



IRIS Participant Paperwork Checklist

Document Name	Required/Optional
Form SS-4 Application for Employer Identification Number	Required
Form 2678 Employer/Payer Appointment of Agent	Required
Form 8821 Tax Information Authorization	Required
Guardianship or Power of Attorney paperwork	Required if participant has a guardian or POA
Participant Direct Deposit	Optional

** Please make sure all **REQUIRED** documents are filled out accurately before submitting for processing**