NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

JOSH STEIN • Governor
DEVDUTTA SANGVAI • Secretary
LISA TUCKER CAULEY • Division Director, Human Services

September 4, 2025

DEAR COUNTY DIRECTOR OF SOCIAL SERVICES

ATTENTION: ADULT SERVICES SUPERVISORS AND PROGRAM MANAGERS

SUBJECT: NC OAASIS IMPORTANT DATES & INFORMATION

REQUIRED ACTION: ☒ Information Only ☒ Time Sensitive ☐ Immediate

The Division of Social Services (DSS) is pleased to share additional details regarding the launch of the new NC OAASIS platform. As a reminder, NC OAASIS (North Carolina Aging and Adult Services Information System) is a modernized system that will replace the APS-R (Adult Protective Services-Registry) and DPAG (Disinterested Public Agent Guardian) legacy systems.

Similar to Path NC for Child Welfare, NC OAASIS is being built using Salesforce cloud-based software. This deliberate design choice will allow counties to benefit from existing familiarity with the platform, supporting a smoother transition.

Data Migration Process
DSS, in collaboration with Brite Systems and state IT partners, is migrating four years of legacy APS-R and DPAG data, approximately 715,000 records, into NC OAASIS.

Medicaid ID/CNDS Numbers
As part of the migration, all APS-R and DPAG legacy records will undergo a detailed data analysis by the state IT team. The goal of this process is to ensure that every client record in NC OAASIS is accurately matched to a **unique identifier** for continuity across systems.
- **When a Medicaid ID exists:**
  If a client already has a Medicaid ID, also referred to as a CNDS number (Common Name Data Service number), that identifier will be attached to the client's legacy record in NC OAASIS.
- **When a Medicaid ID does not exist:**
  If a client does not have a Medicaid ID, the system will generate and assign a new CNDS number. This ensures that every client record has a unique number, preventing duplication and improving search functionality across state and county systems.
- **Why this matters:**
  The CNDS number is the **primary search field** in NC OAASIS. Agencies will use it to locate clients when entering or updating APS and Guardianship case information. This uniform approach improves accuracy, supports cross-program coordination, and ensures that clients are consistently identified across DHHS systems and other service databases.

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES • DIVISION OF SOCIAL SERVICES

LOCATION: 820 S. Boylan Avenue, McBryde Building, Raleigh, NC 27603
MAILING ADDRESS: 2401 Mail Service Center, Raleigh, NC 27699-2401
www.ncdhhs.gov • TEL: 919-855-3400 • FAX: 919-334-1018

AN EQUAL OPPORTUNITY / AFFIRMATIVE ACTION EMPLOYER

- **For new clients (not in the import):**
  If a client has never received services and is not part of the historical data import, agency staff will continue to follow the established SIS (Services Information System) process to open the individual for services using the DSS-5027 form. After entering the client's SIS ID, the system will automatically default to the CNDS screen:
  - County staff will first search to see if the client already exists in CNDS.
  - If the client is not found, staff can add the new client, at which point the system will assign a CNDS number.
- **Where to find guidance:**
  Step-by-step instructions on using the CNDS screen and adding new clients are available in the **SIS User's Manual**. Additional NC OAASIS-specific instructions and demonstrations (e.g., searching clients, and adding new records) will be provided in the **DHHS Adult Services LMS** as part of the NC OAASIS training modules.

This CNDS process is a critical foundation for NC OAASIS. It ensures that all clients, whether migrated from legacy data or added as new, are searchable and correctly linked across county and state systems.

Important Dates to Remember
Data analysis of legacy records is underway and will be completed by **September 19, 2025**. Until **September 12, 2025, at 5:00 p.m.**, counties should continue:
- Entering **DSS-5026 forms** in the APS-R legacy system.
- Submitting **DSS-7016 forms** to 7016.DHHSForms@dhhs.nc.gov.

At that point, the APS-R and DPAG systems will shift to **read-only**. County staff will still have access to view records, and historical data will remain available in the **Client Services Data Warehouse (CSDW)**.

From **September 15–19, 2025**, a system freeze will occur. No DSS-5026 or DSS-7016 forms can be entered in the legacy systems or NC OAASIS during this five-day period. Counties will not be penalized for forms due at this time.

On **September 22, 2025**, NC OAASIS officially launches. Counties should begin entering:
- All pending **DSS-7016 forms** (previously emailed to DHHS).
- All pending **DSS-5026 forms**.

For new clients, staff must follow the NC OAASIS user manual, training videos, or guides to search for or add the individual before forms are entered.

NC OAASIS Training
Training for **County Supervisor** and **County Staff** roles is available in the **DHHS Adult Services LMS**. Training includes guidance on entering, editing, and approving DSS-5026 and DSS-7016 forms.
- Staff who already have LMS access may begin training now.
- Agency staff needing access should request access by completing a **Platform Registration and Support form**.

Updated DSS-5026 and DSS-7016 Forms
NC OAASIS captures more detailed information than the legacy systems, and both the **DSS-5026** and **DSS-7016** forms have been updated to align with these parameters. The revised forms will be posted on the **DHHS Adult Services SharePoint** and the **DHHS Forms and Manuals site** beginning **September 22, 2025**, which is also the effective date for their use.
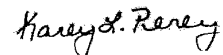
The official launch of NC OAASIS is scheduled for **Monday, September 22, 2025**. This adjusted date, moved from the original October 1st timeline, was selected to ensure Brite Systems partners are available to provide support during the first week of go-live. Counties should make it a priority to key all DSS-5026, and DSS-7016 forms held during the five-day system freeze into NC OAASIS during this first week, while vendor support is fully available.

For assistance:
- **Technical issues (system access or functionality):** Contact the OAASIS Help Desk at **DHHS.ITD.NCOAASIS.HELPDESK@dhhs.nc.gov**.
- **Programmatic questions (Adult Services guidance):** Email **DHHS.AdultServices@dhhs.nc.gov**.

Thank you for working together to strengthen Adult Services across North Carolina.

Sincerely,

Karey L. Perez

Karey Perez
Deputy Director, Adult Services

08_2025