Digital Forensics Intake Kit

Implementation guide for forensic units and agency administrators

PURPOSE

This guide helps a unit adapt the intake form and requester guide to its actual authority, services, routing, evidence systems, records obligations, and approval structure. It is not a universal policy or legal form.

01 DECIDE WHAT THE INTAKE MUST ACCOMPLISH

The form should create a reliable handoff between the person who understands the investigation and the person who must examine the evidence. It should reduce avoidable clarification without asking requesters to make forensic decisions they are not equipped to make.

THE INTAKE SHOULD CAPTURE	THE INTAKE SHOULD NOT ATTEMPT TO
• Who is requesting the work and how to reach them. • The authority, scope, limits, and location of supporting documentation. • The question the examination should help answer. • Submitted items, identifiers, condition, handling, and known access information. • Targets, date ranges, known accounts, relevant context, and urgency.	• Replace legal review, local policy, or a warrant attachment. • Guarantee that a particular tool or data source will produce a result. • Ask requesters to select technical actions without explaining the investigative need. • Collect passwords or sensitive credentials through an unapproved channel. • Become so comprehensive that requesters bypass it and return to informal messages.

DESIGN TEST

Can the examiner understand the authority, the question, the evidence, the targets, and the immediate risks without reconstructing the request from several emails?

Adapt the Template

Change the form before it becomes part of the workflow

02 LOCAL DECISIONS TO MAKE

DECISION	WHAT TO RESOLVE
Agency identity	Add the unit name, routing address, contact information, revision owner, and approved branding.
Authority	Use choices and terminology that match local law, policy, prosecutor expectations, and the work your unit accepts.
Services	Remove services the unit does not offer. Add local categories only when requesters can understand and use them consistently.
Priority	Define what routine, expedited, and emergency mean. Avoid allowing every requested deadline to become a priority by default.
Evidence systems	Add item numbers, transfer records, queue numbers, or case-management identifiers needed to reconcile the request with custody records.
Approvals	Add supervisor, prosecutor, unit, or budget approvals only when they are required and have a clear owner.
Signatures	Decide whether signatures are required, whether electronic acknowledgment is accepted, and where the completed intake becomes a record.
Format and viewer	Choose whether requesters use the print PDF, local fillable PDF, or an adapted agency form. Test saving, reopening, printing, and routing in the approved PDF viewer before publication.
Credentials	State the approved channel for passcodes and account credentials. The form should never invite sensitive values into an unsecured workflow.

KEEP THE FORM SHORT ENOUGH TO USE

A field earns its place only when someone uses the answer to route, scope, preserve, prioritize, examine, document, or accept the request.

THE FILLABLE EDITION STAYS LOCAL

The Forge & Verse fillable PDF contains no automatic submission action, JavaScript, telemetry, or connection to the studio. The adopting agency still decides where completed files are stored, transmitted, retained, and protected.

Roll It Out Deliberately

A form succeeds when the surrounding handoff is clear

03 SUGGESTED ADOPTION PATH

01 **Assign an owner** Name the person or role responsible for the current version, approved changes, and the authoritative download location.

02 **Review the workflow** Include examiners, investigators, evidence personnel, supervisors, records staff, legal counsel, and any team that must act on the form.

03 **Adapt and test** Customize the files, then run realistic requests through the full routing and acceptance process. Test saving, reopening, printing, and records handling in the actual approved viewer.

04 **Pilot with a small group** Use a defined pilot period. Track missing information, unclear fields, workarounds, and repeated questions.

05 **Teach the question** Explain that the forensic unit needs the investigative objective, not merely a requested extraction or tool name.

06 **Publish one source** Place the approved version in one controlled location and remove older copies from shared drives, forms libraries, and email templates.

07 **Review after use** Revisit the form after the pilot and on a scheduled basis. Change it when the workflow changes, not whenever one unusual case appears.

MINIMUM TRAINING MESSAGE

Describe the question. Identify the authority and limits. Tell the examiner what was submitted, what happened to it, what is time-sensitive, and who can clarify the request.

Field Rationale

Why the form asks what it asks

04 HIGH-VALUE FIELDS

FIELD	WHY IT MATTERS
Question the examination should help answer	Turns a tool request into an investigative objective and gives the examiner a basis for prioritization, searching, interpretation, and reporting.
Scope and express limitations	Makes boundaries visible at intake rather than after examination has begun.
Known facts and time-sensitive concerns	Surfaces remote-wipe risk, disappearing data, hearings, safety issues, or operational deadlines that may change the approach.
Device state and handling history	Documents whether the item was powered, networked, accessed, isolated, damaged, wet, or changed before submission.
Known contacts, accounts, keywords, and dates	Gives the examiner defensible targets instead of an undefined request to search everything.
Unit acceptance and clarification	Creates a visible handoff where scope can be confirmed, missing information recorded, and the request assigned to the local queue or case system.

05 VERSION AND RECORDS DISCIPLINE

- Place a version number and effective date on the approved local form.
- Keep a brief change log describing what changed, who approved it, and when the new version became effective.
- State where completed requests are stored and how they relate to evidence, case, queue, and examination records.
- Remove superseded copies from common download locations and communicate the change to requesters.
- Review the form when authority, services, tools, routing, records obligations, or evidence systems change.

LOCAL REVIEW REQUIRED

Before operational use, review the adapted form and guide against applicable law, agency policy, records requirements, prosecutor expectations, evidence procedures, and the services the forensic unit actually provides.