

Therapy software privacy questions worksheet

One worksheet per vendor with questions, answers, written sources, verifier and follow-up. therapycrm.io

Vendor contact Plan or configuration reviewed

Access roles, audit trail and sign-in

Question	Vendor's answer	Where written down	Verified by	Follow-up
1				
2				
3				
4				
5				

Where data is processed, subprocessors and optional features

Question	Vendor's answer	Where written down	Verified by	Follow-up
1				
2				
3				
4				

Breach notification, export, deletion and backups

Question	Vendor's answer	Where written down	Verified by	Follow-up
1				
2				
3				
4				
5				

Family portal consent and staff offboarding

Question	Vendor's answer	Where written down	Verified by	Follow-up
1				
2				
3				
4				

Open follow-ups owner

Reviewed by / date

Write the vendor's own words and a source for every answer. Use test records, never real client records, in any demo. This worksheet is not legal advice and does not settle your obligations. Confirm your obligations with your regulator, privacy officer or counsel.