Policy Letter #6

TO: **All Staff**

FROM: **Samantha Wullenwaber, Director**

SUBJECT: **Repeat Customers Policy**

PURPOSE

This policy establishes guidelines for the eligibility review and enrollment consideration of repeat customers seeking additional services through programs administered by the Mid-Carolina Workforce Development Board (Mid-Carolina WDB). It ensures equitable access to Workforce Innovation and Opportunity Act (WIOA) services while maintaining accountability for public funds and prioritizing individuals seeking services for the first time.

BACKGROUND

The Mid-Carolina WDB administers workforce services through the NCWorks Career Center system under WIOA. These services include training opportunities and supportive services designed to assist eligible individuals in gaining the skills necessary to obtain and retain employment.

Occasionally, individuals who have previously received WIOA-funded services may return to the NCWorks Career Center seeking additional assistance. In such cases, it is necessary to ensure that program resources are allocated appropriately while maintaining compliance with local policies regarding funding limits and program priorities. This policy establishes the criteria and procedures for reviewing and serving repeat customers.

ACTION

The following procedures shall apply when serving repeat customers seeking additional services through the NCWorks Career Center:

1. **Definition of a Repeat Customer**
   A repeat customer is defined as an individual who previously received training or supportive services through an NCWorks Career Center, has been exited from the program for a minimum of 181 days, and has returned to request additional workforce services.

2. **Enrollment Priority**
   Repeat customers shall not receive priority for enrollment into WIOA-funded programs. Priority for services should be given to individuals seeking first-time enrollment due to the demand for workforce services and the expectation that repeat customers have already gained employable skills as a result of their previous sponsorship.

3. **Review of Prior Financial Assistance**
   At the time of intake, Career Advisors must review the participant's prior program records to determine the total amount of training funds previously expended. Case notes

must be entered documenting this review to ensure the participant has not exceeded the established lifetime training cap of $8,000.00.

4. **Documentation Requirements**
   Career Advisors are required to document the intake and eligibility review process in case notes within the appropriate case management system. Documentation must clearly indicate the participant's prior program participation and the review of previous financial expenditures.

5. **Consideration of Priority of Service**
   Career Advisors must follow the guidance outlined in Policy Letter #4 – Priority of Service when evaluating repeat customers for training opportunities. This policy provides additional criteria that must be considered when determining eligibility and enrollment prioritization.

REFERENCES
Mid-Carolina WDB Policy Letter #4 Priority of Service

ATTACHMENT
None

CREATION DATE
July 2022

REVISION DATES
January 2024
December 2024
March 2026