

QM Easy

QMS MADE EASY

TRAINING MANUAL

Post Level 4

A complete guide for Principals — school-wide oversight, appraising your management team, Annexure E1, workplans, settings and your own appraisal.

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1. Before you begin

1.1 Who this manual is for

This manual is for **Post Level 4 — Principals**. You carry overall accountability for QMS at your school: you appraise your management team, oversee the whole process, and submit the school's results to the district office.

1.2 Your responsibilities in QM Easy

Responsibility	What it involves
Appraiser	Appraise deputy principals and departmental heads, and educators where required.
Approver	Approve documents that reach you, and provide the Principal sign-off on appraisals across the school.
Oversight	Track progress across every post level and make sure the cycle is completed on time.
Submission	Produce Annexure E1 — the summative score sheet for the school — and submit it to the district office.
Administration	Manage users, appraiser links and school settings.
Appraisee	Complete your own self appraisal and workplan; you are appraised by your circuit manager.

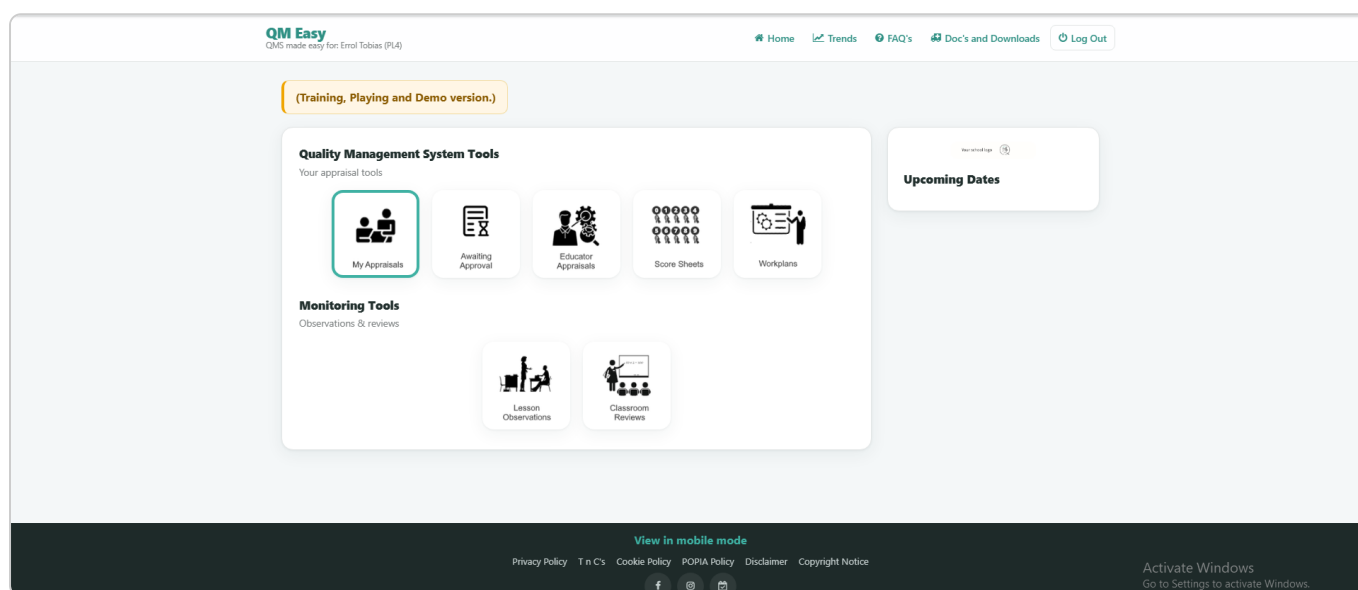
Who appraises the principal. The circuit manager, as the immediate supervisor of the principal, is responsible for the principal's appraisal.

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 4 dashboard.

Tile	Annexure	What it does
My Appraisals	D2	Your own self and QMS appraisal history.
Awaiting Approval	C2	Documents waiting for your approval.
Appraisals	A1, B2, C2	Appraise educators, departmental heads and deputy principals.
Score Sheets	E1	The summative score sheet for the whole school.
Workplan	B1, C1, D1	Your workplan and those of your SMT.
Lesson Observations	E2	Conduct lesson observations.
Classroom Reviews	–	Conduct classroom reviews.

2.3 The teal border

Your daily to-do list. A **teal border** means something behind that tile needs you. As Principal you are the last signature on many documents, so clearing bordered tiles promptly keeps the whole school's cycle moving.

The top menu

Menu item	What it does
Settings	Manage users, profiles and appraiser links.
Support Staff Config	Set up positions and templates for non-teaching staff.
Support Staff Worklist	Support staff appraisals waiting for you.
My Support Staff Appraisal	Your own support staff appraisal, where applicable.
Trends	Appraisal trends across the school.
Doc's and Downloads	Official documents and training manuals.

3. Understanding the QMS cycle

3.1 The appraisal year

When	What happens	Your part
Term 1	Self Appraisals	Make sure every educator completes one; complete your own.
Term 2	QMS Appraisal (mid-year)	Oversee completion school-wide. Compulsory.
Term 3	Self Appraisals	Second round of self appraisals.
Term 4 (Annual)	QMS Appraisal (annual)	Oversee completion, then produce and submit Annexure E1.

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.

Moderate across the school. You see every department’s scoring. Where standards drift apart, address it — comparable scores make the school’s summative results defensible.

3.3 Your performance standards

Principals are appraised on the management instrument, covering **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

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 in their schools. They are not related to the grading of a principal's post.

3.4 Your annexures

Annexure	Document
A1 / A2	Appraisal instrument and score sheet — PL1 educators
B1 / B2 / B3	Workplan, appraisal instrument and score sheet — PL2
C1 / C2 / C3	Workplan, appraisal instrument and score sheet — PL3
D1 / D2	Your workplan and your appraisal instrument
E1	Summative score sheet for the school — submitted to the district
E2	Lesson observation instrument

4. Running the QMS year at your school

A suggested rhythm that keeps the cycle on track without a scramble in Term 4.

Period	What to do
Start of year	Check every staff member has a profile and the correct post level in Settings . Confirm every educator is linked to the right appraiser. Agree SMT workplans.
Term 1	Self appraisals completed and approved. Begin classroom reviews and lesson observations.
Term 2	Mid-year QMS appraisals completed with discussions held. Clear the approval worklists.
Term 3	Second round of self appraisals. Follow up development needs raised at mid-year.
Term 4	Annual QMS appraisals completed and signed off by all parties. Produce Annexure E1 and submit to the district office.

Watch the sign-off columns. On the Appraisees screen, the Appraisee, Appraiser, Resource and Principal columns show a tick when each party has signed. Sorting on these is the fastest way to find documents that are scored but not yet complete.

5. Appraising your staff

- 1 Click **Appraisals** on your dashboard.
- 2 The **Appraisees** screen lists the staff linked to you.
- 3 Use the filters to choose **QMS Appraisals**, **Self Appraisals** or **Support Staff Appraisals**, and the **year**.
- 4 Click any row to open that person's appraisal.
- 5 Check Section A, confirm the Term and Year, then score every descriptor from 1 to 4.
- 6 Add comments per performance standard, capturing evidence and agreed development needs.
- 7 **Save** as you go; **Submit** once the discussion has taken place.

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Home Log Out

Appraisees (10)

QMS Appraisals 2026

Click / tap a row to select an appraisee

Signed Off (✓ = Complete)

FirstName	Surname	PL	Grade	Class	Emp_By	Status	Term/Year	Score_%	Appraisee	Appraiser	Resource	Principal
Sam	BAKER	0			SGB			0				
John	DOMMER	1	3	4I	SGB			0				
Joel	JAMMER	3	Not Applicable		DBE			0				
Bridget	JONES	1	2	1W	DBE			0				
Patience	MPANZA	1	7	7M	DBE			0				
Logi	NAIDOO	1	7	6P	DBE			0				
Sbu	NDLOVU	2	6	6A	DBE			0				
Oscar	ORANGE	1	More than 1 Grade	4Ora	DBE			0				
Ann	OTHER	1	2	3A	SGB			0				
Errol	TOBIAS	4	Not Applicable		DBE			0				

Activate Windows
Go to Settings to activate Windows.

The Appraisees screen at Principal level.

The instrument depends on the person: **A1** for PL1 educators, **B2** for departmental heads, **C2** for deputy principals.

Your signature

Many appraisals require the **Principal** sign-off. Open the document, scroll to the **Sign-off** panel, enter **your own password** and click **Agree & sign off**. Use **Withdraw** to remove a signature added in error.

6. Approving what comes to you

- 1 Click **Awaiting Approval** on your dashboard.
- 2 The worklist shows every document waiting for you.
- 3 Open a document, read it in full, 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 and the document unlocks for correction.

Approvals gate everything downstream. Score sheets and Annexure E1 cannot be finalised while documents sit unapproved.

7. Lesson Observations and Classroom Reviews

Lesson Observations (Annexure E2)

- 1 Click **Lesson Observations** and choose the educator.
- 2 Record the **Subject** and **Topic**, then score as you observe.
- 3 Complete the observer's comment and record the educator's comment after feedback.
- 4 **Save**, 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.

Classroom Reviews

Scored out of **56**: Classroom Appearance (16), Record Check (12, scored 1–3) and Book Check (28), plus a general comment.

Capture on your phone. The mobile version is designed for exactly this — see section 14.

8. Workplans (Annexures B1, C1 and D1)

Only School Management Team members complete workplans. You complete your own (Annexure D1) and agree those of your deputy principals (C1) and departmental heads (B1).

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

9. Annexure E1 and the district submission

Annexure E1 is the summative score sheet for the whole school — the document the district office receives.

- 1 Make sure every annual appraisal is **Approved** and fully signed off.
- 2 Click **Score Sheets** on your dashboard to open the school’s summative score sheet.
- 3 Check that every educator appears with the correct result.
- 4 Download it as a **PDF**.
- 5 Attach the individual composite score sheets, signed by each educator and their supervisor.
- 6 Submit the pack to the district office.

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HomeMy ScoresheetsDownloadFull Scores PackLog Out

Score Sheets

Annexure E 1

Employed ByDBE + SGBSelectTerm 2Year2026

Principal

Principal	Post Level	PS1 (60)	PS2 (52)	PS3 (44)	PS4 (36)	PS5 (56)	PS6 (20)	PS7 (16)	Total (284)	Score %	Development Needed
Errol Tobias	4										

Deputy Heads (1)

Deputy Head	PL	Emp. By	PS1 (60)	PS2 (40)	PS3 (44)	PS4 (36)	PS5 (40)	PS6 (8)	PS7 (8)	Total (236)	Score %	Development Needed
Joel Jammer	3	DBE										
Average Score			0	0	0	0	0	0	0			
Average %			0 %	0 %	0 %	0 %	0 %	0 %	0 %			

Department Heads (1)

Department Head	PL	Emp. By	PS1 (28)	PS2 (48)	PS3 (28)	PS4 (36)	PS5 (12)	PS6 (76)	Total (228)	Score %	Development Needed	
Sbu Ndlovu	2	DBE										
Average Score			0	0	0	0	0	0				
Average %			0 %	0 %	0 %	0 %	0 %	0 %				

Educators (6)

Activate Windows
Go to Settings to activate Windows.

Annexure E1 — the summative score sheet for the school.

Development needs. Development needs still to be addressed are recorded on Annexure E1, so the district has sight of what the school is working on.

Missing or zero results? That almost always means an appraisal is unfinished or unapproved. Go back to **Appraisals**, sort by Status, and clear anything not yet Approved.

Record keeping

Schools must keep appraisal documents for **five years**. QM Easy stores them digitally for the same period, so previous years remain available.

10. Your own appraisal

You complete a self appraisal like everyone else, and you are appraised by your circuit manager.

- 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.
- 4 Your QMS appraisal (Annexure D2) appears in the QMS Appraisals list for you to review and sign off.

11. Settings and managing users

Everything in QMS depends on staff having the right profile and the right appraiser. This is where you maintain that.

- 1 Click **Settings** in the top menu.
- 2 Add, edit or deactivate staff profiles.
- 3 Set each person's **post level** — this determines what they see and which instrument is used.
- 4 Link each person to their **appraiser**. This is what populates everyone's Appraisees list.
- 5 Check email addresses carefully — the email address is the username and drives all notifications.

The most common cause of support calls. If someone says "my staff are missing" or "I cannot log in", it is nearly always a missing appraiser link or a mistyped email address. Both are fixed here.

Licence count. QM Easy counts unique, valid email addresses against your school's licence. Deactivate staff who have left rather than leaving stale profiles in place.

12. Support staff appraisals

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

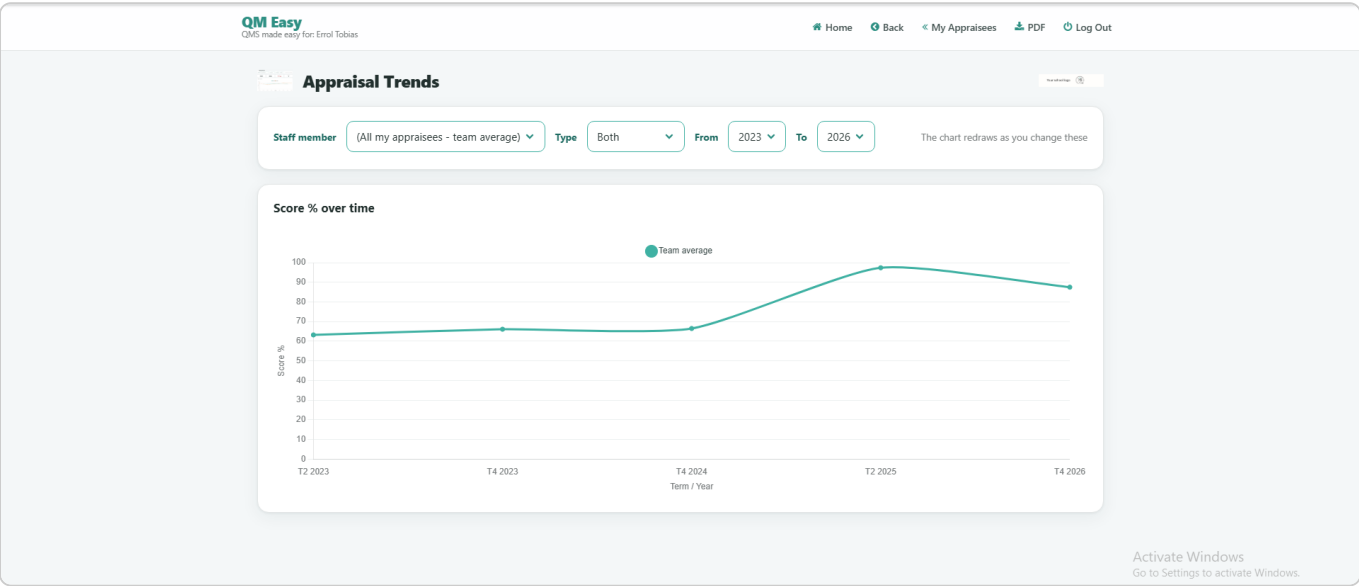
Menu item	What it does
Support Staff Config	Create positions and design appraisal templates.
Support Staff Worklist	Support staff appraisals waiting for you.
My Support Staff Appraisal	Your own, where applicable.

Full instructions. See the separate manuals *Setting Up Support Staff Appraisals* (configuration) and *Support Staff Appraisals* (conducting them).

13. Trends and oversight

Click **Trends** in the top menu to see how appraisal results move across terms, years, departments and post levels.

- ✓ Spot departments where scores drift high or low compared to the rest of the school
- ✓ Identify development needs that recur across staff
- ✓ Prepare evidence for SMT and SGB discussions
- ✓ Track year-on-year improvement



Appraisal trends across the school.

14. 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 and approve appraisals
- ✓ Appraise **Support Staff**
- ✓ View your records and score sheets

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.

15. Troubleshooting and FAQs

A staff member cannot log in

Check the email address on their profile in **Settings** — it is their username. If it is correct, have them use “**No password yet? Get started here**” on the login screen.

An appraiser says staff are missing from their list

The appraiser link is missing. Fix it in **Settings**.

An appraisal is locked and needs editing

Decline it back to the person who completed it. The status becomes **Declined** and it unlocks.

Annexure E1 shows blanks or zeros

One or more appraisals are unfinished or unapproved. Sort the Appraisees list by Status and clear anything not yet Approved.

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.

Which documents go to the District Office?

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

Do we have to create our own templates?

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

How long must documents be kept?

Five years, digitally in QM Easy.