



education

Department:
Education
REPUBLIC OF SOUTH AFRICA

SA-SAMS

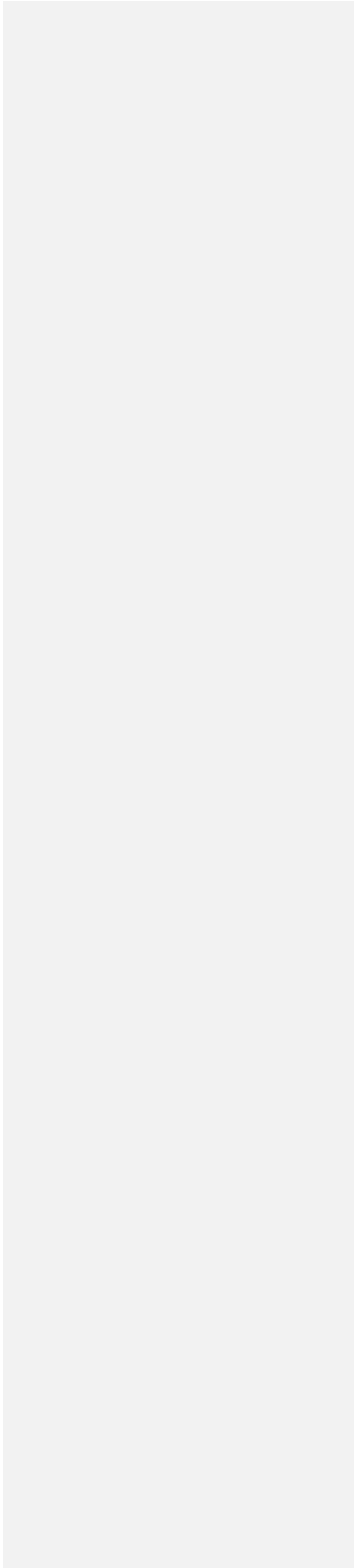
Guideline for using IQMS Module

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1. INTRODUCTION

What is IQMS?

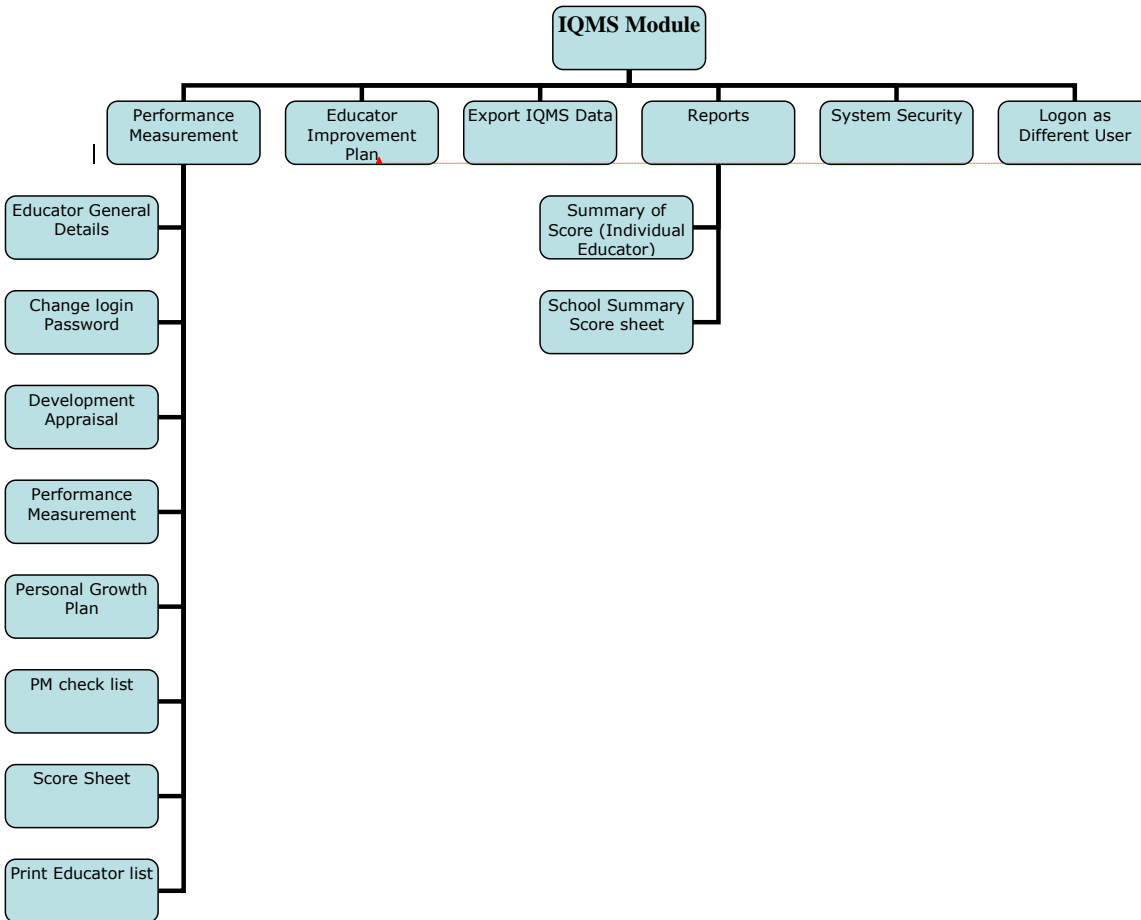
IQMS is an integrated quality management system that consists of development appraisal, performance measurement and whole school evaluation programmes which are aimed at enhancing and monitoring performance of the education system.

The IQMS module had to be integrated into SA-SAMS to reduce administrative burden related to the paper based system. IQMS module has a friendly user interface specifically adapted to cater for non computer literate users. A button interface and user prompting mechanism is used as opposed to more complicated menu structures.

2. GENERAL SUGGESTIONS FOR USING IQMS MODULE

- Use **Save** button to save information you have captured on the form
- Use **Print Page** button to print a grid on the form
- Use **Main Menu** button to return to the Educator's selection form
- Use **Next Page** button to proceed to the next form
- Use **Educator List** to return to the educator list form

3. IQMS ROAD MAP



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To access the IQMS module, please follow the instruction below.

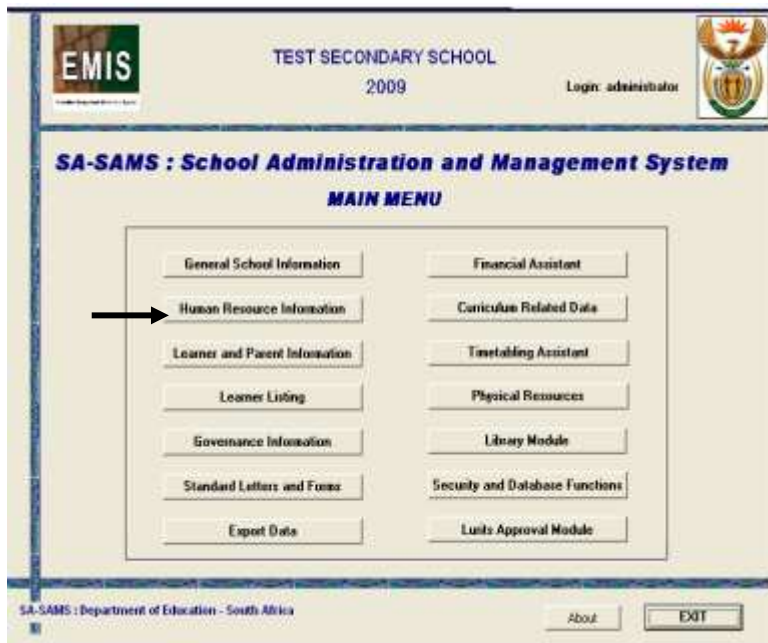


Figure 1: Human Resources Information menu page

- Click on the **Human Resource Information** menu on SA-SAMS main menu, the following screen will appear;

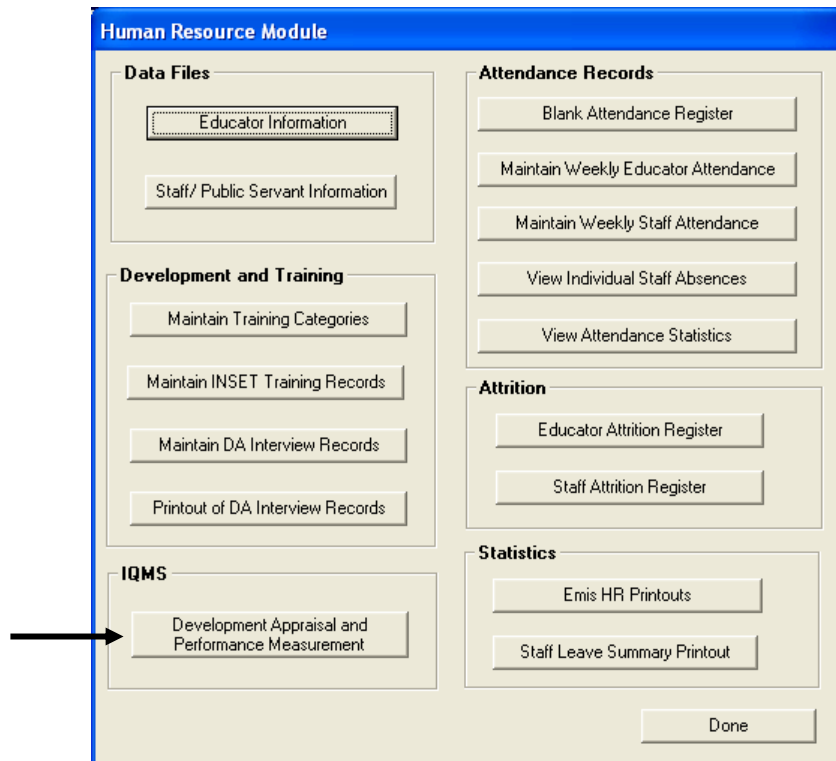


Figure 2: Human Resource menu page

- Click on the Development Appraisal and Performance Measurement menu; the following screen will appear;

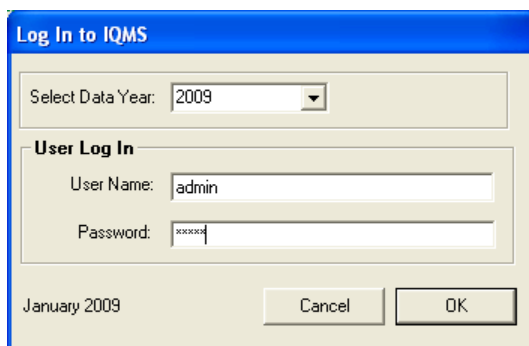


Figure 3: User log-in menu page

- Enter the user name and the password to log in to the IQMS module, the default login username and password are :
- User Name: admin
- Password: admin
- Click on the **Ok** button;

The IQMS Main Menu screen will now be loaded (Note that the password can be changed at anytime. Please refer to the System Security section on how to change the passwords and username.)

4. DEVELOPMENT APPRAISAL AND PERFORMANCE MEASUREMENT SYSTEM

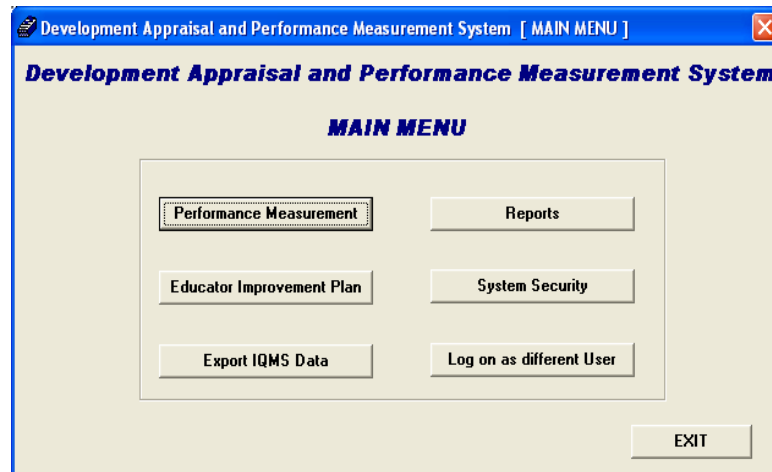


Figure 4: Development appraisal main menu page

- **Performance Measurement** menu is used to capture and manage the appraisal process.
- **Educator Improvement Plan** menu is used to draft a plan for improving the teaching standards of educators. This section must be completed by the school principal.
- **Export IQMS Data** menu is used to create an XML file with performance appraisal and performance scores of individual educators.
- **Reports** menu is used to generate individual educator reports
- **System Security** menu is used to manage and control access into the system.
- **Log on as Different User** menu can be used to renew the active connection session.

4.1 Educator General Details

This is the main menu form that contains the list of educators which can be used for assessing purposes, to start working with this form you need to select an educator and click on any menu item to begin the appraisal process.

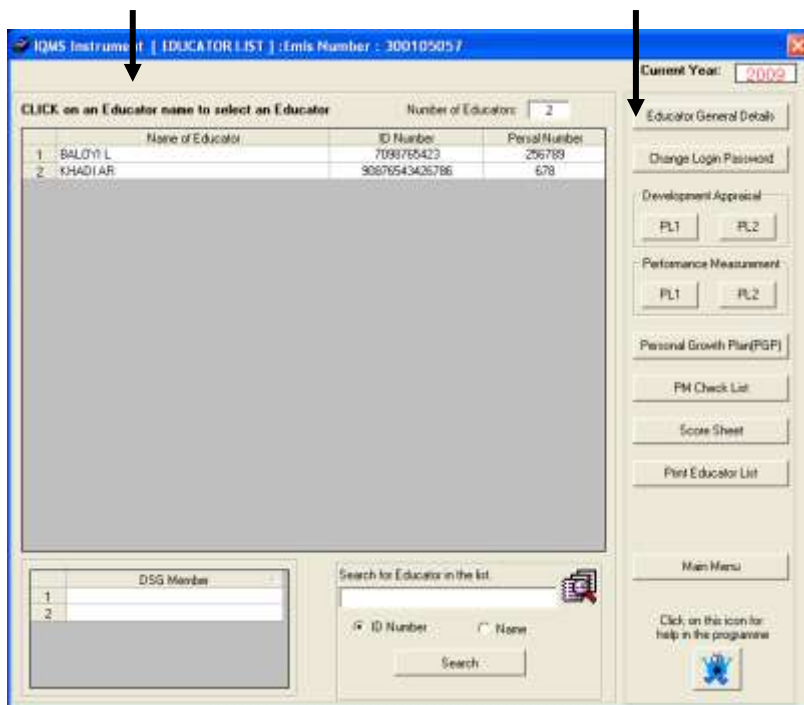


Figure 5: IQMS instrument educator list menu page

- To view the educator’s personal and educational details;
 - Click on the **Educator General Details** menu. The following screen will appear:

This form will be used to view personal and educational details of the selected educator. The DSG members for an educator can also be selected from this section. To return to the main menu click on the **Educator List** menu.

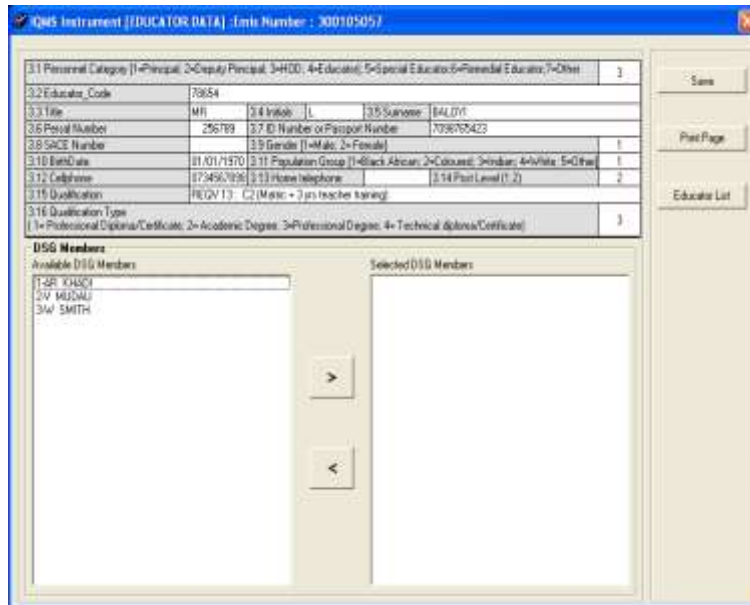


Figure 6: IQMS instrument (educator Data) menu page

- How to select a DSG member
 - To select an SGB member, select an educator from the available DSG members list and click on the **Forward** arrow. The selected educator should now appear in the selected DSG Members list box.
- How to remove a DSG Member
 - To remove an SGB member, select an educator from the selected DSG member list and click on the **back** arrow. The selected educator should now appear in the available DSG member list box

4.2 Development Appraisal

The purpose of the development appraisal is to appraise individual educator in a transparent manner with a view to determine areas of strength and weakness, and to draw up programmes for individual development.

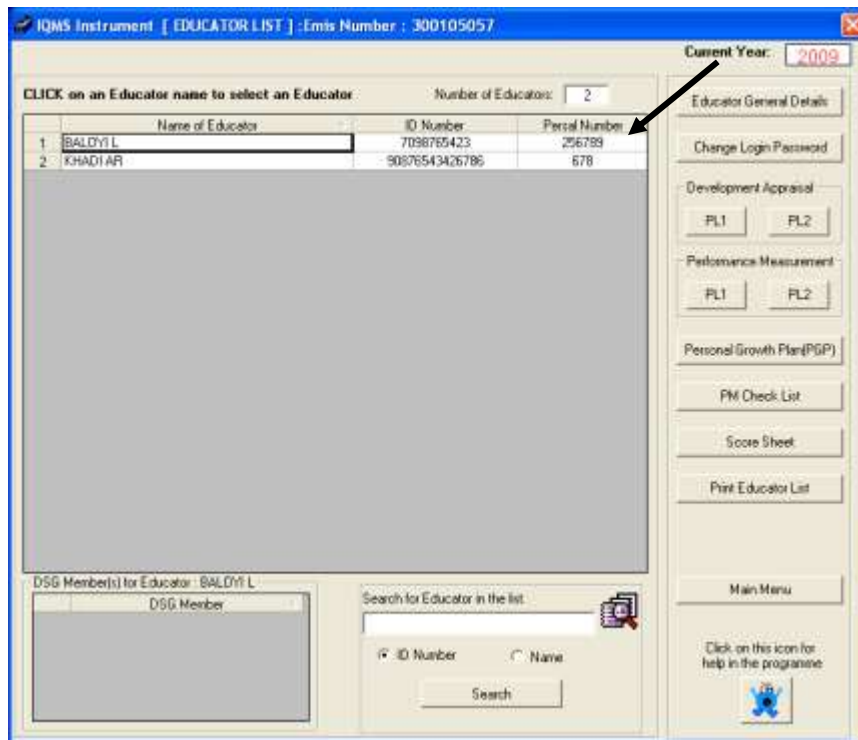


Figure 7: IQMS instrument [educator list] menu page

- To start with the development appraisal for the educator;
 - Select the educator you wish to make assessment for;
 - Click on the **PL1** menu and the following screen will appear;

This form is used to evaluate how the educator interacts with learner, if he/she create a positive learning environment and if his/her teaching methods is understandable by learners.

IQMS Instrument [DEVELOPMENT APPRAISAL] - Title Number: 30105057 [PERFORMANCE STANDARD 1]

Educator: BALDYL ID Number: 170875423 [Post Level] 2 Current Year: 2009

Performance Standard 1: CREATION OF A POSITIVE LEARNING ENVIRONMENT
 The Educator creates a positive learning environment that enables the learners to participate actively and to achieve success in the learning process.

Question: Does the Educator create a suitable learning environment and climate for learning and teaching?

Criteria: (a) Learning environment (b) Learning Process (c) Classroom management (d) Diversity

Levels of performance: (1) Unacceptable (2) Acceptable (3) Good (4) Outstanding

Criteria	Self	Other	Final	Levels of Performance (Tick levels of performance for each criterion)	Strengths	Recommendations for development	Notes on contextual factors
(a) Learning environment	1	1	1	No effort to create a learning environment, or where some effort is made, the learning environment hinders learning and teaching.			
	2	2	2	There is a suitable environment where individual and/or group learning can take place.			
	3	3	3	The Teacher is able to change the environment to promote learning and teaching and adjustments.			
	4	4	4	Creative use of learning environment enables all learners to be productively engaged in individual and cooperative learning.			
(b) Learning Process	1	1	1	No learning process is taking place.			
	2	2	2	Learners are engaged in appropriate activities.			
	3	3	3	The environment is stimulating and the learners participate actively - though they are not yet at discovery level.			
	4	4	4	Learners are engaged in learning by doing processes leading to discovery. They discharge ideas with confidence, and are creative.			
(c) Classroom management	1	1	1	Learners were not focused on the topic of the lesson. The classroom was chaotic. Attempts at discipline may be experienced by learners as humiliating.			
	2	2	2	Educator has a clear idea of the outcome of the lesson. Teaching and learning are not interrupted unnecessarily.			
	3	3	3	Educator checks progress the purpose of the lesson and the learners are cooperative.			
	4	4	4	Educator assesses the intended outcome of the			

Save Next Educator List Print Page TAB button to move between controls

Figure 8: IQMS instrument [development appraisal] menu page

Note that if you log in to the system as the user you can only be able to do the Self assessment appraisal; where else if you log in as the administrator you can only be able to complete the FINAL and DSG appraisal, After you have completed the appraisal on the above form click on the Next button to continue, note that from form 2 to form 10 the appraisal process is completed the same way as you did on the above form.

4.3 Performance Measurement

The purpose of performance measurement is to evaluate individual teachers for salary progression, grade progression, affirmation of appointments and rewards and incentives.

- To start with the assessment of the educator click on the **Performance Measurement** menu;

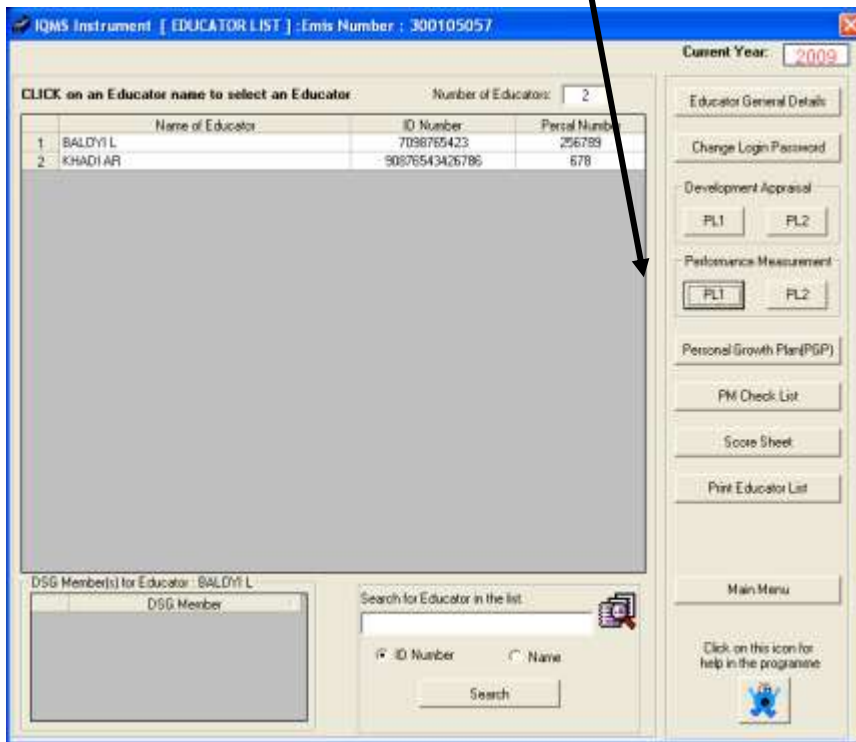


Figure 9: Educator list menu page

Note that the Performance Measurement appraisal process can be completed the same way as the Development Appraisal process.

4.4 Personal Growth Plan (PGP)

Each time the educator is appraised he/she should review his/her own Personal Growth Plan, the aim of this plan is to ensure that the appraisal is developmental, when drawing the PGP the educator needs to actively participate so that he/she will grow as a professional educator.

To start using the Personal Growth Plan Menu:

- Click on the Personal Growth Plan (PGP) button;
- The following screen will appear;

IQMS Instrument [PERSONAL GROWTH PLAN] .xls Number - 300105057

Educator:	BALOYI L	Period:	25/13
School:	RATSHIKWENIETE	Year:	2008

Summary of scores

Performance Standard	PS 1	PS 2	PS 3	PS 4	PS 5	PS 6	PS 7	PS 8	PS 9	PS 10
Criteria	a b c d	a b c d	a b c d	a b c d	a b c d	a b c d	a b c d	a b c d	a b c d	a b c d
Final Score										
Total per PS										

PS & Criteria	Areas for Development (Prioritized according to lowest scores)	Plan of Action			Remarks on achievement
		How?	Who?	When?	
		pc	tatu	today	none

Save

Print Page

Menu

TAB button to move between controls

Figure 10: Personal Growth Plan menu page

- Enter the required details in the various fields;
- Once done click on the Save button then click on the Print Page button;
- Alternatively click on the Menu button to return to the educator list menu.

4.5 PM Check List

This form is used as a check list to evaluate if the educator has been apprised, if the Personal growth plan has been approved, if there are areas which still needs development and how the educator contribute in the extra-circular activities in the school.

IQMS Instrument [PRE-EVALUATION CHECK LIST] : Emis Number : 300105057

Educator: KHADIAR ID Number: 90876543426786 Post Level: 2 Current Year: 2009

Checklist Item	Availability Status		Comments
	Yes	No	
1. Have you been appraised for Development purposes?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2. Do you have a Personal Growth Plan (PGP)? To what extent have you achieved the objectives in the PGP?	<input type="checkbox"/>	<input type="checkbox"/>	
3. Have you received assistance from your Development Support Group (DSG)?	<input type="checkbox"/>	<input type="checkbox"/>	
4. To what extent have you managed to gain new knowledge and additional skills to address your professional needs?	<input type="checkbox"/>	<input type="checkbox"/>	
5. Do you stay informed regarding policies and regulations applicable to your position?	<input type="checkbox"/>	<input type="checkbox"/>	
6. Do you receive support from your colleagues, school managers, governing body, the staff Development Team (SDT), and Departmental officials?	<input type="checkbox"/>	<input type="checkbox"/>	
7. Do you share information with colleagues?	<input type="checkbox"/>	<input type="checkbox"/>	
8. Is there anything you need that could help you develop, and become more effective?	<input type="checkbox"/>	<input type="checkbox"/>	
9. How do you contribute to extra-curricular activities at the school?	<input type="checkbox"/>	<input type="checkbox"/>	
10. Do you participate in professional activities, e.g. conduct workshops, attend INSET courses, seminars, union programmes, etc.?	<input type="checkbox"/>	<input type="checkbox"/>	
11. What type of community activities are you involved in?	<input type="checkbox"/>	<input type="checkbox"/>	
12. What role do you play in formulating and implementing the school's policies?	<input type="checkbox"/>	<input type="checkbox"/>	
13. Are there any other matters you would like to bring to the attention of the supervisor below you are observed in practice?	<input type="checkbox"/>	<input type="checkbox"/>	

Save

Menu

Print Page

TAB button to move between controls

Figure 11: Pre-evaluation check list menu page

- Enter the required details in the various fields;
- Once done click on the Save button then click on the Print Page button;
- Alternatively click on the Menu button to return to the main menu.

4.6 Score Sheet

After the appraisal process has been completed by the school principal, he/she can use this form to rate the educator's performance standards, the rating must be based on the results from the appraisal, this form can be used to determine if there are areas which still needs development.

IQMS Instrument [SCORE SHEET FOR INDIVIDUAL EDUCATORS] : Emis Number : 300105057

Current Year: 2009

EDUCATOR:	BALDWIN	PERSAL:	256789	
POST LEVEL:	2	SCHOOL:	RATSHKWEKWE	
No.	Performance Standards	Max	Score	Total
1	Creation of positive learning environment	16		
2	Knowledge of curriculum and learning programmes	16		
3	Lesson planning, preparation and presentation	16		
4	Learner assessment / achievement	16		
5	Professional development in field of work / career and pa	16		
6	Human relations and contribution to school development	16		
7	Extra-curricular and co-curricular participation	16		
Total for Post Level 1 only		Subtotal 112		
8	Administration of resources and records	20		
9	Personnel	16		
10	Decision making and accountability	20	15	15
Total for Post Level 2 only		Subtotal 56	15	15

The above educator's score has/have not been adjusted
 Comments/reason for adjustment:
 because his assessment has to be evaluated

Save

Menu

Print Page

TAB button to move between controls

Figure 12: Score Sheet menu page

- Enter the required details in the various fields;
- Once done click on the Save button then click on the Print Page button;
- Alternatively click on the Menu button to return to the educator list menu.

4.7 Print Educator List

This form is used to print the list of educators which are currently on your school.

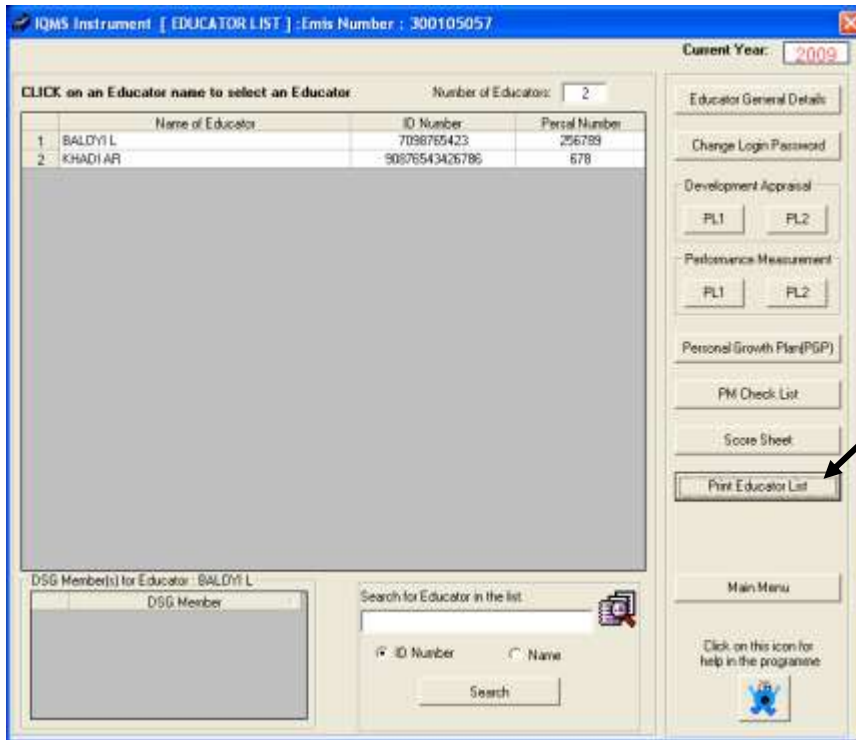


Figure 13: Educator list menu page

- Click on the Print Educator List button and;
- Click on the Print Button to print educator's list.

5. EDUCATOR IMPROVEMENT PLAN

The educator improvement plan is used to show the performance standards where educator got low scores which show where he/she need help, what strategies will be used to provide the help, who will give help and person responsible on the SDT and any other remarks. This plan is completed by the SDT in consultation with the school principal.

IQMS Instrument | EDUCATOR IMPROVEMENT PLAN | Form Number : 30105057

Name of School: RAJSHREERWETA Contact Official: Current Year: 2009
 Telephone Number: 015 3456789 Fax Number: 015 3456789

What	Reference Materials/Class	Area for Development/Recommendations	Strategies/Activities for Improvement	Target Group		Addressing the needs				Subject	Time	Remarks	
				Name of Educator	Phase	By Who? (Tick)						SOT	Class Manager
						By	Who?	(Tick)					
1	a												
	b												
	c												
	d												
	a												
	b												

Save Print Page Menu

TAB button to move between controls

Figure 14: Educator Improvement plan menu page

- Enter the required details in the various fields;
- Once done click on the Save button then click on the Print page button;
- Alternatively click on the Menu button to return to the educator’s list menu.

6. EXPORT IQMS DATA

This menu is used to create various educators’ details; however this report generates the XML file, to access this file.

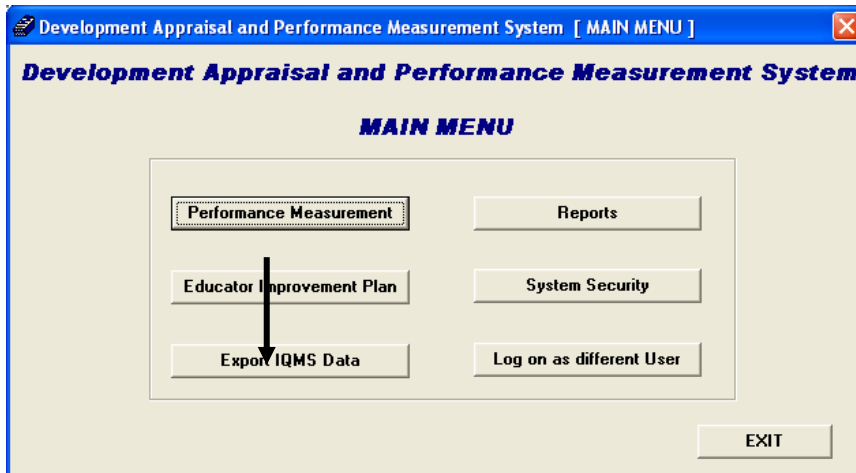


Figure 15: Educator Improvement plan menu page

- Click on the Export IQMS Data menu
- The following user message screen will appear;

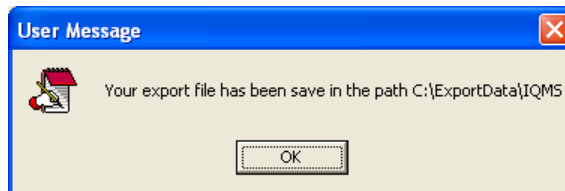


Figure 16: IQMS XML file path menu page

- The above image shows the path where the XML file is stored and created
- Locate the My Computer icon and double click on it
- Click on the Local Disk (c :) icon
- Locate the ExportData folder and open in
- Double click on the XML file to open it

7. REPORTS

7.1 Summary of Score (Individual Educator)

This form is used after the appraisal process has been completed, it is used to view the report of the educator, to begin using this form click on the Reports menu from the IQMS main menu and the following screen will appear.

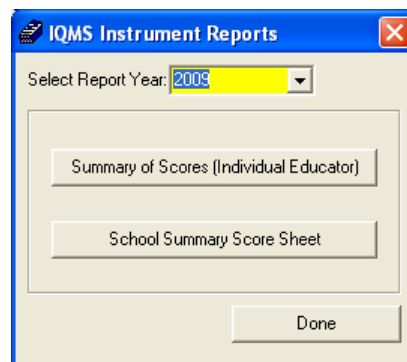


Figure 17: IQMS instrument Report menu page

- Select the year to make the report for from the Select Report Year dropdown.
- Click on the Summary of Score (individual Educator) menu.

The following screen will appear;

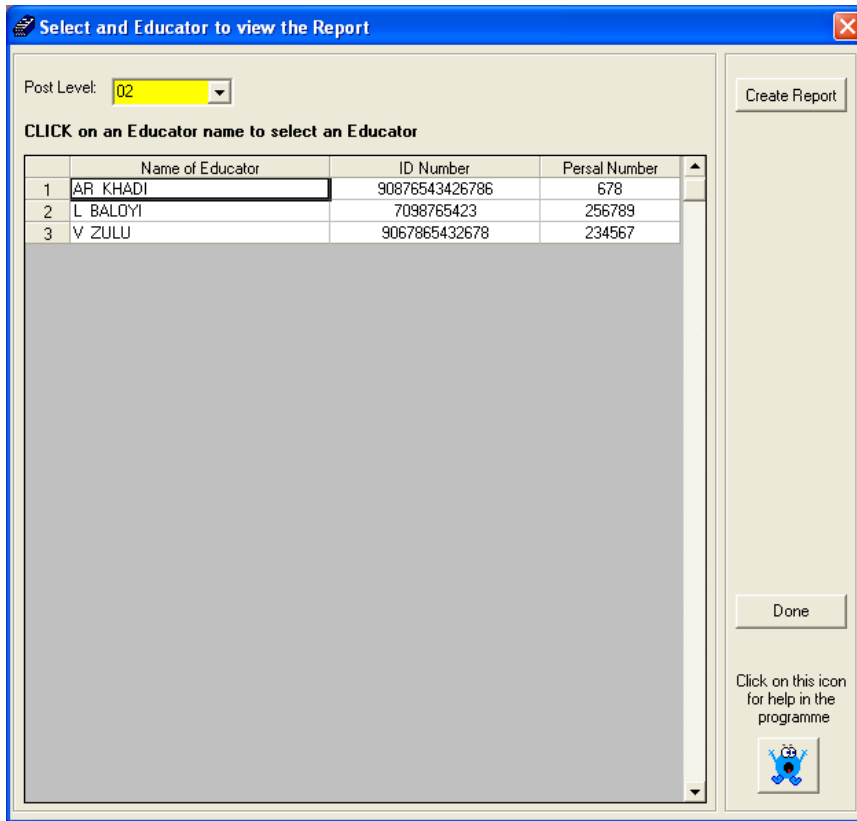


Figure 18: Educator view report menu page

- Select the educator's post level from the Post Level drop down menu.
- Select the educator you wish to view report for.
- Click on the Create Report menu

The following screen will appear;

Summary of Scores - Post Level 1

EDUCATOR:	AR KHADI	POST LEVEL:	2
SCHOOL:	RATSHIKWEKWEETE	DATE:	2009/04/23
PERSAL NUMBER:	679		
Performance Standards	Criteria	Final Scores	Total
1. Creation of a positive learning environment	(a) Learning space		
	(b) Learner involvement		
	(c) Discipline		
	(d) Diversity		
2. Knowledge of curriculum and learning programmes	(a) Knowledge of learning area		
	(b) Skills		
	(c) Goal setting		
	(d) Involvement in learning programmes		
3. Lesson planning, preparation and presentation	(a) Planning		
	(b) Presentation		
	(c) Recording		
	(d) Management of learning programmes		
4. Learner assessment / achievement	(a) Feedback to learners		
	(b) Knowledge of assessment techniques		
	(c) Application of techniques		
	(d) Record keeping		
5. Professional development in field of work / career and participation in professional bodies	(a) Participation in professional development		
	(b) Participation in professional bodies		
	(c) Knowledge of education issues		
	(d) Attitude to professional development		
6. Human relations and contribution to school development	(a) Learner needs		
	(b) Human relations skills		
	(c) Interaction		
	(d) Co-operation		
7. Extra-curricular and co-curricular participation	(a) Involvement		
	(b) Holistic development		
	(c) Leadership and coaching		
	(d) Organisation and administration		
TOTAL (Maximum 112)			

View PL2 Report

Print Page

Done

Figure 19: Summary of score report menu page

- Enter the required details in the various fields;
- Alternatively click on the Done button to return to the previous page.
- Click on the View PL2 Report button to move to the next page the View PL2 Report button provide you with the next part of the report,
The following screen will appear;

Summary of Scores - Post Level 2			
EDUCATOR:	AR KHADI	POST LEVEL:	2
SCHOOL:	RATSHIKWEKWEETE	DATE:	2009/04/23
PERSAL NUMBER:	678		
Performance Standard	Criteria	Final Scores	Total
8. Administration of resources and records.	(a) Utilisation of resources		
	(b) Instructions		
	(c) Record Keeping		
	(d) Maintenance of infrastructure		
	(e) Circulars		
9. Personnel	(a) Pastoral care		
	(b) Staff development		
	(c) Provision of leadership		
	(d) Building commitment and confidence		
10. Decision making and accountability	(a) Stakeholder involvement		
	(b) Decision making		
	(c) Accountability / Responsibility		
	(d) Motivation		
	(e) Objectivity / Fairness		
TOTAL (Maximum 56)			

Figure 20: Summary of score report menu page

- Click on the Print Page button to print the educator.
- Click on the Done button to go back to the previous page.

7.2 School Summary Score Sheet

This menu is used to print the score sheet report form, to access this form click on the school summary score sheet menu and the following screen will appear;

SCHOOL SUMMARY SCORE SHEET: PERFORMANCE MEASUREMENT SUMMATIVE EVALUATIONS

School:	RATSHIKWEKWE TE	District:	vuwana	Circuit:	vuwana
Principal:		Principal's cell phone:		Emir:	300105057
Email Address:	ratshikwekwe@doe.gov.za	No. of educators paid by Department			
Telephone:	015 3496783				

No	Post	Surname & Initials	Post Level	1	2	3	4	5	6	7	8	9	10	Total	Office site	Status of Educator			
																Perm	Temp	Sub	Sec

Figure 21: Summary score sheet report menu page

1. Click on the Print Page menu to print the form or
2. Click on the Done button to return to the IQMS instrument report page.

8. SYSTEM SECURITY

This form is used to add new user name on the system, to access this form click on the System Security menu form the IQMS main menu and the following screen will appear;

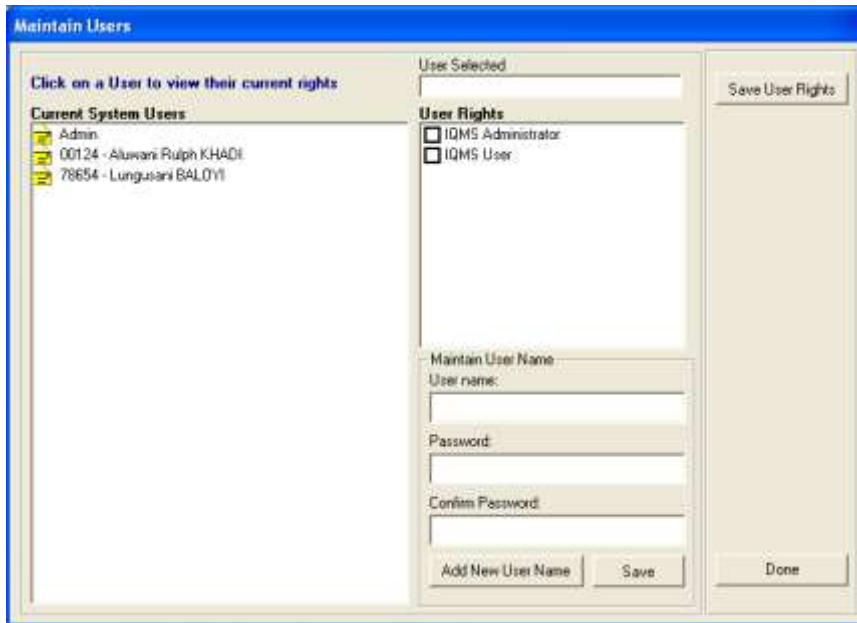
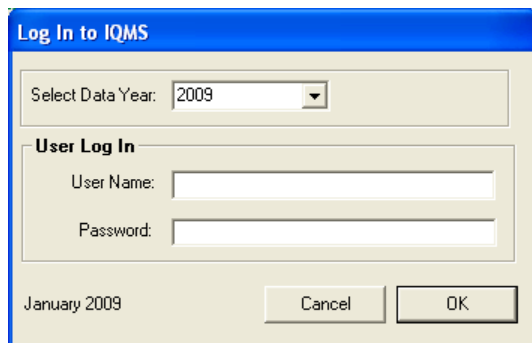


Figure 22: Maintain user menu page

- Select the user under Current system User list box
 - To add current system user click on the Human Resources Information menu from SA-SAMS main menu
 - Go to Educator Information menu then click on the Add New Educator menu to add an educator
- Depending on the rights you wish to have on the system select either IQMS Administrator or IQMS user then click on the Save User Rights button.
 - The IQMS Administrator option gives you rights to complete the FINAL and DSG appraisal
 - The IQMS User option gives you limited rights on the system, as IQMS user you can only be able to do the self-assessment appraisal.
- To add new user name on the system click on the Add New User name button
- The new password must be used when you log in to the IQMS menu.

9. LOG ON AS DIFFERENT USER

This form is used when you want to log in as different user with limited or unlimited rights, to access this form click on the Log on as different user menu and the following screen will appear;



The screenshot shows a dialog box titled "Log In to IQMS". It contains a "Select Data Year" dropdown menu with "2009" selected. Below this is a "User Log In" section with "User Name:" and "Password:" labels and corresponding text input fields. At the bottom left, it says "January 2009". At the bottom right, there are "Cancel" and "OK" buttons.

Figure 23: Log on to IQMS menu page

- Enter the user name and the password on the correct field.
- Click on the OK button to log on.