



LOCAL INSTRUCTION LETTER 26-04

To:	Catawba Local Workforce Area
Subject:	Use of METRIX as Non-ETPL Training
Issuance Date:	August 6, 2026
Effective Date:	August 6, 2026

Purpose: This local guidance establishes expectations for the use of **METRIX from Equus Workforce Solutions** as a **non-ETPL training tool** under the Workforce Innovation and Opportunity Act to establish Measurable Skills Gain and/or credential.

METRIX may be used to support participant skill development, career readiness, occupational preparation, and attainment of documented learning outcomes. When properly assigned, documented, and verified, METRIX coursework may support:

- Career pathway preparation;
- Basic, workplace, digital, or occupational skills development;
- Measurable Skill Gain documentation, when aligned with WIOA MSG definitions;
- Credential-related preparation, when connected to a recognized postsecondary credential or industry-recognized certification; and
- Individualized service strategy, employment plan, or training plan goals.

METRIX must not be treated as an automatically approved Individual Training Account training provider unless it is listed on the applicable Eligible Training Provider List.

References:

- Training and Employment Guidance Letters (TEGLs) 10-16 change 3

Background: WIOA requires training services funded through Individual Training Accounts to be provided by entities listed on the Eligible Training Provider List, unless an exception applies.

METRIX is an online learning platform made available through Equus Workforce Solutions. The platform may include occupational, digital literacy, soft skills, workplace readiness, and certification preparation content. Some METRIX courses may result in completion certificates, while others may prepare participants for external certifications or recognized credentials.

Because METRIX is not being used locally as an ETPL-approved training provider under this guidance, staff must clearly document the purpose, service type, cost structure, participant need, course alignment, and expected outcome before assigning METRIX activities.

Policy: METRIX may be used under WIOA when the service is **participant-centered, documented, reasonable, necessary, and aligned with the participant's assessment, employment goals, and service strategy.**

METRIX should not be assigned simply because access is available. Staff must document why the activity is appropriate for the participant and how it supports employment, education, training, or credential attainment.

METRIX may be used locally for one or more of the following purposes:

A. Career Services Support

METRIX may be used as part of individualized career services to support:

- Digital literacy;
- Workplace readiness;
- Resume, interview, and job search preparation;
- Foundational employability skills;
- Basic computer skills;
- Occupational exploration;
- Skills remediation;
- Preparation for occupational training;
- Preparation for work-based learning;
- Career pathway development.

When used in this way, METRIX should be documented as an individualized career service or other applicable service code, consistent with state data entry guidance.

B. Youth Program Element Support

For WIOA Youth participants, METRIX may support one or more youth program elements, including:

- Tutoring, study skills, or instruction support;
- Occupational skills training, if locally allowable and properly structured;
- Education offered concurrently with workforce preparation;
- Leadership development;
- Adult mentoring support activities;

- Financial literacy education;
- Entrepreneurial skills training;
- Labor market and employment information;
- Postsecondary preparation and transition activities; or
- Follow-up support, where appropriate.

Youth use must be connected to the participants' Objective Assessment and Individual Service Strategy.

C. Pre-Vocational or Workforce Preparation Activity

METRIX may be assigned to help participants build foundational skills before entering occupational training, work-based learning, employment, or credential-bearing training.

Examples include:

- Microsoft Office basics before administrative training;
- Customer service modules before work experience;
- OSHA, safety, or workplace conduct preparation;
- Digital skills before remote or hybrid employment;
- Keyboarding or computer literacy before occupational training;
- Basic math or reading support connected to employment goals.

D. Certification or Credential Preparation

METRIX may be used to prepare participants for an external credential or certification exam if:

- The credential is recognized by industry or employers;
- The credential is connected to the participant's career pathway;
- The participant's employment plan or ISS identifies the credential goal;
- Staff document the credentialing entity and exam requirements; and
- Completion or credential evidence is collected and uploaded.

METRIX course completion alone should not automatically be reported as a WIOA credential or Measurable Skills Gain unless it meets WIOA credential standards and state reporting requirements.

Non-ETPL Training Treatment

METRIX may be used as a **non-ETPL learning activity** when it is not funded through an Individual Training Account as an ETPL occupational training program.

Local staff must distinguish between:

Use of METRIX	ETPL Required?	Notes
Career readiness, digital literacy, soft skills, or pre-vocational instruction	Generally, no	Document as career service or appropriate youth element
Short-term workforce preparation activity	Generally, no	Must be tied to assessment and service plan
Certification exam preparation only	Generally, no, if not funded as ITA training	External credentials must be separately verified
Occupational skills training funded as an ITA	Yes, unless exception applies	Provider/program must be ETPL-approved
Youth occupational skills training	Depends on structure and state/local policy	Must comply with youth program and procurement rules
Incumbent worker or customized training support	Depends on funding structure	Follow applicable local policy

Staff must consult the Workforce Development Administrator or designated program leadership before using METRIX in a way that resembles occupational skills training, an ITA, customized training, or a procured training service. If Metrix is used as a non-ETPL learning activity, staff must enter the appropriate activities (**328-Adult/DW & 430 Youth**).

Participant Eligibility and Suitability

Before assigning METRIX, staff must confirm and document:

1. The participant is enrolled in an appropriate WIOA program;
2. The participant has received an assessment identifying the need for the activity;
3. The activity is included in the Individual Employment Plan, Individual Service Strategy, training plan, or case note;
4. The participant has technology, internet access, accessibility supports, and time needed to participate;

5. The activity is reasonable and necessary for the participant's goal;
 6. The selected METRIX course or pathway aligns with labor market, training, employment, or credential objectives; and
 7. The expected outcome is clearly identified.
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Required Documentation Before Assignment

Before authorizing METRIX coursework, staff must document the following in the participant file:

- Participant needs based on assessment;
- Course, pathway, or module title;
- Start date and expected completion date;
- Purpose of assignment;
- Connection to employment, training, credential, or education goal;
- Whether the activity is expected to support an MSG;
- Whether the activity is expected to support a credential outcome;
- Staff person assigning the course;
- Any cost or license funding source, if applicable;
- Supportive service needs, if any; and
- Participant agreement or acknowledgment of expectations.
- Approved Metrix Checklist

Recommended case note language:

Participant assigned METRIX course/pathway: [Course Name]. Assignment is based on assessment showing need for [digital literacy/workplace readiness/occupational preparation/certification preparation]. Activity supports participant's IEP/ISS goal of [goal]. Expected outcome is [course completion/skill gain/certification preparation/external credential]. Participant understands completion expectations and documentation requirements.

Measurable Skill Gain Guidance

METRIX may support a WIOA Measurable Skill Gain when the participant is in education or training and the documentation meets one of the allowable MSG types.

Staff must not report an MSG solely because a participant logged into METRIX or completed an informal module. Documentation must demonstrate that the reported gain meets an allowable MSG category.

Possible MSG Alignment

MSG Type	Possible METRIX Use	Required Documentation
Educational Functioning Level gain	Usually not applicable unless tied to approved pre/post-test process	Valid assessment records
Secondary school diploma or equivalent	Not applicable unless connected to approved diploma/HSE program	Diploma/HSE documentation
Transcript/report card showing sufficient credits	Generally, not applicable unless METRIX is embedded in an education program issuing transcript credit	Transcript/report card
Satisfactory progress report toward milestone	May be applicable if METRIX is part of a structured training plan with documented milestones	Progress report from instructor, case manager, or training provider
Skills progression through exam or benchmark	May be applicable if METRIX provides a documented assessment, exam, or benchmark showing skill progression	Pre/post assessment, exam result, competency report, or benchmark documentation

Local MSG Conditions

For METRIX to be used as MSG documentation, the file must include:

- Identification of the applicable MSG type;
- Participant's training or education activity;
- METRIX course or pathway assignment;
- Completion or progress report;
- Assessment, benchmark, competency report, or milestone documentation;
- Staff verification case note;

- Date the skill gain occurred; and
- Data entry consistent with state reporting guidance.

METRIX course completion may support an MSG only when the documentation clearly demonstrates skills progression or satisfactory progress toward a training or education milestone.

Credential Guidance

A credential may be reported only if it meets WIOA and state reporting requirements.

METRIX certificates of completion should be reviewed carefully. **A METRIX completion certificate may document participation or course completion, but it should not automatically be reported as a WIOA credential unless it qualifies as a recognized postsecondary credential or secondary school diploma/equivalent under applicable guidance.**

Credential Reporting Requirements

Before reporting a credential outcome, staff must verify:

1. The credential was awarded by an appropriate credentialing entity;
2. **The credential is industry-recognized or otherwise allowable under WIOA;**
3. The credential is connected to the participant's training or education service;
4. The participant attained the credential during participation or within the allowable follow-up period;
5. The credential documentation is uploaded or retained in the file;
6. The credential is entered correctly in the state case management system; and
7. The credential is supported by case notes.

Examples

Scenario	Report as WIOA Credential?	Notes
Participant completes a METRIX soft skills module and receives a completion certificate	Usually no	May support service completion, not credential attainment
Participant completes METRIX Microsoft Office preparation and then earns Microsoft certification from Certiport/Microsoft-authorized process	Potentially yes	External certification must be verified

Scenario	Report as WIOA Credential?	Notes
Participant completes METRIX OSHA preparation and earns OSHA card/certificate from authorized provider	Potentially yes	Credentialing source must be verified
Participant completes METRIX course pathway but no external credential is awarded	Usually no	May support MSG if documentation qualifies
Participant earns industry-recognized certification after METRIX preparation	Potentially yes	Must meet WIOA/state credential rules

Data Entry Expectations

Staff must enter METRIX-related services in the state case management system according to state and local data entry guidance.

At minimum, case records should reflect:

- Correct program enrollment;
- Appropriate service code;
- Service start date;
- Actual end date;
- Course or activity description;
- Funding source, if applicable;
- MSG entry, if applicable;
- Credential entry, if applicable;
- Outcome documentation; and
- Supporting case notes.

Staff must avoid coding METRIX as ETPL-funded occupational training unless the training provider and program are approved on the applicable ETPL and the activity has been authorized according to ITA policy.

Supportive Services

Supportive services may be provided to enable participation in METRIX when allowable, necessary, reasonable, documented, and consistent with local supportive services policy.

Examples may include:

- Internet access support;
- Transportation to an SC Works Center or partner site for computer access;
- Childcare, where allowable and necessary;

- Assistive technology;
- Testing or certification exam fees, if allowable;
- Work-related supplies, where directly connected to the plan.

Supportive services must not be issued solely because a participant is assigned METRIX. The need must be documented and tied to participation, employment, training, or credential goals.

Accessibility and Equal Opportunity

Staff must ensure METRIX use complies with equal opportunity, accessibility, and nondiscrimination requirements.

Before assignment, staff should consider:

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|---------------------------------------|--|
| • Disability accommodations; | • Internet and device access; |
| • Assistive technology compatibility; | • Scheduling limitations; |
| • Language access needs; | • Literacy level; |
| • Digital literacy barriers; | • Need for staff-supported learning at an SC Works Center or partner location. |

Participants must be offered reasonable accommodations and meaningful access consistent with WIOA, ADA, Section 188, and local Equal Opportunity procedures.

Monitoring and Quality Assurance

METRIX use is subject to local, state, and federal monitoring.

Participant files may be reviewed for:

- | | |
|--|---|
| • Eligibility and enrollment; | • MSG documentation; |
| • Assessment-based need; | • Credential documentation; |
| • Service plan alignment; | • Case note quality; |
| • Correct service coding; | • Evidence of completion; |
| • Allowable cost; | • Supportive service documentation; and |
| • Procurement or licensing compliance; | • Equal opportunity compliance. |

Supervisors should periodically review METRIX cases to ensure consistent use and prevent improper reporting of credentials or MSGs.

Staff Responsibilities

Case Managers

Case managers are responsible for:

- Assessing participant need;
- Assigning appropriate METRIX coursework;
- Updating the IEP or ISS;
- Monitoring progress;
- Collecting documentation;
- Entering services and outcomes;
- Verifying MSG or credential documentation;
- Maintaining case notes; and
- Ensuring participant support needs are addressed.

Program Supervisors

Program supervisors are responsible for:

- Reviewing questionable use cases;
- Ensuring staff follow this guidance;
- Approving local exceptions, where permitted;
- Supporting data quality;
- Reviewing MSG and credential documentation before reporting, when needed; and
- Coordinating with the Workforce Development Administrator.

Workforce Development Administrator or Designee

The Workforce Development Administrator or designee is responsible for:

- Maintaining this guidance;
- Coordinating with state staff when clarification is needed;
- Ensuring consistency with local policy and state guidance;
- Reviewing monitoring findings;
- Providing staff training; and
- Approving any use of METRIX that may implicate ETPL, procurement, or ITA requirements.

Local Approval Requirements

Staff must obtain supervisory or administrative approval before using METRIX when:

- The activity is being treated as occupational skills training;
- The activity may be charged directly to WIOA funds through a vendor or license cost;
- The participant will receive supportive services tied to METRIX participation;
- The activity is expected to support an MSG;
- The activity is expected to support a WIOA credential;
- The participant is in a youth-funded occupational skills training activity;
- The activity is connected to customized training, incumbent worker training, or on-the-job training; or
- There is uncertainty about allowability or documentation.

File Documentation Checklist

Each METRIX participant file should include, as applicable:

Documentation Item	Required?
Assessment showing need	Yes
IEP, ISS, or training plan update	Yes
METRIX course/pathway title	Yes
Start and expected completion dates	Yes
METRIX course/pathway title	Yes
Start and expected completion dates	Yes
Case note explaining purpose and alignment	Yes
Participant acknowledgment or communication	Recommended
Progress reports or activity logs	If available
Completion certificate or report	If completed
MSG documentation	If MSG reported

Documentation Item	Required?
Credential documentation	If credential reported
Supportive service documentation	If issued
Supervisor approval	If required locally
Data entry verification	Yes

The Metrix Authorization Checklist (Attachment A) must be approved by delegated staff prior to reported a METRIX-related course in SCWOS as a credential or MSG.

Recommended Case Note Templates

A. Assignment Case Note

Participant was assigned METRIX course/pathway: [Course/Pathway Name] beginning [Date]. Assignment is based on assessment results and participant discussion indicating need for [Skill Need]. The activity supports the participant's IEP/ISS goal of [Employment/Training Goal] and is intended to support [career readiness/digital literacy/credential preparation/occupational preparation]. Participant was advised of completion expectations, documentation requirements, and available SC Works support.

B. Progress Case Note

Staff reviewed METRIX progress on [Date]. Participant has completed [Number/Percent] of assigned course/pathway and demonstrated progress in [Skill Area]. Participant remains on track/not on track for expected completion by [Date]. Staff provided follow-up guidance regarding [Next Step].

C. Completion Case Note

Participant completed METRIX course/pathway: [Course/Pathway Name] on [Date]. Documentation received includes [Completion Certificate/Progress Report/Assessment Result]. Completion supports the participant's IEP/ISS goal of [Goal]. Staff reviewed whether completion supports MSG and/or credential reporting. Outcome determination: [MSG reported/not reported; credential reported/not reported] based on [Reason].

D. MSG Verification Case Note

METRIX documentation was reviewed for Measurable Skill Gain reporting. Participant completed [Course/Assessment/Milestone] on [Date]. Documentation demonstrates [Skills Progression/Satisfactory Progress Milestone] through [Exam/Benchmark/Progress Report].

MSG type selected: [MSG Type]. Supporting documentation has been uploaded to the participant file.

E. Credential Verification Case Note

Credential documentation reviewed on [Date]. Participant earned [Credential Name] from [Credentialing Entity] on [Date]. METRIX was used as preparation for the credential. The credential is connected to the participant's training/employment goal of [Goal] and has been verified through [Certificate/Transcript/Issuer Documentation]. Credential entered in case management system on [Date].

Examples of Appropriate Use

Example 1: Digital Literacy for Adult Participant

An Adult participant seeking administrative employment lacks basic Microsoft Office skills. Staff assign METRIX digital literacy and Microsoft Office modules as individualized career services. Completion is documented in the file. No credential is reported unless the participant later earns a qualifying external certification.

Example 2: Youth Career Pathway Preparation

An Out-of-School Youth participant interested in healthcare completes workplace readiness, customer service, and medical terminology modules through METRIX. The activity is documented in the ISS and connected to postsecondary training exploration. Completion may support progress documentation, but credential reporting requires a qualifying credential.

Example 3: Certification Preparation

A Dislocated Worker completes METRIX coursework to prepare for a recognized IT certification exam. The participant later passes the certification exam through the authorized certifying body. Staff upload the certification documentation and may report the credential if all WIOA and state requirements are met.

Example 4: MSG Through Skills Progression

A participant enrolled in a structured training activity completes a METRIX pathway with pre- and post-assessment results showing competency progression. Staff verify that the documentation meets an allowable MSG type and enter the MSG with supporting documentation.

Prohibited or Restricted Uses

METRIX must not be used to:

- Bypass ETPL requirements for ITA-funded occupational training;

- Report a credential based only on a non-qualifying completion certificate;
 - Report an MSG without valid supporting documentation;
 - Assign training without participant assessment or plan alignment;
 - Provide unsupported supportive services;
 - Replace required case management contact;
 - Substitute for required youth program design elements without documentation;
 - Charge costs without proper authorization;
 - Duplicate services already funded by another source; or
 - Enroll participants in courses unrelated to their employment, education, or training goals.
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Local Review and Updates

This guidance should be reviewed at least annually and updated as needed based on:

- Changes in federal WIOA guidance;
 - State Workforce Development guidance;
 - SC Works data entry requirements;
 - ETPL policy changes;
 - Monitoring findings;
 - METRIX platform changes;
 - Equus Workforce Solutions contract or licensing changes; and
 - Local Workforce Development Board direction.
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Summary of Local Requirements

METRIX may be used as a non-ETPL learning resource when:

1. The activity is tied to assessment and participant goals;
2. The IEP, ISS, or training plan is updated;
3. Staff document the course, purpose, and expected outcome;

4. The service is coded appropriately and not misclassified as ETPL-funded ITA training;
5. MSG is reported only with valid skill gain documentation;
6. Credential is reported only when it meets WIOA/state credential criteria;
7. Supportive services are documented and allowable;
8. Accessibility and equal opportunity requirements are met; and
9. Supervisory approval is obtained when required.

Action: Please ensure that all appropriate staff receive and understand this policy guidance.

Inquires: Questions may be directed to Amanda Baker at abaker@catawbacog.org

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Amanda Baker
WIOA Administrator

Attachment A: Metrix Checklist

METRIX / WIOA Credential Review Checklist

For Case Manager Use

Purpose:

Use this checklist to decide whether a METRIX-related course, certificate, exam, or training outcome can be reported as a **WIOA credential** or **Measurable Skill Gain**, when applicable.

Participant Information

Item	Response
Participant Name	_____
State ID	_____
Program	_____ ☐ Adult ☐ Dislocated Worker ☐ Youth
Case Manager	_____
Review Date	_____
METRIX Course / Pathway	_____
Proposed Credential Name	_____
Credentialing Entity / Issuer	_____

1. Basic Eligibility Check

Question	Yes	No	N/A	Notes
Is staff requesting to report this as a WIOA credential or MSG?	☐	☐	☐	
Is there a specific credential name?	☐	☐	☐	
Is the credential issued by an organization other than METRIX, or by a recognized credentialing entity?	☐	☐	☐	

Question	Yes No N/A Notes
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Is the outcome more than a METRIX participation or course completion certificate?	☐ ☐ ☐
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Is the credential connected to the participant’s IEP, ISS, service strategy, or training plan?	☐ ☐ ☐
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Stop Check:

If the only proof is a METRIX course completion certificate and no recognized credential or credentialing entity can be verified, **do not approve** as a WIOA credential.

2. Credential Type

Check the type that best fits the credential:

- ☐ Secondary school diploma or recognized equivalent
- ☐ Recognized postsecondary credential
- ☐ Industry-recognized certificate or certification
- ☐ Occupational license
- ☐ Degree or academic certificate
- ☐ Other state/local approved credential

Credential Type Selected: _____

3. Credentialing Entity Review

Question	Yes No N/A Notes
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Is the credential issued by a recognized entity, such as an educational institution, licensing board, employer-recognized organization, or industry certifier?	☐ ☐ ☐
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Can staff verify the issuer’s name and authority?	☐ ☐ ☐
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Is the credential recognized by employers, education providers, licensing bodies, or industry?	☐ ☐ ☐
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Examples of credentialing entities:

Microsoft, Certiport, CompTIA, OSHA-authorized providers, ServSafe/National Restaurant

Association, NCCER, NIMS, state licensing boards, technical colleges, community colleges, accredited education providers, or other recognized certifying bodies.

Credential issued by: _____

4. WIOA Service and Goal Connection

Question	Yes	No	N/A	Notes
Was the METRIX activity included in the participant's IEP, ISS, assessment, service strategy, or training plan?	☐	☐	☐	
Does the credential support the participant's employment, education, or training goal?	☐	☐	☐	
Was the participant receiving an allowable WIOA education or training service connected to the credential?	☐	☐	☐	
Was METRIX used as a learning or credential preparation tool, rather than automatically treated as the credential?	☐	☐	☐	

5. ETPL / Training Provider Check

Question	Yes	No	N/A	Notes
Was METRIX used as a non-ETPL learning resource or credential preparation tool?	☐	☐	☐	
If this was occupational skills training funded as an ITA, was the provider/program ETPL-approved?	☐	☐	☐	

Stop Check:

If the activity was occupational skills training funded through an ITA and the provider/program was not ETPL-approved, **escalate before approving the credential.**

6. Required Documentation

Acceptable documentation may include a certificate, license, transcript, digital badge verification, credential registry record, exam score report, or other official proof from the credentialing entity.

Required Item	Yes	No	N/A	Notes
Official credential documentation received	☐	☐	☐	
Participant name appears on the document	☐	☐	☐	
Credential name appears on the document	☐	☐	☐	
Issuing organization appears on the document	☐	☐	☐	
Date awarded appears on the document	☐	☐	☐	
Documentation is uploaded or retained in the participant file	☐	☐	☐	
Case note explains the credential, issuer, award date, METRIX connection, and WIOA service	☐	☐	☐	

7. Timing and Data Entry

Question	Yes	No	N/A	Notes
Was the credential earned during participation or within the allowable post-exit reporting period?	☐	☐	☐	
Was the correct award date entered?	☐	☐	☐	
Was the credential entered in the correct program/application record?	☐	☐	☐	

8. Approval Decision

Credential Determination:

- ☐ Approved as WIOA credential
- ☐ Not approved as WIOA credential
- ☐ Pending additional documentation
- ☐ Escalated for supervisory/local area review
- ☐ Escalated for state guidance

Reason for Determination:

If not approved, select reason:

- ☐ METRIX completion only
- ☐ No recognized credential identified
- ☐ Issuing entity not verified
- ☐ Not connected to WIOA education/training service
- ☐ Not tied to IEP/ISS/training goal
- ☐ Documentation incomplete
- ☐ Earned outside allowable reporting period
- ☐ ETPL/procurement concern
- ☐ Other: _____

9. Signatures

Career Advisor / Case Manager

Name: _____

Signature: _____

Date: _____

Supervisor / Program Manager, if required

Name: _____

Signature: _____

Date: _____

Workforce Development Administrator / Designee, if escalated

Name: _____

Signature: _____

Date: _____

Case Note Template

METRIX Credential Review

Staff reviewed the participant's METRIX-related outcome for WIOA credential reporting.

Participant completed METRIX course/pathway: **[Course/Pathway Name]** on **[Date]**.

The proposed credential is **[Credential Name]**, issued by **[Credentialing Entity]** on **[Award Date]**.

METRIX was used as **[credential preparation / learning platform / other]**.

Documentation reviewed includes **[certificate/license/transcript/exam report/digital badge/verification record]**.

The credential is connected to the participant's **[IEP/ISS/training goal]** and WIOA service **[Service Name/Code]**.

Credential determination: **[Approved / Not Approved / Pending / Escalated]**.

Reason: **[Brief explanation]**.

Documentation has been uploaded to the participant file.

Quick Decision Rule

A METRIX-related outcome may be approved as a WIOA credential only if staff can answer **Yes** to all of the following:

1. Was a specific credential earned?
2. Was it issued by a recognized credentialing entity?
3. Is it more than METRIX course participation or completion?
4. Is it tied to the participant's WIOA education or training activity?
5. Is it connected to the participant's employment or career pathway goal?
6. Was it earned within the allowable reporting period?
7. Is official documentation in the participant file?

If any answer is **No**, do **not** approve the METRIX-related outcome as a WIOA credential until corrected or escalated.