



## EARLY CARE AND EDUCATION SUBSTITUTE POOL ADMINISTRATION MANUAL



Washington State Department of  
**CHILDREN, YOUTH & FAMILIES**

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Original Date: May 2021 | Revised Date: September 1, 2021  
Eligibility and Provider Supports Division | Approved for Distribution by Mallerie Lopez, Program Specialist



Washington State Department of  
**CHILDREN, YOUTH & FAMILIES**

**CONTENTS**

Definitions ..... 1

Overview ..... 1

    Business Need ..... 1

Roles and Responsibilities ..... 2

    DCYF Responsibilities ..... 2

    Substitute Pool Administrator Responsibilities ..... 2

Substitute Pool Implementation ..... 2

    Marketing and Recruitment ..... 3

Substitute Qualifications and Approval ..... 3

    Managing Substitute Interest ..... 3

    Substitute Qualifications ..... 3

    Substitute Orientation ..... 4

    Substitute Status ..... 4

    Managing Substitute Participation ..... 5

Facility Qualifications and Approval ..... 5

    Managing Facility Interest ..... 5

    Facility Requirements for Accessing Substitute Hours ..... 6

    Allowable Activities ..... 6

    Facility Orientation ..... 7

    Facility Status ..... 7

    Managing Facility Participation ..... 8

Connecting Substitutes with Facilities ..... 8

    The Substitute Pool Software ..... 8

    Managing Vacancies ..... 8

    Filling Vacancies ..... 9

Substitute Performs Service ..... 9

    On-Site Walk-Through ..... 9

    Substitute Performance ..... 9

    Evaluations ..... 9

    Paying Substitutes ..... 10

Continuous Quality Improvement ..... 10

## Definitions

**Classroom Assessment Scoring System (CLASS):** The Early Achievers tool for measuring classroom interaction quality.

**DCYF:** The Washington State Department of Children, Youth, and Families (DCYF).

**Early Achievers:** Washington’s quality rating and improvement system (QRIS) provides relationship-based professional development supports, including, but not limited to, technical assistance, consultation and coaching, and resources for child care providers to support the child’s learning and development. Early Achievers is also a tool to connect families to child care and early learning programs by using a quality rating system.

**Early Start Act (ESA):** June 2015 legislation focused on improving access to high-quality early learning opportunities in Washington as a key path to improving outcomes in young children and promoting strong school readiness rates.

**Environmental Rating Scale (ERS):** The Early Achievers tool for measuring classroom environment quality.

**Facilities:** Licensed family home child care and center child care facilities.

**Family Home Child Care:** Licensed home-based care in the caregiver’s home.

**Family, Friend, and Neighbor (FFN) Provider:** Home-based care in the caregiver’s or child’s home provided by caregivers who are relatives, friends, or neighbors who are legally exempt from licensing and receive child care subsidy.

**Managed Education and Registry Tool (MERIT):** Washington’s workforce and professional development registry. This online portal tracks provider background checks, training records, and qualification data.

**Subsidy:** Child care subsidy programs provide financial assistance to eligible families to assist with child care costs. These programs provide financial assistance to employees who have children enrolled or who will be enrolled in licensed family home child care or child care centers. For a child care provider to be classified as a subsidy provider, they must have served at least one non-school age child receiving subsidy within the past 12 months.

**Substitute Pool Administrator:** The Substitute Pool Administrator, the Imagine Institute, provides all responsibilities defined for implementing the Substitute Pool.

**Substitute Pool Software:** Software that matches eligible facilities with qualified substitutes and manages the substitute jobs with facilities.

**Vacancy:** A job opening that is created by a designated owner or staff in a child care center, family home child care provider, or Substitute Pool Administrator in the Substitute Pool Software that needs to be filled by a substitute.

**Verified:** Information in an individual’s professional record in MERIT is confirmed valid through a verification process; this may occur by the appropriate DCYF party or may have the option to be verified by the Substitute Pool Administrator.

## Overview

The Early Care and Education Substitute Pool (Substitute Pool) is a statewide program that provides licensed child care providers access to qualified substitutes for release time. The program supports the continuity of care for children in licensed programs, ensures staff have access to release time, and supports the recruitment of interested professionals into the early learning field. This manual serves as a support document to the contract statement of work for the administration of the Substitute Pool.

## Business Need

The Early Start Act, passed in 2015, marked the beginning of a Substitute Pool and continues to fund substitutes for Early Achievers success. The Collective Bargaining Agreement provides a benefit to licensed family home child care providers

of up to five days of paid substitute access. The scope of the Substitute Pool has expanded to serve a greater need and interest. Today, the Substitute Pool serves as a:

1. Workforce pipeline into the early learning field, providing training and resources for those interested in starting a career.
2. Workforce wellness and stability strategy as providers have access to release time to care for personal and program needs.
3. Emergent needs and scheduled coverage strategy to support licensed child care programs to stay within state ratio and licensing requirements.

## Roles and Responsibilities

The Washington State Department of Children, Youth, and Families (DCYF) and the Substitute Pool Administrator each have responsibilities to ensure successful implementation of the Substitute Pool.

### DCYF Responsibilities

1. Process portable background checks for substitute applicants.
2. Maintain portable background check status for substitute applicants.
3. Process payment to Substitute Pool Administrator for Substitute Pool implementation and administration, including reimbursement for payments to substitutes or facilities.
4. Maintain substitute and facility qualification data in MERIT.
5. Ensure Substitute Pool Administrator has appropriate access to MERIT to administer the program.
6. Ensure Substitute Pool Administrator has appropriate access to the substitute management software to administer the program.
7. Ensure Substitute Pool Administrator has access to the knowledge needed to use DCYF data, project required DCYF systems, and the Substitute Pool Software.

### Substitute Pool Administrator Responsibilities

1. Recruitment of substitutes and facilities.
2. Provide customer service for facilities and substitutes.
3. Develop and deliver substitute and facility orientations according to DCYF requirements.
4. Verify minimum qualifications for substitutes and facilities in MERIT.
5. Actively manage substitute and facility participation in the Substitute Pool Software.
6. Manage and maintain the Substitute Pool Software.
7. Act as employer or contractor of substitutes, including the processing of payroll, payroll taxes, etc.
8. Collect the facility's payment for substitute services.
9. Schedule substitutes with facilities as needed to remove barriers to participation.
10. Develop and monitor a feedback/evaluation system, responding to and providing technical assistance as needed.
11. Establish capacity to use DCYF data, DCYF systems, and the Substitute Pool Software.
12. Maintain program data, including Substitute Pool Software, to ensure accurate, up-to-date reporting.

## Substitute Pool Implementation

The Substitute Pool is a statewide service that ensures access to all licensed family home child care and center providers. The availability of substitutes is dependent on funding availability based on program type. Private pay options are available.

The Substitute Pool implementation plan is developed by the Substitute Pool Administrator and approved by DCYF. The implementation plan addressing how to meet the need in fiscal year 2022 will be available at the beginning of the fiscal year.

## Marketing and Recruitment

The Substitute Pool will reduce barriers for low-income and culturally diverse providers. Substitutes must reflect the diverse needs of early learning programs around the state, and facilities must be matched with substitutes who are culturally and linguistically appropriate. The marketing and recruitment for substitutes must reach a diverse population and provide marketing materials in multiple languages, including English, Spanish, and Somali, and target both licensed family home child care and center providers.

The Substitute Pool marketing and recruitment strategy will be managed by the Substitute Pool Administrator with support from DCYF. DCYF will provide additional support, such as developing how-to guides to navigate MERIT, providing data to support recruitment, and distributing marketing materials wherever possible.

## Substitute Qualifications and Approval

The Substitute Pool Administrator will connect with interested substitutes, ensure qualifications are met, and approve substitutes to be active within the Substitute Pool.

## Managing Substitute Interest

A potential substitute contacts the Substitute Pool Administrator or indicates their interest in being a substitute by checking a participation checkbox on their Professional Record in MERIT. By checking this box, the substitute applicant agrees to share their qualification data in MERIT with the Substitute Pool Administrator. Once a potential substitute has expressed interest, the Substitute Pool Administrator will:

1. Inform the substitute applicant of the qualifications to be a substitute and include a minimum of the following:
  - Information on how to register in MERIT.
  - Information on how to complete a Portable Background Check (PBC).
  - A list of the qualifications.
  - A phone number to reach the Substitute Pool Administrator for support and to find training.
2. If not already registered with MERIT, the substitute applicant will need to create a MERIT Profile before they can mark the Substitute Pool participation box. If needed, the Substitute Pool Administrator will assist the substitute applicant with MERIT registration or substitute interest. The internal and external Substitute Pool Administrators can check the participation box on behalf of the interested substitute in their Professional Record in MERIT.
3. The substitute applicant will work to meet required qualifications with support from the Substitute Pool Administrator. This includes understanding the qualifications, finding training opportunities, and ensuring their record is up to date with completed trainings in MERIT.

## Substitute Qualifications

To be qualified as an eligible substitute, the following must apply:

1. Minimum of 18 years of age.
2. Complete the substitute orientation and substitute orientation documents required by DCYF or the Substitute Pool Administrator.
3. Have a MERIT professional record with evidence of the following (all trainings must be verified):
  - Initial Training Requirement (Child Care Basics).
  - Cleared PBC.
  - Mandated Reporting: Recognizing Child Abuse and Neglect training.
  - Safe Sleep training.
  - Blood Borne Pathogens training.
  - Pediatric First Aid or Basic/Standard First Aid.
  - CPR for Infants, Child, and Adults or CPR for Child and Adult (CPR must be a hands-on training).
  - Food Handler permit.
  - TB Test results.

## Substitute Orientation

Once qualifications have been verified or there is a plan in place to complete them, substitutes must attend a substitute orientation developed by the Substitute Pool Administrator that covers at a minimum:

1. Administrator.
2. Photo taken for identification badge:
  - The badge must be worn when on-site at a facility. If forgotten, the substitute **MUST** have a government-issued ID such as a driver's license with them to perform service.
  - The badge must include the following information on the front:
    - Photo.
    - Position title (Substitute).
    - Substitute Pool Administrator logo.
    - Substitute name.
    - Phone number of Substitute Pool Administrator.
3. Training on the Substitute Pool Software that includes, but is not limited to, creating a profile, searching for available jobs, accepting jobs, and leaving feedback.
4. Overview of licensing standards in alignment with Washington Administrative Code (WAC) requirements and definitions, including:
  - Child supervision requirements (including napping).
  - Guidance/discipline techniques (including restraint policy).
  - Food service practices.
  - Off-site field trips.
  - Transporting children, if applicable.
  - Medication management and storage.
  - Health, safety, and sanitization procedures (including handwashing and contagious disease recognition and prevention).
  - Medical emergencies, fire, disaster, and evacuations.
  - Mandatory reporting of suspected child abuse and neglect.
  - Pick up and drop off requirements.
  - Requirements for authorized person sign in and sign out of children.
5. Confidentiality – i.e., not sharing information about children unnecessarily, ensuring documents with family/child information are stored in a confidential manner.

## Substitute Status

The Substitute Pool Administrator will use MERIT to manage the substitute applicant's qualifications and corresponding Substitute Pool Status, making them active in the Substitute Pool. Detailed instructions and an "At-A-Glance" sheet are [available here](#). Substitute Pool Statuses for substitutes include:

**Pending:** Substitute has indicated interest.

Initial Substitute Pool Status once a substitute applicant has indicated their interest by checking the participation checkbox on their professional record in MERIT.

**Finishing Qualifications:** Substitute is working on qualifications.

Secondary status once the Substitute Pool Administrator has contacted a Substitute Pool applicant and developed a plan to meet all qualifications.

**Approved:** Meets all qualifications.

Once the Substitute Pool applicant meets all qualifications, the Substitute Pool status becomes approved, making the Substitute Pool applicant qualified to work as a substitute.

**Not Approved:** Substitute does not meet qualifications.

If a Substitute Pool applicant does not meet all qualifications, they become unfit to work as a substitute at any time, or they are no longer interested, their Substitute Pool status becomes Not Approved, and the reason will be entered into MERIT. The not approved reasons include:

- Lack of work.
- No longer available to work.
- Substitute Orientation not complete.
- Health and Safety requirements not met.
- Substitute Pool program documentation not complete.
- Pre-service qualifications not met.
- PBC not cleared.
- PBC expired.
- Education Requirements not met.
- Approved in error.
- Approval removed by DCYF.

## Managing Substitute Participation

The Substitute Pool Administrator will manage substitute participation in the Substitute Pool using MERIT to ensure that only fully and currently qualified substitutes are active in the Substitute Pool Software and providing services. Detailed instructions and an “At-A-Glance” sheet are [available here](#).

1. The Substitute Pool Administrator will have access to qualification data in MERIT for those individuals who have indicated their interest in participating as substitutes in the Substitute Pool. The Substitute Pool Administrator will use MERIT to:
  - Review Substitute Pool applicant’s progress toward completing qualifications.
  - Verify substitute health and safety qualifications upon review of proof of completion.
  - Actively review all qualification data to ensure ongoing compliance with qualifications.
2. If a qualification is expired or will expire soon, the Substitute Pool Administrator will:
  - Notify the substitute.
  - Provide the substitute with resources, support, and adequate time to renew their qualifications.
  - Update the substitute’s Substitute Pool Status in MERIT to “Not Approved” and note the appropriate “Not Approved Reason” (if qualification is expired).
  - Indicate in the Substitute Pool Software that they are no longer qualified to provide substitute services (if the qualification is expired).
3. If the substitute has informed the Substitute Pool Administrator that they no longer want to be part of the program, the Substitute Pool Administrator will update their status in MERIT to “Not Approved” and note the appropriate reason.
4. Substitutes can re-apply for the Substitute Pool by contacting the Substitute Pool Administrator or indicating their interest on their Professional Record in MERIT.

## Facility Qualifications and Approval

Early Learning programs across the state are working toward providing higher quality care for children and may have access to the Substitute Pool to continue to reach their program goals and tend to their personal needs.

## Managing Facility Interest

The Substitute Pool Administrator will have access to facility contact information in MERIT that meets the Substitute Pool facility qualifications and will conduct outreach to gather interest in participating in the program.

Facilities interested in participating can contact the Substitute Pool Administrator to discuss eligibility requirements and indicate their interest. Once a facility has expressed interest in participating in the program, the Substitute Pool Administrator will:

1. Inform the facility of the facility qualifications and include a minimum of the following:
  - A list of qualifications.
  - A phone number to reach the Substitute Pool Administrator for support.
2. If the Substitute Pool Administrator finds that a facility they reached out to is not interested in participating in the Substitute Pool, then the Substitute Pool Administrator will:
  - Use MERIT to indicate that the facility is not interested.
3. If at any time the facility becomes interested in participating in the Substitute Pool, they can contact the Substitute Pool Administrator.

## Facility Requirements for Accessing Substitute Hours

Facility requirements may be modified throughout the year as needed based on funding availability or other program needs. DCYF will contact the Substitute Pool Administrator to work on program changes and communication protocols as needed.

To have a substitute placed in a provider's facility, the following must apply:

1. Be in good licensing status; this means having a non-expiring license that is not suspended, revoked, or on probationary status.
2. Complete the facility orientation and facility orientation documents required by DCYF or the Substitute Pool Administrator.
3. **CBA Funding** (Family Home Child Care): To access state funded substitute hours through the Collective Bargaining Agreement (CBA), the following must apply:
  - a. Be covered by the CBA.
  - b. Be a licensed family home child care provider serving at least one non-school-age child receiving subsidy within the past 12 months.
4. **ESA Funding** (Centers and Out of Unit Family Homes Child Care): To access state-funded substitute hours as a licensed provider, the following must apply:
  - a. Be a licensed child care center or family child care provider not covered by the CBA
  - b. Facility must be a licensed provider enrolled and participating in Early Achievers.
  - c. Facility must self-certify that time will be spent to focus on Early Achievers program participation and progress.
5. **Private Pay**: To access substitute hours as a private pay option, the following must apply:
  - a. Facility must be a licensed facility (may include family home child care providers, center providers, school-age programs, licensed Head Start, and ECEAP programs).
  - b. Agree to the terms and conditions of paying for one's own substitute coverage (criteria is under development).

## Allowable Activities

Facilities may use the Substitute Pool for many activities. Allowable activities depend on the funding source.

1. CBA Funding – Family home child care providers, covered by the CBA.
  - a. Licensee vacation.
  - b. Licensee sick leave.
  - c. Cover staff leave (maintain ratio).
  - d. Professional learning – off-site.
  - e. Professional learning – on-site.
  - f. Participate in off-site work activity (community meeting, workgroup).
  - g. Other reason.



2. ESA Funding – Child care center providers and family home child care providers, not covered by the CBA.
  - a. Cover staff leave (maintain ratio).
  - b. Professional learning – off-site.
  - c. Professional learning – on-site.
  - d. Participate in off-site work activity (community meeting, workgroup).
  - e. Other reason.

## Facility Orientation

Once a facility has been deemed eligible to access substitute hours, facilities must attend an orientation developed by the Substitute Pool Administrator. The orientation can be in-person or through a distance learning option such as a webinar or recorded video. The orientation must cover:

1. Training on the Substitute Pool Software that includes, but is not limited to, creating a profile, posting vacancies, accepting substitutes, reconciling past jobs, and leaving feedback.
2. Participation requirements.
3. Payment structure and documentation requirements.
4. Required forms (substitute evaluation form, parent notification form, etc.).
5. Facility Agreement with the Substitute Pool Administrator, including required documentation and who has authority to manage their Substitute Pool Software account.
6. Policy surrounding the misuse of the Substitute Pool including disqualification activities.
7. Insurance requirements/liability agreement as determined by the Substitute Pool Administrator and reviewed by DCYF.

## Facility Status

The Substitute Pool Administrator will use MERIT to verify the facility’s eligibility and corresponding Substitute Pool Statuses, making them active in the Substitute Pool. Detailed instructions and an “At-A-Glance” sheet are [available here](#). Substitute Pool statuses for facilities include:

**Eligible:** Meets qualification requirements.

Facilities that meet the qualification criteria have an initial Substitute Pool status of Eligible.

**Finishing Qualifications:** Finishing required orientation and documentation.

Facilities that have been contacted by the Substitute Pool Administrator and are planning to complete the orientation and orientation documents.

**Approved:** Completed all qualifications.

Once the Substitute Pool Administrator verifies that all qualifications are met, they are now approved to participate in the Substitute Pool.

**Not Approved:** Does not meet qualification requirements

If a facility does not meet all qualifications at any time, their Substitute Pool status becomes Not Approved. The Not Approved reasons include:

- Facility Orientation incomplete.
- Facility Documentation incomplete.
- Licensing status.
- Early Achievers participation status.
- Subsidy status.
- Level 3, never used a substitute.
- Approved in error.
- Approval removed by DCYF.
- Approval removed by Substitute Pool Administrator.

**Not Interested:** Eligible but not interested.

If a facility is eligible but not interested in participating in the Substitute Pool, they have a status of Not Interested. The facility can participate in the Substitute Pool at any time in the future by contacting the Substitute Pool Administrator and letting them know they are now interested.

## Managing Facility Participation

The Substitute Pool Administrator will manage facility participation in the Substitute Pool using MERIT to ensure that only qualified facilities are active in the Substitute Pool Software and accessing substitute services. Detailed instructions and an “At-A-Glance” sheet are [available here](#).

1. The Substitute Pool Administrator will have access to qualification data in MERIT for those facilities that are participating in the Substitute Pool. The Substitute Pool Administrator will use MERIT to:
  - Verify that all active facilities meet all qualifications for participation in the Substitute Pool.
  - Review facilities’ progress towards meeting qualifications.
  - Actively review all qualification date to ensure ongoing compliance with program qualifications.
2. If a qualification has not been met, the Substitute Pool Administrator will:
  - Notify the facility.
  - Provide the facility with resources and support to meet that qualification.
  - Update the facility’s Substitute Pool Status in MERIT to “Not Approved” and note the appropriate “Not Approved Reason.”
  - Indicate in the Substitute Pool Software that they are no longer qualified to access substitute services.
3. If the facility informs the Substitute Pool Administrator that they no longer want to participate in the program, the Substitute Pool Administrator will update their Substitute Pool status in MERIT to “Not Interested.”
4. Facilities can re-apply for the Substitute Pool by contacting the Substitute Pool Administrator.

## Connecting Substitutes with Facilities

### The Substitute Pool Software

The Substitute Pool Administrator maintains and hosts the Substitute Pool Software. Substitute Pool Software requirements are mutually agreed upon between DCYF and the Substitute Pool Administrator.

Once the Substitute Pool Administrator has verified in MERIT that all qualifications are met for both substitutes and facilities, then the Substitute Pool Administrator will add those substitutes and facilities to the Substitute Pool Software. The Substitute Pool Software is where the connection happens for placements. A facility may request a specific substitute through the Substitute Pool Software or by contacting the Substitute Pool Administrator.

There are various roles within the Substitute Pool Software. These include:

- Administrators: Can complete the following activities; DCYF and the Substitute Pool Administrator have administrative permissions.
  - Managing and creating facility and substitute records within the system.
  - Managing facility and substitute program qualifications and ensuring program compliance within the system.
  - Support for users navigating the system.
- Facilities: Eligible family home child care and child care center facilities that participate in the Substitute Pool.
- Substitutes: Eligible substitutes that participate in the Substitute Pool.

### Managing Vacancies

Vacancies are similar to job absences. The system uses vacancy profiles to ensure adequate matching of substitute skills and vacancy needs. Vacancy profiles can be considered job types within the software system. A facility identifies the vacancy they have, and the matching of a substitute is based on that vacancy profile. For example, a facility identifies

they have a vacancy need for a Spanish-speaking substitute. A substitute with that skill set can indicate their ability to meet the requirements and ability to be there for the time of service.

Some other expectations of using the Substitute Pool Software include:

1. The facility contact, typically the owner/director, is the manager of all substitute requests for facilities.
2. The Substitute Pool Administrator may create a vacancy for a facility or accept a job on behalf of the substitute/facility if that support is requested by the facility.
3. The facility must indicate the activity they will be doing that qualifies for substitute use.
4. Documentation of allowable use must be maintained by the facility for the Substitute Pool Administrator to audit at will.

## Filling Vacancies

The program is designed to allow facilities to create vacancies and substitutes to fill a vacancy or be assigned the vacancy. The Substitute Pool Administrator can help both the facility and the substitute complete any of the tasks below by providing technical assistance or entering the information directly into the Substitute Pool Software. Detailed instructions are [available here](#). To fill a vacancy in the Substitute Pool Software, the following occurs:

1. The facility creates a vacancy in the Substitute Pool Software.
2. The facility can assign a specific vacancy to a substitute, and the substitute will be notified. The substitute also has the option of searching for open vacancies within the Substitute Pool Software and accepting them.
3. The facility is notified when their vacancy has been accepted and by whom.
4. The substitute can search for available jobs that meet their interest.

## Substitute Performs Service

### On-Site Walk-Through

Substitutes are required to attend an on-site orientation performed by the facility contact at the beginning of each assignment to orient the substitute to the physical space, the needs of the children in care, and any safety information. An on-site walk-through checklist will be provided by the Substitute Pool Administrator and must be signed by both parties to attest that the orientation has been performed. The signed checklist will be kept onsite at the facility. The Substitute Pool Administrator may audit the facilities to see the signed checklists. DCYF may review the Substitute Pool Administrator's audit records. Substitutes will be paid for up to one hour for on-site orientation time in addition to the time direct service is performed.

### Substitute Performance

When the substitute arrives on-site for the day, the substitute must wear a picture ID provided by the Substitute Pool Administrator while they are at the facility. At the end of their day, they may only leave when the designated facility contact releases them or when there are no children left in care.

The facility reconciles that the job has happened by verifying the hours worked within the Substitute Pool Software.

## Evaluations

The facility and the substitute will provide feedback about their experience through the Substitute Pool Software. The feedback will not be openly visible to the other party, but the Substitute Pool Administrator and DCYF will be able to view the feedback. System improvements, based on this feedback, will be included in the Substitute Pool Administrator's annual report.

Feedback questions will address at a minimum the following:

- Questions for the Facility:
  - Name of person completing the form.
  - Service date.

- Was the substitute on time?
- Did the substitute follow the plans/directions you provided?
- Were you satisfied with the service provided by the substitute? On a scale of 1-5, unsatisfied- average- extremely satisfied.
- Comments text box.
- Questions for the Substitute:
  - Name of person completing the form.
  - Service date.
  - Did the provider return on time?
  - Were the plans/directions clear?
  - Was there enough on-site facility training provided?
  - Is there anything else that would have helped while on-site?
  - Would you be interested in working at this facility again?
    - If no, why?

## Paying Substitutes

- The Substitute Pool Administrator verifies that payment should be made by:
  - Checking to ensure that documentation supporting the reason for substitute use has been collected.
  - Confirming the number of hours worked by viewing the Substitute Pool Software.
  - If any required information for payment is missing, the Substitute Pool Administrator will follow up with the facility/substitute to obtain the missing information or collect payment.
- Substitute Pool Administrator pays the substitute or reimburses facility for services performed.
  - The administrator will run payroll on a regular schedule rather than per assignment.
  - Reimbursements from DCYF to the Substitute Pool Administrator will be negotiated based on the terms of the vendor contract.
  - The Substitute Pool Administrator manages tax reporting and all legal responsibilities.

## Continuous Quality Improvement

The Substitute Pool Program Administrator will develop an approach for providing DCYF recommendations for continuous quality improvement of the Substitute Pool Software. Areas of consideration include but are not limited to:

- Program Implementation: Allowable and qualified activities, use of the Substitute Pool, recruitment.
- Substitute Preparation: Is the pre-service training sufficient? Would in-service training be valuable?
- Facility Preparation: Are facilities prepared for using the Substitute Pool?
- Evaluation: Methods for ongoing feedback such as focus groups and use of evaluation forms.