PRACTICAL WORKING GUIDE / ENGLAND AND WALES

Practitioner Evidence Intake Kit

EvidenceCanvas

For independent family-case practitioners, McKenzie friends, paralegals and small specialist practices

Jurisdiction: England and Wales

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> A practical, client-facing intake structure for receiving material without rebuilding the matter from scattered attachments. This kit supports organisation. It does not determine relevance, admissibility, legal merit or what position a person should take.

1. The five-minute setup

Before inviting a client to upload:

- create one matter workspace for that client and matter;
- grant access only to the named user who needs it;
- record the broad purpose of the intake without allegations or strategy in marketing/CRM tools;
- decide the initial file and size limit;
- state that an upload is not filing, service or acceptance of a deadline;
- give one channel for technical help and a different route for urgent legal/safety issues.

2. Client-facing intake email

Subject: Your protected EvidenceCanvas matter workspace

Hello [first name],

I have created a protected EvidenceCanvas workspace for your matter. Please use that workspace-not ordinary email or the website enquiry form-to provide files and instructions.

Before uploading:

1. keep the original file where possible;
2. give each file a short neutral name using `YYYY-MM-DD - source - document type`;
3. upload one copy only;
4. add a short instruction explaining what the file is and which event/date it relates to;
5. do not alter screenshots or crop away dates, sender details or surrounding context unless we have agreed a separate redaction copy;
6. do not treat an upload as filing with the court or serving another party.

If there is an imminent deadline or safety issue, contact the appropriate legal/emergency service. This workspace is not an emergency or continuously monitored service.

[Practitioner name]

EvidenceCanvas supports evidence organisation and preparation. It is not a law firm and does not provide legal advice or representation.

3. Neutral folder and intake categories

Use categories that describe what a file **is**, not what it proves:

1. **Orders and applications**
2. **Statements and formal reports**
3. **Correspondence**
4. **Messages and screenshots**
5. **School, medical, police or local-authority material**
6. **Financial or property material**
7. **Photos, audio and video**
8. **Working notes and instructions**
9. **Drafts**
10. **Filed/served copies and proof of transmission**

Court-bundle sections are a separate, hearing-specific selection. Do not treat this working file structure as the bundle structure.

4. Evidence inventory fields

Create one row per file or coherent item:

Field	What to record
Item ID	Stable neutral ID, e.g. `EV-0001`
File name	Current controlled file name
Document date	Date on the document; mark estimated dates clearly
Date received	When it entered the workspace
Source/author	Neutral description; do not infer
Document type	Order, email, message export, report, photo, etc.
Short description	One factual sentence about what the item is
Related event	Link to a chronology event ID if known
Version/status	Original, copy, draft, signed, sealed, superseded, unclear
Review flag	Duplicate, illegible, incomplete, redaction check, authenticity query
Access/release	Internal, named user, released, filed/served copy
Locator	Page, paragraph, timestamp or other exact locator

Do not write "proves", "lie", "abuse", "key evidence" or a legal conclusion in the neutral inventory unless clearly attributed as someone else's stated position.

5. File-naming convention

Preferred:

`YYYY-MM-DD - source - document type - short neutral description.ext`

Examples:

- `2026-04-17 - Family Court - sealed order.pdf`
- `2026-05-03 - Applicant - email to school.pdf`
- `2026-05-10 - message export - conversation 01.txt`
- `UNDATED - unknown source - photograph 003.jpg`

Rules:

- never change an original merely to rename it; preserve or hash the received original and name the working copy;
- do not put allegations, children's full names or unnecessary special-category data in filenames;
- use ISO dates so files sort correctly;
- use `UNDATED` rather than inventing a date;
- distinguish `DRAFT`, `SIGNED`, `SEALED`, `FILED` and `SERVED` only where the status is evidenced.

6. Neutral chronology starter

Create one event per row:

Event ID	Date/time	Event (neutral)	Source item(s)	Exact locator	Status/uncertainty
CH-0001	2026-05-03 09:15	Email sent by [role] to [role]	EV-0007	p.1, para.2	Date shown in email header

Drafting rules:

- use a date range or `date unclear` when necessary;
- separate a document's existence from the truth of a disputed assertion inside it;
- attribute disputed statements: "X stated that...";
- link every event to a source or mark it as client instruction pending source;
- keep argument and requested findings out of the neutral chronology;
- preserve contradictions for review rather than silently choosing one account.

7. Upload QA checklist

- ☐ Correct matter and user selected.
- ☐ Original preserved where available.
- ☐ No duplicate already exists.
- ☐ File opens and is legible.
- ☐ Pages are complete and correctly oriented.
- ☐ Date/source/status are recorded without inference.
- ☐ Images retain relevant metadata/context where lawful and available.
- ☐ Message evidence includes enough surrounding context to understand sequence.
- ☐ A separate redaction copy is used where necessary; original remains controlled.
- ☐ Instruction links the upload to a neutral event or task.
- ☐ No one has described the upload as filed, served or court-approved without evidence.

8. Intake close-out

At the end of the first intake:

1. send the client a list of successfully received items;
2. list unreadable, duplicate or incomplete items separately;
3. identify date/status uncertainties without resolving them silently;
4. confirm the next review step and target timing;
5. remind the client that the matter workspace is not filing, service or legal advice.

Useful official references

- Represent yourself in court: https://www.gov.uk/represent-yourself-in-court
- Current Family Procedure Rules and Practice Directions: https://www.justice.gov.uk/courts/procedure-rules/family
- Judiciary guidance on McKenzie friends: https://www.judiciary.uk/guidance-and-resources/practice-guidance-mckenzie-friends-civil-and-family-courts/

> General workflow material, not legal advice. Current rules and any case-specific order prevail. EvidenceCanvas is independent and is not endorsed by HMCTS, the judiciary or a legal regulator.