

QM Easy

QMS MADE EASY

TRAINING MANUAL

Post Level 2

A complete guide for Departmental Heads — appraising your educators, lesson observations, classroom reviews, workplans and your own appraisals.

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1. Before you begin

1.1 Who this manual is for

This manual is for **Post Level 2 educators — Departmental Heads**. You appraise the Post Level 1 educators in your department, and you are appraised yourself.

1.2 Your two roles

Everything in QM Easy at Post Level 2 falls into one of two roles. Keeping them separate makes the system much easier to understand.

Role	What you do
As an appraiser	Appraise your PL1 educators, conduct lesson observations and classroom reviews, approve their self appraisals, and agree workplans.
As an appraisee	Complete your own self appraisal, receive your own QMS appraisal from the Deputy Principal or Principal, complete your own workplan, and sign off your documents.

Who appraises whom. The immediate supervisor of a Post Level 1 educator is their departmental head — that is you. In your absence the deputy principal or principal may conduct the appraisal. You in turn are appraised by the deputy principal or principal.

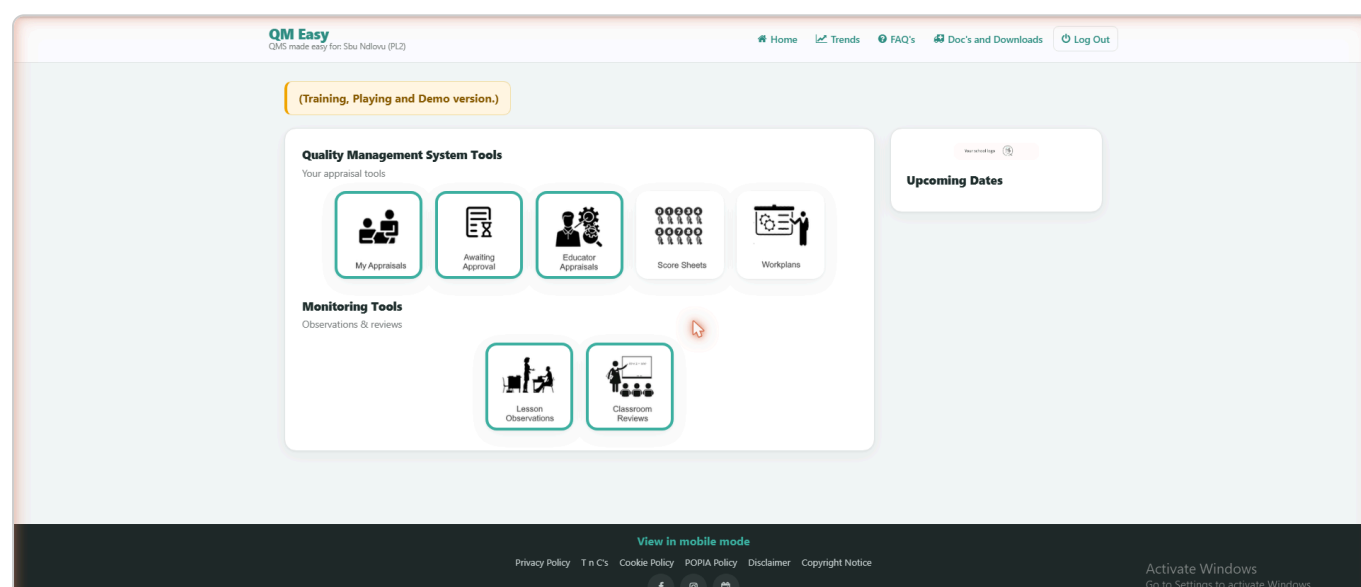
2. Getting started

2.1 Logging in

- 1 Go to the QM Easy website and click **Log In**.
- 2 Enter your **email address** and **password**, then click **Log In**.
- 3 If you hold more than one profile, choose the correct one from the **Multiple profiles detected** window.

Setting a password for the first time? Click “**No password yet? Get started here**” on the login screen and follow the prompts.

2.2 Your dashboard explained



The Post Level 2 dashboard.

Tile	Annexure	What it does
My Appraisals	B2	Your own self and QMS appraisal history.
Awaiting Approval	A1	Documents from your educators waiting for you to approve.
Appraisals	A1	Appraise the educators linked to you.
Score Sheets	A2, B3	Score sheets for you and your appraisees.
Workplan	B1	Your own workplan.
Lesson Observations	E2	Conduct lesson observations.
Classroom Reviews	–	Conduct classroom reviews.

2.3 The teal border

Your daily to-do list. When a tile is outlined with a **teal border**, something needs your attention behind it — an appraisal to complete, a document to approve, or a workplan to agree. Clear the bordered tiles first and the QMS year takes care of itself.

The top menu

At Post Level 2 you also have **Support Staff Worklist** (if you appraise non-teaching staff) and **Trends**, which shows appraisal trends across the educators you are responsible for.

3. Understanding the QMS cycle

3.1 The appraisal year

When	What happens	Who completes it
Term 1	Self Appraisals	Each educator rates themselves — including you.
Term 2	QMS Appraisal (mid-year)	You appraise your educators. Compulsory.
Term 3	Self Appraisals	Each educator rates themselves again.
Term 4 (Annual)	QMS Appraisal (annual)	You appraise your educators. Compulsory.

3.2 The rating 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.

Score against the descriptor, not the person. Read each descriptor and ask what the evidence actually shows. Consistency across your department is what makes the scores meaningful.

3.3 Your performance standards

As a Post Level 2 educator you are appraised against **six performance standards** — the five that apply to every educator, plus one for your management role:

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
6	Management of the curriculum

Performance Standard 6 covers providing leadership, mentoring and support; administration of resources and records; decision-making and accountability; and policy development and implementation.

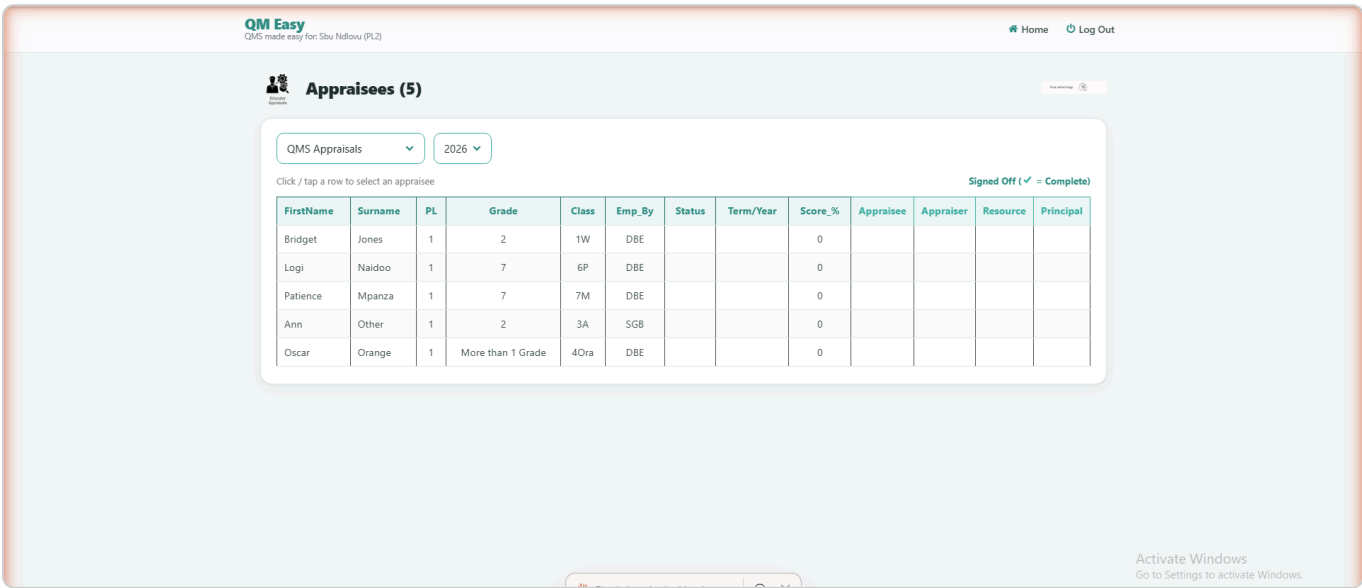
3.4 Your annexures

Annexure	Document
A1	Appraisal instrument for PL1 educators — the one you complete for your team
A2	Score sheet for PL1 educators
B1	Your workplan
B2	Appraisal instrument for PL2 educators — your own appraisal
B3	Score sheet for PL2 educators
E2	Lesson observation instrument

4. Appraising your educators

4.1 Finding your appraisees

- 1 Click **Appraisals** on your dashboard.
- 2 The **Appraisees** screen lists every educator linked to you.
- 3 Use the two filters at the top: the first chooses **QMS Appraisals**, **Self Appraisals** or **Support Staff Appraisals**; the second chooses the **year**.
- 4 Click or tap any row to open that educator’s appraisal.



The Appraisees screen — your whole team at a glance.

Reading the list

Column	What it shows
Status	Where the appraisal is in the process — In Progress, Waiting Approval, Approved or Declined.
Term / Year	The period the appraisal covers.
Score %	The result once scoring is complete.
Appraisee, Appraiser, Resource, Principal	Sign-off columns. A tick means that person has signed. All required ticks must be present before the appraisal is complete.

4.2 Completing a QMS appraisal

- 1 Open the educator from the Appraisees list.
- 2 Check **Section A** — the educator’s details, your details and the school details.

- 3 Confirm the **Term** and **Year** are correct.
- 4 Work through each performance standard, scoring every descriptor from **1** to **4**.
- 5 Add a **comment** for each performance standard, recording evidence and agreed development needs.
- 6 Click **Save** as you go. The running totals update automatically.

Appraisal is a discussion, not a form. Score the appraisal with the educator, not about them. The completed instrument serves as the report — you do not need to write a separate report afterwards.

Annual appraisals show Term 2 scores. When you open an Annual (Term 4) appraisal, each descriptor also displays the Term 2 score as a guide, so movement across the year is obvious.

4.3 Saving and submitting

Button	What it does
Save	Saves your work; status stays In Progress . Come back any time.
Submit	Sends it to the educator for sign-off; status becomes Waiting Approval and the form locks.

Submit only when the discussion has happened. Once submitted the appraisal locks, and it has to be declined back before it can be edited again.

4.4 Signing off

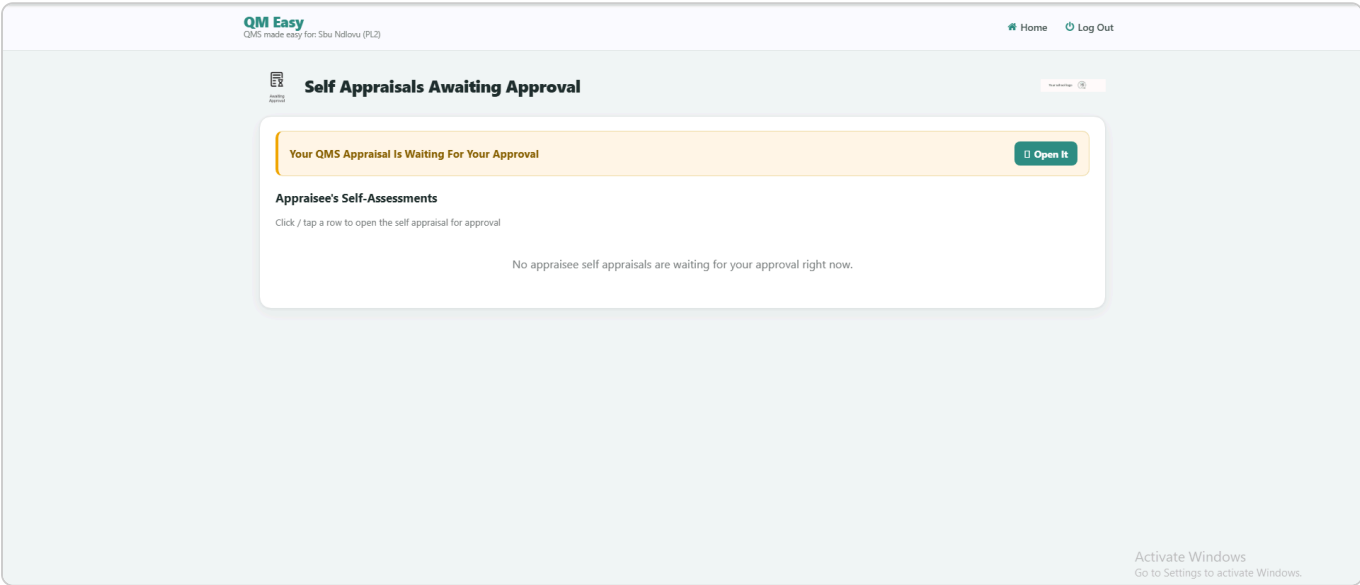
Scroll to the **Sign-off** panel, enter **your own password** as your digital signature, and click **Agree & sign off**. Use **Withdraw** if you need to remove your signature.

5. Approving what comes to you

5.1 Awaiting Approval

When your educators submit their self appraisals, they come to you for approval. The **Awaiting Approval** tile gains a teal border to tell you so.

- 1 Click **Awaiting Approval** on your dashboard.
- 2 The worklist shows every document waiting for you, with the educator’s name, term, year and status.
- 3 Click a row to open it.



The Awaiting Approval worklist.

5.2 Approving or declining

Button	What it does
Approve	Accepts the self appraisal. Status becomes Approved and the educator is notified.
Decline	Returns it with a reason you type. Status becomes Declined , the educator is notified, and they can edit and resubmit.

Write a useful reason. Your decline reason is emailed to the educator, so a specific reason gets the correction made first time.

6. Lesson Observations

A lesson observation (Annexure E2) assesses **performance standards 1, 2 and 3** during an actual lesson.

- 1 Click **Lesson Observations** on your dashboard.
- 2 Choose the educator from the list.
- 3 Record the **Subject** and the **Topic** of the lesson.
- 4 Score each descriptor from 1 to 4 as you observe.
- 5 Use the **Note** box under any descriptor to capture evidence in the moment.
- 6 Complete the **Observer's overall comment**, and record the **Educator's comment** after your feedback discussion.
- 7 Click **Save** while you work, then **Submit** when the discussion is complete.

Use your phone in the classroom. The mobile version is built for exactly this — large score buttons, one-thumb operation, and it saves instantly. See section 11.

What about the other standards? Performance standards outside the classroom are assessed continuously through observation, monitoring, feedback and evidence provided by the educator — they do not have to be evaluated on one day.

7. Classroom Reviews

A classroom review looks at the classroom environment, the educator's records and the learners' books. It is scored out of **56**.

Section	Out of	What you check
1. Classroom Appearance	16	Posters and displays, neatness, desk arrangement, class atmosphere.
2. Record Check	12	Weekly planning, long-term planning, assessment plan, mark book.
3. Book Check	28	Appearance, neatness, setting out, quality of work, regularity, marking, remediation.
4. General Comment	–	Your overall comment.

- 1 Click **Classroom Reviews** and choose the educator.
- 2 In the Book Check section, record which **learning area** you reviewed and which **learners' books** you sampled — the guidance is two top, two middle and two weak learners.
- 3 Score each item. Note that section 2 (Record Check) uses a 1–3 scale: 1 = Not Available, 2 = Needs Work, 3 = Up To Date.
- 4 **Save** as you go, then **Submit** when finished.

8. Workplans (Annexure B1)

Only members of the School Management Team complete a workplan — as a Departmental Head, that includes you. Post Level 1 educators do not have workplans.

- 1 Click **Workplan** on your dashboard.
- 2 Your workplan for the current year opens.
- 3 Agree the content with your immediate supervisor, then complete and sign it.

What makes a good performance indicator

A good performance indicator has four parts:

Part	Example
A measure	"Percentage of learners who arrive at school on time"
A target	97%
A data source / evidence	The attendance register
A reporting frequency	Monthly

QM Easy QMS made easy for: Sbu Ndlovu (PL2)

 [SEND FOR APPROVAL](#)  

QMS Work-plan PL2: Department Head: Year 2026

Your school logo 

Name	Sbu Ndlovu	School	QM Easy - Demo
Period *	03-2026	Designation	PL1 EDUCATOR (SGB DH)
Supervisor	Joel Jammer	Status	In Progress

Annexure B 1

Workplan Activities

Performance Standard	Key Activities	Target	Time Frame	Performance Indicators	Contextual Factors
6. Management of the curriculum	Equipment and furniture are kept in good condition and is working (e.g. computers, photocopiers, projectors, tables, chairs, etc.)	My targets will be described here	Term 1,2,3 & 4	All performance indicators will display here when captured	These will be my contextual factors
6. Management of the curriculum	Conducts regular classroom visits to provide support and development to educators	Targets for this Standard and point will appear here	Term 1&2	These will be my performance indicators	Contextual factors will be displayed here
6. Management of the curriculum	A filing system of all essential records is kept and updated regularly	Educator classroom records updated regularly			

+ Add New Activity

Activate Windows
Go to Settings to activate Windows.

A Post Level 2 workplan.

9. Your own appraisals

You are appraised as well as being an appraiser. Your own appraisals work exactly like your educators' — you simply sit on the other side of them.

| 9.1 Your self appraisal (Terms 1 and 3)

- 1 Click **My Appraisals** on the dashboard.
- 2 Click **New** above the **Self Appraisals** list.
- 3 Complete Section A and score yourself against all **six** performance standards.
- 4 **Save** as you go; **Submit** when finished. It goes to the Deputy Principal or Principal for approval.

| 9.2 Your QMS appraisal (Term 2 and Annual)

The Deputy Principal or Principal completes this with you. When it is submitted it comes to you for sign-off — open it from **My Appraisals**, read it in full, then sign it off with your password.

Set the example. Departments follow the lead of the head. Completing your own appraisals on time makes it much easier to ask the same of your educators.

10. Score sheets and results

- 1 Click **Score Sheets** on your dashboard.
- 2 You see the score sheets for the educators you are responsible for, as well as your own.
- 3 Open any one to view it, and use the PDF option to download or print it.

Score sheets are generated automatically from the appraisals captured — there is no copying, pasting or calculating. Individual score sheets are attached to **Annexure E1**, the summative score sheet for the school, which the Principal submits to the district office.

Trends

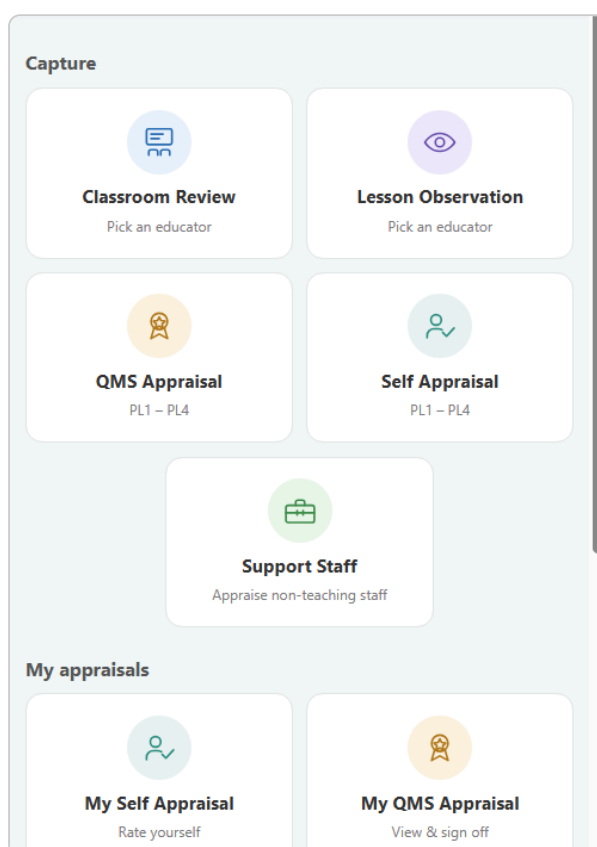
Click **Trends** in the top menu to see appraisal trends across the educators you are responsible for — useful for spotting development needs across your whole department.

11. Using QM Easy on your phone

The mobile version is built for capturing observations and reviews while you are on your feet — in a classroom, in a corridor, between lessons.

11.1 Getting there

- 1 Log in on your phone as normal.
- 2 Scroll to the bottom of the dashboard and tap **View in mobile mode**.
- 3 To return, tap **Switch to the full desktop site** at the bottom of the mobile home screen.



The mobile home screen for an appraiser.

11.2 What you can do on your phone

- ✓ **Classroom Review** — pick an educator and capture the review
- ✓ **Lesson Observation** — score a lesson as you watch it
- ✓ **QMS Appraisal** and **Self Appraisal** — capture appraisals
- ✓ **Support Staff** — appraise non-teaching staff
- ✓ See everything that **needs your attention** at the top of the screen
- ✓ Complete your own appraisals and view your records

Add it to your home screen. In your browser menu choose *Add to Home Screen* and QM Easy opens from an icon like an app.

12. Troubleshooting and FAQs

An educator is missing from my Appraisees list

Educators appear on your list because they are linked to you as their appraiser. If someone is missing, ask your Principal or Super User to check the link in **Settings** → **Users**.

I submitted an appraisal by mistake

A submitted appraisal locks at **Waiting Approval**. Ask the person it went to decline it back, which returns it as **Declined** and unlocks it for editing.

Can an educator 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.

Do I have to write a report after the appraisal?

No. The completed instrument serves as the report.

Which documents go to the District Office?

The composite score sheet is completed and signed by each educator and their supervisor after the annual appraisal. Those individual score sheets are attached to Annexure E1 — the summative score sheet for the school — and submitted to the district office.

How long must documents be kept?

Five years. QM Easy stores them digitally for the same period.

Do educators complete a template for development needs?

No. Development needs are recorded on the lesson observation and appraisal instruments during the mid-year and annual appraisals, and are addressed by the School Management Team. Outstanding needs are recorded on Annexure E1.