

RESOLUTION #2011-8

A RESOLUTION OF THE TOWNSHIP OF UPPER SOUTHAMPTON, COUNTY OF BUCKS, COMMONWEALTH OF PENNSYLVANIA, AUTHORIZING THE DISPOSITION OF PUBLIC RECORDS

WHEREAS, by virtue of Resolution #2011-7, adopted on March 1, 2011, the Township of Upper Southampton declared its intent to follow the schedules and procedures for the disposition of records as set forth in the Municipal Records manual approved on December 16, 2008, and

WHEREAS, in accordance with 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 that the Township of Upper Southampton, Bucks County, Pennsylvania, in accordance with the above cited Municipal Records Manual, hereby authorizes the disposition of the following public records:

Administration and Legal:

- Bonds (Performance and Security) (expired) prior to 2006
- Bid Files – unsuccessful – 3 years after job completion
- Bid Files – successful – 6 years after termination
- Bid Files – Construction contract – 12 years after termination of contract
- Ethic Commission Statements of Financial Interest prior to 2006
- Liquid Fuel Tax Records prior to 2004
- Insurance Claims 6 years after final settlement
- Insurance Policies 6 years after expiration provided all claims have been settled
- Municipal Bonds 6 years after cancellation
- Cancelled Notes prior to 2005
- Loan files 6 years after final payment on loan
- Oaths of Municipal Officials prior to 2005
- Public Hearing Notices and Proof of Publication prior to 2001
- Recycling program records prior to 2001
- Right to Know Requests prior to 2009
- Oaths of Municipal Officials prior to 2005

Financial and Purchasing Records:

- Accounts Payable Files and Ledgers prior to 2004
- Accounts Receivable Files and Ledgers prior to 2004

Financial and Purchasing Records:

- Annual Audit and Financial Reports prior to 2006
- Annual Budgets and related records- retain one copy of the budget permanently, retain all other papers 7 years
- Audit work papers-prior to 2006
- Balance Sheets prior to 2004
- Bank Statements and Reconciliation's prior to 2004
- Cancelled Accounts Payable Checks prior to 2004
- Check Registers prior to 2004
- Daily Cash Records prior to 2008
- Deposit slips prior to 2004
- Depreciation Schedules retain for life of equipment plus three years
- Employee Expense Reports prior to 2004
- General Ledger Analyses prior to 2004
- Investment Records retain 6 years after cancellation
- Purchase Order files prior to 2005
- Supply Requisitions prior to 2009
- Surplus Sale Files prior to 2008
- Utility and Paid Service Receipts prior to 2004
- Vendor Files, retain until superseded or obsolete
- Voucher Files prior to 2004

Parks and Recreation Records:

- Accident/Incident Reports – prior to 2008
- Citations – prior to 2008
- Operation and Maintenance records prior to 2006
- Park Program Files – prior to 2009
- Park Rules and Regulations – Retain 5 years after revoked or superseded
- Park Use Records (Includes facilities such as tennis courts, athletic fields, and playgrounds – prior to 2008

Payroll Records:

- Cancelled Payroll Checks prior to 2004
- Employee Payroll Adjustment Records prior to 2007

- Employee's Earning Record
 - Employees who separate with post-termination benefits – retain 5 years after all benefits have been paid if not part of personnel files
 - Employees who separate without post-termination benefits – retain 5 years after termination of employment
- Payroll Deduction Authorizations – 4 years after cancelled or superseded
- Payroll Earnings and Deduction Registers pay period reports prior to 2007
- Payroll Earnings and Deduction Registers – year to day annual summary – if payroll data is posted to individual employee's earning record, retain 7 years; otherwise retain 50 years
- Payroll Voucher (check) Registers prior to 2007
- Pension files – individual employees-retain 3 years after benefits have been paid
- Pension plan date sheets (AG385)-retain 10 years
- Pension Plans Administration Records – 6 years after termination of plan
- Quarterly Returns of Withholding of Federal Income Tax prior to 2007
- Quarterly Statements of State and Local Taxes Withheld prior to 2007
- Social Security Reports prior to 2007
- Time Cards and Attendance Records prior to 2008
- Unemployment Compensation Records (UC2) and supporting records prior to 2007
- Wage and Tax Statements (W-2 forms) prior to 2007
- Withholding Allowance Certificates (W-4 forms) for terminated employees prior to 2007
- 1099 Forms prior to 2007

Personnel Records:

- Applications for Employment (not hired) prior to 2009
- Employee Personnel Records – without post-termination benefits-5 years after termination of employment.
- Labor Negotiation Files – 5 years after expiration of contract
- Labor Union Contracts – 20 years after expiration
- Union Grievances – 3 years after final resolution
- Worker's Compensation Records – 4 years after signing of final settlement receipt or 4 years after death of recipient. Retain 10 years if suspension agreement has been filed

Planning & Building/Zoning Code Enforcement:

- Complaints, Notices of Violations, and Investigations – Retain 3 years after final disposition
- Contractors' Licensing Records – prior to 2004
- Reports of Buildings or Zoning Permits issued and Local Public Construction submitted to the U.S. Department of Commerce, Bureau of the Census – prior to 2006
- Zoning Hearing Board Applications – 3 years after final decision
- Zoning Hearing Board Tapes, Stenographic Notes and Transcripts – retain tapes and notes 90 days after final decision if no appeal to Common Pleas Court is filed. If appeal is filed, retain tapes, notes and transcripts until resolution of case.

Office of Police:

- Animal Law Enforcement Records prior to 2009
- Bicycle Registration Records prior to 2009
- Calibration Records retain five years after expiration of certification
- Traffic Citations prior to 2008 if not part of criminal history case file
- Non-traffic Citations prior to 2008 if not part of criminal history case file
- Community Relations files as long as of administrative value
- Complaints, Incident Reports or Initial Activity Reports prior to 2008 if not part of criminal history case file
- Court Orders as long as of administrative and legal value if not part of criminal history case file
- Daily Activity Logs (included assignment sheets, officer activity reports, patrol logs, sign-in sheets, and work schedules prior to 2008)
- Daily Bulletins/Blotters/Logs as long as of administrative value
- Dispatcher's Log Books – three years after last entry
- Firearms and Ammunition Records/inventories – two years after superseded or obsolete
- Hunting Accident Reports submitted to the Pennsylvania Game Commission prior to 2009
- K-9 Corps Records – two years after retirement or death of dog
- Master Name Index as long as of administrative value
- Motor Vehicle Records – Accident Reports – 5 years after close of investigation if not part of criminal history case file

- Motor Vehicle Records – Parking Violations (tickets) – 1 year after all fines have been paid
- Motor Vehicle Records – Police requests for removal of abandoned or impounded vehicles prior to 2009
- Motor Vehicle Records – Recommendations for Special Driver’s Examinations prior to 2010
- Pennsylvania Uniform Crime Reporting Program Worksheets and Printouts prior to 2009
- Permits and Related Applications – three years after expiration
- Property Records (Evidence/Found/Recovered) – ten years after property is no longer in custody of the Police Department if record is not part of criminal history case file
- Temporary Detention Reports prior to 2008 if not part of criminal history case file
- Temporary Inspection Reports (from the Pennsylvania Department of Corrections) prior to 2007
- Tow Truck Operator’s Schedules as long as of administrative value
- Towing Service Records – one year after all fines have been paid
- Vacation/Vacant House Check Record retain 30 days after re-occupancy
- Training Records – as long as administrative value
- Video/Audio Tapes -30 days if not used as evidence
- Waivers/Release Forms – retain as long as administrative and legal value

Public Works/Engineering Record:

- Complaints and Notification of Hazard – 2 years after correction/final resolution
- Equipment Records – Retain for life of equipment
- Maintenance records routine– prior to 2006
- Street Light Routine Maintenance records –prior to 2006
- Traffic Studies – as long as of administrative value

Tax Collection and Assessment Records:

- Certifications for Taxes Paid on Real Estate (provided by the Tax Collector) prior to 2009
- Delinquent Tax Collection Records retain one year after delinquent taxes have been paid
- Exoneration Certificates Issued to Tax Collector prior to 2006
- General and Special Tax Ledgers/Journals prior to 2004

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- Public Utility Realty Reports submitted to the Pennsylvania Department of Revenue prior to 2004
- Tax Bills, Paid receipts prior to 2008
- Tax Collector's Monthly Report to Taxing District prior to 2004

RESOLVED AND ENACTED, this 1st day of March, 2011

**BOARD OF SUPERVISORS
TOWNSHIP OF UPPER SOUTHAMPTON**


Lola G. Biuckians, Chairman

ATTEST:



Walter C. Stevens, Secretary/Treasurer