



Providing a future you can depend on

To: TRS Members
RE: TRS Confidentiality Policy—We’re Looking Out for You!
Date: March 19, 2004

At the Teachers Retirement System of Georgia (TRS), we are committed to honoring the privacy of our members. In an effort to protect our members, we adhere to a strict policy regarding the release of confidential information. The TRS Confidentiality Policy helps to ensure that the release of personal information to a third party is authorized by the member or a properly executed power of attorney or guardian.

The following applies to all persons and entities requesting information about a TRS member.

1. No confidential information will be provided to a person outside TRS, unless a written request is received via fax or mail by the member or retiree to whom the information pertains. This applies to phone call, email, fax, regular mail and Internet-based requests. Information will only be released if the signature on the release form or letter matches the signature on file with TRS, although further confirmation of identification may be required.
2. If a properly executed power of attorney or guardianship form exists and is on file with TRS, confidential information may be released to the designated person upon written request of the person holding the power of attorney or guardianship, as long as the signature on the request matches the signature on the power of attorney or guardianship form, although further confirmation of identification may be required.
3. Confidential member information requested by an employer for use in its ordinary course of business will be released to the employer only with the written consent of the member. Information will only be released if the signature on the release form or letter matches the signature on file with TRS, although further confirmation of identification may be required. It is preferable that approval of release of confidential information by TRS to an employer be made by completion of the TRS form entitled "Certification and Information Release Authorization."
4. If requested, confidential information may be given to the Attorney General and the Department of Law, the Office of Planning and Budget, or the state auditor and the Department of Audits and Accounts for use and public disclosure in the ordinary performance of those officers' and offices' duties. Also, confidential information may be given to federal or state regulatory or law enforcement agencies in the course of their official duties. A "confidentiality agreement" shall be obtained before the information is released.

All requests for the release of confidential information by a third party must be made in writing. Requests can be in the form of a letter or on the TRS Certification and Information Release Authorization form, available on the TRS website (www.trsga.com in the forms section entitled "Information Release Authorization Form") or by calling the TRS office. Release forms and letters on file with TRS will be valid for one year from the date on the form or letter. Once that time period expires, a new release document, signed by the member, will be required for the release of confidential information.

A member requesting information about his or her own TRS account will be required to provide specific information that identifies himself or herself as the appropriate member.

This policy has also been posted on our website in the Active Member, Retiree and News sections. If you have questions regarding this policy, please contact TRS at (404) 352-6500 or (800) 352-0650.