

**Gregg Township, Centre County**  
**Board of Supervisors**  
Resolution R-19-04  
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 Seventh Day of January 2019 by the Board of Supervisors of the Township of Gregg, Centre County, Pennsylvania.

**BOARD OF SUPERVISORS**

*Douglas P Bierly*

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Douglas P. Bierly

*Keri B. Miller*

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Keri Miller

*Charles W. Stover*

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Charles W. Stover

**ATTEST:**

*Pamela Hackenburg*

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Pamela Hackenburg, 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 2013
AL-8	Contract Files	Bids, Ads, Proposals, Price Quotes	6 years after termination of contract, Retain 12 years records related to construction	Prior to 2013
				Prior to 2006
AL-12	Elections Records	Ethics Commission Statements of Financial Interest	5 years	Prior to 2014
AL-17	Insurance Claims and Policies	Insurance Claims and Policies	6 years after final settlement	Prior to 2014
AL-20	Liquid Fuels Tax Records	Records required by State Auditors for liquid fuels audit	7 years	Prior to 2012
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 2013
AL-29	Oaths of Office	Oaths	6 years	Prior to 2013
AL-30	Permits and Licenses	Special Events, parades	3 years after expirations	Prior to 2016
AL-35	Public Meeting/Hearing Notices & Proof Of Publications	Meeting dates, Hearing Notices and Proof of Publications	10 years	Prior to 2009
AL-42	Sales and Use Tax Exemption Certificates	Forms for vendors exempting from sales and use tax	3 years	Prior to 2016
AL-43	Survey of Financial Conditions (DCEC)	Annual DCEC Report	5 years	Prior to 2014
AL-46	Right To Know Requests	Right To know Requests	2 years	Prior to 2017
<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 2016
			Year End - 7 years	Prior to 2012
FN-2	Accounts Payable Files and Ledgers	Records documenting money spent	7 years	Prior to 2012
FN-3	Accounts Receivable Files and Ledgers	Records documenting money owed and paid	7 years	Prior to 2012
FN-4	Annual Audit & Financial Reports	Elected & Appointed Officials Report, Survey of Financial Conditions	5 years	Prior to 2014
		Report, Tax Information		
FN-5	Annual Budgets & Related Records		7 Years - keep one permanently	Prior to 2012
		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 2016

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			cycles	
FN-8	Balance Sheets	Balance Sheets	7 years	Prior to 2012
FN-9	Bank Statements and Reconcilliations	Bank Statements and Reconcilliations	7 years	Prior to 2012
FN-10	Cancelled Checks	Cancelled Checks	7 years	Prior to 2012
FN-11	Check Registers	Check Registers	7 Years	Prior to 2012
FN-12	Daily Cash Records	Records of daily cash receipts/receipt books	3 years	Prior to 2016
FN-13	Deposit Slips	Bank deposit slips and attached remittance forms	7 years	Prior to 2012
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 2013
FN-18	Purchase Order Files	Purchase orders and related papers	7 years	Prior to 2012
FN-19	Purchasing Files	Files related to acquisition of services, goods, equipment	6 years	Prior to 2013
FN-23	Utility & Paid Services	Vendor invoices from utilities	7 years	Prior to 2012
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 2012
PL-2	Employee Payroll Adjustment Records	Employee Payroll Adjustment Records	4 years	Prior to 2015
PL-3	Individual Employee's Earning Records - Terminated Employees	Individual Employee's Earning Records - Terminated Employees	5 years after all benefits paid	Prior to 2014
PL-4	Payroll Deduction Authorizations	Payroll Deduction Authorizations	4 years after cancelled or superseded	Prior to 2015
PL-5	Payroll Earnings and Deductions Registers	Payroll Earnings and Deductions Registers	4 years Pay Period Reports 7 years if payroll data posted to individual earning record 50 years otherwise	Prior to 2015 Prior to 2012
PL-11	Quarterly Returns of W/H of Federal Income Tax	Quarterly Returns of W/H of Federal Income Tax	4 years	Prior to 2015
PL-12	Quarterly statement of State and Local Taxes Withheld	Quarterly statement of State and Local Taxes Withheld	4 years	Prior to 2015

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PL-13	Social Security Reports	Social Security Reports	4 years	Prior to 2015
PL-14	Time Cards and Attendance Records	Time Cards and Attendance Records	3 years	Prior to 2016
PL-15	Unemployment Compensation Records	Unemployment Compensation Records	4 years after contributions have been paid	Prior to 2015
PL-16	Wages and Tax Statements (W-2)	Wages and Tax Statements (W-2)	4 years after due date of tax	Prior to 2015
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 2015
PL-18	1099 Forms	1099 Forms	4 years	Prior to 2015
<b>Personnel Records</b>				
PS- 2	Application for employment (not Hired)	Application for employment (not Hired)	2 years	Prior to 2017
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 2014
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 2014
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 2015
<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 2016
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 2016
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 2018
<b>Tax Collection and Assessment Records</b>				
TA-2	Certifications for Taxes Paid on Real Estate	Real Estate Tax Certifications	2 years	Prior to 2017
TA-4	Delinquent Tax Collection Records	Lien Lists, etc.	1 year after del taxes are paid	Prior to 2018
TA-5	Exoneration Certificates Issued To Tax Coll	Exoneration Certificates Issued To Tax Coll	5 years	Prior to 2014

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TA-6	General & Special Tax Ledger & Related Records	Earned Income Tax Ledger Book	7 years	Prior to 2012
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 2012
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 2017
TA-13	Tax Collector's Monthly Report to Taxing Districts	Monthly Tax Reports	7 years	Prior to 2012
TA-15	Tax "Duplicates" Real Estate and Non	RE and other Duplicates	7 years	Prior to 2012
TA-17	Abatements and Exonerations	Assessed tax appeals and related papers	5 years	Prior to 2014
TA- 20	Changes of Assessments Notices	Records related to tax assessment changes	5 years	Prior to 2014
TA-22	Exemption Files	Exemption Files	3 years after expir. Of exemptio	Prior to 2016