



Survivor Benefits (in the event of an employee death)

Designation of Beneficiary

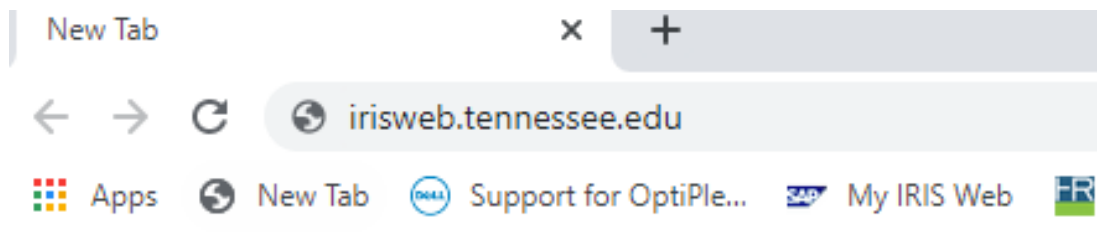
UT survivor benefits are a great way to plan for the future and take care of your loved ones when you can't be there. By completing just a few simple steps online you can ensure some quick financial relief to your named beneficiaries during a difficult time.

Things you might need to complete the eForm:

- Beneficiary name(s)
- Beneficiary's birthdate (not your birthday)
- If applicable, name of legal guardian
- Beneficiary's address (international address option is available)
- Beneficiary's email
- Beneficiary's phone number
- Beneficiary's Social Security Number or Tax ID
- Any relevant supporting documents that you wish to attach (example – copy of will or estate)

To complete/update your beneficiary online:

1. Open your browser, type irisweb.tennessee.edu in the search bar and press enter.



2. Log into the IRIS portal using your UT NetID and password.

CENTRAL AUTHENTICATION SERVICE

Please enter your NetID and password:

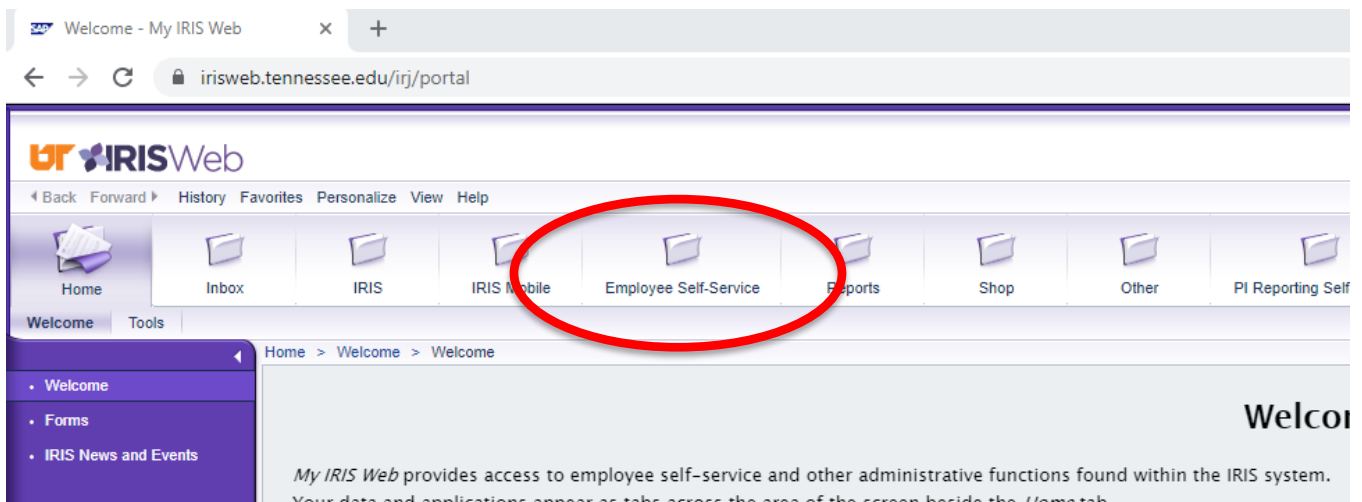
NetID:

Password:

By logging in to this site, you agree to the terms of the [UT Acceptable Use Policy](#).

Two Factor at UT

3. Select *Employee Self-Service* in the top/middle of your screen.




4. Scroll down and select *personal information*.

The screenshot shows the 'Employee Services' page. At the top, there is a navigation bar with 'Map', 'Directory', and 'Index'. Below this, the 'Benefits and Payment' section is visible, followed by a 'Quick Links' section with 'Online Pay Statement'. The 'Personal Information' section is highlighted with a red circle. Below it, another 'Quick Links' section contains 'Outside Interest Disclosure'.


Employee Services

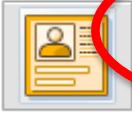
▼ **Map** Directory Index

 **Benefits and Payment**

In this area, you can use services to display your salary statement and other information regarding your payment.


Quick Links

 [Online Pay Statement](#)

 **Personal Information**

Display your personal data from the IRIS System. Data such as: demographic information, organizational assignments, addresses, education, communication and bank information.

Quick Links


 [Outside Interest Disclosure](#)


5. Scroll to *beneficiary electronic form*. Once you click the link the new online eForm should appear.


Personal Information


Back


▼


 **Personal Profile**
Use the links below to access your personal information.


 [Personal Profile](#)
Use this link to display your personal data (for example, address information or bank details). (Address) may be updateable. Use the link below for the Personal Data Form to update information. Personal Data Form should be submitted to your local Human Resource Office.


 [Outside Interest Disclosure](#)
This form is for the University of Tennessee President, Chancellors, and other designated administrators under the University's Conflict of Interests Policy.

 [Personal Data Form](#)
Use this link to download the Personal Data Form to change information in your Personal Profile.

 [Personal Data Form Instructions](#)
Use this link to download instructions for completing the Personal Data Form to change information.

 [My HR128 Training History](#)
Use this link to check your HR 128 status using the training history stored in IRIS.

 [Vaccination Verification](#)
This form is used to provide information on your vaccinations.

 [Beneficiary Electronic Form](#)
Use this link to designate your beneficiary in the event of death per Policy HR0307.

If you do not wish to designate a beneficiary in the event of your death, you may select the box indication “you do not wish to designate a beneficiary.” In this case, you should check the electronic signature box to digitally sign the document then select submit at the top of your screen to complete your form with no beneficiary listed.

The screenshot shows the 'Beneficiary EForm' interface. At the top, there is a navigation bar with a 'Menu' dropdown, a 'Submit' button, and links for 'Attach Supporting Documents', 'View PDF', and 'International Addresses'. Below this is a disclaimer: 'beneficiaries, each must be named and listed individually.) Distribution may not be made directly to a minor child. A guardian or custodian along with their contact information should be listed if the intended beneficiary is a minor.'

Annotation 1: A red circle highlights the checkbox 'I do not wish to designate a beneficiary. I understand that by not designating a beneficiary, in the event of my death, survivor benefits will be distributed in accordance with Policy HR0307.'

Annotation 2: A red circle highlights the 'Electronic Signature' section, which includes the checkbox 'I acknowledge that by clicking submit I am generating my digital signature on this document.'

Annotation 3: A red circle highlights the 'Submit' button in the top navigation bar.

The 'Employee Information' section contains the following fields: Employee Name (Roe, Julie Ann), Personnel Number (214470), Email (JMONDAY@tennessee.edu), and Phone ((865)974-6452). To the right, there are radio buttons for 'Co-Beneficiary (Equal Shares with Primary Beneficiary)' and 'Contingent Beneficiary', along with a 'Definitions' button.

Below the employee information is a tabbed interface for beneficiaries, with 'Primary' selected. The 'Primary' tab shows fields for Name of Beneficiary, Beneficiary Birth Date (MM/DD/YYYY), Beneficiary's relationship to you, Legal Guardian/Custodian/Conservator, Address 1, Address 2, City, State, Zip Code, Email, Phone ((123)456-7890), and SSN or Tax Id. There is also an 'International Address' checkbox and a note: '(Use button above to enter International Address - Do Not enter domestic address fields)'. A 'Go To Next Tab to Add Additional Beneficiary' link is at the bottom.

If you wish to designate one or more beneficiaries you must complete the rest of the eForm. You may list up to nine beneficiaries in addition to the primary beneficiary. There are two definitions for your beneficiary designation and you should select the box for the one that applies to you.

This screenshot is identical to the one above, showing the 'Beneficiary EForm' interface. The annotations are the same: 1. The checkbox for not designating a beneficiary; 2. The 'Electronic Signature' checkbox; 3. The 'Submit' button. The form fields and layout are consistent with the previous image.

Co-Beneficiary: Receives equal shares of the survivor benefit with the primary beneficiary. In the event that a named co-beneficiary precedes the employee in death, the survivor benefit will be split equally among remaining co-beneficiaries.

Contingent Beneficiary: Receives survivor benefit only if the primary beneficiary cannot or will not accept the benefit. Unlike a co-beneficiary, the employee will need to select the percentage of the survivor benefit that each contingent will receive. In the event that a named contingent beneficiary precedes the employee in death, that contingent's percentage of the survivor benefit will be split equally among remaining contingent beneficiaries.

6. Once the eForm is complete with your desired beneficiary information and any relevant supporting documents attached, simply check the electronic signature box to digitally sign the document. You may select **View PDF** at the top of the page to print a copy for your records **before** you click submit.
7. Finally, select submit at the top of your screen to complete your eForm. The completed document will be automatically upload to your employee file with Human Resources. In the event of an employee death, HR will use the most recent (dated) eForm on file.

The screenshot shows the 'Beneficiary EForm' interface. At the top, there is a navigation bar with buttons for 'Submit', 'Attach Supporting Documents', 'View PDF', and 'International Addresses'. Below this, there is a section for 'Employee Information' with fields for Name, Personnel Number, Email, and Phone. To the right of this section, there are radio buttons for selecting a beneficiary type: 'Co-Beneficiary (Equal Shares with Primary Beneficiary)' and 'Contingent Beneficiary'. Below the beneficiary type selection, there is an 'Electronic Signature' section with a checkbox that reads: 'I acknowledge that by clicking submit I am generating my digital signature on this document.' This checkbox and the surrounding text are circled in red. Below the signature section, there are tabs for adding multiple beneficiaries, labeled 'Primary', 'Beneficiary 1', 'Beneficiary 2', etc. The 'Primary' tab is active, showing fields for the beneficiary's name, birth date, relationship, and address. At the bottom of the form, there is a 'Go To Next Tab to Add Additional Beneficiary' link.

For questions and technical assistance with the eForm submission and ESS, contact the IRIS Help Desk at irishelpdesk@tennessee.edu.

If you have any questions about Policy HR 0307 Benefit in the Event of an Employee Death, contact Human Resources at (865) 974-6642 and press three for Employee Relations.