



QMS MADE EASY

ADMINISTRATOR GUIDE

Setting Up Support Staff Appraisals

Positions, appraisal templates, staff links and two-tier sign-off — everything needed to appraise your non-teaching staff.

For Deputy Principals, Principals and Super Users

QM Easy · Annexure SS 1

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1. Overview

1.1 What support staff appraisals are

QM Easy appraises **non-teaching staff** — administrators, teacher assistants, grounds staff, cleaners, drivers, coaches and any other support role — on appraisal templates that **your school designs itself**.

Unlike educator appraisals, which follow the fixed instruments in Collective Agreement No. 2 of 2020, support staff appraisals are yours to shape. You decide the positions, the sections, and the criteria staff are measured against.

The one rule that defines support staff. In QM Easy a person is treated as support staff because they **hold a Position** — not because of how they are employed. An SGB-employed person can still be an educator. Assigning a Position is what puts someone into the support staff appraisal flow.

1.2 Who may set them up

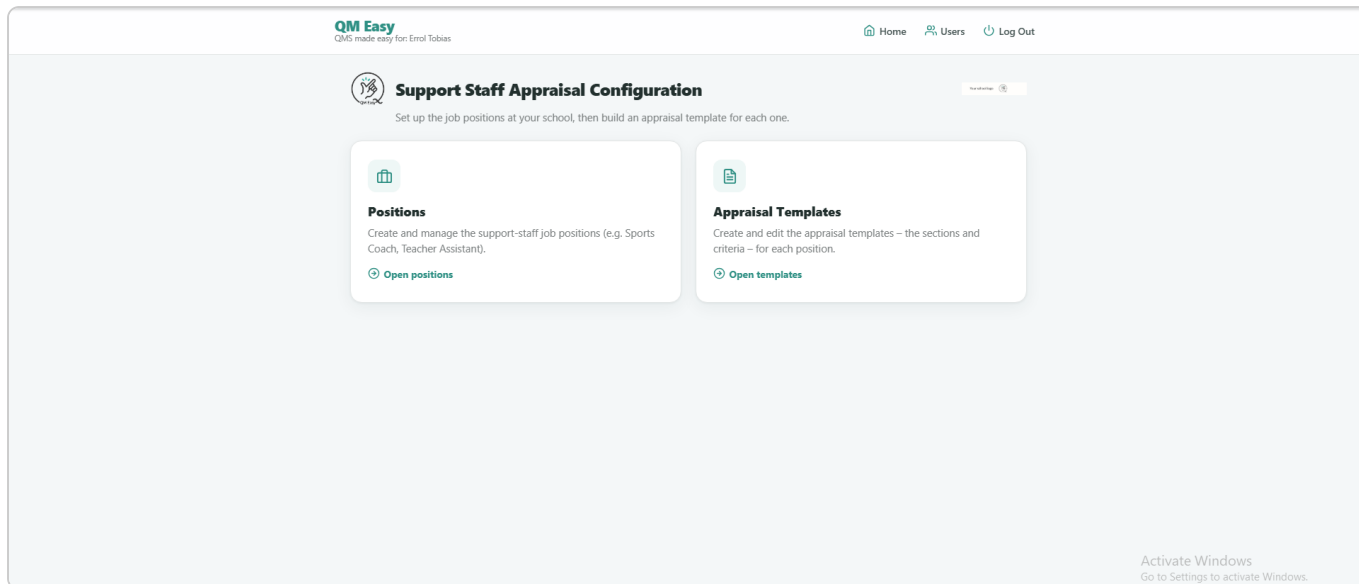
Task	Who can do it
Create positions and templates	Deputy Principal (PL3), Principal (PL4) and Super User (PL6)
Link staff to positions and appraisers	Principal (PL4) and Super User (PL6), via Settings
Assess support staff	Any staff member linked as their appraiser
View school-wide results	PL3, PL4 and PL6

PL3 and PL4 reach the configuration through **Support Staff Config** in the top menu. Super Users reach it through **Settings** → **Support Staff**.

1.3 The four setup steps

- 1 Create your positions** — the job roles at your school.
- 2 Create a template** for each position.
- 3 Build the sections and criteria** staff will be scored against.
- 4 Link your staff** to their position and to an appraiser.

You only do this once. After that the appraisal cycle simply runs each term.

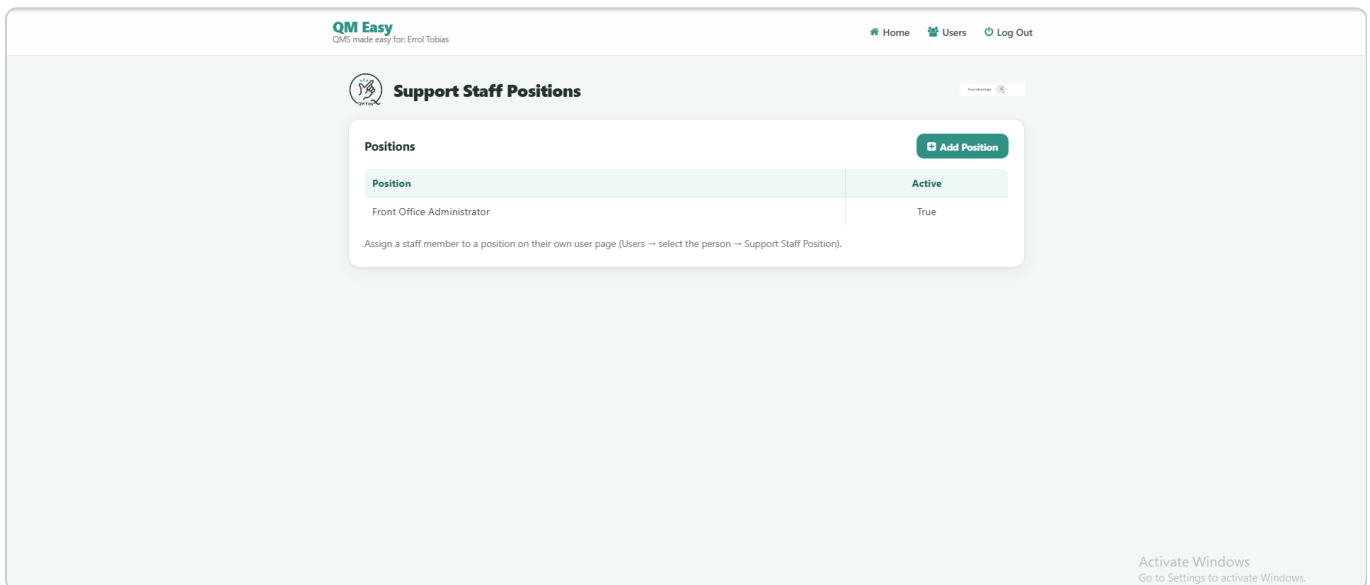


The configuration launcher with its two tiles.

2. Step 1 — Create your positions

A **position** is a job role, for example *Teacher Assistant*, *Sports Coach*, *Administrator* or *Groundsman*. Every support staff member is assigned to one, and the position determines which appraisal template they receive.

- 1 Click **Support Staff Config** in the top menu.
- 2 Click the **Positions** tile.
- 3 Click **Add Position**.
- 4 Type the **Position Name**.
- 5 Leave **Active** ticked.
- 6 Click **Save**.
- 7 Repeat for every support role at your school.



The Positions screen.

Editing and removing positions

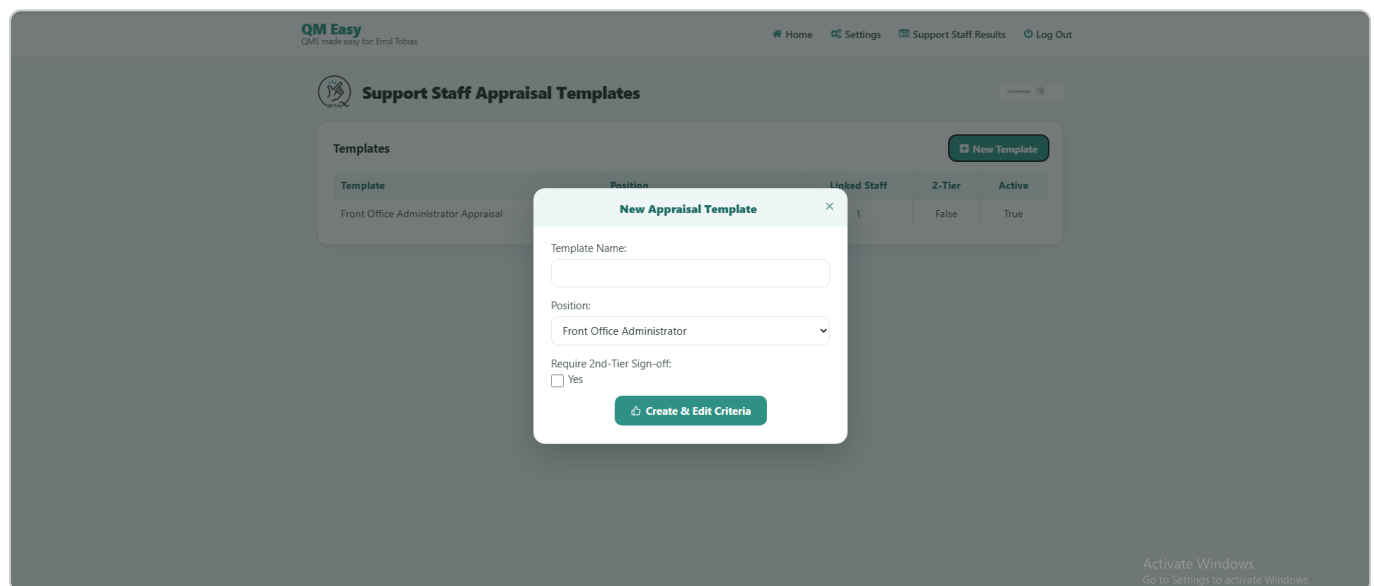
- ✓ Click any row in the list to edit that position.
- ✓ To retire a position, **untick Active**. It stays on record but can no longer be chosen.
- ✓ Deleting is blocked if the position is in use. You will see: *"This Position is assigned to staff or used by a template and cannot be deleted. Untick Active instead."*

Plan your positions before you start. One template is built per position, so group roles sensibly. If three cleaners are all measured on the same things, use one *Cleaner* position rather than three individual ones.

3. Step 2 — Create an appraisal template

A **template** is the appraisal form for one position — the sections and criteria a person in that role is scored against.

- 1 From **Support Staff Config**, click the **Appraisal Templates** tile.
- 2 Click **New Template**.
- 3 Enter a **Template Name** — for example “Teacher Assistant Appraisal 2026”.
- 4 Choose the **Position** the template belongs to.
- 5 Tick **Require 2nd-Tier Sign-off** if this appraisal needs moderation by a second person (see section 7).
- 6 Click **Create & Edit Criteria**. QM Easy saves the template and opens the builder.



Creating a template.

Reading the template list

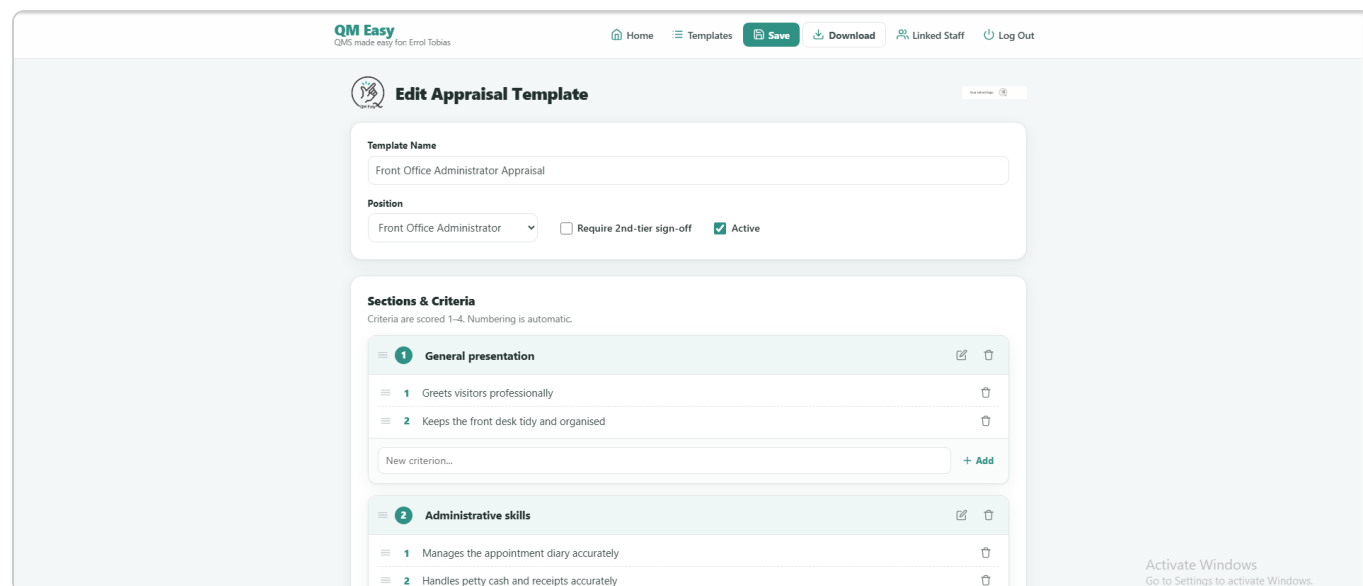
Column	What it shows
Template	The template name.
Position	The position it applies to.
Linked Staff	How many staff hold that position — that is, how many people this template will appraise.
2-Tier	Whether second-tier moderation is required.
Active	Whether this is the template currently in use for the position.

Only one active template per position. When you activate a template, every other template for that same position is automatically set to inactive. QM Easy tells you when this happens. This is deliberate — it guarantees everyone in a position is appraised on the same form.

No positions yet? You will see *"No positions exist yet. Please ask your Super User to set up Support Staff positions first."* Go back and complete Step 1.

4. Step 3 — Build the sections and criteria

The **Appraisal Template Builder** is where you design the actual form. Sections group related criteria; criteria are the individual statements a person is scored on.

The screenshot shows the 'Edit Appraisal Template' interface in the QM Easy system. At the top, there's a navigation bar with 'Home', 'Templates', 'Save', 'Download', 'Linked Staff', and 'Log Out'. The main area is titled 'Edit Appraisal Template'. It contains two main sections: 'Template Name' and 'Sections & Criteria'. The 'Template Name' section has a text input field with 'Front Office Administrator Appraisal' and a 'Position' dropdown menu set to 'Front Office Administrator'. There are also checkboxes for 'Require 2nd-tier sign-off' (unchecked) and 'Active' (checked). The 'Sections & Criteria' section has a note 'Criteria are scored 1-4. Numbering is automatic.' It lists two sections: '1 General presentation' and '2 Administrative skills'. Each section has a list of criteria with edit and delete icons. For 'General presentation', the criteria are '1 Greet visitors professionally' and '2 Keeps the front desk tidy and organised'. For 'Administrative skills', the criteria are '1 Manages the appointment diary accurately' and '2 Handles petty cash and receipts accurately'. There is a 'New criterion...' input field and an '+ Add' button at the bottom of each section. A Windows watermark 'Activate Windows Go to Settings to activate Windows.' is visible in the bottom right corner.

The template builder.

4.1 Adding sections

- 1 Type a section title into the **New section title...** box.
- 2 Click **Add Section**.
- 3 Repeat for each section you need.

Typical sections for a support role might be *Quality of Work*, *Reliability and Attendance*, *Teamwork and Communication*, *Care of Equipment* and *Health and Safety*.

4.2 Adding criteria

- 1 Under the section, type the criterion into the **New criterion...** box.
- 2 Click **Add**.
- 3 Repeat for every criterion in that section.

Scoring is always 1 to 4. Every criterion is scored on the same four-point scale, and numbering is applied automatically. You do not configure the scale.

Writing good criteria

- ✓ Make each one **observable** — something the appraiser can actually see or verify.
- ✓ Keep each to a **single idea**, so a single score makes sense.

- ✓ Write in **plain language** the staff member will understand.
- ✓ Aim for roughly **4 to 8 criteria per section** — enough to be fair, few enough to be usable.

Rather than this	Write this
"Good worker"	"Completes assigned tasks within the agreed timeframe"
"Attitude and punctuality"	Split into two: "Arrives on time for shifts" and "Responds positively to instruction"
"Looks after things"	"Takes good care of equipment and reports damage promptly"

4.3 Reordering, renaming and deleting

- ✓ **Reorder** — drag a section or criterion by its grip handle. Numbering updates automatically.
- ✓ **Rename** — edit the title in place and click the save icon.
- ✓ **Delete a criterion** — click its delete icon and confirm.
- ✓ **Delete a section** — click its delete icon. This also deletes every criterion inside it.

4.4 Finishing the template

- 1 Check **Template Name** and **Position** at the top.
- 2 Confirm **Require 2nd-tier sign-off** is set as you want it.
- 3 Tick **Active** to put the template into use.
- 4 Click **Save**.

Two useful buttons

Button	What it does
Download	Produces a blank, printable copy of the template — ideal for circulating to staff or discussing at a management meeting before going live.
Linked Staff	Shows exactly who will be appraised on this template — everyone assigned to its position.

Print it before you activate it. Use **Download** to get a blank copy and check the wording reads well on paper. It is much easier to fix now than mid-cycle.

5. Step 4 — Link your staff

A template only reaches a person once that person is **assigned to its position** and **linked to an appraiser**. Both are done on the staff member's own user page, not in the Support Staff Config area.

- 1 Go to **Settings** and open the staff member's profile (or create it if they are new).
- 2 Set **Educator / Support Staff** to **Support Staff**.
- 3 Choose their role in **Support Staff Position (for support staff only)**.
- 4 Choose their **appraiser** from the appraisers list.
- 5 Save.

The screenshot shows the 'User Settings and Configuration' page in the QM Easy system. The page has a header with the QM Easy logo and navigation links for Home, Users, and Log Out. Below the header, there are buttons for 'Reset password' and 'Delete user'. The main content area is titled 'Role and details' and contains a form for configuring a staff member's profile. The form includes a 'Post level' dropdown set to '0', an 'Educator or support staff' dropdown set to 'Support Staff', a 'Support staff position' dropdown set to 'Front Office Administrator', a 'Designation' text field, a 'Highest qualification' text field, and a 'Specialisation in subject domain' text field. A 'Successfully Saved' message is displayed at the top of the form. The page also features an 'Activate Windows' watermark in the bottom right corner.

Assigning a position and an appraiser.

The appraiser link is essential. Without it the staff member cannot submit a self-assessment — they will be told *“No appraiser is linked to you yet - please ask your administrator to link one”* — and the appraisal will not appear on anyone's worklist. If nothing seems to be happening, check this first.

What changes when you choose Support Staff. Teaching-only fields (Persal, grade taught, class, grades and subjects) are hidden, and the duties heading becomes **Assessment responsibilities** instead of *Teaching and assessment responsibilities*.

6. Staff who have no email address

Many support staff never use a computer and have no work email. QM Easy handles them properly — they are still appraised, they simply never log in.

- 1 When creating the staff member, tick **No email address (support staff who won't log in)**.
- 2 QM Easy generates a placeholder address automatically. You do not have to invent one.
- 3 Assign the position and appraiser exactly as normal.

How their appraisal works

Aspect	What happens
Self-assessment (Terms 1 & 3)	Does not apply — it requires a login.
Official appraisal (Terms 2 & 4)	The appraiser scores it as usual.
The submit button	Changes to Complete Appraisal (log discussion) .
Discussion outcome	Mandatory. It is the record of the sign-off conversation, standing in place of a digital signature.
Status	Goes straight to Approved — it never sits at Waiting Approval.
Emails	None are sent to placeholder addresses.

Have the conversation, then record it. Because there is no digital sign-off, the discussion outcome you type is the record. Write enough that someone reading it in a year's time understands what was agreed.

7. Two-tier sign-off explained

Two-tier sign-off adds a **moderation step**. After the appraisal is agreed between the staff member and their appraiser, a second, more senior person reviews and approves it.

When to use it

- ✓ Where appraisal results affect pay, contracts or progression
- ✓ Where you want consistency checked across several appraisers
- ✓ Where school policy or the SGB requires a second signature

How the moderator is decided

Important. The second-tier moderator is worked out automatically — it is the **appraiser's own appraiser**. There is no screen for choosing a moderator by name.

This means the appraiser must themselves be linked to an appraiser. **If they are not, the moderation step has nobody to go to and the appraisal will sit unfinished.** Before you tick *Require 2nd-Tier Sign-off*, confirm every appraiser using that template has their own appraiser linked in Settings.

What it changes

Stage	With two-tier sign-off on
After Tier 1 approval	Status moves to awaiting Tier 2 rather than complete.
The moderator	Is emailed and the appraisal appears on their worklist as Tier 2 Sign-off .
Completion	Only once the moderator approves.
Printed template	Includes a Moderator signature line.

A Tier 2 decline does not reopen the appraisal. If the moderator declines, the appraisee is notified with the reason, but the appraisal does not become editable again. Treat a Tier 2 decline as a matter to resolve in person — and, if scores must change, start a fresh appraisal for the period.

8. How the appraisal cycle then runs

Once set up, support staff appraisals run twice a year in each direction. The direction flips depending on the term.

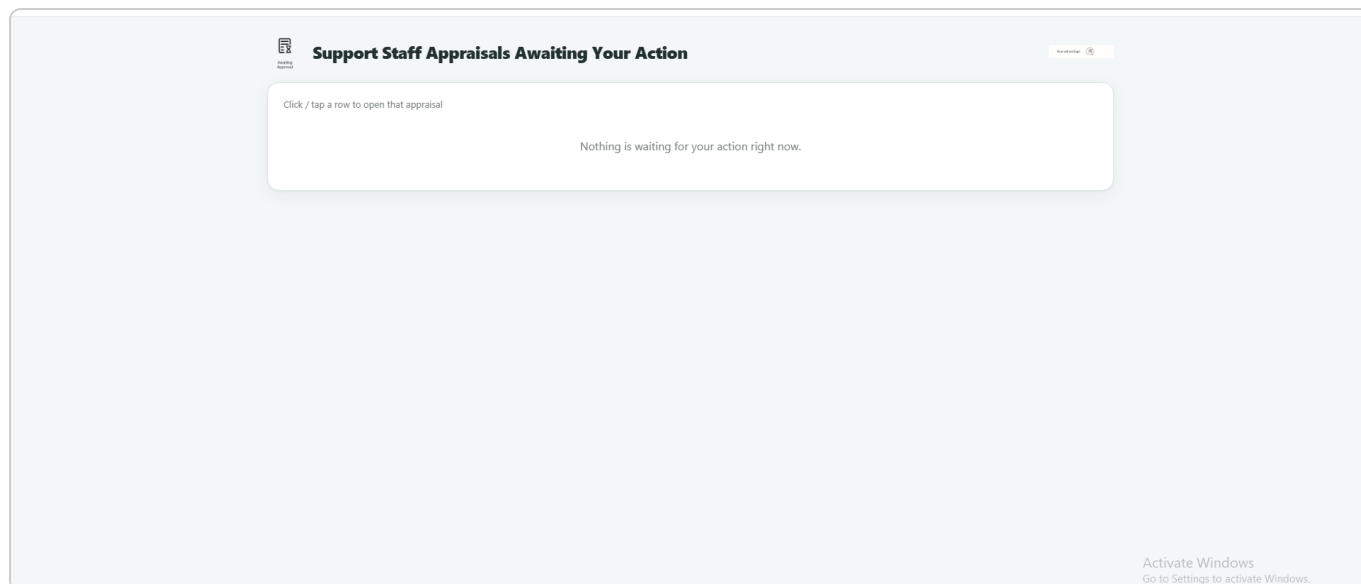
Term	Type	Who scores	Who approves
Term 1	Self-assessment	The staff member	Their appraiser
Term 2	Official appraisal	The appraiser	The staff member
Term 3	Self-assessment	The staff member	Their appraiser
Term 4	Official appraisal	The appraiser	The staff member

The mirror image. In self terms the staff member scores and the appraiser approves. In official terms the appraiser scores and the staff member approves. Same form, opposite directions.

8.1 The worklist

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

Action Needed	What it means
Score Appraisal	An official appraisal is waiting for you to score.
Rescore (Appraisee Declined)	The staff member declined it — review, adjust and resubmit.
Approve Self-Assessment	A staff member has submitted their self-assessment for your approval.
Tier 2 Sign-off	An appraisal is waiting for your moderation.



The support staff worklist.

8.2 Statuses you will see

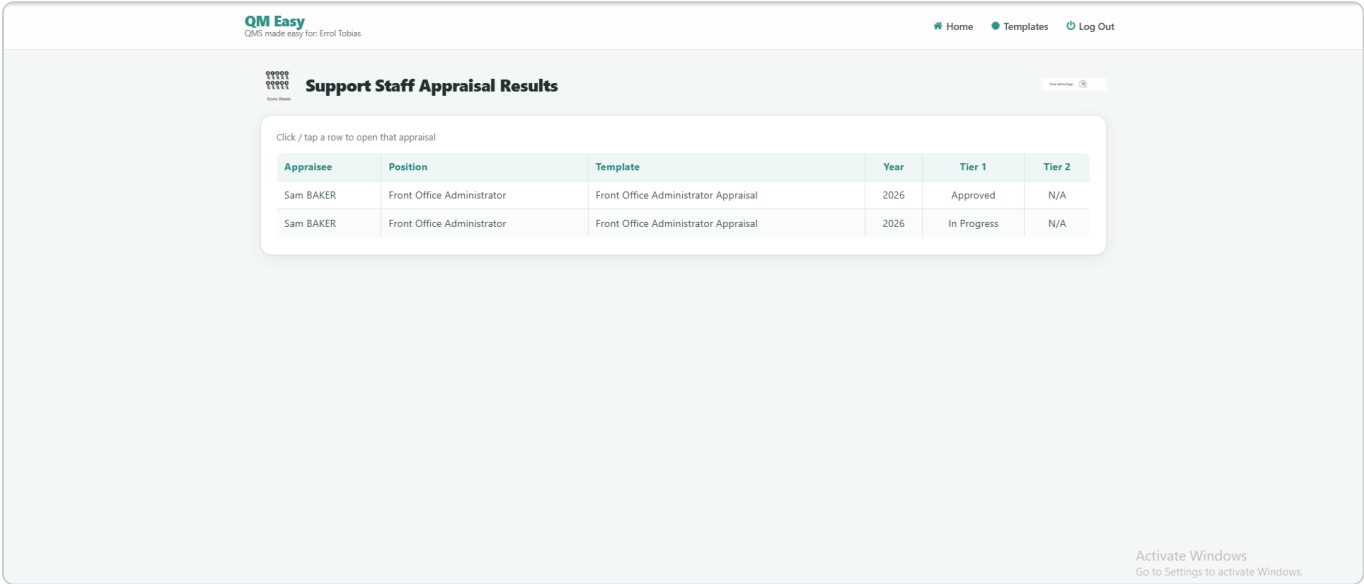
Status	Meaning
In Progress	Being scored; still editable.
Waiting Approval	Submitted and waiting for the other party.
Approved	Agreed. Complete, unless Tier 2 is still outstanding.
Declined	Returned with a reason; editable again by whoever scored it.

8.3 What staff and appraisers see

- ✓ **Support staff** who log in land on their own home page with a single card for their appraisal, and a **Sign-off required** badge when something needs them.
- ✓ **Appraisers** see support staff appraisals in their worklist, and can filter their Appraisees list to **Support Staff Appraisals**.

9. Results and reporting

- 1 Go to **Support Staff Results** from the templates screen.
- 2 The list shows every appraisal with appraisee, position, template, year and both tier statuses.
- 3 Click a row to open the full result.
- 4 Use **Download PDF** for a print-ready copy for the personnel file.



School-wide support staff results.

The overall result is shown as a **percentage**, calculated from the average score across all criteria against the maximum of 4.

Who can see what. Staff see their own appraisal. Appraisers see the people they appraise. PL3, PL4 and PL6 see everything for the school.

10. Maintaining your setup

Changing a template mid-year

Avoid it if you can. Editing sections or criteria on a live template affects appraisals already in progress. If a role changes materially, build a **new template** for the position and activate it — the previous one is deactivated automatically and past appraisals keep their original wording.

A staff member changes role

- 1 Open their profile in **Settings**.
- 2 Change their **Support Staff Position**.
- 3 Update their appraiser if their reporting line changed.

They are appraised on the new position's template from their next appraisal. Completed appraisals are unaffected.

A staff member leaves

Deactivate the profile in Settings rather than deleting it — their appraisal history stays intact, and the licence count stays accurate.

Retiring a position

Untick **Active** on the position. It disappears from the choices for new templates and new staff, but existing records are untouched.

Yearly checklist

- ✓ Are all positions still current?
- ✓ Does each position have exactly one active template?
- ✓ Does every support staff member have a position and an appraiser?
- ✓ Where two-tier sign-off is on, does every appraiser have their own appraiser linked?
- ✓ Have staff who left been deactivated?

11. Troubleshooting and FAQs

A staff member says they cannot submit their self-assessment

They have no appraiser linked. Fix it in **Settings** on their profile. Their scores are saved and nothing is lost.

The appraisal is not appearing on the appraiser's worklist

Check three things: the person has a **position**; the position has an **active template**; and the person is **linked to that appraiser**.

"No active appraisal template has been assigned to your Position yet"

Either no template exists for the position, or every one is inactive. Open the templates screen and activate one.

I activated a template and another one switched off

That is correct behaviour. Only one template per position can be active at a time.

An appraisal is stuck at "Awaiting Tier 2"

Almost always because the appraiser has no appraiser of their own, so there is nobody to moderate. Link an appraiser to them in Settings.

I cannot delete a position

It is in use by staff or a template. Untick **Active** instead.

Can support staff use the mobile version?

They can sign off an appraisal on a phone. Capturing a *self-assessment* must be done on the full site. Appraisers can score support staff appraisals on mobile.

Who can change the scoring scale?

Nobody — it is always 1 to 4. This keeps results comparable across positions and years.