



EVERY CHILD IS A NATIONAL ASSET

MODULE 2

ABC OF ... HUMAN RESOURCES



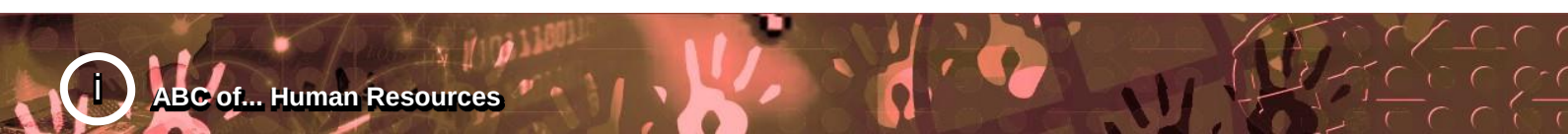
basic education

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General Instructions on using this SA-SAMS Manual:

- Click on the **menu option** to open the required screen.
- Fields containing **an arrow** on the side **contains drop-down boxes** with pre-populated information. **Click on the arrow** to display the list and then **click on selected value**.
- Click on **Save** to update all capturing.
- Click on **Done** to exit the screen.

The following symbols are used in the manual to indicate the required action with every screen:

					
Background Information	Data used in other modules or pre-captured data needed	Options in drop-down tables	Screens that require capturing	Printouts and Reports	Summary and Stats screens

A. Introduction



1. Purpose of the module

The Human Resource Information Module (Fig. 1) assists schools in the administration of the educators and staff/ public servants' information. It also contains the processing and the administration of leave, absenteeism, training, appraisals and all human resource related data and processes:

SA-SAMS : School Administration and Management System MAIN MENU	
1. General School Information	11. Financial Assistant
2. Human Resource Information	12. Curriculum Related Data
3. Learner and Parent Information	13. Timetabling Assistant
4. Learner Listing	14. Physical Resources
5. Governance Information	15. Library Module
6. Standard Letters and Forms	16. Security and Database Functions
7. Export Data	17. Units Approval Module
8. Annual National Assessment	
User Preferences	

Figure 1: Main Menu

This module contains information that will **assist**:

- The **school management** in completing the Annual School Survey and quarterly reports for the districts.
- The **school administration** by using this **data in other modules** as indicated in the table below.

Module	Data needed for (function and Menu no)
1	- Teacher per Bus Route (1.9), School Hostels (1.12), House Groups (1.13) - Educator photos in General Settings (1.16)
3	Assign grades to classes (3.1.5), Class statistics (3.1.6)
7	Export Data – ASS and other surveys
11	SGB Payment of staff
12	- Create Educator / Subject Groups (12.1.14), - Print Educator marks schedules (12.1.17)
14	Learner Support Materials (14.1)
16	- Set up security functions for module access in Maintain Users (16.12) - Set up access to grades and classes in Marks Capturing Security (16.13)

B. Components of this Module

2. Module 2: Human Resource Information



All the employees' information is captured, maintained and reported in this module.

- This includes educators, non-teaching staff and all public servants employed at the school.
- Educators and non-teaching staff are captured in separate screens.

The **Human Resource Information** module consists of the following components as shown in Figure 2.



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SA-SAMS : School Administration and Management System

2. HUMAN RESOURCE MODULE

2.1. Educator Information	2.11. Blank Attendance Register
2.2. Update Educator Subject Teaching Experience	2.12. Maintain Weekly Educator Attendance
2.3. Non-teaching Staff Information	2.13. Maintain Weekly Staff Attendance
2.4. Maintain Training Categories	2.14. View Individual Staff Absences
2.5. Maintain INSET Training Records	2.15. View Attendance Statistics (Details)
2.6. Maintain DA Interview Records	2.16. View Attendance Statistics (Summary)
2.7. Printout of DA Interview Records	2.17. View Attrition Register
2.8. HR Dashboard	2.18. Development Appraisal and Performance Measurement
2.9. Emis HR Printouts	2.19. Design HR List
2.10. Staff Leave Summary Printout	<< MAIN MENU

SA-SAMS : Department of Basic Education - South Africa

Login: Dbe@dmin (8) Marks Security: Off

System Functions

About

EXIT

Figure 2: Components of Human Resource Information

The HR Module is divided into 4 sections according to its allocated functions:

- 2.1 Staff Information (Educators and non-teaching staff captured separately).
- 2.2 Educator Evaluation & all staff training documented records.
- 2.3 Staff Attendance
- 2.4 Summary Reports

The functionalities of the sections are summarised in the table below:

Heading in Manual	Sub – head & (SA-SAMS Menu no)	Functionality
2.1 Staff information	2.1.1 Educator Information (2.1)	→ Educators' details → Subject specialisations & years training → Educator teaching load (of current year) → Edit / View leave and absentee records of the individual → Assign educators to register classes → Educator contact list
	Update Educator Subject Teaching Experience (2.2)	→ Report on updated Educator training & teaching experience for subjects taught the current year
	2.1.2 Staff Public Servant Information (2.3)	→ Staff members (public servants) → Add new staff member → Edit staff member's details → Archive a staff member → Edit / view - leave and absentee records Print - staff contact list
2.2 Educator evaluation & all staff training	2.2.1 Maintain Training Categories (2.4)	→ Add training courses
	2.2.2 Maintain INSET Training Records (2.5)	→ Development and Training
	2.2.3 Maintain DA Interview Records (2.6)	→ Development appraisal interview records → Add new record
	2.2.4 Printout of DA Interview Records (2.7)	→ DAS Appraisal Report
	2.2.5 Development Appraisal and Performance (2.18)	→ General development, performance appraisal
2.3 Summary reports	2.4.1 Emis HR Printout (2.9)	→ Appointment Register / Educator Details / Educator Subject Specialisation / Staff Training
	2.4.2 View Attrition Register (2.16)	→ Summary of archived Educators/Staff
2.4 Staff Attendance	2.3.1 Blank Attendance Register (2.11)	→ Blank printout register for educators / staff
	2.3.2 Maintain Weekly Educator Attendance (2.12)	→ Capture absenteeism of educators → Type of leave & documentation
	2.3.3 Maintain Weekly Staff Attendance (2.13)	→ Capture absenteeism of staff → Type of leave & documentation
	2.4.4 HR Dashboard (2.8)	→ Dashboard
	2.3.5 Staff Leave Summary Printout (2.10)	→ Summary record of all staff leave of a certain period of time
	2.3.6 View Individual Absences (2.14)	→ Both Staff and Educator absences indicated

2.1 Staff Information



This section groups all the sub-menus related to educator and non-teaching staff. All the information for educator and non-teaching staff is captured and maintained as summarised in the table below:

Header (SA-SAMS Menu no)		Sub-Menu / Functionality
2.1.1 Educator Information (2.1)	2.1.1a Add New Educator	Compulsory Information & Additional Details
	2.1.1b Edit Educator	- Educator's details - Compulsory Information & Additional Details - Detail Qualification Types
	2.1.1c Remove or archive an educator	Educator's details from Current Educator list to Archive List
	2.1.1d Print educator contact list	Educator Contact List with names, birthdays, Persal and contact numbers
	2.1.1e Subject years training & teaching	Add years training and teaching for subjects
	2.1.1f Maintain teaching load	Update of the educators' subject experience (current year)
	2.1.1g Assign educators to register classes	- Assign educators to register classes - Reassign
	2.1.1h Print Register Classes	Print Register Classes
	2.1.1i Leave & Absences	Edit / View / Print Leave and Absentee Records of the Individual
2.1.2 Update Educator Subject Teaching Experience (2.2)		Report on updated educator training & teaching experience for subjects taught the current year
2.1.3 Staff Public Servant Information (2.3)	2.1.3a Add new Staff Member	Details of new staff member
	2.1.3b Edit Staff Member	- Member's details - Detail Qualification Types
	2.1.3c Remove or archive a Staff Member	Archive a staff member
	2.1.3d Print staff member contact list	Contact List with names, birthdays, designation, Persal and contact numbers
	2.1.3e Leave & Absences	Edit / View - leave and absentee records of the individual

2.1.1 Educator Information (Menu 2.1)



This menu contains only the details of the educators at the school.

- This **part is compulsory** as the information is required by all school surveys and other official school documents.



- Data should be **checked quarterly and updated** when there are any changes.
- Educators cannot be deleted but only Archived.

✓ The educator screen has an option to list **Current Educators** or **Archived Educators** as seen at the top of the screen. (Fig. 3)

- The total number of educators captured is indicated at the top.
- Educators are listed alphabetically with contact number, Persal Number and post level.

The screenshot shows the 'Educators (2.1)' window. At the top, there are tabs for 'View Educators' and 'Assign Register Class'. Under 'View Educators', there are radio buttons for 'Current Educators' (selected) and 'Archived Educators'. A counter shows '22' current educators. The main area is a table with the following columns: * Surname, Name, * Code, Cellphone, Persal No, and Post Level. The table lists 22 educators. To the right of the table are buttons: 'Add New Educator', 'Edit an Educator', 'Archive an Educator', 'Subject Specialisations', 'Leave and Absences', 'Teaching Load', 'Assign Register Class', 'Print Register Classes', 'Educator Contact List', and 'Done'. At the bottom, there is a 'Search List for Educator' field with a 'Go' button and a note: 'Only archived educators may be deleted from the system'.

* Surname	Name	* Code	Cellphone	Persal No	Post Level
ABDUL	Paulus	023	077234567	555444333	01
BOTHA	Carine	019	0772345678	545454545	01
CHETTY	Christine	024	0884774774	5631313131	01
COCKRAL	Hantie	002	082547547	51416171	02
CORNELISSEN	Margret	033	0772468024		01
CROUCAMP	Elmari	032	0884455667		01
FOX	Stephen	027	0771357913		01
GOVENDER	Ayesha	030	0794445556		01
GRANT	Elizabeth	016	0771313131	5353535353	01
JABULE	Bheki	012	0881122334	556677889	01
KORDAAT	Gabriel	035	0733344556	54774455	01
KWEPILE	Nomalanga	011	0884545454	6113344556	01
LECWIDI	William	036	0772241199	554455632	01
MARAIS	Valarie	010	0884433660		01
MATI	Anele	009	0787878787	575859601	01
OBAKENG	Henry	026	0729292929	6352521212	01
DBU - DARKO	Mathew	038	0883453453	54239176	01
STEYN	Anriette	048	0847057047	617617617	01
VAN DER MERWE	Martha	034	0727272829		01
VAN DER WALT	Helen	001	0881122334	5151515151	03
VAN STRATEN	Alta	020	0774564564		01
WILSON	Amanda	031	0778934216		01

Figure 3: List of Educators

Educators can be **Added, Edited or Archived** and details printed as follows:

2.1.1a Add New Educator

Click on **Add New Educator**. (Fig. 3)

- There are two tabs (**Compulsory Details** and **Additional Details**) that have to be completed. (Figures 4 & 5)
- All the *fields marked in blue* must be completed before you can **Save** the data.
- Fields with arrows are populated from a drop-down box. Options for the drop-down tables are given below.
- Educators need to supply the following numbers: ID or passport, SACE and if applicable the Persal and working permit.
- Educators that are not South African citizens need to enter the passport number, working permit no and date of expiry as shown below.

SA Citizen: ☐ Yes ☒ No

Country of Citizenship:

Passport Number:

Work Permit: ☐ Yes ☐ No

Work Permit Number:

Permit Expiry Date: 2015/01/12

- Complete the **Actual** position as stated on the letter of appointment.
- Complete the **Acting** position if applicable and update any changes later.
- Enter the total number of **Years of Teaching Experience** and not the experience per grade or per subject.

When finished click on Save.

Click on **Done** to exit screen

Compulsory Details

Additional Details

Educator Code: (max 5 characters)

Surname:

Previous Surname:

First Names:

Initials: Title:

Gender: ☒ Female ☐ Male

Home Language:

Instruction Language:

Race:

Date of Birth: Year Month Day

SA Citizen: ☐ Yes ☒ No

Country of Citizenship:

Passport Number:

Work Permit: ☐ Yes ☐ No

Work Permit Number:

Permit Expiry Date: 2015/01/12

Persal Number: (not compulsory for SGB post)

Date Joined Staff: 2015/01/12

Nature of Appointment:

Duration: ☒ Fulltime ☐ Part-time

Personnel Position: Actual: Acting:

Post Level: Clear

Educator Teaching Level: Select option where educator spends most time

☐ Pre-grade R ☐ Remedial/Special Needs

☐ Grade R ☐ Intermediate ☐ Other

☐ Primary ☐ Secondary ☐ Guidance Teacher

Years of Teaching Experience:

Remuneration: ☒ Paid by State ☐ Paid by SGB ☐ Paid by R3 Subsidy

Qualification REQV Level:

Highest Qualification Type:

Educator LURITS Number:

Reasons for computer usage (Multiple options allowed)

☐ School Administration ☐ Teaching ☐ Curriculum Administration

☐ Other

Save

Done

Figure 4: Add New Educator – Compulsory Details Tab 1



The values available for the different drop-down boxes for **Tab 1: Compulsory Details** are tabled below.

Drop-down Field on Screen 2.1	Options
Home Language	• All Official Languages • Sign Language • Other
Instruction Language	• <i>Same as above</i>
Race	• African/Black, Asian/Indian, Coloured, White, Other
Nature of Appointment	• Permanent, Temporary, Substitute
Personnel Position	• Principal, Deputy Principal, HOD, Educator, Special Educator, Remedial Educator
Acting	• <i>Same as above</i>
Post Level	• 01, 02, 03, 04, 05
Qualification REQV Level	• Without Matric – no training at all • REQV 10:A2 (Matric no training) • REQV 11:A1 (Std 6,7,8,9 + 2 years training) • REQV 12:B(Matric + 1 or 2 years training) • REQV 13:C1 (Matric 3 year BA, BSC etc.) • REQV 13:C2 (Matric 3 years teache training) • REQV 14:D (Matric + 4 years training) • REQV 15:E (Matric + 5 years training) • REQV 16:F (Matric + 6 years training) • REQV 17:G (Matric + 7 years training)
Highest Qualification Type	• Professional Teaching Qualification • Post-Professional Teaching Qualification • First Graduate Academic Qualification • Post-Graduate Academic Qualification

Figure 5: Add New Educator – Additional Details Tab 2



The values available for the different drop-down boxes for **Tab 2: Additional Details** are tabled below.

Drop-down Field on Screen 2.1	Options	
Sport House Group	- Unassigned - House specified in 1.13 Maintain Sport/House Groups	
Marital Status	- Divorced - Married	- Single - Widowed
Disability Status	- Epilepsy - Hearing - Multiple	- Physical - Sight - Other - None
ICT Skill Level	0 = No ICT Skills 1 = Entry Level 2 = Adoption	3 = Adaptation 4 = Appropriation 5 = Innovation
Computer Usage	Daily, Weekly, Monthly, Rarely, Never	

2.1.1b Edit Details of an Educator

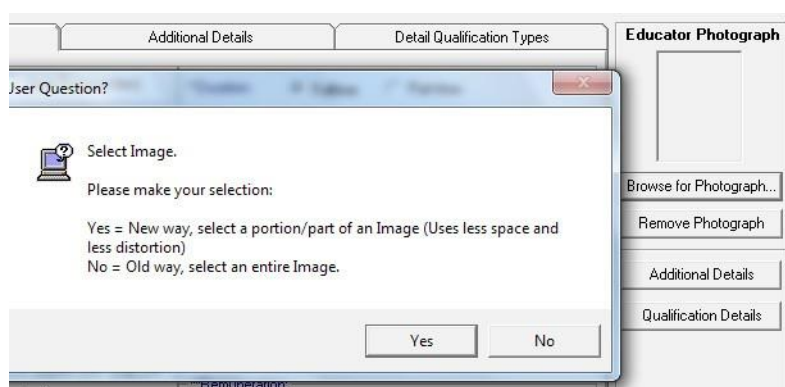


Two functions are added to the **Edit an Educator** screen:

- **Insert a photo** of the educator.
- Two screens for capturing **specific qualification** details.

From the Educator List, select the name of the educator you wish to view or to update, then click on **Edit an Educator**. (Fig. 3)

- **Edit / Update** the data on the tab 1 & tab 2. (Figures 4 & 5)
- To add a photo
 - Click on **Browse for Photograph**.
 - Click on **Yes**, then click on **Load Picture**, click on the photo and crop it, click on **Select Thumb**.



- There are two added functions that capture qualification details i.e.
 - **Detail Qualification Types** tab 3 (Fig. 6) to tick the applicable qualification

Compulsory Details	Additional Details	Detail Qualification Types
BOTH, Carine		
Indicate all qualification types attained by the educator. More than one can be selected		
1	Two year teacher's certificate	☐
2	Three-year Teachers' Diploma/National Professional Diploma in Education	☒
3	Four-year Higher Diploma in Education	☐
4	Four-year professional teaching degree	☐
5	Higher Diploma in Education (Post-Graduate)/Post-Graduate Certificate in Education	☐
6	One-year Post-Professional Teachers' Certificate (with specialization)	☐
7	One-year Higher Diploma in Education	☐
8	Diploma in Specialized Education	☐
9	Further Diploma in Education	☐
10	Advanced Certificate in Education	☐
11	One-year National Higher Diploma/Bachelor of Technology (Education management/other specialization)	☒
12	Partially completed first Bachelor's degree	☐
13	Three-year Bachelor's degree	☐
14	Four-year Bachelor's degree	☐
15	Four-year Bachelor of Technology degree	☐
16	Three-year National Diploma	☐
17	Four-year National Higher Diploma	☐
18	Post-Graduate Diploma (other than a HDE Post-Graduate)	☐
19	Honours degree (including an old one-year B Ed/BEd Honours))	☐
20	Master's degree	☐
21	Doctors degree	☐
22	ABET Practitioner Certificate	☒
23	ABET Practitioner Diploma	☐
24	National N 3 to N 6 Certificates	☐

Figure 6: Detail Qualification Types Tab 3

- In **Qualification Details** (Fig. 7) the following relevant information can be captured:
 - Professional Qualification
 - Academic Qualification
 - Universities, Colleges and other Training Institutions attended
 - Other Skills and Areas of Interest.

When finished click on **Save** and then **Done** to exit the screen.

Figure 7: Qualification Details

2.1.1c Remove / Archive an Educator



Educators are **first archived and then deleted** from the system.

- The educator archive is maintained for record keeping purposes.
 - A register class must be reassigned before the educator, assigned to it, can be archived.
 - Details of **returning educators must be restored** from the archive in order to avoid duplicate educators.

✓ To remove an educator from the **Current Educator** list of a school, click on the name of the educator you wish to archive. (Figure 3 or 8)

- Click on **Archive an Educator**. (Figure 3 or 8)

Click on **Archive** and then **Done** to exit the screen.

Figure 8: Archive an Educator



Select from the drop-down box the following options:

Drop-down Field	Options		
Reasons for Leaving	- Absconded - Death - Dismissal - End of Contract	- Promotion - Resignation - Retirement	- Seconded - Substitute - Transferred
Cause of Death	- Accident - Illness	- Suicide - Violence	

✓ To **restore** an educator from the **Archived Educator** list of a school, click on the name of the educator you wish to restore (Fig. 9).

- Click on **Restore Educator**.
- Click on **Yes** on the pop-up screen to confirm.
- Return to the **Current Educators** screen and the selected educator can once again be viewed on the list.

Figure 9: Restore Details of an Archived Educator

✓ To **delete an educator** permanently from the **Archived Educator** list of a school, click on the name of the educator you wish to delete. (Fig. 10)

- Click on **Delete an Educator**.
- Click on **Yes**.

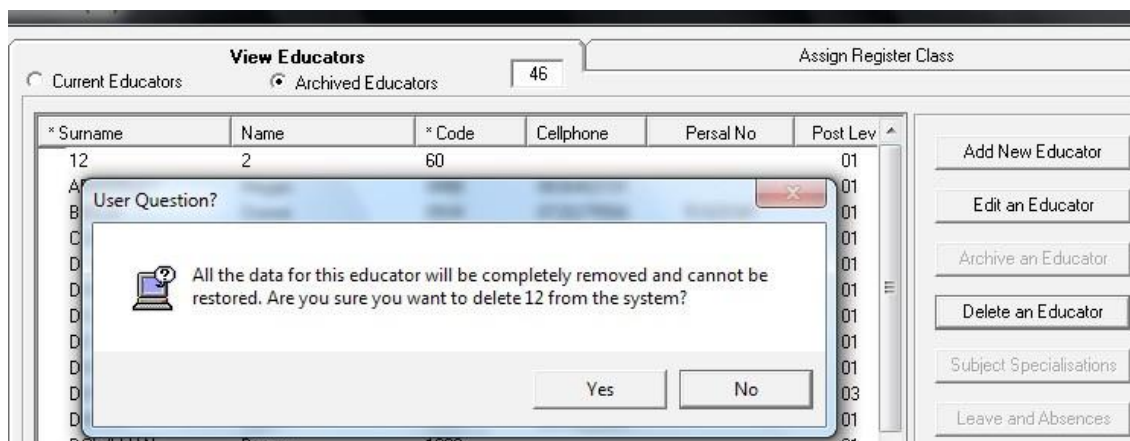


Figure 10: Delete an Educator

2.1.1d Print Educator Contact list

-  To print a contact list of educators for the school, click on **Educator Contact List**.
- The **Print Setup** window will open and select options or click on **Ok** to continue the Print Preview window.
 - The **Preview Window** gives an indication of what the printed report will look like.
 - Click on the printer image to print a contact list of educators, their birthdays and contact no.
- When finished click on **Done** to exit the screen.

2.1.1e Update the Educator's Subject Training and Experience



Subject specialisations are annually updated for each educator.

It includes the number of years training received for a subject as well as the number of years of teaching experience acquired in that subject per grade.

-  Click on an educator in the educator list and click on **Subject Specialisations** (Fig. 11)
- The captured data will be listed on the next screen.
 - To **Add/ Edit** a new subject:
 - Click on **Add or Edit Record** to edit/enter training records.
 - Select a subject from the drop-down list.
 - Enter/change the number of years of training and experience in the subject.

When finished click on Save and then Done to exit the screen.

- Continue until all subjects that are/were taught by the educator are captured.

When finished click on **Done** to exit the screen.

Educator Subject Training and Experience

Surname: Initials: Personal No:

Subject Specialisation and Experience

Subject	Training Years	Teaching Years
Life Sciences (Gr 11)	0	12
Life Sciences (Gr 12)	0	12
Life Sciences (Gr 10)	1	12

Add New Training Records

Educator:

Click on a Subject to select the subject

Subjects	Code
Life Sciences (Gr 11)	19351073
Life Sciences (Gr 12)	19351084
Life Skills (Gr 0)	16341302
Life Skills (Gr 1)	16341152
Life Skills (Gr 2)	16341162
Life Skills (Gr 3)	16341172
Life Skills (Gr 4)	16341212
Life Skills (Gr 5)	16341222
Life Skills (Gr 6)	16341232
Maritime Economics (Gr 10)	12361002
Maritime Economics (Gr 11)	12361013
Maritime Economics (Gr 12)	12361024

Subject Selected

Subject:

Training Years: Years of Teaching Experience:

Buttons: Add Record, Edit Record, Delete Record, Add New Educator, Edit an Educator, Archive an Educator, Subject Specialisations, Leave and Absences, Teaching Load, Assign Register Class, Print Register Classes, Educator Contact List, Done.

Figure 11: Educator Subject Training and Experience

2.1.1f Maintain Teaching Load



This section is **compulsory** as it is required for ASS purposes.

The **level of confidence** (using the scale 1 – 4) in **teaching a subject** of a particular grade is updated annually by every educator.

- After teaching sciences Gr 12 for 15 years you know the curriculum by heart and assign a rating of “4”, but starting to teach a new grade needs a rating of “2 or 3”.
- Introduction of new curriculum has an effect on the level of confidence.

Click on **an educator** from the educator list and click on **Teaching Load**. (Fig. 3)

- Click on **GO** to populate the subjects and grades offered by the school. (Fig. 12)
- Select the level of confidence from a drop-down list for every subject and grade taught.

When finished click on **Save** and then **Done** to exit the screen.

- To print the **Teaching Load** for the educator, click on the **Print** button. (Fig. 10)

Educator Teaching Load (2.1)

Educator:

Select Year: ☐ Max View

Enter level of confidence to teach learning area (per Grade) that the educator is teaching.
 Scale: 1=not confident, 2=confident some of the time, 3=confident most of the time, 4=extremely confident all the time.
 Data prior CAPS 2012 is read only.
 Data must be obtained from the relevant individual educator.

Educator: MATHIBELA, N
 Teaching Year: 2015
 Scale: 1=not confident, 2=confident some of the time, 3=confident most of the time, 4=extremely confident all the time

Learning Areas	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7
Sepedi Home Language	▼	▼	▼	2 ▼	▼	▼	▼
English First Additional Language	▼	▼	▼	▼	▼	▼	▼
Arts And Culture				▼	▼	▼	▼
Creative Arts							▼
Economic Management Sciences				▼	▼	▼	▼
Life Orientation				▼	▼	▼	▼
Life Skills	▼	▼	▼	▼	▼	▼	▼

Figure 12: Maintain Teaching Load

2.1.1g Update Educator Subject Teaching Experience (Menu 2.2)



This section is only a report (Fig. 13) on all educators' teaching experience and training per subject. There is no capturing here.

- This report reflects the educator, the subjects taught, the training and teaching experience of each.
- The report is generated as follows:
 - Columns "Years in training and teaching" from 2.1 **Update of Educator Subject Training**. (Fig. 11)
 - Columns "Taught ('13 and '12) from 2.1 **Maintain Teaching Load**. (Fig. 12)

Update Educator's Subject Teaching Experience						
Current Educators (Current Year:2015)						
Educators	Name	Subjects				
		Years		Taught		Key II Code
		Train	Teach	'15	'14	
MATHIBELA, Ntombi	Afrikaans First Additional Language (Gr 2)	2	27			AFAL 2 13312882
MATHIBELA, Ntombi	Afrikaans First Additional Language (Gr 3)	2	27			AFAL 3 13312892
MATHIBELA, Ntombi	Afrikaans First Additional Language (Gr 4)	2	27			AFAL 4 13313532
MATHIBELA, Ntombi	Afrikaans First Additional Language (Gr 5)	2	27			AFAL 5 13313542
MATHIBELA, Ntombi	Afrikaans First Additional Language (Gr 7)	2	27			AFAL 7 13314522
MATHIBELA, Ntombi	English First Additional Language (Gr 1)	2	27			ENGAL 1 13312932
MATHIBELA, Ntombi	English First Additional Language (Gr 2)	2	27			ENGAL 2 13312942
MATHIBELA, Ntombi	English First Additional Language (Gr 3)	2	27			ENGAL 3 13312952
MATHIBELA, Ntombi	English First Additional Language (Gr 4)	2	27			ENGAL 4 13313622

Figure 13: Report on Update Educator Subject Teaching Experience

2.1.1h Assign Educators to Register Classes

Educators can be assigned to a register class as follows:

- Select the **Assign Register Class** tab (or click on **Assign Register Class button**). (Fig. 3)
- Click on the **class** and then click on the **educator**. (Fig. 14)
 - Both appear at the bottom of the screen.
 - Type the classroom number and then click on the **Accept** button.
- To remove a class from an educator, click on the class name in the right-hand column.
 - Then click on the **Reassign Class and Educator**.

When finished click on **Save** and then **Done** to exit the screen.

*Class	Code	*Surname	Initials	*Room
1	035	KORDAAT	G	g 1
10A	011	KWEPILE	N	f 10
10B	023	ABDUL	P	f 12
11A	032	CROUCAMP	E	sc lab 3
11B	048	STEYN	A	m20
12A	030	GOVENDER	J	m23
12B	012	JABULE	B	lab2
1B	034	VAN DER MER...	N	g 4
2	019	BOTHA	C	g 2
2B	038	OBU - DARKO	M	s 5
3	031	WILSON	N.A	g 3
4	024	CHETTY	C	2.20
5	033	CORNELISSEN	M	2.23
6	009	MATI	A	2.24
7	016	GRANT	E	lab1
8A	010	MARAI	V	

Figure 14: Assign Register Classes



2.1.1i Print Register Classes

To print the Educator class' Registers, click on **printing classes register**.

- The **Print Setup** window will open and select options or click on **Ok** to continue to the Print Preview window.
- The **Preview Window** gives an indication of what the printed report will look like.
- Click on printer image to print a list of register Classes with educators and classrooms.

When finished click on **Done** to exit the screen.

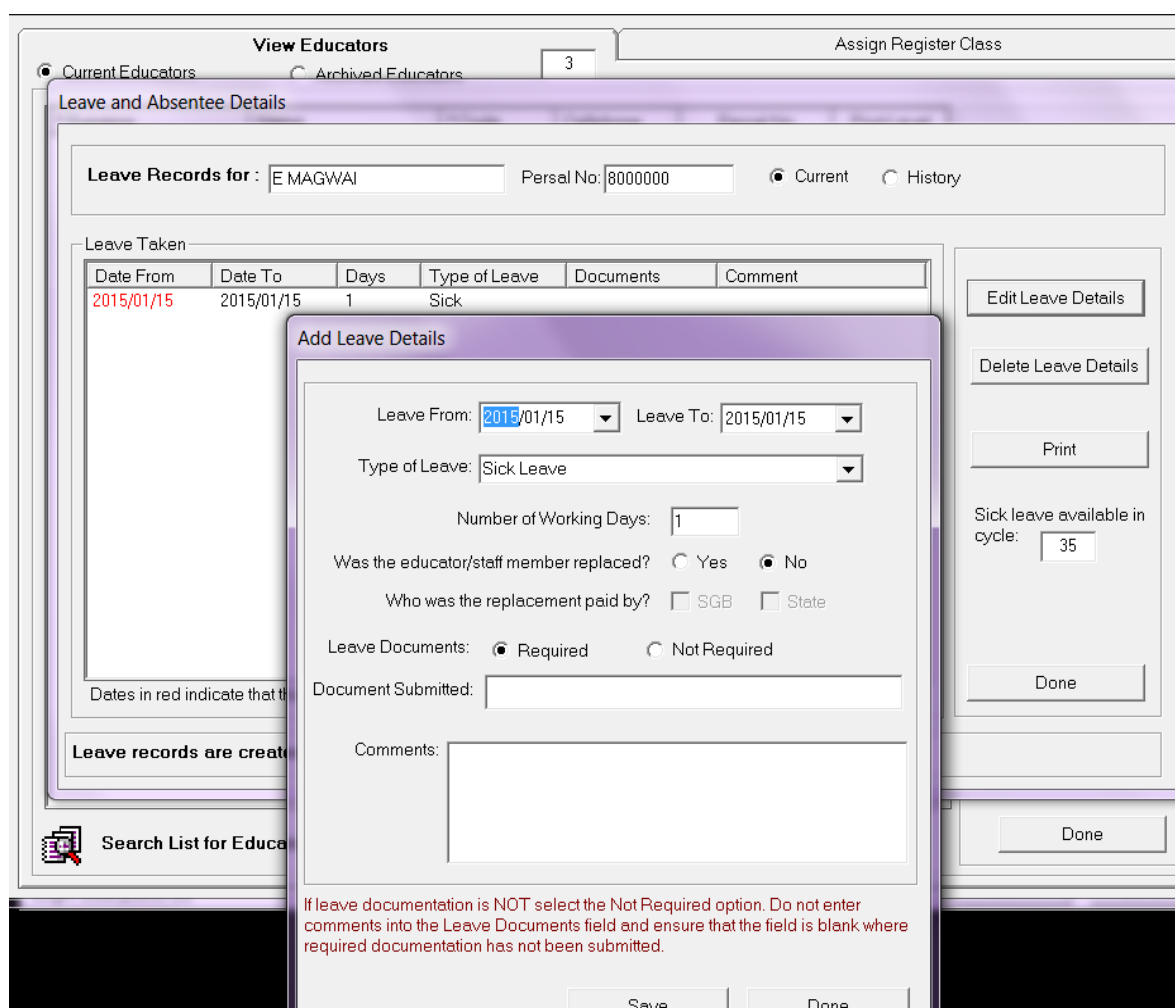
2.1.1j Edit /View Leave and Absences Details

 This section **cannot add or delete Leave and Absence Information**. Leave and Absence information can only be captured in the **Attendance Records (2.2)**.

- This section **allows you to Add/ Edit/ Delete Leave Details** (Fig. 15).
- The leave history can be printed for the current period and previous years that are captured. (Fig. 15).

 Click on an educator in the educator list and click on **Leave and Absences**.

- The captured data will be listed on the next screen. (Fig. 15).
- Select **Current** year's records or **History** (previous year's records).
- To Add/ Edit/ Delete Leave Details:
 - Click on **Add or Delete Leave Details** to Edit/ Delete details.
 - When finished click on **Save** and then the **Done** to exit the screen.
- To print **Leave Details**, click on **Print**.



Date From	Date To	Days	Type of Leave	Documents	Comment
2015/01/15	2015/01/15	1	Sick		

Add Leave Details

Leave From: 2015/01/15 Leave To: 2015/01/15

Type of Leave: Sick Leave

Number of Working Days: 1

Was the educator/staff member replaced? ☐ Yes ☒ No

Who was the replacement paid by? ☐ SGB ☐ State

Leave Documents: ☒ Required ☐ Not Required

Document Submitted:

Comments:

Save Done

Figure 15: Leave and Absentee Details



2.1.2 Non-Teaching Staff Information (Menu 2.3)

The Public Servant / Staff Information section contains the details of the non-teaching staff at the school.



- **This part is compulsory** as the information is required by all school surveys and other official school documents.
- Data should be **checked quarterly** and updated when there are any changes.

📄 The staff member screen has an option to list **Current Staff Members** or **Archived Staff Members** selected at the top of the screen. (Fig. 16)

- The total number of non-teaching staff that have been captured is indicated at the top.
- Staff members are listed alphabetically with **contact number, gender, Persal number, category of workplace and contact number**.

Staff Members (Public Servants)

Non Educator Staff 25 ☒ Current Staff Members ☐ Archived Staff Members

* Surname	Name	Gender	* Persal No	Category	Telephon
FRIEDBERG	Norah	Female			
GONOLEWE	Bulelwasiwe	Female			
GOUWS	Sophina	Female			
GUMEDE	Baba	Female			
HLEKISO	Tinkie	Female			
KAMASISWE	Nofeat	Female			
LIMBANA	Buyiswa	Female			
MAKALENI	Nomaladi	Female			
MGODI	Alfred	Male			
MORENA	Baba	Female			
NDA	Lala	Female			
NOFEMELE	Gladys	Female			
RAMPHELE	Nobonepha	Female			
SLINGER	Martha	Female			
TSEPO	Olivia	Female			
TSHANA	Vundiswa	Female			
VERMAAS	Petrus	Male			
VERMEULEN	Lydia	Female			
VINJWA	Nompiet	Female			
XELELO	Nolimit	Female			
YEKANI	Jamela	Female			

Search List for Staff Member: DU PLOOY Go Only archived staff members may be deleted

Buttons: Add New Staff Member, Edit a Staff Member, Archive a Staff member, Leave and Absences, Staff Contact List, Done

Figure 16: List of Staff

Non-teaching staff members can be **Added, Edited or Archived** and details **Printed** as follows:



2.1.2a Add New Non-teaching Staff Member

Click on **Add New Staff Member**. (Fig. 17)

- Complete all fields as requested.
 - Compulsory Details are marked in blue and must be completed before data can be saved. (Fig. 17)
 - Fields with arrows are populated from a drop-down box. Options for the drop-down tables are given below.
- Complete the **Current** position as stated on the letter of appointment.
- Click on **Save** to save the captured data.
- To capture the next person click on **Next Staff Member** at the bottom of the screen.

When finished with capturing click on **Save** and click on **Done** to exit screen.

New Staff Member (2.3)

Compulsory Details

***Surname:**

***First Names:**

***Initials:** ***Title:**

***Race:**

***Gender:** ☒ Female ☐ Male

***Home Language:**

***Date of Birth:** Year Month Day

***SA Citizen:** ☐ Yes ☐ No

***Identity Number:**

***Persal Number:**

Lurits Number:

Personnel Category:

Type of Employment:

☒ Fulltime ☐ Part-time

Remunerated by:

Current Position:

Date Joined Staff: 2015/01/12

Other Information

Physical Address:

City/Suburb:

Code:

Telephone:

Cell Phone:

Email:

Medical Aid Name:

Medical Aid Number:

Spouse Name:

Emergency Number:

Tax Number:

State Subsidies:

Union:

Membership Number:

ICT Skill Level:

Next Staff Member Save Done

Figure 17: Add New Non-Teaching Staff Member



The values available for the different drop-down boxes are tabled below:

Drop-down Field on Screen 2.3	Options	
Race	African/Black, Asian/Indian, Coloured, White, Other	
Home Language	- All Official Languages - Sign Language - Other	
Personnel Category	- Admin Staff - Food Nutrition Staff - Hostel Staff - Practitioner - Professional Non-Teaching Staff - Support Staff	
Type of Employment	Permanent, Temporary, Substitute	
Remunerated by	- Paid by State - Paid by SGB - Paid by both State and SGB	
ICT Skill Level	0 = No ICT Skills 3 = Adaptation 1 = Entry Level 4 = Appropriation 2 = Adoption 5 = Innovation	



2.1.3b Edit a Non-teaching Staff Member

Select the staff member from the list of **Current Staff Members** or **Archived Staff Members** (Fig. 16).

- Edit / Update the data on the screen (Fig. 17).
- Click on **Qualifications** at the bottom of the screen.
 - Add the qualifications and institutions where applicable (Fig. 18).

When finished click on **Save** and then on **Done** to exit screen.

Figure 18: Add/Edit Qualifications for Non-Teaching Staff Members

2.1.3c Removing /Archiving a Non-teaching Staff Member



Staff members **are first archived and then deleted** from the system.

- The staff members' archive is maintained for record keeping purposes.
- Details of **returning staff members must be restored** from the archive in order to avoid duplication.

✓ To remove a staff member from the **Current Staff Member** list of a school, click on the name of the staff member you wish to archive. (Fig. 18)

- Click on **Archive a Staff Member**. (Fig. 19)

Click on **Archive** and then **Done** to exit the screen.

Figure 19: Archive a Staff Member



Select from the drop-down box the following options:

Drop-down Field	Options		
Reasons for Leaving	• Absconded • Death • Dismissal • End of Contract	• Promotion • Resignation • Retirement	• Seconded • Substitute • Transferred
Cause of Death	• Accident • Illness	• Suicide • Violence	

✓ To **restore** a non-teaching staff member from the **Archived Staff Member** list of a school, click on the name of the staff member you wish to restore (Fig. 20).

- Click on **Restore Staff Member**.
- Click on **Yes** on the popup screen to confirm.
- Return to the **Current Staff Members** screen to view the restored staff member on the list.

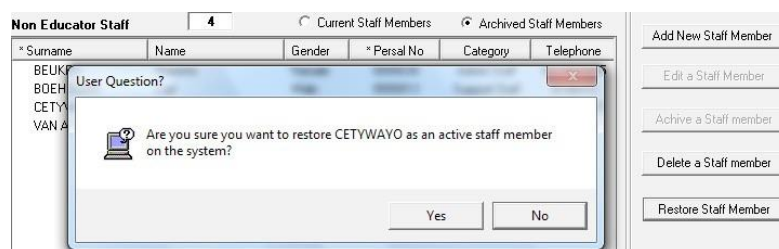


Figure 20: Restore Details of an Archived Staff Member

📁 To **delete a non-teaching staff member** permanently from the **Archived Staff Member** list of a school, click on the name of the staff member you wish to delete. (Fig. 21)

- Click on **Delete a Non-Teaching Staff Member**.
- Click on **Yes** to confirm the decision.

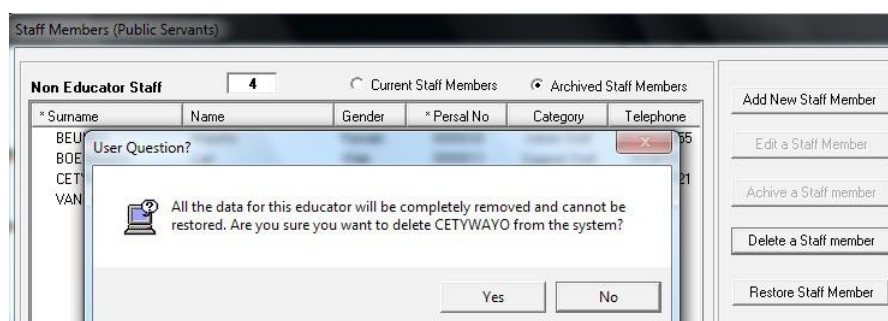


Figure 21: Delete a Staff Member

2.1.3d Edit/View Leave and Absences

This section cannot add or delete Leave and Absence Information. Leave and Absence information can only be captured in the **Attendance Records** (2.2).



- This section allows you to Add/ Edit/ Delete leave details.
- The leave history can be printed for the current period and previous years that are captured.

📁 Click on a staff member in the Staff Member List, click on **Leave and Absences** (Fig. 16)

- The captured data will be listed on the next screen. (Fig. 22)
- Select **Current** year's records or **History** (previous year's records).
- Click on **Add or Delete Leave Details** to edit/delete details.

When finished click on Save and then Done to exit the screen.

- To print **Leave Details**, click on the **Print button**.

Figure 22 Leave and Absentee Details

2.1.3e Print Non-Teaching Staff Member Contact List

To print a contact list of non-teaching staff members for the school, click on **Staff Member Contact List**.



- The **Print Setup** window will open and select options or click on **Ok** to continue to the Print Preview window.
- The **Preview Window** gives an indication of what the printed report will look like.
- Click on the printer image to print a contact list of the staff members, their birthdays and contact numbers.

When finished click on **Done** to exit the screen.

2.2 Staff Development and Training Data



This section groups all the sub-menus **related to training**. All the training and development information for educators and staff are captured and maintained in the following screens as summarised in the table below:

Sub- Header (SA-SAMS Menu no)	Functions		
2.3.1 Maintain Training Categories (2.4)	Add new record	Edit record	Delete record
2.3.2 Maintain INSET Training Records (2.5)	Add new record	Edit record	Delete record
2.3.3 Maintain DA Interview Records (2.6)	Add new record	Edit record	Delete record
3.3.5 Printout of DA Interview Records (2.7)	Printed list of all staff's Interview records		
3.3.6 Development Appraisal and Performance Measurement (2.18)	General development and performance appraisal		

Each of the sub-menus is now discussed in the following sections.

2.2.1 Maintain Training Categories (Menu 2.4)

 Training categories are recorded in two categories: **Curriculum Based Training** or **School Management Training**.

Record training categories as follows: (Fig. 23)

 Click on **Add New**:

- Select the required option: **Curriculum Based** or **School Management**
- Type the category name.

Click on Save

 Click on **Edit**

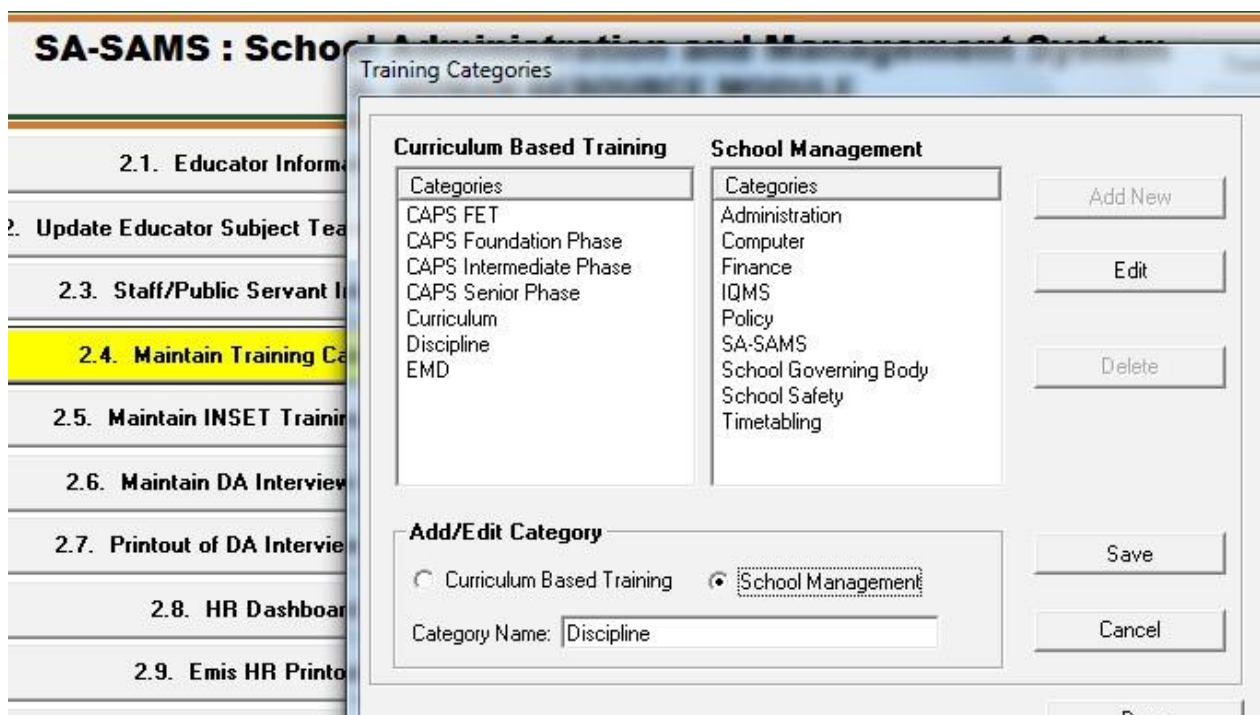
- Click on the **category to edit** on the list.
- Select the required option: **Curriculum Based** or **School Management**
- Edit the category name.

Click on Save

 Click on **Delete**:

- Click on the category to be deleted on the list.
- Click on **Delete**

Click on **Done** to exit screen.



The screenshot shows the SA-SAMS : School Administration and Management System interface. On the left is a menu with options 2.1 to 2.9. Option 2.4, 'Maintain Training Categories', is highlighted in yellow. Overlaid on the right is a 'Training Categories' dialog box. This dialog has two columns: 'Curriculum Based Training' and 'School Management'. The 'Curriculum Based Training' column lists: CAPS FET, CAPS Foundation Phase, CAPS Intermediate Phase, CAPS Senior Phase, Curriculum, Discipline, and EMD. The 'School Management' column lists: Administration, Computer, Finance, IQMS, Policy, SA-SAMS, School Governing Body, School Safety, and Timetabling. To the right of these columns are buttons for 'Add New', 'Edit', and 'Delete'. At the bottom of the dialog is an 'Add/Edit Category' section with two radio buttons: 'Curriculum Based Training' (unselected) and 'School Management' (selected). Below the radio buttons is a 'Category Name' text field containing the word 'Discipline'. To the right of this section are 'Save' and 'Cancel' buttons. A 'Done' button is visible at the bottom right of the dialog box.

Figure 23: New Subject Training Record

2.2.2 Maintain INSET Training Records (Menu 2.5)



INSET is a vital part of **educator development**. Educators attend workshops/ seminars/ discussion groups given by the Education Department or by contracted Service Providers.

The INSET training is aimed at developing the skills and knowledge of educators to become effective in the classroom and non-educators effective in job performance.

- Click on **Maintain INSET Training Records (2.5)** to open the INSET training records maintenance screen (Fig. 24).
- Select either **Educator or Non-Educator** to get the required staff listing.
- Click on the staff member's name.
- The training attended by individual educators is listed. The *hours attended for training* and *hours available for training* are indicated in the middle of the screen.

SA-SAMS : S

Training Attended

Select a Staff Category: ☒ Educator ☐ Non Educator

Current Year only - Use printout options to view previous years

Click on a staff member to view their record: BOTHA, C

Course	Provider	Category
SA-SAMS Curriculum trai...	Province	Administration
School Safety Committee	Province	School Governing B.

Total Training Hours: 7 Hours still required: 73

Development needs can be changed and added under Maintain Appraisal Records option

Type	Category
------	----------

Buttons: Add New Record, Edit Record, Delete Record, Done

Figure 24: List of INSET Training Received

- Click on the **Add New Record**:
 - Complete the screen as shown in Figure 25.
- Click on the **Save** and click on **Done** to exit the screen.
- Click on the **Edit Record**:
 - Click on record to edit and click on **Edit Record**.
 - Edit the data on the screen as shown in Figure 25.
- Click on **Save** and then click on **Done** to exit the screen.
- Click on the **Delete Record**:
 - Click on record to delete and click on **Delete Record**.
 - Click on **Yes** to confirm on the popup screen.
- Click on the **Save** and click on **Done** to exit the screen.

Figure 25: Add / Edit Training Record

2.2.3 Maintain Development Appraisal Interview Records (Menu 2.6)

 Click on **Maintain Development Appraisal Interview Records (2.6)** to open the screen.

- Select either **Educator or Non-Educator** to get the required staff listing. (Figure 26).
- Click on the staff member's name.
- Records of the individual's appraisal are listed in the middle of the screen.

 Click on the **Add New Record:**

- Complete the screen as shown in Figure 26.

Click on **Save** and click on **Done** to exit the screen

 Click on the **Edit Record:**

- Click on record to edit and click on **Edit Record**.
- Edit the data on the screen as shown in Figure 26.

Click on **Save** and click on **Done** to exit the screen.

Click on the **Delete Record:**

- Click on record to delete and click on **Delete Record**.
- Click on **Yes** to confirm on the popup screen.

Click on **Save** and click on **Done** to exit the screen.

Development And Training PRIMARY SCHOOL

DA Interviews

Select a Staff Category ☒ Educator ☐ Non Educator

Current Year only - Use printout options to view previous years

Click on a staff member to view their record

MAGWAI, EM

Staff Member	Date of Appraisal	Person conducting	Comments
MAGWAI, EM			
MATHIBELA, N			
MVELA, L			

Developmental Appraisal Interview Records

Appraisal Interview Details

Staff Member: MAGWAI, EM

Date of Appraisal: 2015/01/12

Person Conducting Appraisal:

Comments:

Development needs: (Select all that apply)

Inset Training

Categories

☐ Curriculum

☐ EMD

☐ OBE

School Administration and Management

Categories

☒ Administration

☐ Computer

☐ Finance

☐ Policy

☒ School Governing Body

Save

Add New Record

Edit Record

Delete Record

Done

About

EXIT

Figure 26: Appraisal Records with Identified Developmental Needs

2.3.4 Printout of DA Interview Records (Menu 2.7)



Click on **Print DA Interview Records (2.7)** to open the screen.

- Select a **period** or select All.



- Click on **Print**.

2.4. Maintain Training Categories

2.5. M

2.6. M

2.7. Pr

Das Appraisal Report

☒ Educators ☐ Non Educators

Select to

All ☒

Print

Done

- A list of staff's appraisal can be viewed on Print Preview format. (Fig. 27)
- Click on **Printer icon** to print the list.

Click on **Done** to exit the screen.

SUMMARY OF DA APPRAISALS:

Educators

BOTHA, C Persal Number: 545454545

Date Appraised

Person who conducted Appraisal

Comment

Principal

Development Need

School Management

SA-SAMS

Training Received

<u>Course Name</u>	<u>Category</u>	<u>From Date</u>	<u>To Date</u>	<u>Hours</u>	<u>Provider</u>	<u>Type</u>
SA-SAMS Curriculum training	Administration			5	Province	School Management
School Safety Committee	School Governing Body			2	Province	School Management
Total Training Hours:				<u>7</u>		

Figure 27: Printout of Appraisal Records

2.3.5 Development Appraisal and Performance Measurement (Menu 2.18)



This is a fully functional sub-module that is used for educator/ appraisals according to the ERL signed protocol agreement. All functions of this sub-module are discussed in a separate module called IQMS Module.

- ❶ To gain access to this sub-module it is a prerequisite that “IQMSInstrument.exe” is loaded in the same folder as “edusolSAMS.exe”.
- ✓ Select an educator from the list (Fig. 28) to complete the appraisal form.
 - Select the correct post level for **development appraisal** (Fig. 29)
 - The scores should be completed on the same form by the educator and the DSG.
 - The strengths and recommendations for development, notes on contextual factors have to be completed.
 - Complete an appraisal form for all state appointed educators.
 - Click on **PGP** to view plan.
 - All the evaluated educator’s scores are summarised in **School Summary Score Sheet: Performance Measurement Summative Evaluation** (Fig. 30) and can be printed for submission to the provinces.

Click on **Done** to return to the main HR menu.

IQMS Instrument | EDUCATOR LIST | :Emis Number : 500103378

Current Year:

CLICK on an Educator name to select an Educator

Number of Educators: 23

	Name of Educator	ID Number	Personal Number
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			
23			

DSG Member

Search for Educator in the list.

☐ ID Number ☐ Name

Search

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

Main Menu

Click on this icon for help in the programme

Figure 28: IQMS Opening screen (Educator List)

IQMS Instrument | DEVELOPMENT APPRAISAL | :Emis Number : 500103378 | PERFORMANCE STANDARD 1

Educator: FOUCHÉ AM ID Number: Post Level: 1 Current Year:

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 No effort to create a learning environment, or where some effort is made, the learning environment hinders teaching and learning.			
	2	☐	☐	2 There is a suitable environment where individual and/or group learning can take place.			
	3	☐	☐	3 The Teacher is able to change the environment to promote learning and teaching and assessment.			
	4	☐	☐	4 Creative use of learning environment enables all learners to be productively engaged in individual and cooperative learning.			
(b) Learning Process	1	☐	☐	1 No learning process is taking place.			
	2	☐	☐	2 Learners are engaged in appropriate activities.			
	3	☐	☐	3 The environment is stimulating and the learners participate actively - though they are not yet at discovery level.			
	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 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 Educator has a clear idea of the outcome of the lesson. Teaching and learning are not interrupted unnecessarily.			
	3	☐	☐	3 Educator clearly conveys the purpose of the lesson and the learners are cooperative.			
				4 Educator conveys the intended outcome of the			

TAB b move contro

Figure 29: IQMS Instrument (Development Appraisal)

School:		District:		Circuit:	
Principal:				Emis:	
Email Address:		Principal's cell phone:			
Telephone:		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 30: School Summary Score Sheet (Performance Summative Evaluation)

2.4 HR Reports (excluding attendance)



This section groups all the sub-menus related to staff information that will assist the school management with quarterly reports and surveys. The following are available:

2.4.1 EMIS HR Reports (2.9)

2.4.2 Attrition Report (2.16)

2.4.1 EMIS HR reports (2.9)



EMIS HR reports (2.9) summarises all the staff information on training, remuneration and staff establishment. The following reports are available for printing. (Fig. 31)

Figure 31: EMIS HR reports

All the reports can be accessed and printed as follows:

- Click on **any report** to open the **Print Setup** window and select the options for printing.
- Tick **No Printer** option at the top of the screen and click **Ok** to view the report on the Preview Window.
- The **Preview Window** gives an indication of what the printed report will look like.
- Click on the **printer image** to print a hard copy of the report

When finished click on **Done** to exit the screen.

The contents of each of the reports are summarised in the table below. Examples of report formats are given in brackets:

EMIS HR Reports – Educators only	Content of Report		
Appointment register for CS Educators (see Fig. 27)	- Persal no - Surname & Initials - Gender	- Designation - Date appointed - Paid by	Type of appointment (Permanent/ temporary/ substitution), full time or part time.
Educator Details	- Persal no - Surname & Initials - Gender	- Race - Category - Post Level - REQV	- Home language - Instructional Language
Educator Subject Specialisation (see Fig. 28)	Per subject:	Related educators with:	
	years of training	years of teaching experience	
	Per educator:	Subjects with:	
	years of training	years of teaching experience	
Staff Development Appraisals (see Fig. 25)	Appraisal per educator:	- Date appraised , who appraised, comments - Developmental needs - Training received (type & hours)	
Aggregated Educator Details	Gender	- per post category - per post level - per REQV level	
Education Instruction Language	Educators	per language of instruction	

EMIS HR Reports – All staff	Content of Report		
Staff Training Received (see Fig. 29)	Per Educator or Staff member	- Course name - Category - Date started - Date ended	- Hours - Provider - Method of training - Funded
Staff Training per Category	Summary per category of funding	- Staff member - Course name - Duration hours	- Provider - Method of training

Employment and Remuneration (see Fig. 30)	No of Staff per category	- appointed by State - appointed by SGB
	No of Staff appointed by State	- permanent : Full / part time per gender - temporary: Full / part time per gender - substitute: Full / part time per gender
	No of fulltime educators	- appointed by State per category - appointed by SGB per category
Home language and race	Staff Categories	- gender per race group - gender per language group

Examples of report formats:

APPOINTMENT REGISTER:

CSEducator Appointment Register.

Serial Number	Surname & Initials	Designation	Date Appointed	Gender		Paid By		Type of Appointment					
				Male	Female	State	SGB	Permanent		Temporary		Substitute	
								Full	Part	Full	Part	Full	Part
555444333	ABDUL, P	Educator	2008-05-27	1		1		1					
545454545	BOTHA, C	Educator	2004-02-01		1	1				1			
5431313131	CHITTY, C	Educator	2006-07-21		1		1			1			
51416171	COCKRILL, H	HOD	1993-01-16		1	1		1					
	CORNELIUSSEN, M	Educator	2012-01-09		1		1	1					
	CROUCAMP, E	Educator	2011-07-18		1		1	1					

Figure 32: EMIS HR Reports: Appointment Register

RAINING RECEIVED:

OTHA Carine

Course Name	Category	From Date	To Date	Hours	Provider	Method	Funded By
13							
SAMS Curriculum	Administration			5	Province	Computer Based	Department
School Safety Committee	School Governing Body			2	Province	Facilitator Based	School Funds
Total Training Hours:				7			

Figure 33: EMIS HR Reports: Training received per staff member

SUMMARY INFORMATION ON NUMBER OF STAFF:

Category	State		Governing Body		Total	
	Full - time	Part - time	Full - time	Part - time	Full - time	Part - time
Educators	11		11		22	
Admin Staff			2		2	
Support Staff			7		7	
Hostel Staff	11		5		16	

NUMBER OF STAFF REMUNERATED BY STATE:

Category	Permanent				Temporary				Substitute		
	Full - time		Part - time		Full - time		Part - time		Full - time		Part - time
	M	F	M	F	M	F	M	F	M	F	M
Educators	3	6			1	1					
Hostel Staff		11									

NUMBER OF STAFF REMUNERATED BY GOVERNING BODY:

Category	Permanent				Temporary				Substitute		
	Full - time		Part - time		Full - time		Part - time		Full - time		Part - time
	M	F	M	F	M	F	M	F	M	F	M
Educators	1	9				1					
Admin Staff		2									
Support Staff	4	3									
Hostel Staff		5									

NUMBER OF FULL-TIME EDUCATORS ACCORDING TO TYPE OF EDUCATION: (excludes sub

Paid by	State	Governing Body
Pre - Grade R		1
Gr R		
Primary (Excluding grade R)	1	2
LSEN/SE		
Secondary	8	4
Total	9	7

Figure 33: EMIS HR Reports: Employment and Remuneration

SUBJECT SPECIALISATION BY SUBJECT:

<u>Educator</u>	<u>Formal Training Years</u>	<u>Teaching Experience</u>
<u>Subject:</u> Accounting (Gr 10) <u>Code</u> 12351002 <u>Group:</u> 0 WILSON, N.A	2	1
<u>Subject:</u> Life Sciences (Gr 10) <u>Code</u> 19351062 <u>Group:</u> 0 ABDUL, P	1	12
<u>Subject:</u> Life Sciences (Gr 11) <u>Code</u> 19351073 <u>Group:</u> 0 ABDUL, P		12
<u>Subject:</u> Life Sciences (Gr 12) <u>Code</u> 19351084 <u>Group:</u> 0 ABDUL, P		12
<u>Subject:</u> Maritime Economics (Gr 10)		

Figure 34: EMIS HR Reports: Subject Specialisation per Staff Member

2.4.2 Attrition Statistics (2.16)

 Educators/ Staff Attrition are printouts of all educators/ other staff who have been archived.

✓ To access the attrition (archived) information, click on **View Attrition Register**.

- Select the report for **Educators** or non-teaching **Staff**. (Fig. 35)
- Select the report for **All** the staff, staff **Paid by the State** or **Paid by the SGB**.
- **Select the period.**
- Click on **print** to display a print preview. (Fig. 36)
- Click on the **Printer icon** to print hard copy report.

Click on **Done** to exit the screen and return to the HR menu.

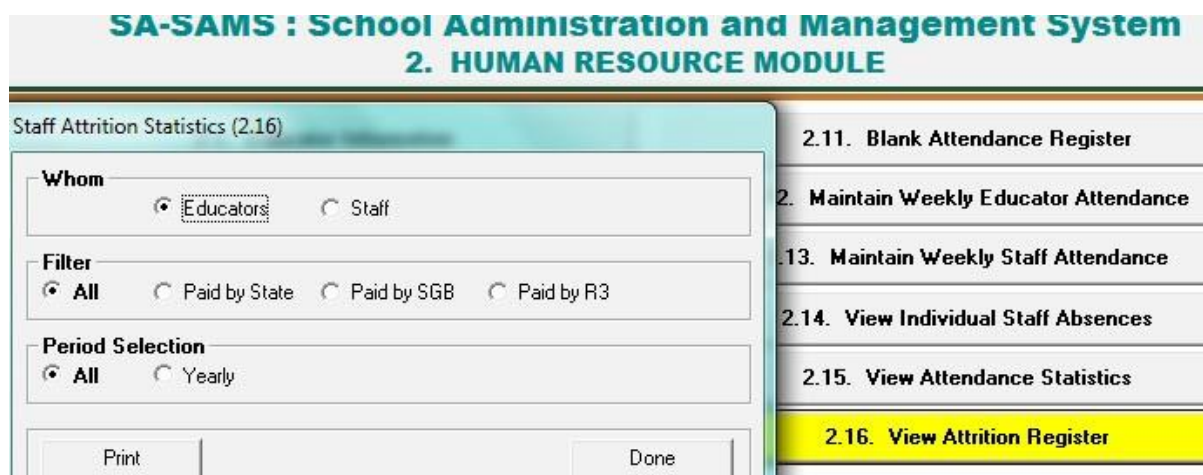


Figure 35: Attrition Reports Selection

REGISTER OF ATTRITION						Seconded	Transferred	Retirement	Resignation	Dismissal	Absented	Cause of Death				Age Range at Death			
Date	PersalNo	Surname	Initials	Male	Female							Illness	Accident	Suicide	Violence	20 - 24	25 - 29	30 - 34	35 - 39
2008/06/27	0000014	VAN ALTENA	A		1														

Figure 36: Attrition Register per Staff Member

2.4.3 Design HR List (2.19)



To create a list select All, Educators or Staff, select if they should be sorted alphabetically or per gender.

(Fig. 37)

- Click on the data fields from the column on the left to add to list. Name and save the **Template** for future reference. If the list is to be viewed by others then select the share option.
- Click on **View grid** to view the list. The school/ provincial logo can be added to the list for **printing** and **export**.
- Click on "Parameters" to move back to the selection screen or click on **Done** to exit the screen.

Figure 37: Design HR List

2.5 HR Attendance and Leave



This section groups all the sub-menus related to **attendance and leave information** for educators and staff captured and maintained in the following screens summarised in the table below:

Header (SA-SAMS Menu no)	Functions
2.3.1 Blank Attendance Register (2.11)	→ Blank Register for educators staff
2.3.2 Maintain Weekly Educator Attendance (2.12)	→ Capture absenteeism of educators → type of leave & documentation
2.3.3 Maintain Weekly Staff Attendance (2.13)	→ Capture absenteeism of staff → type of leave & documentation
2.3.4 HR Dashboard (2.8)	→ Summary report on the status of the educator's attendance and leave information
2.3.5 Staff Leave Summary Printout (2.10)	→ Summary record of all staff leave of a certain period of time
2.3.6 View Individual Absences (2.14)	→ Both Staff and Educator absences indicated → Summary per person
2.3.7 View Attendance Statistics (2.15)	→ Summary of attendance per week, month, Quarter, year

2.5.1 Blank Attendance Register (2.11)

 Click on **Blank Attendance Register**:



- Select for **Print Register for Educators** or **Staff** and click on **Print** (Fig. 38).
- Click on the print to display a print preview.
- Click on Printer icon to print hard copy report.

Click on Done to exit the screen and return to the HR menu.

Figure 38: Print Blank Attendance Register

2.5.2 Maintain Weekly Educator Attendance (2.12)

 **Educator absenteeism with reference to supporting documents is captured per week.**
The information is automatically fed into all reports related to staff attendance e.g. Quarterly Reports.

-  Click on **Maintain Weekly Educator Attendance (2.12)** to open the capturing screen.
- Select the following from the drop-down lists: select the **Year**, select the **Term**. (Fig. 38).
 - Select the week by selecting the **Friday of the particular week**.
 - Click on **GO** to display a list of the educators.
 - **Click on the day** that the educator was absent to populate it with an “a” (Fig. 39).
 - Click on **Save** and the **attendance statistics for the week** are updated at the bottom of the screen.
 - Click on **Add Leave Records** in order to qualify the absenteeism and maintain reference to documentation.

Educators Attendance (2.12)

Year: 2014 Term: Term1 - 2014/01/13 to 2014/03/28 GO By Gender Add Leave Records Save
 Select a FRIDAY to mark Attendance: 2014/02/28 Max View Alphabetical Done

Remuneration (Re): 1=Paid by State, 2=Paid by SGB, 3=Paid by R3 Week Selected: 2014/02/28

Persal	M/F	Staff Member	Re	Mon 24/02	Tue 25/02	Wed 26/02	Thu 27/02	Fri 28/02	Sat 01/03	Sun 02/03
0	F	MATHIBELA, N	1	a				a		
0	F	MVELA, L	1				a			

Check Weekly Statistics and SAVE (Statistics do not include weekends)

☒ All
☐ Paid by State
☐ Paid by SGB
☐ Paid by R3

	M	F
Possible No of Attendances:	0	10
Total No of Attendances:	0	7
Total No of Absentees:	0	3

% Attendance: 0% 70%
 Average Staff No: 0 2
 No of School Days in Week: 5

Figure 39: Maintaining Educators Attendance per Week

Click on **Add Leave Records**.

- The educator's name and dates of absenteeism is listed to be completed with reasons and reference to leave documents (Fig. 40).
- Select from the drop-down list a **Reason for Leave, replaced during leave**.
- Documents required** would be an official reason for absenteeism e.g. medical certificate, training & meeting invitations.
- Click on **Save Leave Records**.
- Leave **days can be split** due to **different reasons** e.g. 2 days sick leave and 1 day family responsibility leave).

Click on **Done** to exit to the previous screen.

Leave Records for Staff and Educator Absences

2013/01/25 Complete the leave details to create a leave record for each absence

	Split	Staff Member	Start Date	End Date	Reason for Leave	Replaced during leave	Rep
1	☐	BOTHA Carine			Sick Leave		
2	☐	BOTHA Carine			Special Leave		

Print page continue->

	Replaced during leave	Replacement paid by	Document Required	Comment
1				
2				

Figure 40: Leave Records for Staff and Educator Absences

2.5.3 Maintain Weekly Staff Attendance (2.13)



Staff absenteeism with reference to supporting documents is captured per week. The information is automatically fed into all reports related to staff attendance e.g. Quarterly Reports.



Click on **Maintain Weekly Staff Attendance (2.13)** to open the capturing screen.

- Select the following from the drop-down lists: select the **Year**, select the **Term**. (Fig. 40).
- Select the week by selecting the **Friday of the particular week**.
- Click on **GO** to display a list of the educators.
- **Click on the day** that the educator was absent to populate it with an “a”.
- Click on **Save** and the **attendance statistics for the week** are updated at the bottom of the screen.
- Click on **Add Leave Records** in order to qualify the absenteeism and maintain reference to documentation (Fig. 40).

Click on **Done** to exit to the previous screen.

Staff Attendance (2.13)

Year: 2014 Term: Term1 - 2014/01/15 to 2014/03/28 GO By Gender Add Leave Records Save
 Select a FRIDAY to mark Attendance: 2014/02/28 Max View Alphabetical Done

Remuneration (Re): 1=Paid by State, 2=Paid by SGB, 3=Both State and SGB Week Selected: 2014/02/28

Persal	M/F	Staff Member	Re	Mon 24/02	Tue 25/02	Wed 26/02	Thu 27/02	Fri 28/02	Sat 01/03	Sun 02/03
1000	F	MATHIBELA, NP	1	a	a		a			

Check Weekly Statistics and SAVE (Statistics do not include weekends)

☒ All
☐ Paid by State
☐ Paid by SGB
☐ Both State and SGB

	M	F		M	F
Possible No of Attendances:	0	7	% Attendance:	0%	57%
Total No of Attendances:	0	4	Average Staff No:	0	1
Total No of Absentees:	0	3	No of School Days in Week:	5	

Figure 41: Staff Attendance

2.5.4 Human Resource Dashboard (2.8)



The **HR Dashboard (2.8)** is a summary report on the status of the educator's attendance and leave information (Fig. 41) and is designed to assist with the management of leave and documentation.

This includes:

- A popup opening screen appears if the 8 week rule is disobeyed e.g. if an educator or staff member takes sick leave within 8 weeks of previous sick leave.
- A warning message that appears when a sick certificate is required.
- A warning message that appears if the 36 days sick leave within a cycle has expired.

📄 To access the information click on **HR Dashboard**.

- Click on the **Print** for a hard copy of the print preview (Fig. 41).

Click on **Done** to exit the screen and return to the HR menu.

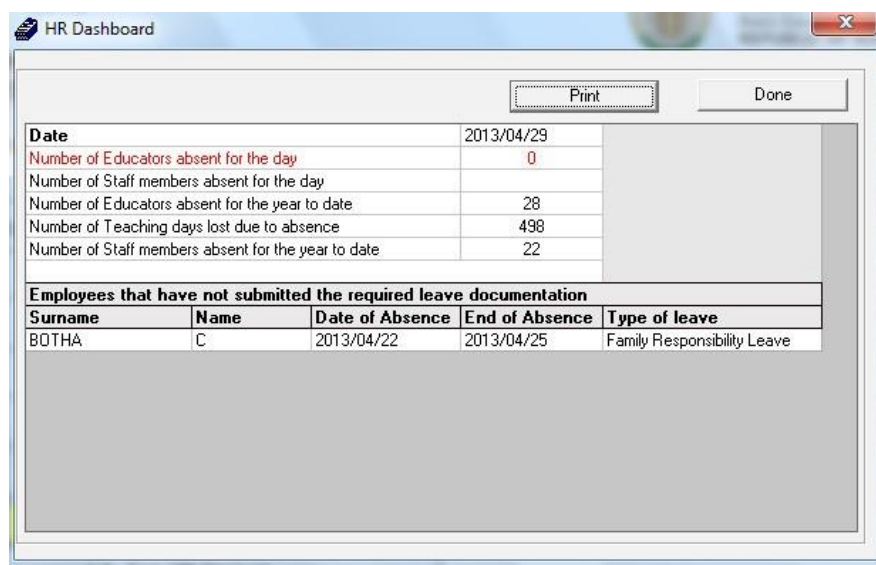


Figure 42: Human Resources Dashboard

2.5.5 Staff Leave Summary Printout (2.10)



The Staff Leave Summaries are the records of educator/ staff attendance for a certain period of time. These records can be used by management to follow absentee patterns and trends of educators and for Quarterly Reports.

Click on **Staff Leave Summary Printout** and select the report on the following criteria (Fig. 43):

- Select for **Educators** or **Non-educators**
 - that are **currently employed** or **archived** or **all**
 - paid by the **State** or **SGB** or **all**
 - the period : **Annual** , **Quarterly**, **Weekly**, or a specific **date range**.
 - as a **summary** report (totals) or a report with **Details** (per person).
- Click on the **Print** to display a print preview. (Fig. 44)
- Click on **Printer icon** to print hard copy report.

Click on **Done** to exit the screen and return to the HR menu.

Figure 43: Staff Leave Summary Printout Selection

LEAVE SUMMARY Educators (Current), Paid by State, Yearly :

Permal No	Surname	Initials	Start Date	End Date	Annual	Sick	Incapacity	Occupational Injury	Maternity	Adoption	Family Responsibility	Special	Office Bears	Study
545454545	BOTH	C					1				4			
535353535	GRANT	E				1								
Totals						1	1				4			

Figure 44: Example of a Staff Leave Summary Printout

2.5.6 View Individual Staff Absences (2.14)

📄 A user can view Staff Absentee Records for individual absences for each staff member including educators. (Fig. 45)

- Select a staff member you wish to view.
- Click on **Filter by Date** to view a specific period.
 - Select the **From date** and the **To date** then click on **GO** to view.



- The number of days absent is given and the individual days absent is listed.
- For printouts, click on **Selected Staff Member** to print just one staff member's details

OR

- Click on **All Staff Members** to print out the absenteeism days for the whole staff.

Click on **Done** to exit the screen.

Staff Absentees Records

Select Category ☒ Educator ☐ Other Staff ☐ View Archived Staff

☒ Show All for current year

Click on Staff Member

Surname	Name
ABDUL	Paulus
BOTHA	Carine
CHETTY	Christine
COCKRAL	Hantie
CORNELISSEN	Margret
CROUCAMP	Elmari
FOX	Stephen
GOVENDER	Ayesha
GRANT	Elizabeth
JABULE	Bheki
KORDAAT	Gabriel
KWEPILE	Nomalanga
LECWIDI	William
MARAIS	Valarie
MATI	Anele
OBAKENG	Henry
OBU - DARKO	Mathew
STEYN	Anriette
VAN DER MERWE	Martha
VAN DER WALT	Helen
VAN STRATEN	Alta
WILSON	Amanda

Surname BOTHA

Name Carine

Days Absent 10

Date Absent

Filter by Date

From: 2013/05/02 To: 2013/05/02

GO

Print Absentee Dates

Selected Staff Member

All Staff Members

Done

Figure 45: Staff Absentees Records

2.5.7 View Attendance Statistics (Details) (2.15)



Staff Leave Summaries are the records of educator or staff attendance for a certain period of time.

- These reports can be used as quarterly summary reports as required by the Education Department for purposes of record keeping.
- These records can also be used for staff management by the Principal.

Click on **View Attendance Statistics (Details)** (Fig. 46):

- Select the relevant staff group.
- Filter the group according to remuneration:
 - Education Departments are mainly interested in the attendance performance of the educators paid by the State.
- Select the period from the range. Schools need to send a Quarterly Summary Report to the District.
- Click on **Print** for a preview of the report.
 - The report summarises attendance per staff type, per gender, actual numbers and %. (Fig. 47)
- Click on the **printer icon** to print a hard copy.

Click on **Done** to return / exit the screen.

Attendance Statistics (Details) (2.15)

Department: Basic Education
REPUBLIC OF SOUTH AFRICA

Whom
☒ All ☐ Educators ☐ Staff

Filter
☒ All ☐ Paid by State ☐ Paid by SGB ☐ Paid by R3

Period Selection
☒ All ☐ Yearly ☐ Per Term ☐ Weekly ☐ Date Range

Print Done

2.5. Maintain INSET Training Records

2.15. View Attendance Statistics (Details)

2.6. Maintain DA Interview Records

2.16. View Attendance Statistics (Summary)

Figure 46: Staff Attendance Statistics

ATTENDANCE STATISTICS:
Educators, All Dates.

Stats for the week: 2008.02.01

Category	Gender	Quantity	Present	Absent	% Present	% Absent
Educators	M	4	12	0	100.00	
Educators	F	15	42	3	93.33	6.67
Total		19	54	3	94.74	5.26

Stats for the week: 2008.02.01

Category	Gender	Quantity	Present	Absent	% Present	% Absent
Educators	M	4	20	0	100.00	
Educators	F	15	69	6	92.00	8.00
Total		19	89	6	93.68	6.32

Stats for the week: 2008.02.01

Figure 47: View Staff Attendance Statistics

2.5.8 View Attendance Statistics (Summary) (2.16)



Staff Leave Summaries are the records of educator or staff attendance for a certain period of time.

- These reports can be used as quarterly summary reports as required by the Education Department for purposes of record keeping.

- These records can also be used for staff management by the Principal.

Click on **View Attendance Statistics (Summary)** (Fig. 46):

- Select the relevant staff group. (Fig. 48)
- Select according to remuneration:
 - Education Departments are mainly interested in the attendance performance of the educators paid by the State.
- Select the format:
 - Schools need to send a Quarterly Summary Report to the District.
- Click on **View Statistics** for a preview of the report.

Attendance Statistics (Summary) (2.16)

Whom: All Paid By: All Format: Weekly Max View

☒ 2015
☐ 2014

Please Note:

- Statistics are based on the 'Weekly Attendance Statistics (2.12 / 2.13), as such, weeks where the Friday falls within the Selected Period(s) will be selected irrespective of the dates of the other days of that week.
- Button '2.10. Staff Leave Summary Printout', is available only if Educator or Staff is selected and One Period only.

2.10. Staff Leave Summary Printout View Statistics >> Done

Figure 48: Attendance Statistics (Summary)

C. Summary

The **Human Resource Information** Module assists schools in the administration of the educators and staff/ public servants' information. It also contains the processing and administration of leave, absenteeism, training, appraisals and all human resource related data and processes.

HR module is divided into 4 sections according to its allocated functions:

- 2.1 Staff Information (Educators and non-teaching staff captured separately).
- 2.2 Educator evaluation & all staff training documented records.
- 2.3 Staff Attendance.
- 2.4 Summary Report

3. Quick reference of the sub-menus and their uses:

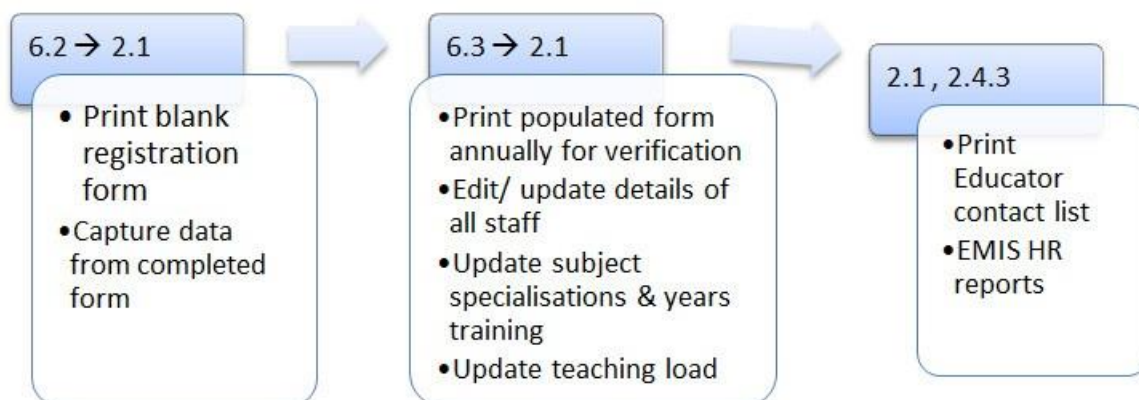
The functionalities of the sections are summarised in the table below:

Heading in Manual	Sub – head & (SA-SAMS Menu no)	Functionality
2.1 Staff Information	2.1.1 Educator Information (2.1)	→ Educators' Details → Subject Specialisations & Years Training → Educator Teaching Load (of current year) → Edit / View leave and absentee records of the individual → Assign Educators to Register Classes → Educator Contact List
	Update Educator Subject Teaching Experience (2.2)	→ Report on updated Educator training & teaching experience for subjects taught the current year
	2.1.2 Staff Public Servant Information (2.3)	→ Staff Members (public servants) → Add New Staff Member → Edit Staff Member's details → Archive a Staff Member → Edit / View - Leave and Absentee records of the individual → Print - staff contact list

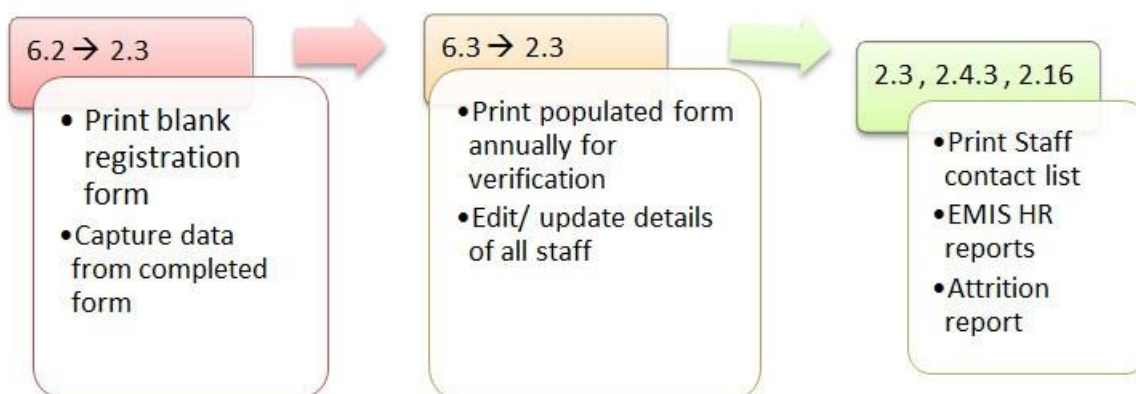
2.2 Educator Evaluation & all staff training	2.2.1 Maintain Training Categories (2.4)	→ Add training courses
	2.2.2 Maintain INSET Training Records (2.5)	→ Development and Training
	2.2.3 Maintain DA Interview Records (2.6)	→ Development appraisal interview records → Add New Record
	2.2.4 Printout of DA Interview Records (2.7)	→ DAS Appraisal Report
	2.2.5 Development Appraisal and Performance Measurement (2.18)	→ General development and performance appraisal
2.3 Summary reports	2.4.1 Emis HR Printout (2.9)	→ Appointment Register / Educator Details / Educator Subject Specialisation / Staff Training /Aggregated Educator Details / Employment Remuneration /Education Institution Language / Raw Data
	2.4.2View Attrition Register (2.16)	→ Summary of archived Educators/Staff
	2.4.3 Design HR List (2.19)	→ Design HR List templates for future use.
2.4 Staff Attendance	2.3.1 Blank Attendance Register (2.11)	→ Blank printout register for educators staff
	2.3.2 Maintain Weekly Educator Attendance (2.12)	→ Capture absenteeism of educators → type of leave & documentation
	2.3.3 Maintain Weekly Staff Attendance (2.13)	→ Capture absenteeism of staff → type of leave & documentation
	2.4.4 HR Dashboard (2.8)	→ Dashboard
	2.3.5 Staff Leave Summary Printout (2.10)	→ Summary Record of all staff leave of a certain period of time
	2.3.6 View Individual Absences (2.14)	→ Both Staff and Educator absences indicated
	2.3.7 View Attendance Statistics (2.15)	→ Summary of attendance per week, month, term, year → Summary per person

3.1 “How to...” flow diagrams:

- **Capture educator & to quality assure data regularly:**



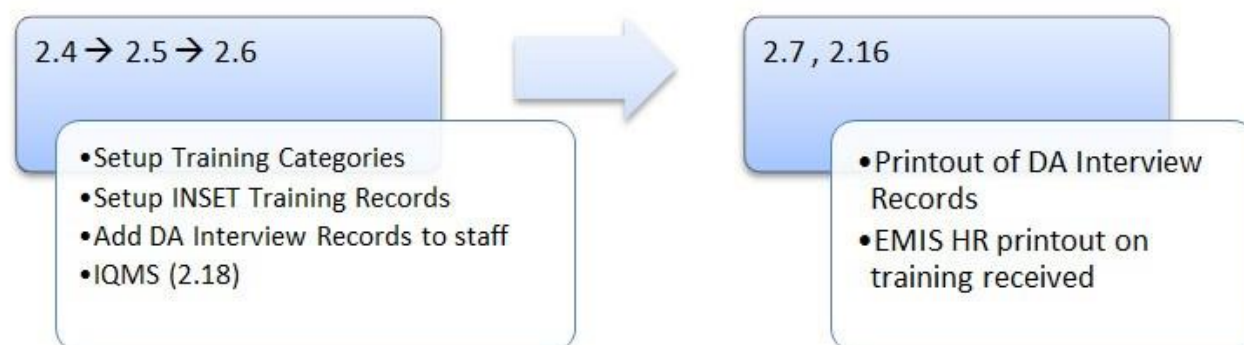
- **Capture staff member & to verify data regularly:**



- **Maintain and report on Attendance:**



- **Reports on Evaluation and Training:**



- **Report formats available on SA-SAMS are summarised in the tables below:**

EMIS HR Reports – Educators only	Content of Report		
Appointment Register for CS Educators (see Fig. 27)	▪ Persal no ▪ Surname & Initials ▪ Gender	▪ Designation ▪ Date appointed ▪ Paid by	▪ Type of appointment (Permanent/ temporary/ substitution), full time or part time.
Educator Details	▪ Persal no ▪ Surname & Initials ▪ Gender	▪ Race ▪ Category ▪ Post Level ▪ REQV	▪ Home Language ▪ Instructional Language
Educator Subject Specialisation (see Fig. 28)	Per subject:	Related educators with:	
	▪ years of training	▪ years of teaching experience	
	Per educator:	Subjects with:	
	▪ years of training	▪ years of teaching experience	
Staff Development Appraisals (see Fig. 25)	Appraisal per educator:	▪ Date appraised , who appraised, comments ▪ Developmental needs ▪ Training received (type & hours)	
Aggregated educator details	Gender	▪ per post category ▪ per post level ▪ per REQV level	
Education Instruction Language	Educators	▪ per Language of Instruction	

EMIS HR Reports – All staff	Content of Report	
Staff Training Received (see Fig. 29)	Per Educator or Staff mem- ber	▪ Course name ▪ Category ▪ Date started ▪ Date ended ▪ Hours ▪ Provider ▪ Method of training ▪ Funded
Staff Training per Category	Summary per category of funding	▪ Staff member ▪ Course name ▪ Duration hours ▪ Provider ▪ Method of training
Employment and Remuneration (see Fig. 30)	No of Staff per category	▪ appointed by State ▪ appointed by SGB
	No of Staff appointed by State	▪ permanent : Full / part time per gender ▪ temporary: Full / part time per gender ▪ substitute: Full / part time per gender
	No of fulltime educators	▪ appointed by State per category ▪ appointed by SGB per category
Home Language and Race	Staff Catego- ries	▪ gender per race group ▪ gender per language group

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

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EVERY CHILD IS A NATIONAL ASSET



basic education

Department:
Basic Education
REPUBLIC OF SOUTH AFRICA