PRIVACY OPERATIONS · PRIVORA PRO · WORKBOOK

Evidence request and review cycle workbook

Prepare one Request to Report cycle with explicit acceptance criteria, safe context, accountable review, and a recorded decision.

Primary action
Complete the working pages, then enter approved records in Privora Pro.

Version
1.0.0

Reviewed
2026-08-12

Guide
[Open the Privora guide]

CONTROLLED OPERATIONAL RESOURCE

Important legal and use notice

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GUIDE
[Open the Privora guide]
REVIEWED
2026-08-12

VERSION
1.0.0

Purpose
This document is a Privora operational resource designed to help teams organize privacy work, evidence, ownership, review, and reporting.

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Do not enter personal, sensitive, privileged, or confidential information into uncontrolled copies. Store approved operational records only in authorized systems and follow your organization’s access, retention, and handling policies.

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Evidence request and review cycle workbook

Use this workbook to prepare and review the operating sequence Request → Owner → Evidence → Review → Decision → Report. It does not persist responses and does not approve evidence. After accountable review, enter approved records in Privora Pro so the task, document version, review outcome, decision, and reporting link remain connected.

> Operational guidance — not legal advice. This guide does not guarantee compliance.

Keep the working copy appropriately confidential. Do not record passwords, authentication material, full identity documents, raw special-category data, live incident payloads, or unrelated client information. Use safe references and authorized systems for sensitive records.

Request brief

Write one coherent request. A contributor should understand why the evidence is needed, what period and client scope apply, what to submit, and how to ask for clarification.

Action-led request title

Decision, requirement, or report this evidence will support

Client, entity, process, and period in scope

Contributor due date

Request priority

- ☐ Low
- ☐ Medium
- ☐ High
- ☐ Urgent with documented reason

Sensitive content to exclude or minimize

Evidence acceptance criteria

Define acceptance before sending the request. Separate required criteria from preferred presentation. State what the evidence must demonstrate and who may approve the outcome.

What the evidence must demonstrate

Required source, owner, or approval context

Required period and currency threshold

Required context

- ☐ Purpose
- ☐ Owner
- ☐ Source
- ☐ Period
- ☐ Version
- ☐ Approval context
- ☐ Known limitation
- ☐ Linked requirement

Allowed review outcomes

- ☐ Approved for stated purpose
- ☐ Returned or rejected
- ☐ Clarification required
- ☐ Named exception
- ☐ Not applicable with rationale

Owner map

Keep request ownership, evidence ownership, contribution, review, and final decision authority distinct. Technical permission does not expand the agreed authority model.

Role	Named person	Responsibility	Escalation path
Request owner			
Evidence owner			
Client contributor			
Evidence reviewer			
DPO or privacy lead			
Report owner			

Accountable request owner

Accountable evidence owner

Authorized evidence reviewer

Authority for reserved or escalated decisions

Submission context

Capture safe context, not the sensitive record itself. Use Privora Pro task and document records for the approved submission and version history.

Evidence source or originating system

Period covered

Version or approval date

Contributor statement of what the evidence demonstrates

Known gaps, limitations, or changes since approval

Safe submission method

☐ Privora portal task upload
☐ Approved client system reference
☐ Controlled alternative approved by owner

Minimize the working record

Do not paste the evidence into this workbook. Do not record passwords, full identity documents, raw special-category data, credentials, or material from another client. Record only the safe context needed to locate and review the authorized record.

Reviewer sheet

Apply accountable human review against the predefined purpose and criteria. A linked requirement, upload, task completion, prior review, or automated summary can inform the reviewer but cannot make the current decision.

Relevant to the stated criterion and client scope

☐ Yes
☐ Partly
☐ No
☐ Clarification required

Source and approval authority are sufficient

☐ Yes
☐ Partly
☐ No
☐ Specialist review required

Period and currency are sufficient

☐ Yes
☐ Partly
☐ No
☐ No currency threshold applies

Required components and context are complete

☐ Yes
☐ Partly
☐ No

Consistent with other known approved records

☐ Yes
☐ Conflict identified
☐ Not assessed

Reviewer rationale and material limitation

Review date

Decision record

Record the decision for the stated purpose. Approval is not universal; return or rejection should identify an actionable correction.

Evidence decision

- ☐ Approved for stated purpose
- ☐ Returned or rejected
- ☐ Clarification required
- ☐ Exception requires authority
- ☐ Not applicable with rationale

Purpose, period, and limitation attached to the decision

Named accountable reviewer

Next review or expiry date

Returned-work log

Use a new row for each return. Preserve the original version and explain the smallest sufficient correction.

Return date	Criterion not met	Requested correction	Owner	New due date	New version

Specific reason for return or rejection

Owner for clarification or new version

Returned-work due date

Exception log

An exception requires named authority, rationale, consequence, interim control, and review date. A portal contributor cannot approve an exception.

Exception	Authority	Rationale	Residual uncertainty	Interim action	Review date

Exception path required

☐ No
☐ Yes
☐ Specialist decision required

Named exception authority

Rationale, consequence, and interim control

Exception review date

Reporting link

Connect the reviewed result to the requirement, assessment, deliverable, or management report. Preserve limitations and unresolved gaps in the summary.

Requirement, workflow, or deliverable receiving the result

Careful reporting statement based on reviewed evidence

Limitations, assumptions, and open actions to carry forward

Report or deliverable owner

Cycle-close checklist

Close only when the full chain is traceable. Upload and task completion are inputs to review, not approval outcomes.

Cycle-close controls

☐ Request preserved
☐ Owner named
☐ Submission context complete
☐ Version identified
☐ Human review recorded
☐ Decision rationale recorded
☐ Returned work resolved or owned
☐ Exception authorized
☐ Reporting link recorded
☐ Next review set

Cycle status

☐ Complete
☐ Complete with tracked open action
☐ Returned for more work
☐ Escalated

Person who will enter approved records in Privora Pro

Open client evidence tasks · Privora Pro console

Sources and operating-record handoff

This workbook follows current implemented Privora Pro portal-task, document-review, deliverable, audit, and client-scope behavior reviewed 2026-08-12. It uses the canonical Privora Privacy Operations category and claim boundaries. It asserts no universal retention period or statutory evidence format.

Implemented portal-task, document-review, deliverable, audit, and client-scope behavior; reviewed 2026-08-12

Privacy Operations category, evidence and ownership language, and claim boundaries; reviewed 2026-08-12

Audience needs, evidence pain points, operational differentiation, and customer language; reviewed 2026-08-12

After accountable review, enter approved records in Privora Pro. Keep the task brief and assignment in Portal Tasks, the authorized evidence and version in Documents, the decision in the review record, and the reporting relationship in the appropriate workflow or Deliverable. Retain or dispose of the working copy under the organization's approved records practice.