
Professional Collaterals for Qualified Individuals

SSIS Worker

February/2026

Professional Collaterals for Qualified Individuals (QIs)

Professional collaterals are primarily entered into workgroups because they are providing professional services or resources for families or clients at an agency. Unlike collaterals, these individuals have a relationship with clients due to a professional relationship with them, such as a Qualified Individual (QI).

Qualified Individuals are required to be added to SSIS as Professional Collaterals and associated with a Business Organization. This allows for the Qualified Individual (QI) to be re-used in multiple workgroups while maintaining the same SSIS Person Number for the Qualified Individual (QI) Portal. Agencies should create a specific Business Organization to associate the Qualified Individuals with.

Create “Qualified Individuals” Business Organization

1. Search for the business organization to make sure it does not already exist in SSIS.
2. If the business organization is found, review the business organization record to determine if it is the same business organization and/or make updates or changes as needed.
3. From the Business Organization Search node in the Tree View, access the Action menu and select New Business Organization.
4. Enter the name of the business organization in the Name field on the General information tab.
5. Select the status from the Bus. Org. Status drop-down menu.
6. Enter the effective date in the Effective field.
7. Select the type of business organization from the Type drop-down menu.
8. Enter notes or description in the Comments field, if applicable.
9. Click Save.

SSIS Worker/Fiscal - 26.1.2.12 - [Business Organization Search]

File View Searches/Logs Tools Window Help Testers

Business Organization Search

- Nicole's QI Group
- New

Name: Qualified Individuals Bus. Org. Status: Active Effective: 2/3/2026

Voucher Method: Default 1099: Type: Other

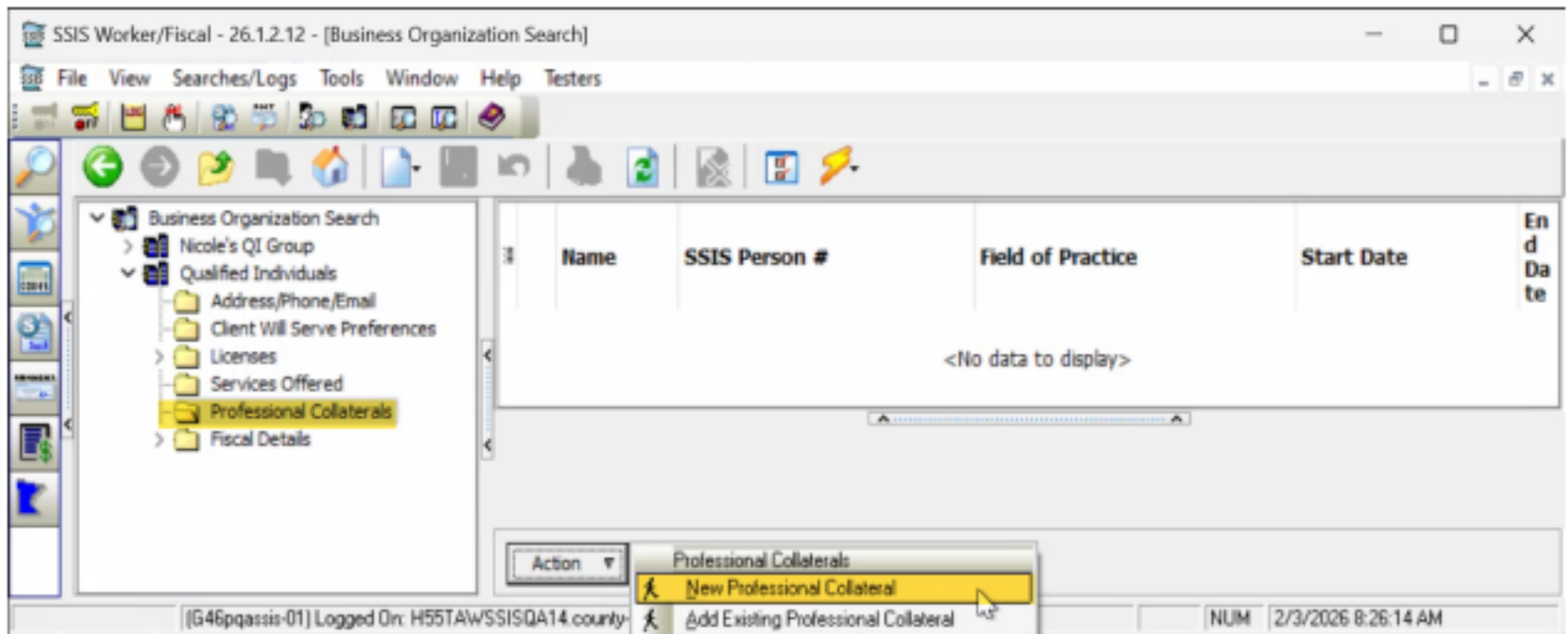
County Vendor #: SSIS Bus. Org. #: 203101531 MMIS Provider #: Federal Tax ID: NPI:

Comments:

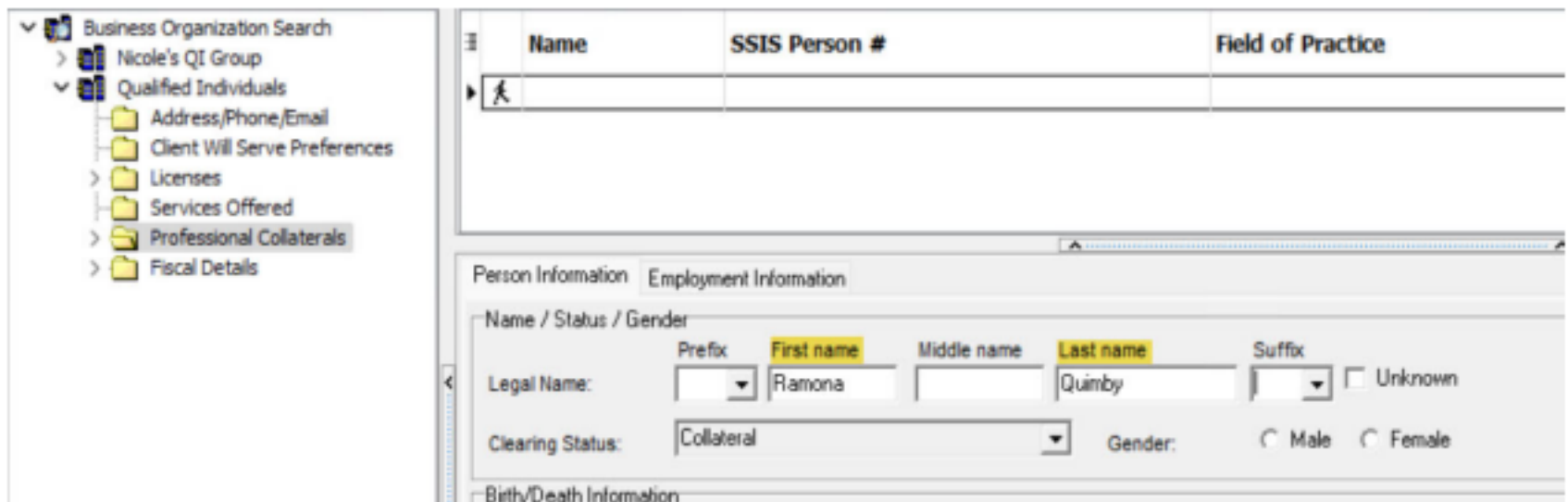
Create Professional Collaterals for Qualified Individuals

To enter a professional collateral in SSIS, first and last names fields are required to enter, in addition to the entry of at least one employment record. Agency workers should also enter the address, phone number and email of the Qualified Individual, this will populate into the QRTP Assessment.

1. Expand the Qualified Individuals business organization.
2. Select the folder labeled Professional Collaterals.
3. From the Action Button, select New Professional Collateral.



4. Enter the Qualified Individuals first and last name and select Save.



SSIS Tip: To add professional collaterals to a workgroup, Person Search must be accessed through the Participants folder of the workgroup, a quick add button, Action menu, or from a Person Search button within a Detail screen.

Once professional collaterals are entered, users can access them from their agency's database. There is no statewide database of professional collaterals available for search. During the search, if a record is not found, new individuals may be entered to the SSIS database. The professional collaterals can be accessed in any workgroup within an agency.