

Phishing Incident Intake

Capture the message, reporter, time, interaction, credentials, attachments, affected systems, containment, evidence, and follow-up.

FREE PDF RESOURCE	Free to view, download, print, and use internally as a general guide.
PUBLIC FORMAT	Watermarked public edition. Editing, assembly, and extraction are disabled in compliant PDF readers.
REUSABLE WORD VERSION	Available when this resource relates to a paid RiskWise engagement.

What this free resource includes

01 Reporter and message

02 User interaction

03 Affected access

04 Containment

05 Evidence and closure

Use the working pages to collect facts, owners, evidence, and dates. Review tax, legal, security, licensing, employment, insurance, or regulatory decisions with the qualified professional appropriate to your facts.

Work through Phishing Incident Intake

Record what is known, identify the source, assign an owner, and make missing information visible.

Reporter and message

Purpose / facts / owner / evidence / date:

User interaction

Purpose / facts / owner / evidence / date:

Affected access

Purpose / facts / owner / evidence / date:

Finish the record and confirm the next step

Complete the remaining sections, then identify what needs review, approval, secure delivery, implementation, or follow-up.

Containment

Purpose / facts / owner / evidence / date:

Evidence and closure

Purpose / facts / owner / evidence / date:

Choose the support you need

FREE PDF	Free	Use this public edition as an internal reference or printed working guide.
REUSABLE WORD TEMPLATE	Included	An editable Word version is available when it supports a related paid engagement.
CUSTOM WORK	Scoped	RiskWise can adapt, review, implement, document, or hand off the resource for your business.

Discuss a paid engagement

Call 702-421-1111 or email sales@ezypz.com and mention: Phishing Incident Intake

Do not resell this PDF, remove its watermark, or present it as professional advice tailored to another person's facts.