

What to file in OnBase

DOCUMENT TYPE	COMMENTS
Annual reports	Keep all final copies; no drafts if final available
BoV paperwork	Keep establishment forms, final guest list, financial back-up, narrative, and keepsake booklet
Checks and Deposit Forms	No longer filing copies of checks and deposit forms; remove and destroy any copies found in OnBase
Contact reports	Only scan if prior to 1998
Correspondence from a donor	Keep all, including substantive e-mails
Correspondence to a donor	Keep all, including substantive e-mails
Deed of Gift	
Deferred Gift Form	
Endowment agreements	Keep all final copies; no drafts if final available
Endowment reports	Keep all final copies; no drafts if final available
Gift agreements	Keep all final copies; no drafts if final available
Internal communications regarding donor or gift	Including e-mails
Matching Gift Forms	
Media coverage	i.e. newspaper and magazine articles about the donor both internal & external
Naming Verification Forms	i.e.: Compass Rose, Honor Roll; completed and returned unless otherwise noted in letter
Obituary	
Photos	
Planned giving calculations	
Pledge forms	Keep all signed forms
Proposals	
Research	Keep most recent version
Trust agreements	Keep all final copies; no drafts if final available
Web Document	A listing of historical data from the Internet
Wills, Estates	Keep all final copies; no drafts if final available