

QM Easy

QMS MADE EASY

TRAINING MANUAL

Post Level 3

A complete guide for Deputy Principals — appraising departmental heads and educators, approvals, workplans, school-wide oversight and your own appraisals.

Contents

1. Before you begin

1. Who this manual is for
2. Your three roles

2. Getting started

1. Logging in
2. Your dashboard explained
3. The teal border

3. Understanding the QMS cycle

1. The appraisal year
2. The rating scale
3. Your performance standards
4. Your annexures

4. Appraising your staff

1. Finding your appraisees
2. Completing an appraisal
3. Saving, submitting and signing off

5. Approving what comes to you

6. Lesson Observations

7. Classroom Reviews

8. Workplans (Annexures B1 and C1)

9. Your own appraisals

10. Score sheets, results and trends

11. Support staff appraisals

12. Using QM Easy on your phone

13. Troubleshooting and FAQs

1. Before you begin

1.1 Who this manual is for

This manual is for **Post Level 3 educators — Deputy Principals**. You appraise departmental heads and educators, approve documents from across the school, and are appraised yourself by the Principal.

1.2 Your three roles

Role	What you do
As an appraiser	Appraise the departmental heads and educators linked to you, conduct lesson observations and classroom reviews, and agree workplans with your SMT members.
As an approver	Approve self appraisals submitted by PL1 and PL2 staff who report to you, and sign off appraisals as part of the school's oversight chain.
As an appraisee	Complete your own self appraisal and workplan, receive your own QMS appraisal from the Principal, and sign off your documents.

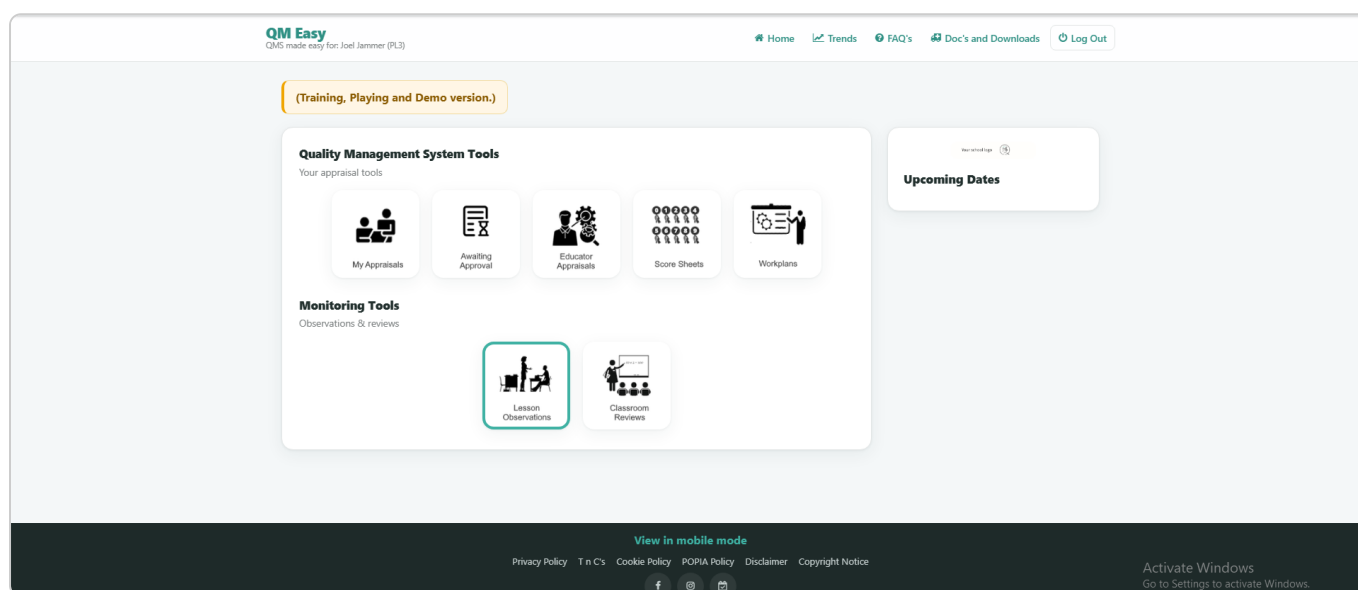
Who appraises whom. The deputy principal or principal appraises a departmental head. A deputy principal is appraised by the principal. The circuit manager, as the principal's immediate supervisor, appraises the principal.

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 when prompted.

2.2 Your dashboard explained



The Post Level 3 dashboard.

Tile	Annexure	What it does
My Appraisals	C2	Your own self and QMS appraisal history.
Awaiting Approval	A1, B2	Documents from PL1 and PL2 staff waiting for your approval.
Appraisals	A1, B2	Appraise the educators and departmental heads linked to you.
Score Sheets	A2, B3, C3	Score sheets across the levels you oversee.
Workplan	B1, C1	Your workplan and those of your SMT members.
Lesson Observations	E2	Conduct lesson observations.
Classroom Reviews	–	Conduct classroom reviews.

2.3 The teal border

Your daily to-do list. A **teal border** around a tile means there is something behind it waiting for you. At Post Level 3 the **Awaiting Approval** tile is usually the busiest — check it first.

The top menu

At Post Level 3 you also have **Support Staff Worklist**, **Support Staff Config** (for setting up non-teaching staff appraisals) and **Trends**.

3. Understanding the QMS cycle

3.1 The appraisal year

When	What happens	Your part
Term 1	Self Appraisals	Complete your own; approve those submitted to you.
Term 2	QMS Appraisal (mid-year)	Appraise your staff. Compulsory.
Term 3	Self Appraisals	Complete your own; approve those submitted to you.
Term 4 (Annual)	QMS Appraisal (annual)	Appraise your staff. 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.

Consistency across the school matters. As a Deputy Principal you see scoring from several departmental heads. Where standards drift apart, moderate them — comparable scores are what make the school's summative results credible.

3.3 Your performance standards

Post Level 3 is appraised on a management instrument with **seven performance standards**:

PS	Focus
1	Classroom teaching, and support for the learning school
2	Planning, and the School Governing Body and broader school community
3	Securing accountability, and managing the quality of teaching and learning
4	Development of staff and self
5	Financial management, general institutional management and administration, and management of infrastructure
6	Managing human resources (educators and support staff) in the school
7	Management and advocacy of extra-mural activities

Lesson observation at management level. For a deputy principal and principal, lesson observation uses **Performance Standard 1, Criterion 1** of the PL3 / PL4 appraisal instrument — not the three standards used for PL1 and PL2 educators.

3.4 Your annexures

Annexure	Document
A1 / A2	Appraisal instrument and score sheet for PL1 educators
B1	Workplan for PL2
B2 / B3	Appraisal instrument and score sheet for PL2 educators
C1	Your workplan
C2 / C3	Appraisal instrument and score sheet for PL3 — your own appraisal
E1	Summative score sheet for the school
E2	Lesson observation instrument

4. Appraising your staff

4.1 Finding your appraisees

- 1 Click **Appraisals** on your dashboard.
- 2 The **Appraisees** screen lists everyone linked to you.
- 3 Use the filters to switch between **QMS Appraisals**, **Self Appraisals** and **Support Staff Appraisals**, and to change the **year**.
- 4 Click any column heading to sort — useful for finding everyone with an outstanding status.
- 5 Click or tap a row to open that person's appraisal.

The Appraisees screen, showing both educators and departmental heads.

Use the sign-off columns as a tracker. The Appraisee, Appraiser, Resource and Principal columns show a tick once each party has signed. Sorting by these quickly shows you which documents are still incomplete.

4.2 Completing an appraisal

- 1 Open the person from the Appraisees list.
- 2 Check **Section A** and confirm the **Term** and **Year**.
- 3 Score every descriptor from **1** to **4**, working standard by standard.
- 4 Add a **comment** per performance standard capturing evidence and agreed development needs.
- 5 Click **Save** regularly — totals update automatically.

Remember the instrument you complete depends on the person: PL1 educators are appraised on **Annexure A1**, departmental heads on **Annexure B2**.

4.3 Saving, submitting and signing off

Button	What it does
Save	Keeps the appraisal In Progress so you can continue later.
Submit	Moves it to Waiting Approval and locks it for editing.
Agree & sign off	Adds your digital signature. Enter your own password to confirm.
Withdraw	Removes a signature you added in error.

5. Approving what comes to you

At Post Level 3 you approve self appraisals from both **PL1 educators** and **PL2 departmental heads** who report to you.

- 1 Click **Awaiting Approval** on your dashboard.
- 2 The worklist shows every document waiting for you, with name, post level, term, year and status.
- 3 Click a row to open the full document.
- 4 Read it, then choose **Approve** or **Decline**.

Action	What happens
Approve	Status becomes Approved ; the person is notified by email.
Decline	Status becomes Declined ; your reason is emailed to them and the document unlocks for correction.

Do not let the worklist build up. Nothing downstream — score sheets, Annexure E1, the district submission — can be finalised while documents sit unapproved. Clearing this list weekly keeps the whole school moving.

6. Lesson Observations

- 1 Click **Lesson Observations** and choose the educator.
- 2 Record the **Subject** and **Topic**.
- 3 Score each descriptor from 1 to 4 during the lesson, using the **Note** box to capture evidence.
- 4 Complete the **Observer's overall comment** and record the **Educator's comment** after the feedback discussion.
- 5 **Save** as you go, then **Submit**.

For PL1 and PL2 educators, lesson observation covers performance standards 1, 2 and 3. For a deputy principal or principal it uses Performance Standard 1, Criterion 1 of the management instrument.

Capture it on your phone. Use the mobile version in the classroom — it saves instantly and needs one thumb. See section 12.

7. Classroom Reviews

A classroom review is scored out of **56** across three sections plus a general comment.

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. Scored 1–3.
3. Book Check	28	Appearance, neatness, setting out, quality, regularity, marking, remediation.
4. General Comment	–	Your overall comment.

Record which learning area you reviewed and which learners’ books you sampled — two top, two middle and two weak learners.

8. Workplans (Annexures B1 and C1)

Only School Management Team members complete workplans. As a Deputy Principal you complete your own (Annexure C1) and agree those of your departmental heads (Annexure B1).

- 1 Click **Workplan** on your dashboard.
- 2 Open your own workplan, or select an SMT member to review theirs.
- 3 Agree the targets and evidence, then complete and sign.

What makes a good performance indicator

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

Post Level 1 educators do not complete workplans. Only members of the School Management Team are required to agree and sign a workplan with their immediate supervisors.

9. Your own appraisals

| 9.1 Your self appraisal (Terms 1 and 3)

- 1 Click **My Appraisals**, then **New** above the Self Appraisals list.
- 2 Complete Section A and score yourself against all **seven** performance standards.
- 3 **Save** as you go; **Submit** when finished. It goes to the Principal.

| 9.2 Your QMS appraisal (Term 2 and Annual)

The Principal completes this with you, using **Annexure C2**. When submitted it comes to you for sign-off — open it from **My Appraisals**, read it, and sign off with your password.

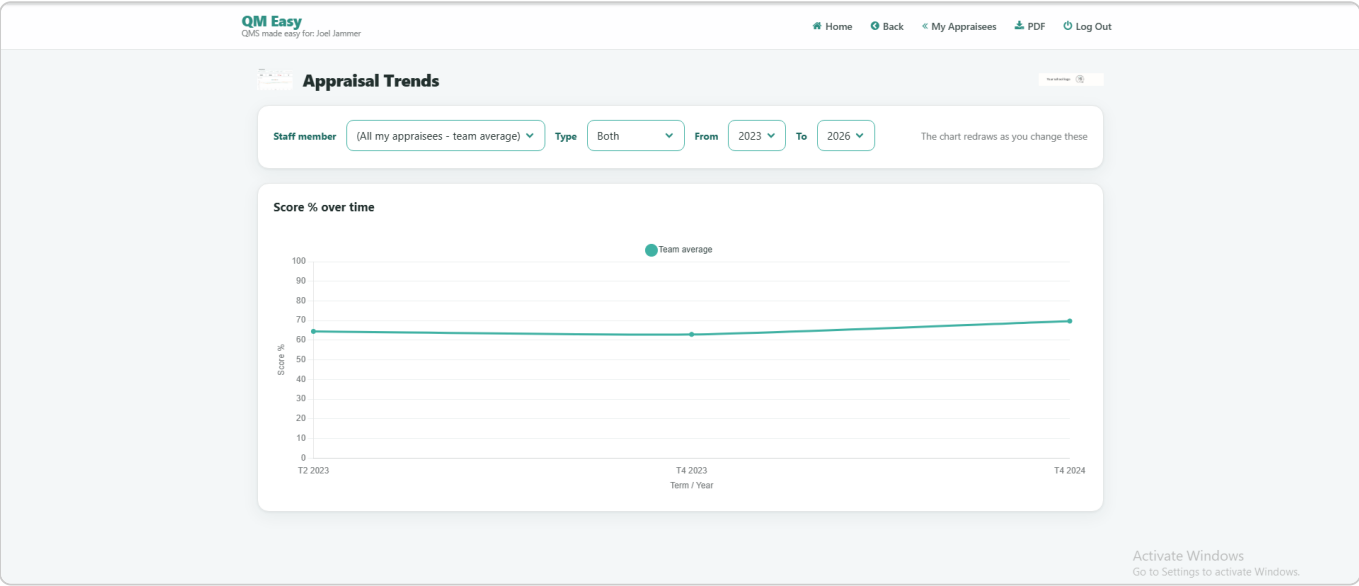
10. Score sheets, results and trends

- 1 Click **Score Sheets** to see score sheets across the levels you oversee (A2, B3 and your own C3).
- 2 Open any one to view it and download it as a PDF.

Individual score sheets are attached to **Annexure E1**, the summative score sheet for the school, which is submitted to the district office after the annual appraisal.

Trends

Click **Trends** in the top menu to see how appraisal results move across terms and years. Use it to spot development needs across departments and to prepare for SMT discussions.



Appraisal trends.

11. Support staff appraisals

QM Easy also appraises **non-teaching staff** — administrators, grounds staff, cleaners, drivers and other support roles — on templates your school designs itself.

Menu item	What it does
Support Staff Config	Set up positions and design the appraisal templates.
Support Staff Worklist	The support staff appraisals waiting for you.
Appraisals → Support Staff Appraisals	Filter your Appraisees list to non-teaching staff.

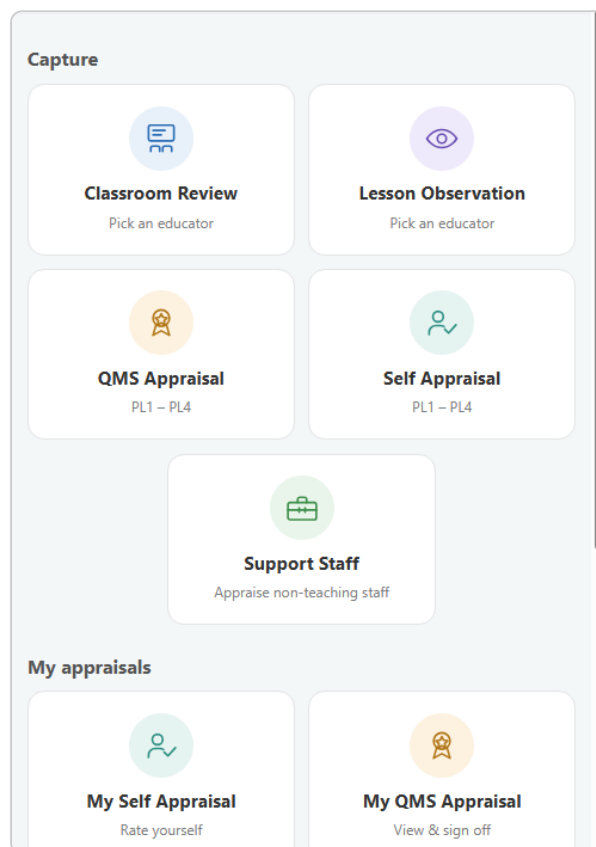
Full instructions. Setting up support staff appraisals is covered step by step in the separate manual *Setting Up Support Staff Appraisals*. Conducting them is covered in *Support Staff Appraisals*.

12. Using QM Easy on your phone

- 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**.

What you can do on your phone

- ✓ See everything that **needs your attention** in one list
- ✓ Capture **Classroom Reviews** and **Lesson Observations** on the spot
- ✓ Complete **QMS** and **Self Appraisals**
- ✓ Appraise **Support Staff**
- ✓ Approve documents waiting on you
- ✓ View your records and score sheets



The mobile home screen.

13. Troubleshooting and FAQs

Someone is missing from my Appraisees list

People appear because they are linked to you as their appraiser. Ask your Principal or Super User to check the link in **Settings** → **Users**.

An appraisal is locked

Submitted appraisals lock at **Waiting Approval**. Decline it back to unlock it for editing.

Which Performance Standards are used for lesson observation?

For PL1 and PL2 educators: performance standards 1, 2 and 3. For a deputy principal or principal: Performance Standard 1, Criterion 1 of the PL3 / PL4 instrument.

Do all educators complete a workplan?

No. Only members of the School Management Team agree and sign a workplan with their immediate supervisors.

What is the difference between 'P 1A' and 'P 1B'?

These terms are used strictly during the appraisal process to distinguish principals who teach for more or less than 30% of the scheduled teaching time. They are not related to the grading of a principal's post.

Which documents are submitted to the District Office?

Individual composite score sheets, signed by each educator and their supervisor after the annual appraisal, attached to Annexure E1 — the summative score sheet for the school.