

Fiscal Agent Employer/Client Checklist

#	Employer/Client Start-up Forms	When Required
1	Employer/Client Information Form	For all Employer/Clients
2	IRS Form 2678: Employer/Payer Appointment of Agent	For all Employer/Clients NOTE: By signing Form 2678, you authorize iLIFE to be your fiscal agent (“Fiscal Employer Agent”).
3	IRS Form SS-4: Application for Employer Identification Number	For all Employer/Clients NOTE: If the Employer/Client is a minor, write the child’s Social Security number beneath the parent/guardian’s signature.
4	IRS Form 8821: Tax Information Authorization	For all Employer/Clients
5	Information for the Fiscal Intermediary	For all Employer/Clients
	** Not included in this packet ** Guardianship and/or Power of Attorney of Finance (Form F-00036) documents	If a guardian or representative with Power of Attorney of Finance will be signing on behalf of the Employer/Client

	Resources	When Needed
	Employer/Client Status Change Form	Optional; not required for start up. Only needed if Employer/Client needs to submit changes during or after the application process.
	Consent for the Release of Confidential Information	Optional; not required for start up. Only needed if Employer/Client wants to disclose Employee information with a third party.

 **IMPORTANT:**

Not submitting all documents or submitting incomplete and/or unsigned documents will delay the application process.

To process the application, iLIFE must receive documents numbered 1 – 5 on the list above. To be processed, all submitted documents must be complete and signed.