 1 Work down the form, standard by standard.

- 2 For each descriptor, click the score that reflects your performance: **1, 2, 3** or **4**.
- 3 Add a **comment** for each performance standard where useful. Comments are where you record evidence, context and development needs.
- 4 Watch the running totals update as you score — per standard and overall.

Be honest, and give evidence. A self appraisal is most useful when it is realistic. Where you score yourself 1 or 2, say what support or development would help. Those needs are picked up by the School Management Team.

4.4 Saving and submitting

There are two buttons at the bottom of every appraisal:

Button	What it does
Save	Saves your work and leaves the status as In Progress . Use this as often as you like — you can come back and finish later.
Submit	Sends the appraisal to your appraiser. The status becomes Waiting Approval and the form is locked for editing.

Save often. Click **Save** regularly while you work, especially on a long form or a slow connection. Only click **Submit** when you are completely finished — you cannot edit the appraisal afterwards.

4.5 What happens next

- 1 Your appraiser reviews your self appraisal.
- 2 If they accept it, the status changes to **Approved** .
- 3 If they return it, the status changes to **Declined** with a reason. Open it, make the changes and submit it again.

5. Your QMS Appraisal (Term 2 and Annual)

The QMS appraisal is the official appraisal completed by your appraiser — usually your departmental head. You do not score this one, but you must review and sign it off.

5.1 How the process runs

- 1 Your appraiser opens your appraisal and scores each descriptor after observation and discussion with you.
- 2 You and your appraiser discuss the ratings and agree on development needs.
- 3 Your appraiser submits the appraisal. The status becomes **Waiting Approval**.
- 4 QM Easy notifies you that an appraisal is waiting for you.
- 5 You review it and sign it off (see section 7).

5.2 Viewing your QMS appraisal

- 1 Click **My Appraisals** on the dashboard.
- 2 In the **QMS Appraisals** list on the right, click the row you want to open.
- 3 The full appraisal opens, showing every score, every comment and the totals.

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Appraisal Instrument Educator Post- Level 1

Select Term 2 2025

Your school logo

Annexure A 1

Status: Approved

Section A: Educator and School Information

1. Appraisee

Surname	Other	First Name(s)	Ann
Designation		Persal number	874125
Highest Qualification		Specialization in subject domain	
Grade / Subjects taught during current appraisal year			

2. Appraiser

Surname	Tobias	First Name(s)	Errol
Designation	Principal	Persal number	

3. School

Name of school	QM Easy - Demo	Province	KZN
Circuit/district	Durban West/Umlazi	Principal's name	Errol Tobias
Telephone	0317651214	Cell No	0317651214

4. EDUCATOR'S BRIEF JOB DESCRIPTION (Subjects/Grades/Key areas of responsibility, etc)

Activate Windows
Go to Settings to activate Windows.

The Post Level 1 appraisal instrument, laid out like the official paper document.

Annual appraisals show the Term 2 scores. When you open the Annual (Term 4) appraisal, each descriptor also shows the score given in Term 2 as a guide, so progress across the year is visible at a glance.

5.3 If you do not agree

You are not obliged to accept an appraisal you disagree with. Discuss it with your appraiser first — most differences are resolved in conversation. If agreement cannot be reached, follow your school's established QMS dispute process. Your comments are recorded on the instrument itself, so make sure your view is captured there.

6. Lesson Observations and Classroom Reviews

6.1 Lesson Observations (Annexure E2)

A lesson observation is a structured observation of one of your lessons by your appraiser, covering **performance standards 1, 2 and 3**.

- 1 Your appraiser observes the lesson and captures scores, often on a phone or tablet in the classroom.
- 2 They record the subject, the topic and their observations.
- 3 They submit the observation, which then comes to you.
- 4 Click **Lesson Observations** on your dashboard to open the most recent one.
- 5 Read the scores and comments, add your own comment, and sign it off.

The tile tells you when to look. When a lesson observation or classroom review is waiting for you, the matching dashboard tile is outlined with a **teal border**.

6.2 Classroom Reviews

A classroom review looks at your classroom environment, your records and your learners’ books. It is scored in three parts:

Section	Out of	What is looked at
Classroom Appearance	16	Displays, neatness, desk arrangement, class atmosphere.
Record Check	12	Weekly planning, long-term planning, assessment plan, mark book.
Book Check	28	Appearance, neatness, setting out, quality, regularity, marking, remediation.

Click **Classroom Reviews** on your dashboard to open yours, read the comments and sign it off.



A completed classroom review.

7. Signing off and approving

Signing off is your confirmation that you have seen the document and that the discussion took place. It is a required step — the appraisal is not complete without it.

7.1 The four signatures

Every QMS appraisal carries up to four sign-offs, shown in the **Sign-off** panel at the bottom of the instrument:

Signature	Who signs
Appraisee	You — the educator being appraised.
Appraiser	The person who conducted the appraisal.
Resource	The resource member of the Development Support Group, where applicable.
Principal	The Principal.

7.2 How to sign off

- 1 Open the appraisal, observation or review that is waiting for you.
- 2 Read it in full — every score and every comment.
- 3 Scroll to the **Sign-off** panel at the bottom.
- 4 Enter **your own password** in the confirmation box. This is your digital signature.
- 5 Click **Agree & sign off**.

Your password is your signature. Never share it and never sign off on someone else's behalf. If you signed off in error, use **Withdraw** in the same panel to remove your signature, then sign again once the matter is resolved.

7.3 Approving a document

Where a document is presented to you for approval, you will see two buttons:

Button	What it does
Approve	Accepts the document. The status becomes Approved and it is locked.
Decline	Returns it with a reason you type in. The status becomes Declined and it goes back for correction.

If you decline, be specific. The reason you type is sent to the person who completed the document, so a clear reason gets it corrected quickly.

8. Your Score Sheet

Your score sheet (Annexure A2) collects every result captured about you during the year into one official document.

- 1 Click **Score Sheets** on your dashboard.
- 2 Your score sheet opens, showing your scores per performance standard and your totals.
- 3 Use the **PDF** or **Print** option to download or print a copy.

QM Easy QMS made easy for: Ann Other (PL1)

PDF Trends

QM Easy Score Sheets

Your school logo

Select: Term 2 Year 2025

Annexure A 2

COMPOSITE SCORE SHEET: PL 1 EDUCATOR

Educator Ann Other Term/Year 2/2025

Personal Number 874125 School QM Easy - Demo

PERFORMANCE STANDARD	MAXIMUM SCORE	EDUCATOR SCORE
1. Creation of a positive learning and teaching environment	28	28
2. Curriculum knowledge, lesson planning and presentation	48	46
3. Learner assessment and achievement	28	27
4. Professional development	36	35
5. Extra-mural and co-curricular participation	12	12
FINAL SCORE	152	148
PERCENTAGE (Educator Score ÷ 152) x 100 =		97.37 %

Educators Comments:

Thank you.

Appraiser's Comments:

Resource Person's Comments:

Activate Windows
Go to Settings to activate Windows.

The Post Level 1 score sheet.

Nothing to calculate, nothing to copy. Score sheets are generated automatically from the appraisals already captured. The individual score sheets are attached to Annexure E1 — the summative score sheet for the whole school — and submitted to the district office.

Keeping your records

Schools must keep appraisal documents for **five years**. QM Easy stores them digitally for the same period, so you can return to any previous year at any time.

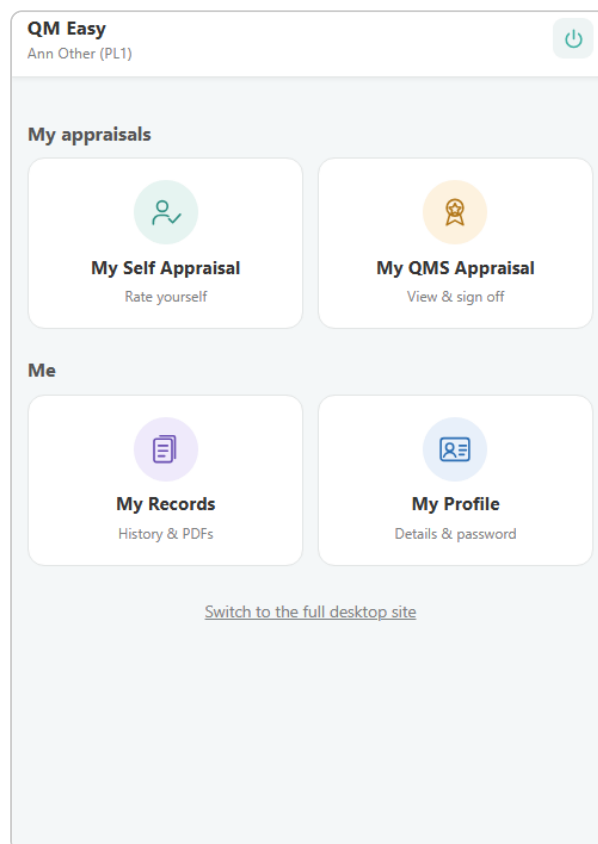
9. Using QM Easy on your phone

QM Easy has a mobile version designed for phones and tablets. It works like an app in your browser — no installation, no app store.

9.1 Getting to the mobile version

- 1 Log in as normal on your phone.
- 2 Scroll to the bottom of the dashboard and tap **View in mobile mode**.
- 3 The mobile home screen opens with large, easy-to-tap tiles.

To go back, tap **Switch to the full desktop site** at the bottom of the mobile home screen.



The QM Easy mobile home screen.

9.2 What you can do on your phone

- ✓ See anything that **needs your attention** at the top of the screen
- ✓ Open and complete **My Self Appraisal**
- ✓ View and sign off **My QMS Appraisal**
- ✓ Sign off classroom reviews and lesson observations about you
- ✓ View **My Records** — your history and PDFs
- ✓ Update your details in **My Profile**

Add it to your home screen. In your phone's browser menu choose *Add to Home Screen*. QM Easy then opens from an icon just like an app.

The attention list. The mobile home screen lists everything waiting on you, each with a coloured label such as **Sign off** or **To score** . Tap any item to go straight to it.

10. Documents and downloads

Click **Doc's and Downloads** in the top menu to reach every official document and training resource.

Document	What it covers
QMS Introduction	An introduction to the Quality Management System.
Collective Agreement No. 2 of 2020	The official agreement that governs QMS.
QMS School Training Toolkit	Training material for the whole school.
Post Level training manuals	This manual and the manuals for other post levels.
First log in and self setup	Step-by-step guide to setting your password.

Every appraisal document you complete can also be downloaded as a **print-ready PDF** from the appraisal itself.

11. Troubleshooting and FAQs

I cannot log in

Check that your email address is spelled correctly and that Caps Lock is off. If you still cannot get in, ask your Principal or Super User to confirm the email address on your profile.

I forgot my password

Contact your Principal or Super User, who can reset your access.

My appraisal is locked and I cannot edit it

Once an appraisal is submitted its status becomes **Waiting Approval** and it locks. If you need to change it, ask your appraiser to decline it back to you — it will return as **Declined** and become editable again.

I cannot see the Appraisals or Workplan tiles

That is correct. Post Level 1 educators do not appraise others and do not complete workplans — workplans apply to School Management Team members only.

Can I refuse to be appraised?

No. The employer has every right to evaluate the performance of its employees provided there is an agreed process and instrument, which QMS provides.

Do I have to create my own templates?

No. Every document layout has been accepted by the Department of Basic Education and is generated automatically. Each is downloadable as a printable PDF.

Is my information safe?

Yes. QM Easy is a secure web application and all documents are generated and continuously saved on a secure cloud server.

Who do I ask for help?

Start with your appraiser or your school's QM Easy Super User. For system problems, use **Contact Us** on the QM Easy website.