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.

3. Select *Employee Self-Service* in the top/middle of your screen.
4. Scroll down and select *personal information*.
5. Scroll to *beneficiary electronic form*. Once you click the link the new online eForm should appear.
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.

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.
**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.

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.