

RETENTION AND DESTRUCTION POLICY

DentaVate's own retention policy. **The periods below are DentaVate's choices, not statutory requirements.** Retention remains subject to applicable law, contractual requirements, and legal holds, any of which may require longer.

1. Schedule

Record	How long	Why
Financial, contract and commercial records — invoices, SOW closeout, payments, tax records, executed agreements and signing evidence	7 years	Service history, audit, tax. CRA's ordinary business-record rule is six years from the end of the last tax year; seven is DentaVate's margin. No patient information in these
Service and evidence records, including identifiable Worktable information	7 years	Service history, auditability, handling complaints and disputes, defence of DentaVate's work
Privacy and security breach register	At least 2 years	PIPEDA requires a record of every breach of security safeguards, whether or not reportable
The population of patients to be worked	Not retained by DentaVate	Stays in the Client's system
A report or export generated for a task	Destroyed when the approved purpose ends	Held only in the approved environment

2. What seven years is, and is not

It is DentaVate's operating policy, set so that DentaVate can show what it did, answer a complaint, and defend its work.

It is not a statutory retention period, and this policy does not represent it as one. Canadian retention requirements vary by jurisdiction and by who holds the record, and limitation periods commonly run from when a claim is discovered rather than from when work was done.

It does not make DentaVate the source of truth. The Client's practice management software remains the authoritative patient and clinical record. The Client's own retention obligations are unaffected.

3. Legal hold

Nothing is destroyed, whatever the clock says, where any of the following is open: a clinic dispute or complaint • a worker payment or closeout dispute • a privacy complaint or regulator investigation • a college or professional body inquiry • litigation or a threat of it • an insurance claim • any other matter counsel identifies.

A hold is set by a named person, records the reason and date, and is released the same way.



4. How destruction happens

Nothing is automated. There is no timer, no scheduled job, no countdown. Destruction is a deliberate act by a person, recorded.

When DentaVate later builds tooling for this, it will show what is eligible, confirm no hold applies, require a person to approve the batch, and log who approved it and when — with no patient information in that log.

5. Method

Identifiable information is deleted from active systems so it cannot be recovered through normal use. Backups expire on their documented cycle; where a restore occurs, records already due for destruction are re-applied for deletion. DentaVate does not promise selective deletion from backup media unless its backup technology supports it.

Written confirmation of destruction is available to a Client on request.

