

**Gregg Township, Centre County**  
**Board of Supervisors**  
Resolution R-17-05  
Disposition of Records

**BE IT RESOLVED BY** the Board of Supervisors, Gregg Township, Centre County, Pennsylvania, that

**WHEREAS**, by virtue of Resolution R#010-07-13 adopted on the 11<sup>th</sup> of October, 2007, Gregg Township declared its intent to follow the schedules and procedures for the disposition of records as set forth in the Pennsylvania Historical and Museum Commission *Municipal Records Manual*, approved on December 16, 2008, last revised July 23, 2009: and

**WHEREAS** in accordance Act 428 of 1968 each individual act of disposition shall be approved by resolution of the governing body of the municipality;

**NOW, THEREFORE**, be it resolved by the Board of Supervisors of Gregg Township, Centre County, Pennsylvania, in accordance with the above cited Municipal Records Manual hereby authorizes the disposition of records as cited on the attached Appendix A.

THIS RESOLUTION DULY ADOPTED this Second day of January, 2018 by the Board of Supervisors of the Township of Gregg, Centre County, Pennsylvania.

**BOARD OF SUPERVISORS**

Douglas P. Bierly  
Douglas P. Bierly

Keri Miller  
Keri Miller

Charles W. Stover  
Charles W. Stover

**ATTEST:**

Jennifer Snyder  
Jennifer Snyder  
Secretary/ Treasurer

PA Historical and Museum Commission's Municipal Records Retention Manual - Appendix A

| Code                              | Category   | General Record Description   | Retention Period   | Records for destruction |
|-----------------------------------|--|--|--|-------------------------|
| <b>Administrative and Legal</b>   |  |  |  |                         |
| AL-1                              | Administrative Subject Files                           | General Correspondence, reports, manuals, studies, bulletines, newsletters | As long as of administrative value   | Varies                  |
|                                   |  |  |  |                         |
| AL- 4                             | Bonds, Performance & Security                          | Treasurers Bonds   | 6 years  | Prior to 2012           |
| AL-8                              | Contract Files   | Bids, Ads, Proposals, Price Quotes   | 6 years after termination of contract, Retain 12 years records related to construction | Prior to 2012           |
|                                   |  |  |  | Prior to 2005           |
|                                   |  |  |  |                         |
| AL-12                             | Elections Records                                      | Ethics Commission Statements of Financial Interest                         | 5 years  | Prior to 2013           |
| AL-17                             | Insurance Claims and Policies                          | Insurance Claims and Policies  | 6 years after final settlement   | Prior to 2013           |
| AL-20                             | Liquid Fuels Tax Records                               | Records required by State Auditors for liquid fuels audit                  | 7 years  | Prior to 2011           |
| AL-24                             | Minutes  | Tape Recordings of Public Meetings   | Until minutes are approved or not of administrative value                              | Varies                  |
|                                   |  |  |  |                         |
| AL-26                             | Municipal Obligations                                  | Financing Municipal Projects through bonds.                                | 6 years  | Prior to 2012           |
| AL-29                             | Oaths of Office  | Oaths  | 6 years  | Prior to 2012           |
| AL-30                             | Permits and Licenses                                   | Special Events, parades  | 3 years after expirations  | Prior to 2015           |
| AL-35                             | Public Meeting/Hearing Notices & Proof Of Publications | Meeting dates, Hearing Notices and Proof of Publications                   | 10 years   | Prior to 2008           |
|                                   |  |  |  |                         |
| AL-42                             | Sales and Use Tax Exemption Certificates               | Forms for vendors exempting from sales and use tax                         | 3 years  | Prior to 2015           |
|                                   |  |  |  |                         |
| AL-43                             | Survey of Financial Conditions (DCEC)                  | Annual DCEC Report   | 5 years  | Prior to 2013           |
| AL-46                             | Right To Know Requests                                 | Right To know Requests   | 2 years  | Prior to 2016           |
|                                   |  |  |  |                         |
| <b>Emergency Services Records</b> |  |  |  |                         |
| ES-2                              | Comprehensive Emergency Management Plan and Records    | Civil defense plans, guides, reports                                       | 3 years after superseded   | Varies                  |
|                                   |  |  |  |                         |
|                                   |  |  |  |                         |
| <b>Financial and Purchasing</b>   |  |  |  |                         |
| FN-1                              | Account Distribution Summaries                         | General Ledgers  | Weekly/Monthly - 3 years   | Prior to 2015           |
|                                   |  |  | Year End - 7 years   | Prior to 2011           |
|                                   |  |  |  |                         |
| FN-2                              | Accounts Payable Files and Ledgers                     | Records documenting money spent  | 7 years  | Prior to 2011           |
|                                   |  |  |  |                         |
| FN-3                              | Accounts Receivable Files and Ledgers                  | Records documenting money owed and paid                                    | 7 years  | Prior to 2011           |
|                                   |  |  |  |                         |
| FN-4                              | Annual Audit & Financial Reports                       | Elected & Appointed Officials Report, Survey of Financial Conditions       | 5 years  | Prior to 2013           |
|                                   |  | Report, Tax Information  |  |                         |
|                                   |  |  |  |                         |
| FN-5                              | Annual Budgets & Related Records                       |  | 7 Years - keep one permanently   | Prior to 2011           |
|                                   |  | Final Budgets, review files, correspondences and related records           |  |                         |
|                                   |  |  |  |                         |
| FN-7                              | Audit Workpapers                                       | Audit papers supporting records audited                                    | Current Plus 3 years prior audit   | Prior to 2015           |

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|                              |  |  |  |                                |
|------------------------------|--|--|--|--------------------------------|
|                              |  |  | cycles   |                                |
| FN-8                         | Balance Sheets   | Balance Sheets   | 7 years  | Prior to 2011                  |
| FN-9                         | Bank Statements and Reconcilliations                         | Bank Statements and Reconcilliations                         | 7 years  | Prior to 2011                  |
| FN-10                        | Cancelled Checks   | Cancelled Checks   | 7 years  | Prior to 2011                  |
| FN-11                        | Check Registers  | Check Registers  | 7 Years  | Prior to 2011                  |
| FN-12                        | Daily Cash Records   | Records of daily cash receipts/receipt books                 | 3 years  | Prior to 2015                  |
| FN-13                        | Deposit Slips  | Bank deposit slips and attached remittance forms             | 7 years  | Prior to 2011                  |
| FN-16                        | Financial Statements   | Monthly Finance Reports                                      | Periodic Until final audit completed   | Varies                         |
| FN-17                        | Invest Records   | Investment documents   | 6 years after cancellation   | Prior to 2012                  |
| FN-18                        | Purchase Order Files   | Purchase orders and related papers                           | 7 years  | Prior to 2011                  |
| FN-19                        | Purchasing Files   | Files related to acquisition of services, goods, equipment   | 6 years  | Prior to 2012                  |
| FN-23                        | Utility & Paid Services                                      | Vendor invoices from utilities                               | 7 years  | Prior to 2011                  |
| FN-24                        | Vendor Files   | Vendor maintenance information                               | Until superseded or obsolete   | Those superseded or obsolete   |
| <b>Payroll and Personnel</b> |  |  |  |                                |
| PL-1                         | Cancelled Payroll Checks                                     | Cancelled Payroll Checks                                     | 7 years  | Prior to 2011                  |
| PL-2                         | Employee Payroll Adjustment Records                          | Employee Payroll Adjustment Records                          | 4 years  | Prior to 2014                  |
| PL-3                         | Individual Employee's Earning Records - Terminated Employees | Individual Employee's Earning Records - Terminated Employees | 5 years after all benefits paid  | Prior to 2013                  |
| PL-4                         | Payroll Deduction Authorizations                             | Payroll Deduction Authorizations                             | 4 years after cancelled or superseded  | Prior to 2014                  |
| PL-5                         | Payroll Earnings and Deductions Registers                    | Payroll Earnings and Deductions Registers                    | 4 years Pay Period Reports<br>7 years if payroll data posted to individual earning record 50 years otherwise | Prior to 2014<br>Prior to 2011 |
| PL-11                        | Quarterly Returns of W/H of Federal Income Tax               | Quarterly Returns of W/H of Federal Income Tax               | 4 years  | Prior to 2014                  |
| PL-12                        | Quarterly statement of State and Local Taxes Withheld        | Quarterly statement of State and Local Taxes Withheld        | 4 years  | Prior to 2014                  |

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|  |  |  |  |               |
|--|--|--|--|---------------|
| PL-13  | Social Security Reports                                  | Social Security Reports  | 4 years  | Prior to 2014 |
| PL-14  | Time Cards and Attendance Records                        | Time Cards and Attendance Records  | 3 years  | Prior to 2015 |
| PL-15  | Unemployment Compensation Records                        | Unemployment Compensation Records  | 4 years after contributions have been paid   | Prior to 2014 |
| PL-16  | Wages and Tax Statements (W-2)                           | Wages and Tax Statements (W-2)   | 4 years after due date of tax  | Prior to 2014 |
| PL-17  | Withholding Allowance Certificates (W-4)                 | Withholding Allowance Certificates (W-4)   | 4 years after new certificate is filed or employee is terminated                   | Prior to 2014 |
| PL-18  | 1099 Forms   | 1099 Forms   | 4 years  | Prior to 2014 |
| <b>Personnel Records</b>                                       |  |  |  |               |
| PS- 2  | Application for employment (not Hired)                   | Application for employment (not Hired)   | 2 years  | Prior to 2016 |
| PS-4   | Commercial Drivers License Records                       | Commercial Drivers License Records   | Comply with retention requirments promulgated by 5 years after settlement of claim | Varies        |
| PS-6   | Employee Health Insurance Claim Files                    | Employee Health Insurance Claim Files  | 5 years after settlement of claim  | Prior to 2013 |
| PS-8   | Employee Personnel Records                               | Applications for Employment, Correspondence, Health Insurance Applications, I9 Forms, Letters of Resignation , Photo Identification, Vacation and Sick Leave | Retain Summary of employment permanently, 5 years                                  | Prior to 2013 |
| PS-10  | Job Descriptions and Announcements                       | Job Descriptions and Announcements   | Current plus one prior revision  | Varies        |
| PS-14  | Worker's Compensation Records                            | Worker's Compensation Records  | 4 years after signing final settlement receipt or death                            | Prior to 2014 |
| <b>Planning &amp; Building Zoning Code Enforcement Records</b> |  |  |  |               |
| PZ-18  | Zoning Hearing Board Applications                        | Name, ect of applicants and reason for petition  | 3 years after decision   | Prior to 2015 |
| PZ-21  | Zoning Hearing Tapes, Stenographic Notes and Transcripts | Zoning Hearing Tapes, Stenographic Notes and Transcripts   | Retain 90 days after final decision  | Varies        |
| <b>Public Works/Engineering Records</b>                        |  |  |  |               |
| PW-1   | Applications/Licenses/Permits                            | For access driveway location,  | 3 years annual or short term   | Prior 2015    |
| PW-6   | Equipment Records  | Operational & maintenance records for public works equip.  | Life of Equipment  | Varies        |
| PW-18  | Underground Conduit - PA One Call Record                 | Underground Conduit - PA One Call Record   | 1 year   | Prior to 2017 |
| <b>Tax Collection and Assessment Records</b>                   |  |  |  |               |
| TA-2   | Certifications for Taxes Paid on Real Estate             | Real Estate Tax Certifications   | 2 years  | Prior to 2016 |
| TA-4   | Delinquent Tax Collection Records                        | Lien Lists, etc.   | 1 year after del taxes are paid  | Prior to 2017 |
| TA-5   | Exoneration Certificates Issued To Tax Coll              | Exoneration Certificates Issued To Tax Coll  | 5 years  | Prior to 2013 |

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|        |  |   |                                  |               |
|--------|--|---|----------------------------------|---------------|
| TA-6   | General & Special Tax Ledger & Related Records     | Earned Income Tax Ledger Book               | 7 years                          | Prior to 2011 |
| TA-8   | Occupational Tax Lists                             | Occupational Tax Reports                    | Until Superseded or Obsolete     | Varies        |
| TA-10  | Public Utility Realty Reports                      | Submitted to the PA Department of Revenue   | 7 years                          | Prior to 2011 |
| TA-11  | Real Estate Transfer Record                        | Recorder of Deeds and Assessment of Reports | As long as administrative value  | Varies        |
| TA-12  | Tax Bills, Paid Receipts                           | Tax Bills, Paid Receipts                    | 2 years                          | Prior to 2016 |
| TA-13  | Tax Collector's Monthly Report to Taxing Districts | Monthly Tax Reports                         | 7 years                          | Prior to 2011 |
| TA-15  | Tax "Duplicates" Real Estate and Non               | RE and other Duplicates                     | 7 years                          | Prior to 2011 |
| TA-17  | Abatements and Exonerations                        | Assessed tax appeals and related papers     | 5 years                          | Prior to 2013 |
| TA- 20 | Changes of Assesements Notices                     | Records relatedto tax assessment changes    | 5 years                          | Prior to 2013 |
| TA-22  | Exemptiong Files                                   | Exemption Files                             | 3 years after expir. Of examptio | Prior to 2015 |
|        |  |   |                                  |               |