Eastern Carolina
WORKFORCE DEVELOPMENT BOARD, INC.

July 27, 2026

Eastern Carolina Local Area Issuance No. 2025-01, Change 2

SUBJECT: Individual Training Accounts (ITA) Policy

PURPOSE: To update the ITA policy to clarify allowable ITA charges for required items for training when providing Individual Training Accounts (ITAs) for WIOA eligible Adults, Dislocated Workers and Out-of-School Youth (OSY) ages 16-24 throughout the Eastern Carolina Workforce Development region and update the ITA Voucher. This policy rescinds Eastern Carolina Loca Area Issuance No. 2025-01, Change 1 dated October 20, 2025.

BACKGROUND: WIOA title I adult, dislocated workers, and out-of-school youth ages 16-24 purchase training services from State eligible training providers they select in consultation with the career advisor, which includes discussion of program quality and performance information on the available eligible training providers that best meet the customer needs and interest.

ACTION: The Board approved WIOA sub-recipients will be responsible for managing the Individual Training Account voucher system in the Career Center. As appropriate, the WIOA sub-recipients will assist eligible individuals with the purchase of a training program that meets the individual's training needs as evidenced by supporting documentation in the participant's record. WIOA funded training activities may only be made available to adults, dislocated workers and out-of-school youth who have been determined to need training. The ITA shall cover tuition, fees, required books, required supplies, and required fees that are listed as mandatory by the training provider on an official course description, syllabus, program cost sheet, invoice, or other training provider documentation.

EFFECTIVE DATE: Immediately

EXPIRATION DATE: Indefinite

CONTACT: William Green, Executive Director

DISTRIBUTION: WIOA Adult, Dislocated Worker, and Out-of-School Youth Sub-recipients

William Green, Executive Director

Attachments: A – ECWDB ITA Policy
B – ITA Voucher
C – Voucher Control Log

1341 South Glenburnie Road ● New Bern, NC 28562
(252)636-6901 voice (252)638-3569 fax email:admin@ecwdb.org
An Equal Opportunity/Affirmative Action Employer

Eastern Carolina Workforce Development Board Individual Training Account (ITA) Policy

ELIGIBILITY:

Training services may be made available to eligible adults, dislocated workers, and out-of-school youth residing in Carteret, Craven, Duplin, Greene, Jones, Lenoir, Onslow, Pamlico and Wayne counties, who have been determined to need training and at a minimum receive either an interview, evaluation, or assessment, and career planning or any other method through which the WIOA sub-recipients can obtain enough information to make an eligibility determination; and it is determined that the individual is in need of training.

Once the individual has been determined in need of training services to obtain or retain employment leading to self-sufficiency or wages comparable to or higher than wages from previous employment; and the ability to participate successfully in training services, the WIOA sub-recipients will provide information regarding the availability of training. Individual Training Accounts will be discussed with the individual specifying his/her responsibility regarding the ITA. In consultation with the WIOA sub-recipients, the participant will review the statewide list of eligible training providers to determine available training options. The training provider's requirements for enrollment, performance outcomes, and cost for the training course selected will be discussed with the participant. It will be the participant's responsibility to identify and select a training provider from the State list of eligible providers that offer training approved by the Local Board.

The case file must contain a determination of need for training services as determined through the interview, evaluation, or assessment, and career planning informed by local labor market information and training provider performance information, or through any other career service received.

THE INDIVIDUAL TRAINING ACCOUNT (ITA):

Prior to issuing an ITA, sub-recipients must complete a Financial Award Analysis (FAA) for each individual enrolled in curriculum as a means to determine shortage/surplus of resources available. An FAA is not required for "short-term" training classes. All participants enrolled in curriculum must apply for a Federal Pell Grant. Sub-recipients must consider the availability of other sources of grants, excluding loans, to pay for training costs so that WIOA funds are used to supplement but not supplant other sources. Please refer to the Eastern Carolina Workforce Development Board's policy on WIOA Funds and Pell Grant.

Short-term and pre-requisite training courses such as CRC, CPR, Servsafe, etc., that do not lead to a credential but are required for employment and/or training may use the ITA voucher but should not be charged as an ITA expenditure. These expenditures would be charged as other training.

Individuals will use ITAs ***(Attachment B)*** for training services provided by training providers on the state approved Eligible Training Provider List that offers training approved in this local area. Training shall be directly linked to occupations that are in demand in the local area or in another area to which an adult, dislocated worker, or out-of-school youth receiving such services is willing to relocate.

The ITA shall cover tuition, fees, only required books, required supplies, and required fees that are listed as mandatory by the training provider on an official course description, syllabus, program cost sheet, invoice, or other provider documentation are allowable under the ITA. Optional, recommended, personal, or non-required items are not allowed under the ITA. Items that are needed to complete training that do not fall under an ITA expense are considered a supportive service and sub-recipients must follow the process outlined in the supportive services policy.

The ITA will be allocated on a semester basis with training to be completed within a two-year period. The individual must meet the training provider's attendance requirements for full-time student status and maintain a minimum 2.0 cumulative grade point average on a semester basis in order to be certified for continued funding under the ITA. The sub-recipients must obtain grades/transcript to confirm, case note it and scan into NCWorks Online prior to issuing the next ITA.

ITAs cannot be issued for remedial classes or repeat classes.

WIOA funds can only pay for one (1) occupational skills training program. Eastern Carolina allows for an exception when "stackable" credentials are obtained. Stackable credentials are a sequence of credentials that can be accumulated over time to build up an individual's qualifications and help them to move along a career pathway or career ladder to different and potentially higher-paying jobs. Examples of stackable credentials are below. The list below is not all inclusive and sub-recipients would need to check with the Local Area before issuing an ITA to ensure that the training is considered to be stackable.

a. NA I to NA II
b. NA I/II to LPN
c. NA I to Phlebotomy
d. Phlebotomy to NA I
e. LPN to RN

The ITA and all supporting documents (registration, receipts, etc.) should be uploaded into NCWorks Online.

Exceptions to the completion of training within a two-year period, full-time student status, or paying for remedial classes may be taken into consideration on a case-by-case basis. All exceptions must be approved by the Local Area prior to paying for the expenditure.

ITA LIMITS:

In an effort to maximize the funds available for adult, dislocated worker, and out-of-school youth occupational skills training activities, limits will be placed on the amount and duration of the ITAs. Limitations established by the Local Board will not be implemented in a manner that undermines the Act's requirement that training services be provided in a manner that maximizes customer choice in the selection of an eligible training provider.

To maximize training opportunities for as many eligible individuals as possible, the maximum ITA amount shall be consistent with the curriculum course rates offered through the North Carolina funded Colleges and/or Universities, not to exceed $5,000 per year. The maximum amount in ITAs for a two-year training program is $10,000. The maximum ITA limit is not an entitlement. The amount and duration of each participant's ITA award is determined on an individual basis.

In cases where the individual opts to purchase training services from an eligible training provider where the costs exceed the approved amount, the individual will be required to pay the additional costs associated with that training.

VOUCHER CONTROL LOG:

After the ITA is established, the WIOA sub-recipients will write the control number, name of training provider, WIOA customer/participant name, last 4 digits of the social security number or school ID number, date voucher issued, approved amount, date voucher was redeemed, and amount redeemed for on a voucher control log ***(Attachment C)***.

Payments from ITAs will be made to the approved training institutions by the authorized WIOA sub-recipients. Payment of training costs by WIOA will be coordinated with any payment of training costs by other grant assistance. The WIOA sub-recipients will be required to abide by contractual requirements, as well as federal, state, and local policies and procedures.

The WIOA sub-recipients will be required to track expenditures of resources by individuals to ensure that individual accounts are not over awarded through WIOA Title I funds for the ITA. Only training providers that are on the state Eligible Training Provider List will be reimbursed under the ITA training vouchers.

TRAINING REQUIRING TOOLS AND SUPPLIES:

Training requiring a significant investment in tools and supplies in excess of five hundred dollars ($500) will require three (3) quotes unless the training provider has identified a preferred vendor for the purchase of such tools. WIOA sub-recipients will adhere to the Local Area's supportive service policy for these purchases.

TRAINING THAT LEADS TO SELF-EMPLOYMENT:

All participants enrolled in Cosmetology, Barber, Massage Therapy or Esthetic Technology would be considered enrolled in training that leads to self-employment. All career advisors that have participants enrolled in training that leads to self-employment must complete follow-up for the four (4) quarters following exit and secure supplemental data to verify employment and earnings. Below is a chart that shows documents that can be used to verify employment and earnings.

Verification of:	WIOA Source Documentation
Employment	One of the following: • UI wage data match/administrative wage match, such as the National Directory of New Hires • Follow-up survey from program participants • Paycheck stubs, tax records, W2 form • Quarterly tax payment forms, such as an IRS form 941 • Document from employer on company letterhead attesting to an individual's employment status and earnings • Self-employment worksheets signed and attested to by program participants • Detailed case notes verified by employer and signed by the counselor
Wages	One of the following (consistent with TEGL 26-16): • Cross-Match with State and Out-of-State UI Quarterly Wage Records (intrastate and interstate) • Federal Government Employment Records (such as military employment, Department of Defense, Office of Personnel Management, and US Postal Service) • Cross-Match with Federal Administrative Wage Record Databases (such as the National Directory of New Hires) • State New Hires Registry • Signed Follow-up Survey Response from Program Participants • Copy of Pay Check Stubs, Payroll Slip, or Leave and Earnings Statements (minimum of two per TEGL 26-16) • Income Tax Records, W-2 Form, or Other Records from the State Department of Revenue or Taxation • Railroad Retirement System • Quarterly Tax Payment Forms (such as IRS Form 941) • A Signed Letter from an Employer on Company Letterhead (attesting to an individual's employment status and earnings) • Self-Employment or Sales Commission Worksheets Signed and Attested to by Program Participants • Cross-Match with Partner Program Administrative Databases (such as TANF, SNAP or other public assistance programs)

No participant shall be directly reimbursed for any training or training related expenses covered by an ITA. Any exceptions to this must be approved by the ECWDB Executive Director prior to any reimbursement.

ATTACHMENT B

Workforce Innovation and Opportunity Act
Individual Training Account
Voucher Certificate
AUTHORIZATION FOR TRAINING

ITA CONTROL #:	40 (LA)	(Year (2))	(ITA # (4))	(Sub-Recipient Identifier (4))	Date Authorized	

WIOA Customer:	Last 4 digits of Social Security # or School ID #:	Expected Completion Date *(Graduation Date)*

Approved Course of Study	Applied for PELL: ☐ Yes ☐ No ☐ NA *(Short-term Training)*
	☐ Adult ☐ Dislocated Worker ☐ Out-of-School Youth ☐ Other *(Indicate Program)*:

Semester ☐ Fall ☐ Spring ☐ Summer Year: _____

AUTHORIZED BY WIOA SUB-RECIPIENT				TRAINING PROVIDER			
Contact Person:		Phone:		Contact Person:		Phone:	
E-Mail:				E-Mail:			

APPROVED SERVICES: (Please fill in the approved amount for each service)

ALLOWABLE ITA COSTS: This authorization is limited to WIOA Title I training costs that meet WIOA requirements and are necessary for the approved course of study. In addition to approved tuition, only required books, required supplies, and required fees that are listed as mandatory by the training provider on an official course description, syllabus, program cost sheet, invoice, or other provider documentation are allowable under this ITA. Optional, recommended, personal, or non-required items are not allowable under this voucher and must not be billed to the ITA.

Application/Registration:	$	Fees :	$
Tuition:	$	Other Required *(Please specify)*:	$
Books (required only):	$		

TOTAL AMOUNT OF APPROVED FUNDS: $

This Voucher Certificate is approved and issued by:

Authorized Signature _____ Printed Name _____ Date _____

REDEMPTION OF VOUCHER

TO REDEEM: The above-named individual has been determined eligible and is being referred for training services through an Individual Training Account. To redeem this voucher, the training provider must submit an itemized invoice to the WIOA Sub-Recipient listed above at the end of each semester, quarter, term, or approved billing period. The invoice must include supporting documentation for each expenditure charged to the ITA, including documentation showing that books, supplies, and fees billed to this voucher are required for the approved training program. Acceptable supporting documentation may include an official course syllabus, program cost sheet, bookstore list, fee schedule, registration statement, or other provider-issued document identifying the cost as required. Before payment can be processed, the training provider must submit documentation with the ITA redemption invoice.

PROVIDER CERTIFICATION: By redeeming this voucher, the training provider representative indicated below certifies that all required supporting documentation is included or submitted with the invoice, and all costs billed to the ITA are allowable, required, accurate, and not paid by another source. Payment is subject to review and approval by the WIOA Sub-Recipient and cannot exceed the total amount of approved funds.

Provider Representative Name: _____ Title: _____

Date: _____

Please forward all invoices to the WIOA Sub-Recipient listed above. Total cost cannot exceed the amount of approved funds.

VOUCHER CONTROL LOG

WIOA Sub-Recipient	Program Year	Semester

CONTROL NUMBER	TRAINING PROVIDER	NAME OF WIOA CUSTOMER	LAST 4 OF SSN or SCHOOL ID #	DATE VOUCHER ISSUED APPROVED AMOUNT	DATE VOUCHER WAS REDEEMED AMOUNT REDEEMED FOR
				$	$
				$	$
				$	$
				$	$
				$	$
				$	$
				$	$
				$	$