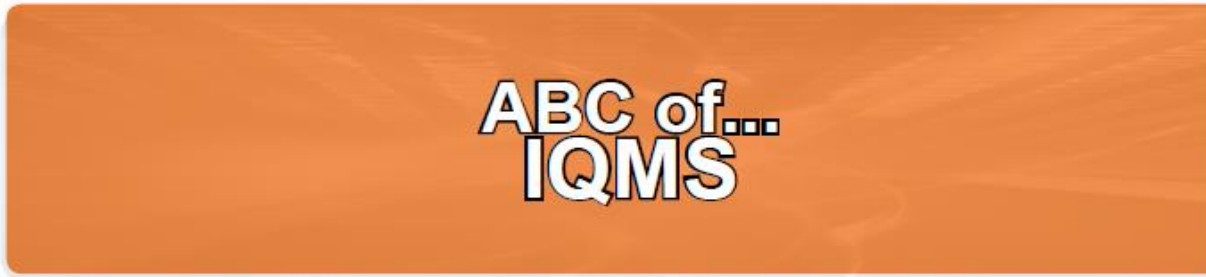


EVERY CHILD IS A NATIONAL ASSET

Part of

**M  
O  
D  
U  
L  
E  
2**

## ABC of... IQMS



**basic education**

Department:  
Basic Education  
REPUBLIC OF SOUTH AFRICA



Published by the Department of Basic Education  
222 Struben Street  
Private Bag X 895, Pretoria, 0001

For Enquiries:

Mrs van der Westhuizen (SA-SAMS Support)

Email: [vanderwesthuizen@dbe.gov.za](mailto:vanderwesthuizen@dbe.gov.za)

Tel: 012 357 3832

Fax:

website: [www.education.gov.za](http://www.education.gov.za) or find us on [Thuthong](#)

© Department of Basic Education - January 2013 (All rights reserved)

For use in publication please obtain the written permission of the Department.

ISBN:



## Contents

<b>1. Introduction</b>	<b>4</b>
<b>2. General Suggestions For Using IQMS</b>	<b>4</b>
<b>3. IQMS Road Map</b>	<b>4</b>
<b>4. Development Appraisal And Performance Measurement System</b>	<b>8</b>
<b>4.1 Educator General Details</b>	<b>9</b>
<b>4.2 Development Appraisal</b>	<b>10</b>
<b>5. Personal Growth Plan (PGP)</b>	<b>12</b>
<b>6. PM Checklist</b>	<b>13</b>
<b>7. Score Sheet</b>	<b>13</b>
<b>8. Print Educator List</b>	<b>14</b>
<b>9. Educator Improvement Plan</b>	<b>14</b>
<b>10. Export IQMS Data</b>	<b>15</b>
<b>10.1 Reports</b>	<b>16</b>
<b>12. Summary of Score (Individual Educator)</b>	<b>16</b>
<b>13. System Security</b>	<b>18</b>
<b>14. Summary</b>	<b>19</b>
<b>15. Feedback/Contact Form</b>	<b>21</b>



## 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 has 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.

### GENERAL SUGGESTIONS FOR USING IQMS

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

**IQMS Module**

<b>Performance Measurement</b>	Educator General Details
	Change Login password
	Development Appraisal
	Performance Measurement
	Personal Growth Plan
	Score Sheet
	Print Educator List
<b>Educator Improvement Plan</b>	Where help is needed /Strategies to be used for improvement/Who will give help/ SDT.
<b>Export IQMS Data</b>	XML file/Used to create educator details
<b>Reports</b>	Summary of Score /Relevant Year/ Post level of educator/Report printed/ Score sheet for school.
<b>System Security</b>	Add new user name/Final DSG /User rights/ new password.
<b>Log in as Different user</b>	Limited or unlimited rights/Security.

The table above provides a lot of information for quick reference.

Drop-down options :

<b>Log in to IQMS</b>	Select data year: 2008 - 2013
<b>Reports</b>	Select year: 2008 - 2013

To access the IQMS module, follow the instructions below:

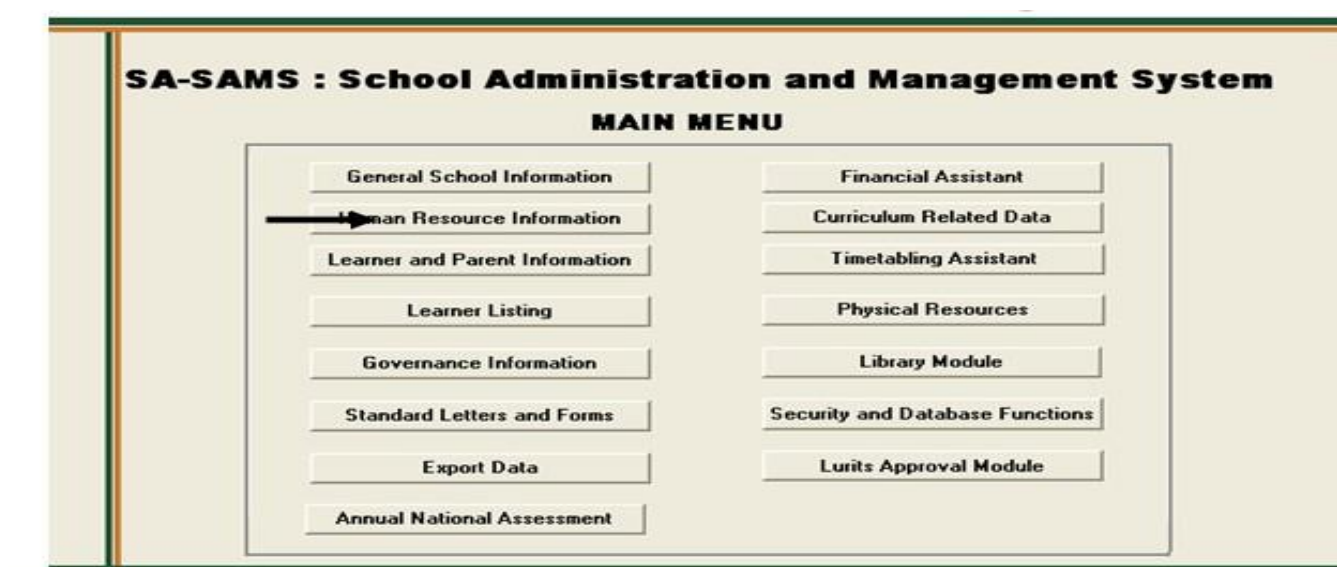


Figure 1: SA-SAMS: Human Resource Information

Insert SA-SAMS Main Menu here. Page 5

- Click on the Human Resource Menu on SA-SAMS and the screen below will appear:

EMIS  
Data Management System

LETHAMAGA SECONDARY SCHOOL  
2013

basic education  
Department:  
Basic Education  
REPUBLIC OF SOUTH AFRICA

**SA-SAMS : School Administration and Management System  
HUMAN RESOURCE MODULE**

Educator Information	Blank Attendance Register
Update Educator Subject Teaching Experience	Maintain Weekly Educator Attendance
Staff/Public Servant Information	Maintain Weekly Staff Attendance
Maintain Training Categories	View Individual Staff Absences
Maintain INSET Training Records	View Attendance Statistics
Maintain DA Interview Records	View Attrition Register
Printout of DA Interview Records	
HR Dashboard	Development Appraisal and Performance Measurement
Emis HR Printouts	
Staff Leave Summary Printout	<< MAIN MENU

Figure 2: Human Resource menu page

- Click on the Development Appraisal and Performance Measurement menu. The user log-in menu below appears;

**SA-SAMS : School Administration and Management System**  
HUMAN RESOURCE MODULE

**Log In to IQMS**

Select Data Year: 2009

**User Log In**

User Name:

Password:

January 2009

Educator In	Attendance Register
Update Educator Subject	Educator Attendance
Staff/Public Serv	y Staff Attendance
Maintain Training	al Staff Absences
Maintain INSET T	ance Statistics
Maintain DA Inter	tion Register
Printout of DA Interview Records	
HR Dashboard	<b>Development Appraisal and Performance Measurement</b>
Emis HR Printouts	
Staff Leave Summary Printout	<< MAIN MENU

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 passwords 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 any time. Refer to the System Security section on how to change the passwords and user name.)

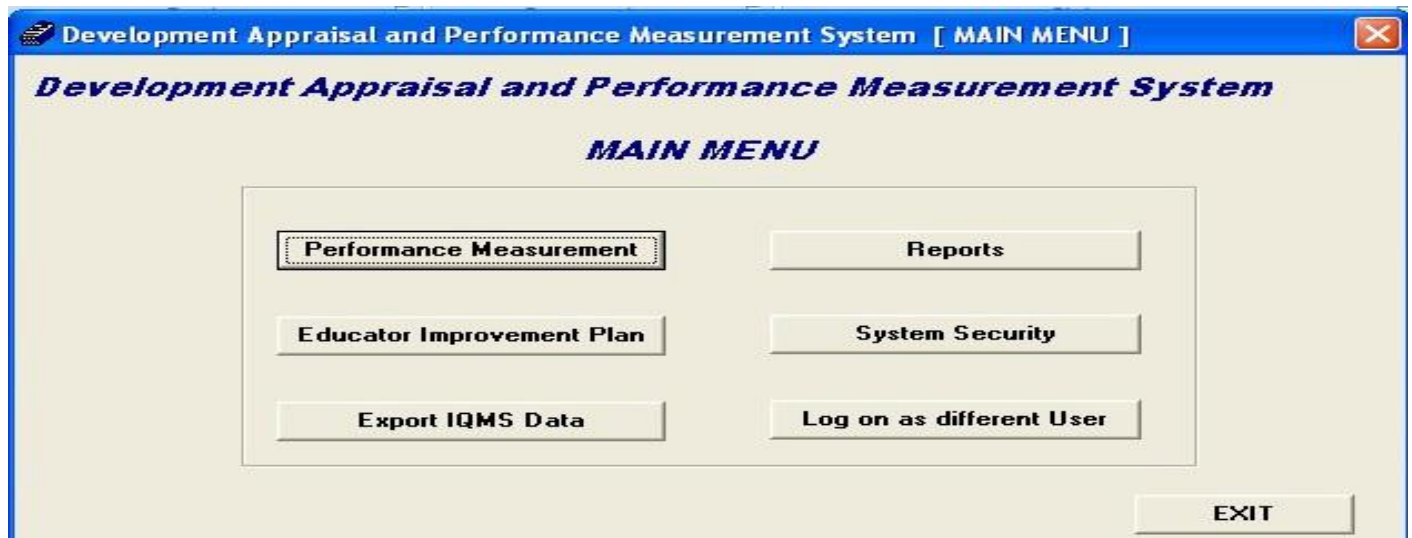


Figure 4: Development Appraisal Main Menu page

- **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.



## 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 the this form you need to select an educator and click on any menu item to begin the appraisal process.

	Name of Educator	ID Number	Persal Number
1	BALOVI L	7098765423	256789
2	KHADI ARI	90876543426786	678

Figure 5: IQMS Instrument Educator List Menu page

This form will be used to view personal and educational details of the selected educator.

To return to the main menu, click on the **Educator List** menu.

3.1 Personnel Category [1=Principal; 2=Deputy Principal; 3=HOD; 4=Educator; 5=Special Educator; 6=Remedial Educator; 7=Other]	3					
3.2 Educator_Code	78654					
3.3 Title	MR	3.4 Initials	L	3.5 Surname	BALOVI	
3.6 Persal Number	256789	3.7 ID Number or Passport Number	7098765423			
3.8 SACE Number	256789	3.9 Gender [1=Male; 2=Female]	1			
3.10 BirthDate	01/01/1970	3.11 Population Group [1=Black African; 2=Coloured; 3=Indian; 4=White; 5=Other]	1			
3.12 Cellphone	0734567898	3.13 Home telephone	3.14 Post Level [1,2]			2
3.15 Qualification	REQV 13 : C2 (Matric + 3 yrs teacher training)					
3.16 Qualification Type [1= Professional Diploma/Certificate; 2= Academic Degree; 3=Professional Degree; 4= Technical diploma/Certificate]	3					

Figure 6: IQMS Instrument (Educator Data) menu page

- How to select a SGB 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 SGB Members list box.

- How to remove a DSG member

- To remove an SGB member, select an educator from the selected SGB member list and click on the back arrow. The selected educator should now appear in the available DSG member list box.

## Development Appraisal

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

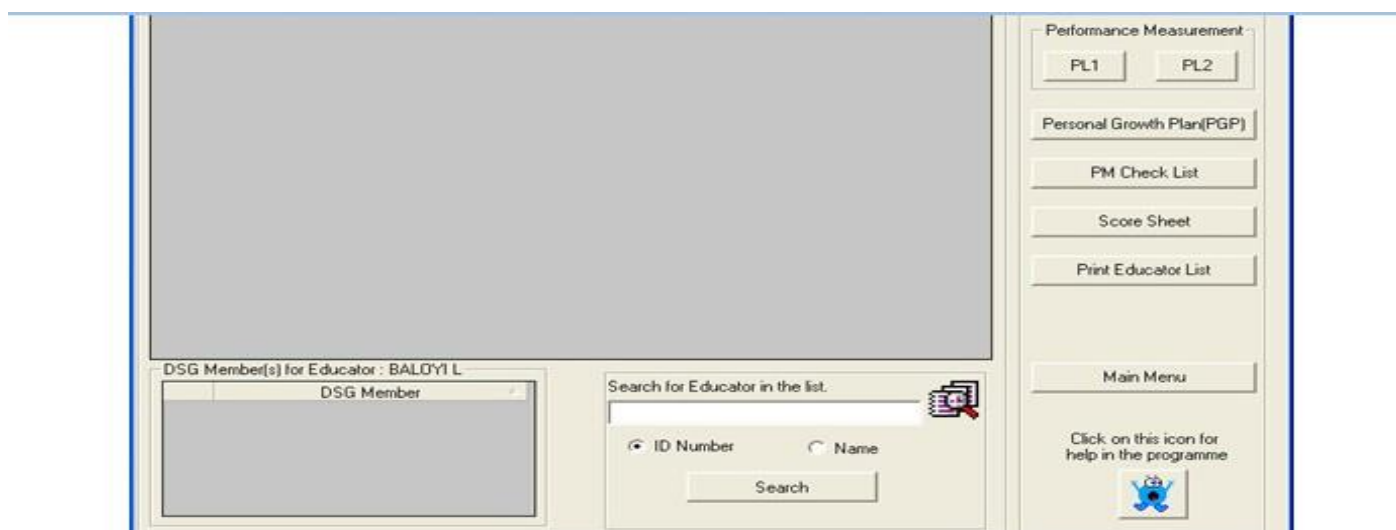


Figure 7: IQMS Instrument (Educator List) menu page

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.

IQMS Instrument [ DEVELOPMENT APPRAISAL ] : Emis Number : 300105057 [ PERFORMANCE STANDARD 1 ]

Educator: BALOYI L ID Number: 7098765423 Post Level: 2 Current Year: 2009

**Performance Standard 1: CREATION OF A POSITIVE LEARNING ENVIRONMENT**

Expectation: 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	DSG	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 teaching and learning.			
	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 assessment.			
	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 exchange 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 clearly conveys the purpose of the lesson and the learners are cooperative.			
	4	4	4	Educator conveys the intended outcome of the			

Save Next Educator List Print Page

TAB button to move between controls

Figure 8: IQMS instrument (development) menu page

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

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 form 2 to form 10 the appraisal process is completed the same way as you did on the above form.

### 1.1 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.

Current Year: 2009

CLICK on an Educator name to select an Educator Number of Educators: 2

	Name of Educator	ID Number	Personal Number
1	BALOYI L	7098765423	256789
2	KHADI AR	90876543426786	678

Educator General Details  
 Change Login Password  
 Development Appraisal  
 PL1 PL2  
 Performance Measurement  
 PL1 PL2  
 Personal Growth Plan(PGP)  
 PM Check List  
 Score Sheet  
 Print Educator List

Figure 9: Educator List menu page

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

### 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:

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	tulu	today	none

Menu

TAB button to move between controls

Figure 10: Personal Growth Plan menu page

- Enter the required details in the various fields.
- Click on the **Save** button when done.
- Click on the **Print Page** button.
- Alternatively click on the menu button to return to the educator list menu.

## PM Checklist

This form is used as a checklist to evaluate if the educator has been apprised, if the Personal Growth Plan has been approved, if there are areas which still need development and how the educator contributes in the extra-curricular activities in the school.

2. Do you have a Personal Growth Plan (PGP)? To what extent have you achieve the objectives in the PGP?			
3. Have you received assistance from your Development Support Group (DSG)?			
4. To what extent have you managed to gain new knowledge and additional skills to address your professional needs?			
5. Do you stay informed regarding policies and regulations applicable to your position?			
6. Do you receive support from your colleagues, school managers, governing body, the staff Development Team (SDT), and Departmental officials?			
7. Do you share information with colleagues?			
8. Is there any anything you need that could help you develop, and become more effective?			
9. How do you contribute to extra-curricular activities at the school?			
10. Do you participate in professional activities, e.g. conduct work-shops, attend INSET courses, seminars, union programmes, etc.?			
11. What type of community activities are you involved in?			
12. What role do you play in formulating and implementing the school's policies?			
13. Are there any other matters you would like to bring to the attention of the supervisor before you are observed in practice?			

Menu

Print Page

TAB button to move between controls

Figure 11: Pre-evaluation Checklist 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.

## Score Sheet

After the appraisal 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 need development.

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18				
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		
	<b>Total for Post Level 1 only</b>	<b>Subtotal 112</b>		
8	Administration of resources and records	20		
9	Personnel	16		
10	Decision making and accountability	20	15	15
	<b>Total for Post Level 2 only</b>	<b>Subtotal 56</b>	<b>15</b>	<b>15</b>
The above educator's score has/has not been adjusted. Comments/reason for adjustment: because his assessment has be avakuated				

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.

### Print Educator List

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

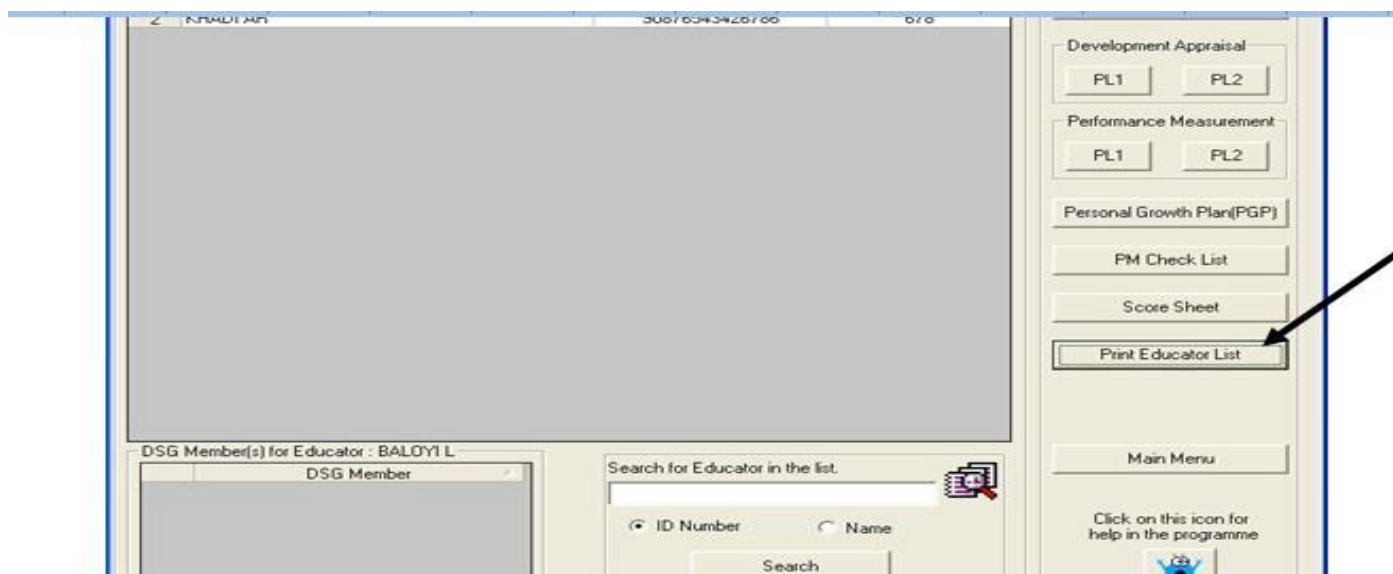


Figure 13: Educator List menu page

### EDUCATOR IMPROVEMENT PLAN

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

Name of School:		RATSHIKWEKETE		Contact Official:				Current Year:		2009		Save		
Telephone Number:		015 3456789		Fax Number:		015 3456789						Print Page		
Performance Standard	Criteria	Area for Development/ Recommendations	Strategies/Activities for Improvement	Target Group			Addressing the needs				Budget	Time	Remarks	
				Names of Educators	Phase	No of Educ	By Who? [Tick]						SDT	Circuit Manager
							010	10T	18T	DIS-TRICT				
1	a													
	b													
	c													
	d													
	a													
	b													

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 list menu.

## EXPORT IQMS DATA

This menu is used to create various educator's details. However, this report generates the XML file, to access the file.

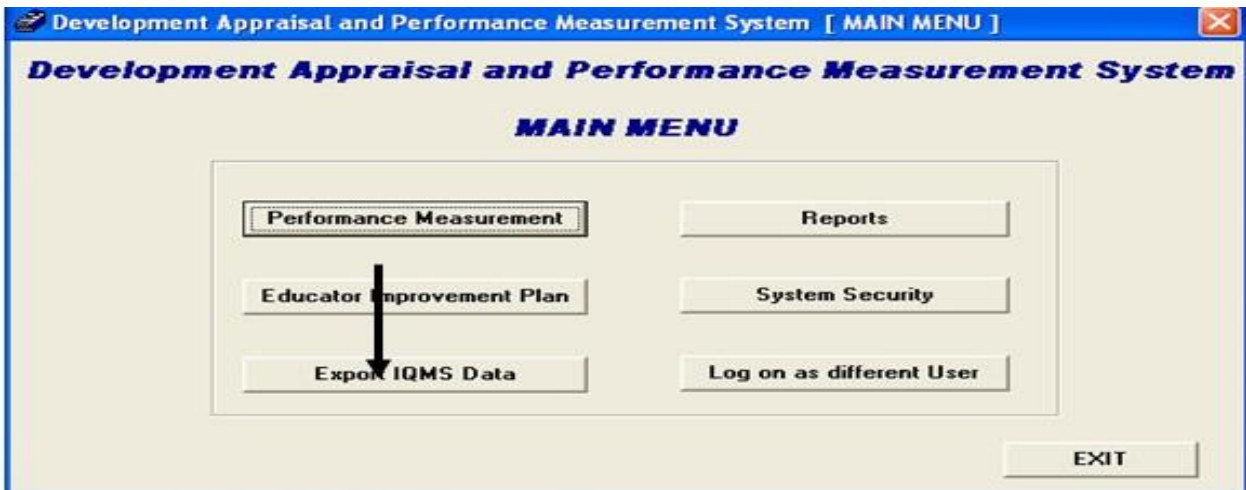


Figure 15: Educator Improvement Plan menu page

- 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 My Computer icon and double click on it.
- Click on the Print Local Disk ( c : ) icon.
- Find the Export Data folder and open it.
- Double click on the XML file to open it.

## REPORTS

### 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:

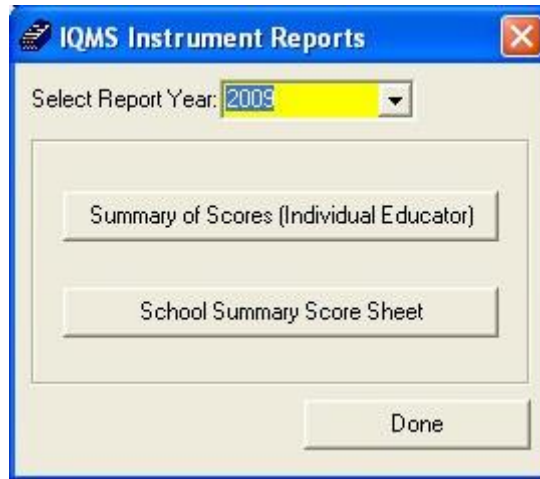
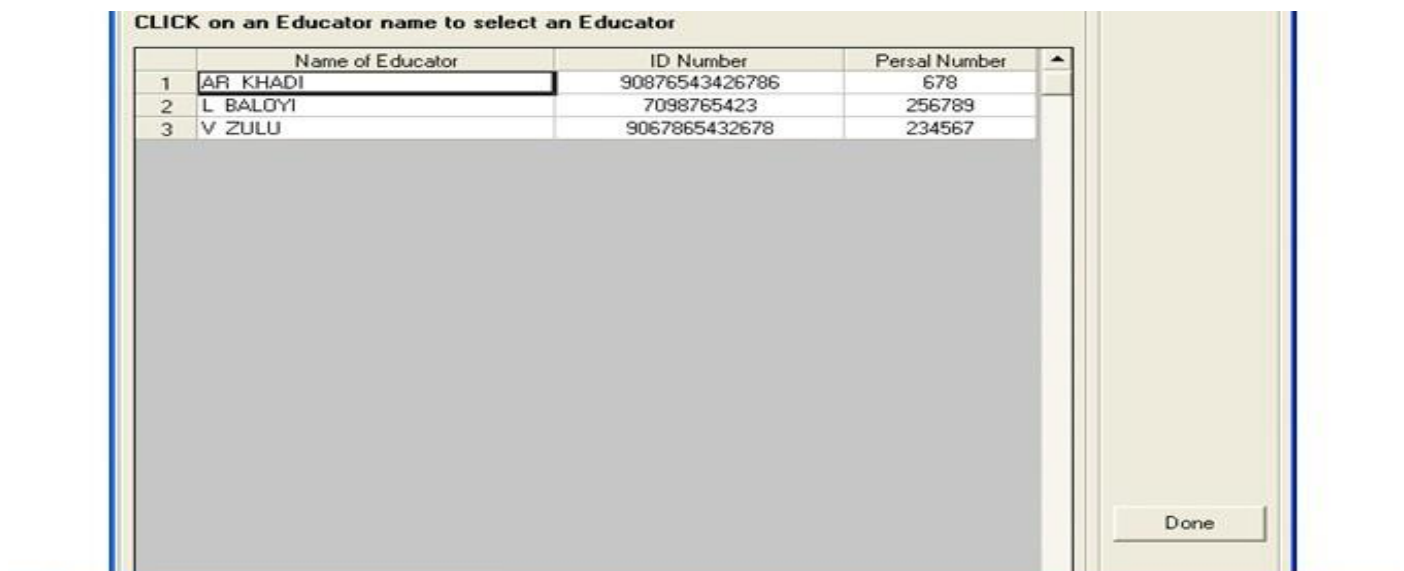


Figure 17: IQMS Instrument Report menu page

- 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:



	Name of Educator	ID Number	Persal Number
1	JAR KHADI	90876543426786	678
2	L BALOYI	7098765423	256789
3	V ZULU	9067865432678	234567

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:

<b>EDUCATOR:</b>	AR KHADI	<b>POST LEVEL:</b>	2	View PL2 Report
<b>SCHOOL:</b>	RATSHIKWEKWE TE	<b>DATE:</b>	2009/04/23	
<b>PERSAL NUMBER:</b>	678			
<b>Performance Standards</b>	<b>Criteria</b>	<b>Final Scores</b>	<b>Total</b>	
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			
	(a) Learner needs			

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 to provide you with the next part of the report.

The following screen will appear:

8. Administration of resources and records.	(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			
	<b>TOTAL (Maximum 56)</b>			

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.

## School Summary Score Sheet

This menu is used to print the score sheet form. To access this form click on the school summary score sheet menu and the following screen will appear:

School:	RATSHIKWEKWETE	District:	vuwani	Circuit:	vuwani
Principal:				Emis:	300105057
Email Address:	ratshikwekwete@doe.gov.za	Principal's cell phone:			
Telephone:	015 3456789	No. of educators paid by Department			

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

Figure 21: Summary score sheet report menu page.

- Click on the Print Page menu to print the form.
- **OR** Click on the **Done** button to return to the IQMS instrument report page.

## SYSTEM SECURITY

This form is used to add a new user name on the system. To access this form click on the System Security menu from the IQMS main menu and the following screen will appear:

Click on a User to view their current rights

**Current System Users**

- Admin
- 00124 - Aluwani Rulph KHADI
- 78654 - Lungusani BALOYI

User Selected

**User Rights**

- IQMS Administrator
- IQMS User

Save User Rights

Maintain User Name

User name:

Password:

Confirm Password:

Figure 22: Maintain user menu page

- Select the user under Current System User list box:
  - To add current system user, click on the Human Resource Information menu from the 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 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 a 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.

## LOG ON AS DIFFERENT USER

This form is used when you want to log in as a 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

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.



## SUMMARY

In the business world, sport, arts, in fact in every imaginable sector appraisal is important. It therefore stands to reason that appraisal should take place in the world of education where suddenly so many different educational institutions have sprung up and the training differs widely. Some institutions can be proud of their records of achievement, but others again are fly-by-night organisations where the interests of the learner have fallen by the wayside. Appraisals also invariably will encourage educators to improve their qualifications so as to be more effective in their teaching and training of learners with the IQMS in mind. It is not intended as a way to spy on educators, but rather as a means to pinpoint shortcomings in educators' training and teaching. This a sure way to ensure that the best education for our children is offered. Considering the cost involved in education at present, only the best educators can be appointed.



## Notes

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

## Feedback/Contact Form

Your feedback is important to us. Please leave any comment that you want. If you are struggling with anything in this module, please send us an email and remember to also give us a number or email to contact you back with.

**Contact Name:**

**Email Address:**

**Cellphone Number:**

**Version of SA-SAMS:**

**Operating System:**

**District / Province:**

**Comments / Problem Details:**

Send Email

**Contact Person**

Carinne van der Westhuizen

Pauline Ramphele

Lebogang Mveke

**Telephone**

0123573832

0123573287

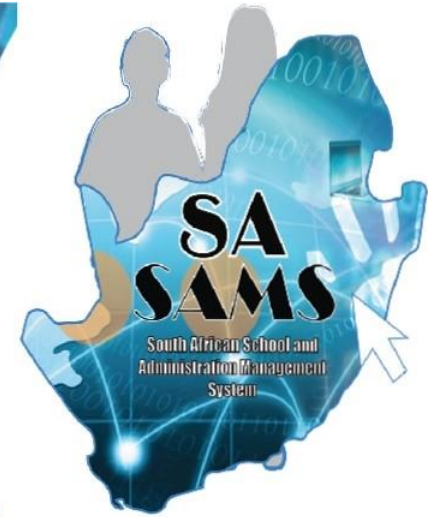
0123573396

**Email**

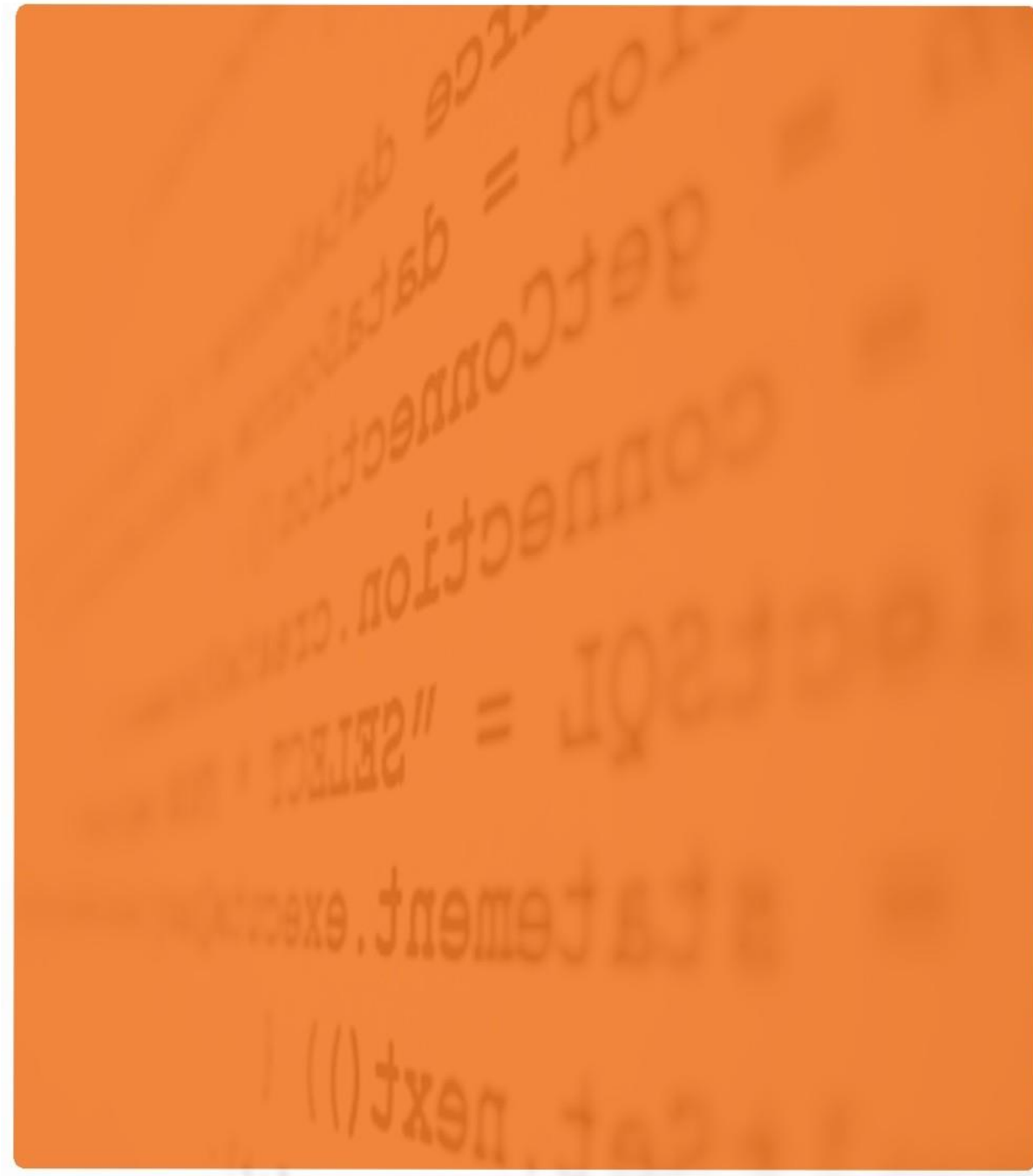
[vanderwesthuizen@dbe.gov.za](mailto:vanderwesthuizen@dbe.gov.za)

[ramphele.m@dbe.gov.za](mailto:ramphele.m@dbe.gov.za)

[mveke.l@dbe.gov.za](mailto:mveke.l@dbe.gov.za)



EVERY CHILD IS A NATIONAL ASSET



## basic education

Department:  
Basic Education  
REPUBLIC OF SOUTH AFRICA