

DATA365 EVIDENCE

Intake Summary Template

A concise opening record for matter reference, source condition, authority path, timing considerations, and the planned preservation sequence before fuller engagement terms are set.

Matter / Reference: [Insert]

Opening Record Summary (High Level)

- Matter type / context
- Source categories and current source condition
- Preservation objective to be addressed
- Expected access or transfer path
- Planned preservation sequence before fuller engagement terms are set

Authority / Timing / Constraints

- Who can authorize access, export, receipt, release, or transfer
- Known deadlines, urgency, or risk of loss
- Transfer / logistics constraints
- Privacy or third-party data considerations
- Fee-sensitive assumptions needing written confirmation

Opening record only — not a substitute for the final engagement letter, authority record, or close-out record package.