

Firm privacy impact assessment (EFVP) template

For: consulting firms that use Dossierly

Why: Québec Law 25 requires an EFVP before acquiring, developing, or overhauling an information system that involves personal information, and before communicating personal information outside Québec.

Vendor pack: read `vendor-due-diligence-pack.pdf` and `yuzu-subprocessors.pdf` first.

This is a template, not legal advice. Sections 1–5 describe **facts** about the product and ask the firm to record facts about its own use. Yuzu Solutions Inc. does **not** propose a conclusion, a residual-risk rating, or a decision to proceed. The person in charge at **your** firm must write the conclusions in section 6. Keep the signed copy in your privacy file. You may send a high-level copy to Yuzu Solutions Inc. at info@dossierly.ca if you wish; you are not required to.

Firm legal name: _____

Person in charge of personal information: _____

Email: _____

Date: _____

Product assessed: Dossierly, operated by Yuzu Solutions Inc.

1. Project (facts)

Dossierly is a practice-management system (client records, questionnaires, form fill, documents, portal, calendar, public booking).

This assessment covers:

☐ New system ☐ Replacement of [prior tool] ☐ Major change: _____

2. Personal information the product can hold (facts)

Check the categories this firm will enter. Immigration files often include sensitive information. Québec Law 25 generally requires **express** consent for sensitive information and parental / guardian authorization before collecting information about a child under 14. Whether this firm's files are sensitive, and what consent it will obtain, are for the firm to conclude in section 6.

- ☐ Identity and contact (name, email, phone, address)
- ☐ Immigration status and history
- ☐ Passports and supporting documents
- ☐ IRCC / MIFI questionnaire answers
- ☐ Consultation notes
- ☐ Information about spouses / children / other family members
- ☐ Information about minors under 14

- ☐ Booking and payment details
- ☐ Other: _____

3. What the product supports (facts)

The product supports immigration professional services, appointment management, and related practice records. The firm decides which fields and documents to collect.

This firm's purposes for the project (record facts only here; analysis belongs in section 6):

4. Extra-Québec communications (facts)

Yuzu hosts the system of record in Canada (Montréal region). Application hosting, email, and optional Google / Microsoft / Zoom / Square tools may process data in the United States.

This firm will enable (check what applies):

- ☐ Email via the product (Resend)
- ☐ Google Calendar / Meet
- ☐ Outlook / Teams
- ☐ Zoom
- ☐ Square payments

For each box checked, personal information (for example guest name, email, phone on a calendar event) is sent to that provider. See Yuzu's transfer summary in the vendor pack. The firm's assessment of those communications belongs in section 6.

5. Product controls available to the firm (facts)

These are features of the product. They are not a conclusion that residual risk is acceptable, and they are not a list of measures the firm must adopt.

Topic	Fact about the product
Staff access	Admin and Case Manager roles. Every member of the firm workspace can access all of that firm's data; the firm decides whom to invite
Portal	Portal invitations go to an email the firm chooses; clients set a password or use Google sign-in
Collection	The firm chooses which documents and questionnaire answers to request
Minors	The product can store information about minors when they are part of a file; the firm controls when that happens

Retention	Closing a file in the product starts a six-year hold; a firm administrator can then destroy when purposes are fulfilled
Incidents	firm-confidentiality-incident-register.pdf and incident-notice templates are available for the firm to use

6. Firm conclusions (insert here)

Do not leave this section to Yuzu Solutions Inc. Yuzu does not complete it and does not propose wording. The person in charge of personal information at the firm must write the firm's own analysis and decision. Attach extra pages if needed.

6.1 Necessity and proportionality

Is this project, and the personal information in section 2, necessary and proportionate to the firm's professional purposes?

6.2 Extra-Québec communications

For each tool checked in section 4, what is the firm's assessment of protection (for example contracts, encryption, purpose limitation) and of the communication outside Québec?

6.3 Risks and measures the firm will take

Risks the firm identifies, and measures the firm — not Yuzu — will implement:

6.4 Residual risk

Residual risk the firm accepts, if any:

6.5 Decision

- ☐ Proceed as described
- ☐ Proceed with the following conditions: _____
- ☐ Do not proceed

6.6 Conclusion of the person in charge

Insert the firm's conclusion here. Signing section 7 without a conclusion means the assessment is incomplete.

7. Approval

Person in charge of personal information: _____

Date: _____

Signature: _____

CAI guidance: <https://www.cai.gouv.qc.ca/>

This template does not replace the CAI's official EFVP report model. Attach extra pages if the project is large.