

QM Easy

QMS MADE EASY

TRAINING MANUAL

Support Staff Appraisals

For non-teaching staff and the people who appraise them — self-assessments, official appraisals, sign-off and moderation.

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1. Overview

1.1 Who this manual is for

This manual covers **support staff appraisals** — the appraisal of non-teaching staff such as administrators, teacher assistants, grounds staff, cleaners, drivers and coaches.

If you are...	Read...
Support staff	Part A. It covers everything you need.
An appraiser	Part B, and Part C if your school uses moderation.
Setting the system up	The separate manual <i>Setting Up Support Staff Appraisals</i> .

Your appraisal is designed by your school. Unlike educator appraisals, which follow national instruments, support staff appraisals are built by your school for your specific role — so the sections and criteria you see match the job you actually do.

1.2 How the year works

There are two appraisals a year in each direction. The direction changes with the term.

Term	Type	Who scores	Who approves
Term 1	Self-assessment	You rate yourself	Your appraiser
Term 2	Official appraisal	Your appraiser rates you	You sign it off
Term 3	Self-assessment	You rate yourself	Your appraiser
Term 4	Official appraisal	Your appraiser rates you	You sign it off

1.3 The rating scale

Score	Meaning	Guidance
1	Lowest	Performance falls short; support or development is needed.
2	Below expectation	Some elements met, others need work.
3	Meets expectation	Performance is consistently sound.
4	Highest	Performance consistently exceeds what the role requires.

The overall result is shown as a **percentage**, worked out from the average score across all criteria.

Part A — For support staff

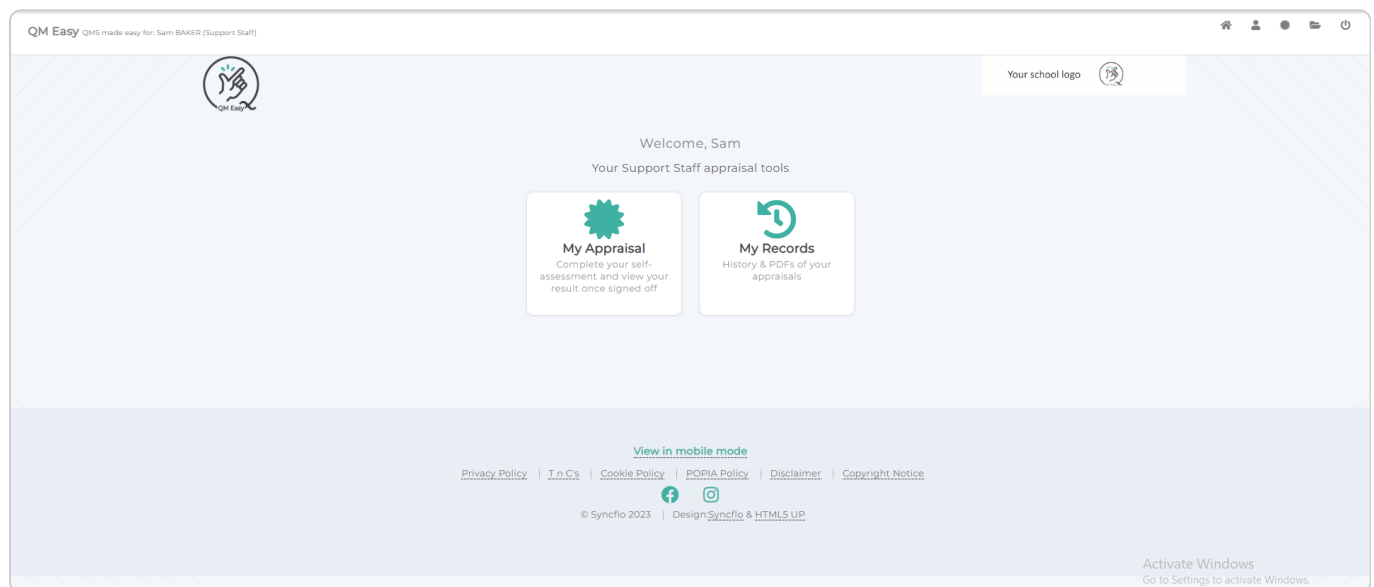
2.1 Logging in for the first time

- 1 Go to the QM Easy website and click **Log In**.
- 2 Click **“No password yet? Get started here”**.
- 3 Enter the **email address your school has on record** and click **Go find me**.
- 4 Follow the prompts to choose your password.
- 5 From then on, log in with your email address and that password.

No email address? Some support staff do not log in at all. If that is you, your appraiser completes the appraisal with you in person and records what was agreed — see section 3.4. You do not need a login.

2.2 Your home screen

Support staff have their own simple home screen with one main card — your appraisal.



The support staff home screen.

Menu item	What it does
Home	Back to this screen.
My Appraisal	Opens your appraisal.
My Profile	Your details and password.
Docs & Downloads	Guides and documents.
Log Out	Ends your session.

Watch for the badge. When an appraisal needs you, a **Sign-off required** badge appears on the card. Tap it to go straight there.

2.3 Completing your self-assessment (Terms 1 and 3)

A self-assessment is your own honest rating of how you are doing. It prepares you for the conversation with your appraiser.

- 1 Click **My Appraisal**.
- 2 Check the **term** and **year** at the top.
- 3 Work down the list. For each criterion choose a score from **1** to **4**.
- 4 Add a **comment** where it helps — this is optional but valuable.
- 5 Click **Save Progress** as often as you like.
- 6 When you are finished, click **Mark Complete & Submit**.

The screenshot shows the 'My Self Assessment' interface for 'Front Office Administrator Appraisal — Term 3, 2026 | Status: In Progress'. At the top, there are dropdowns for 'Term 3' and '2026'. The interface is divided into two main sections:

- 1 General presentation**
 - Criteria:**
 - a Greet visitors professionally (Score: 1, 2, 3, 4; Comment: optional)
 - b Keeps the front desk tidy and organised (Score: 1, 2, 3, 4; Comment: optional)
- 2 Administrative skills**
 - Criteria:**
 - a Manages the appointment diary accurately (Score: 1, 2, 3, 4; Comment: optional)
 - b Handles petty cash and receipts accurately (Score: 1, 2, 3, 4; Comment: optional)

At the bottom, there are two buttons: 'Save Progress' and 'Mark Complete & Submit'. A Windows watermark is visible in the bottom right corner.

Completing a self-assessment.

Use the comments. Comments are where you explain *why* — what you achieved, what got in your way, and what would help you do the job better. They often matter more than the score.

“No appraiser is linked to you yet”? Your scores are saved and nothing is lost, but the appraisal cannot be submitted. Ask your administrator to link your appraiser, then submit again.

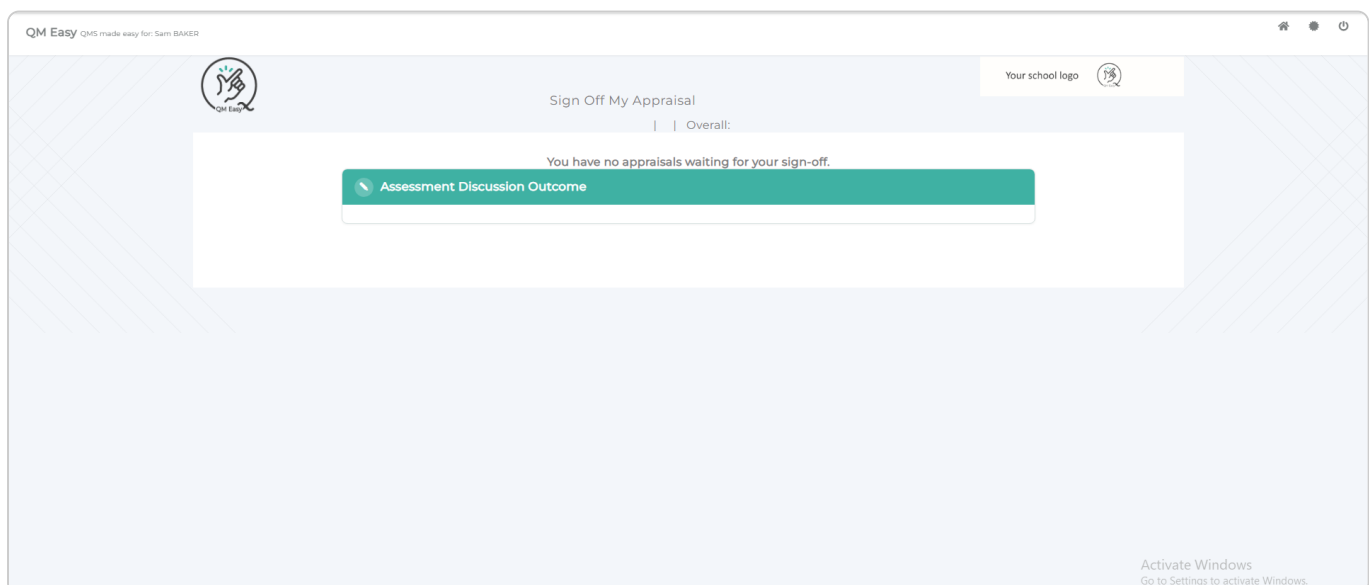
Statuses you will see

Status	What it means
In Progress	Still yours to edit.
Submitted — awaiting your appraiser’s approval	Sent. Nothing to do.
Returned by your appraiser	Sent back with a reason. Edit it and submit again.
Approved — Complete	Agreed and finished.
Approved — awaiting Tier 2 moderation	Agreed; a senior manager is still to review it.

2.4 Signing off your official appraisal (Terms 2 and 4)

In Terms 2 and 4 your appraiser scores you. When they finish, it comes to you to sign off.

- 1 You receive an email, and a **Sign-off required** badge appears on your home screen.
- 2 Click through to open the appraisal.
- 3 Read every score and comment, and the **Assessment Discussion Outcome**.
- 4 Click **Approve** if you accept it, or **Decline** if you do not.



Signing off an official appraisal.

Declining is allowed. If you do not agree, click **Decline** and type your reason. It goes back to your appraiser to look at again, and your reason is emailed to them. Be specific and factual — it is the quickest way to get things resolved.

2.5 Your profile and password

Click **My Profile** to check your details and change your password. If you have no email address on file, the profile shows *(no email)* — that is normal and expected.

Part B — For appraisers

3.1 Your worklist

Click **Support Staff Worklist** in the top menu to see everything waiting on you.

Action Needed	What to do
Score Appraisal	Complete an official appraisal (Term 2 or 4).
Rescore (Appraisee Declined)	The staff member declined — review, discuss, adjust and resubmit.
Approve Self-Assessment	A staff member has submitted their self-assessment.
Tier 2 Sign-off	Moderate an appraisal — see Part C.

You can also reach support staff from **Appraisals** on your dashboard and switching the filter to **Support Staff Appraisals**.

3.2 Scoring an official appraisal (Terms 2 and 4)

- 1 Open the person from your worklist or Appraisees list.
- 2 Check the **Term** and **Year**.
- 3 Review **Section A** — staff, appraiser and school information, and the brief job description.
- 4 Work through each section, scoring every criterion from **1** to **4**.
- 5 Add a **comment for each section**.
- 6 Complete the **Assessment Discussion Outcome** — a short summary of the appraisal conversation and any agreed actions.
- 7 Click **SAVE** as you go, then **SEND FOR SIGN-OFF** when the discussion has happened.

QM Easy QMS made easy for: Errol Tobias

Support Staff Appraisal Instrument — Front Office Administrator Appraisal

Select: Term 4 2026

Annexure SS 1

Section A: Educator and School Information Status: Signed off by appraisee

1. Appraisee

Surname	BAKER	First Name(s)	Sam
Designation		Position	Front Office Administrator
Highest Qualification	Specialization in subject domain		

2. Appraiser

Surname	Tobias	First Name(s)	Errol
Designation	Principal		

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. BRIEF JOB DESCRIPTION (Key areas of responsibility, etc)

Assessment responsibilities

Activate Windows
Go to Settings to activate Windows.

The support staff appraisal instrument.

Score it with them, not about them. The appraisal is a conversation. Go through the criteria together, and record what you agree in the discussion outcome.

Use the **PDF** button at any time to download a copy for the personnel file.

3.3 Approving a self-assessment (Terms 1 and 3)

- 1 Open the item from your worklist.
- 2 Read their scores and comments.
- 3 Discuss any differences with them in person.
- 4 Click **Approve**, or **Decline** with a reason to return it.

Declining is not a rebuke. Returning a self-assessment for more detail or a more realistic score is a normal part of the process. Your reason is emailed to them, so make it constructive.

3.4 Staff who do not log in

Many support staff have no email and never use the system. They are still appraised properly — you complete it with them in person.

- 1 Open their appraisal from your worklist as usual.
- 2 Score every criterion together, in conversation.
- 3 Complete the **Assessment Discussion Outcome**. For these staff this is **required**.
- 4 Click **Complete Appraisal (log discussion)**.

The discussion outcome is the signature. Because the staff member cannot sign in to approve it, what you type is the record of the sign-off conversation. Write enough that it still makes sense to someone reading it a year later. The appraisal completes immediately — there is no waiting-for-approval step.

These staff never complete self-assessments — only the official Term 2 and Term 4 appraisals apply.

Part C — Tier 2 moderation

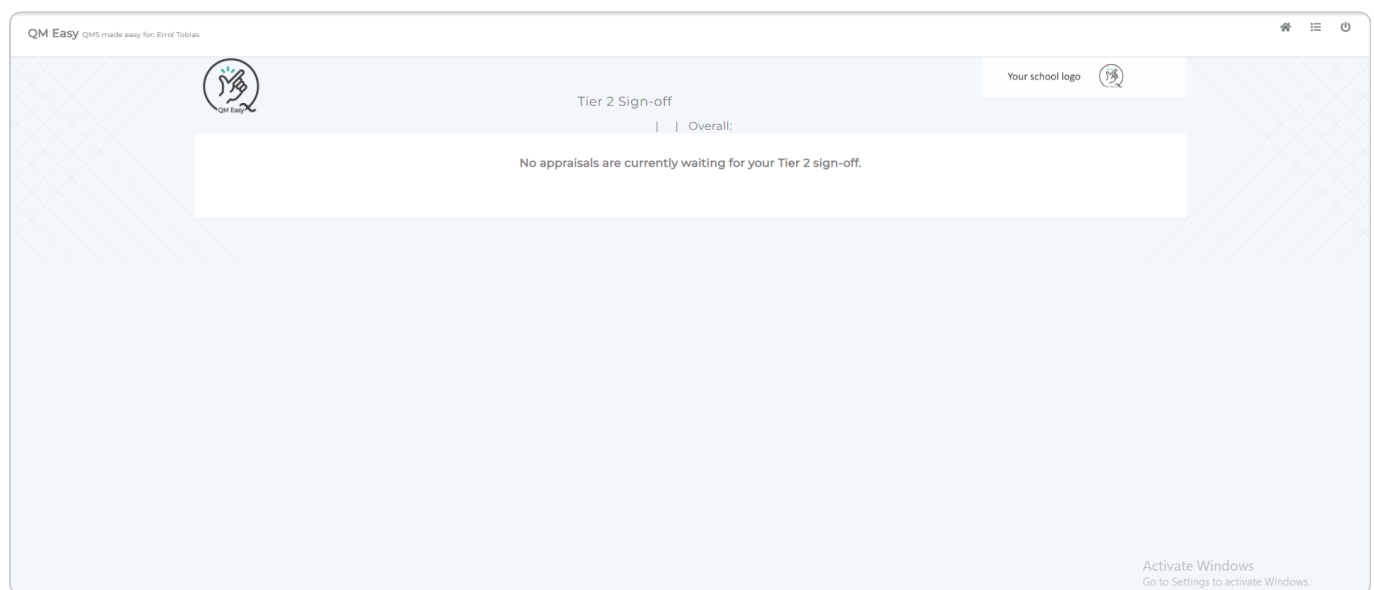
Some templates require a **second, more senior signature** after the appraisal is agreed. This is Tier 2 moderation.

4.1 What it is for

- ✓ Consistency — making sure appraisers across the school score to a similar standard
- ✓ Assurance — where results affect pay, contracts or progression
- ✓ Governance — where school policy requires a second signature

4.2 Doing a Tier 2 sign-off

- 1 Open the item marked **Tier 2 Sign-off** on your worklist.
- 2 Review the criteria, the self and assessor scores side by side, and the assessor's comments.
- 3 Click **Approve** to complete it, or **Decline** with a reason.



Tier 2 moderation.

A Tier 2 decline does not reopen the appraisal. The appraisee is notified with your reason, but the appraisal does not become editable again. Treat a decline as something to resolve in person — and if the scores genuinely must change, a fresh appraisal for the period is the cleanest route.

Who moderates. The moderator is worked out automatically — it is the appraiser's own appraiser. There is no screen for choosing one by name. If an appraisal seems stuck awaiting Tier 2, the appraiser most likely has no appraiser of their own linked.

5. Results and PDFs

Managers (PL3, PL4 and Super Users) can review every support staff appraisal for the school.

- 1 Open **Support Staff Results**.
- 2 The list shows appraisee, position, template, year and both tier statuses. Click any column to sort.
- 3 Click a row to open the full result.
- 4 Click **Download PDF** for a print-ready copy.

Staff can download their own appraisal; appraisers can download those they conducted.

Self versus official. A self-assessment result shows the staff member's own scores and comments. An official appraisal shows the assessor's. Only the relevant column is displayed, so there is no confusion about whose rating you are reading.

6. Emails you can expect

QM Easy emails the right person at each step, so nothing sits unnoticed.

When this happens	Who is emailed
A staff member submits their self-assessment	Their appraiser
An appraiser sends an official appraisal for sign-off	The staff member
An appraiser approves a self-assessment	The staff member
An appraiser returns a self-assessment	The staff member, with the reason
A staff member signs off their appraisal	The appraiser
A staff member declines their appraisal	The appraiser, with the reason
An appraisal reaches Tier 2	The moderator
Tier 2 approves	The staff member
Tier 2 declines	The staff member, with the reason

No emails to staff without an address. Staff set up as non-login users receive no emails — their appraisal is handled in person.

7. Troubleshooting and FAQs

I cannot submit my self-assessment

You have no appraiser linked yet. Your scores are saved — ask your administrator to link your appraiser, then submit again.

“No active appraisal template has been assigned to your Position yet”

Your school has not finished setting up the appraisal for your role. Contact your school administrator.

My appraisal is not on my worklist

Check that the staff member has a **position**, that the position has an **active template**, and that they are **linked to you** as their appraiser.

I declined an appraisal — what now?

It goes back to whoever scored it, with your reason. They review, adjust and resubmit, and it comes back to you.

An appraisal is stuck at “Awaiting Tier 2”

The appraiser most likely has no appraiser of their own linked, so there is nobody to moderate. Ask your administrator to fix the link.

Can I do this on my phone?

Appraisers can score support staff appraisals on a phone, and staff can sign off on a phone. Capturing a *self-assessment* must be done on the full site.

Why does my appraisal look different from a colleague's?

Because appraisals are built per position. Different roles are measured on different things — that is the point.

Who can see my appraisal?

You, your appraiser, the moderator if there is one, and school leadership. It is not visible to other staff.