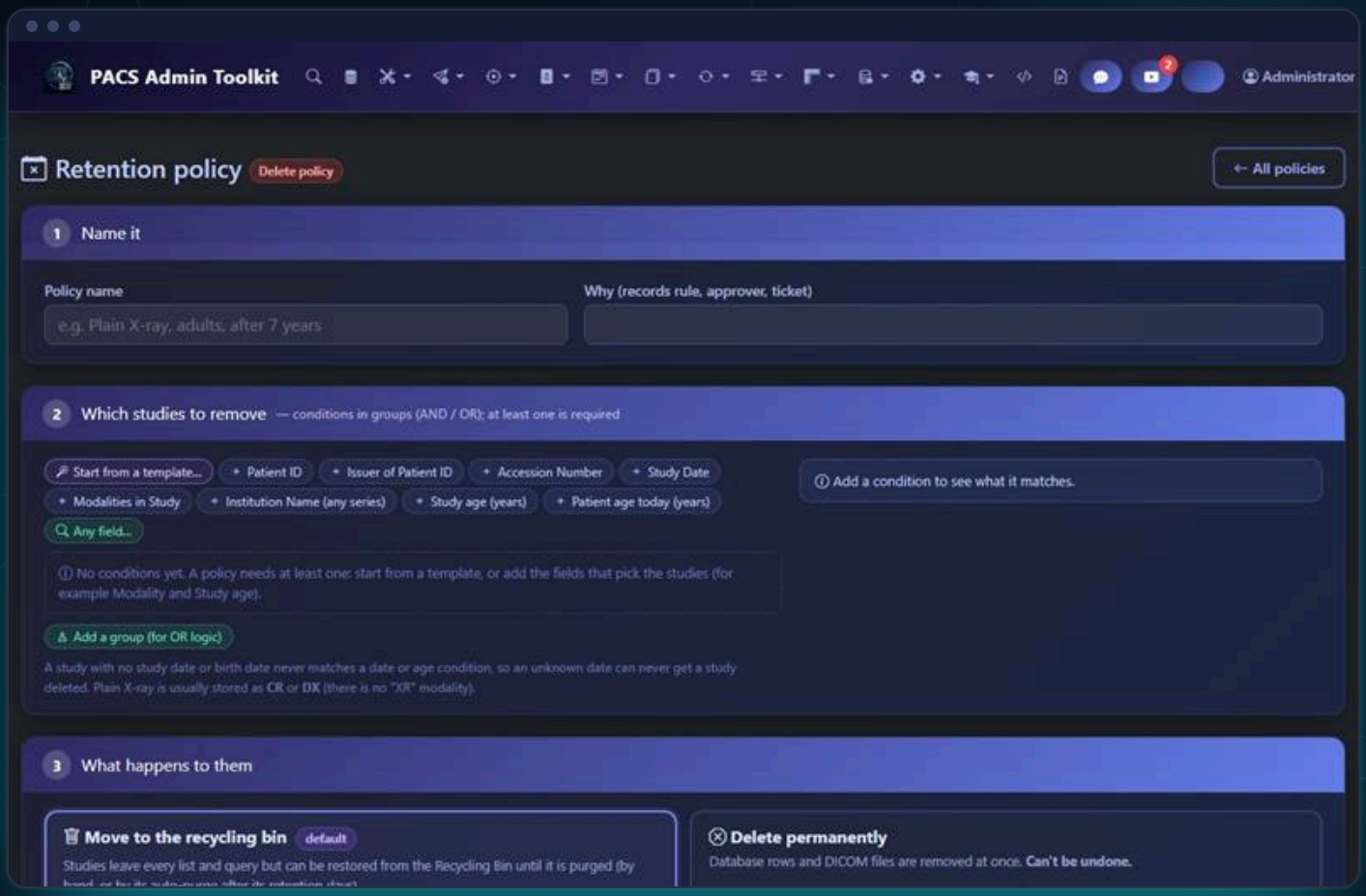
Data Lifecycle | Leads with Trust

Study Retention Policies

Keep what the law and your records officer require, release the rest, and prove it.



Scheduled delete and keep policies for the studies stored in PATK, with dry runs, typed approval and safety stops. Legal holds, protections and a permanent deletion log show exactly what was kept, what went and why.

0
studies on legal hold any policy can remove

Dry run
reviewed and approved before any policy runs

Forever
deletion-log entry kept for every removed study

Replaces: **Manual purge scripts or a separate archive lifecycle manager**

License module `RETENTION`

THE CHALLENGE

Why it matters

Cache, edge and routing servers fill up. Someone has to decide what to delete, and in radiology that decision is never simple: adult studies, minors until they reach a set age, mammography for ten years, a litigation hold on one patient, a temporary site that should be cleared after six months. Getting it wrong either way is expensive: a full disk stops clinical traffic, and a study deleted too early can be a records or legal problem.

Most sites handle it with a script someone wrote years ago, or a manual purge that nobody wants to own. There is no preview of what will go, no brake if the numbers look wrong, and no record a records officer can sign off on.

> IN SHORT
>
> Scheduled delete and keep policies for the studies stored in PATK, with dry runs, typed approval and safety stops. Legal holds, protections and a permanent deletion log show exactly what was kept, what went and why.

CAPABILITIES

What it does

- **Rules your records officer can read**
  Conditions on patient, study and series fields plus calculated values (study age, patient age today, patient age at the study, days since received), in AND / OR groups.
- **Templates for common schedules**
  Start from adults after 7 years with minors kept until 25, plain X-ray after 7 years, mammography after 10, one issuer after 6 months, one site after 7 years, or a list of accession numbers.
- **Keep policies that always win**
  A keep policy (for example all mammography for 10 years, or patients under 18) protects matching studies from every delete policy.
- **Dry run, then a typed approval**
  A dry run counts what matches, what each hold keeps back and what would go, lists the oldest 100 and exports the full list; approval needs a dedicated permission and the policy name typed in.
- **Safety stops built in**
  A per-run cap (default 500, oldest first), a pause when a run would remove more than a set share of all studies, a pause when the count jumps sharply since last time, and recent arrivals (default 30 days) never touched, so imported priors with old dates are safe.
- **Legal holds and protections**
  Hold studies by search, by pasted list (up to 1,000,000 UIDs) or by patient; protect one study or a whole patient from the browser or viewer with a category, a reason and an end date.

Manual deletes obey the same rules
Deleting by hand checks holds, keep policies and Deletion Exclusion patients first; overrides need a reason and are audited, and legal holds are never overridden.

Reversible by default
Policies move studies to the recycling bin unless a user with the permanent-delete permission says otherwise; an optional daily bin auto-purge skips held studies.

A record that lasts
Every removed study gets a deletion-log entry in the same transaction, kept forever and exportable as a certificate of destruction.

WORKFLOW

How it works

1
Write the policy
Conditions, recycle or delete, safety stops and run windows (default 01:00-05:00).

2
Holds come out
Legal holds, Deletion Exclusion patients, active bulk updates, recent arrivals and keep policies are set aside.

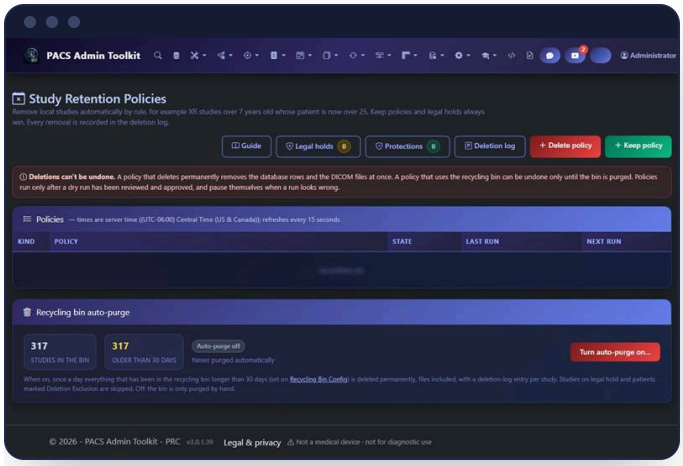
3
Dry run
Counts, the oldest 100 and a full CSV for the records officer.

4
Approve
A permitted user types the policy name; any later change switches it off again.

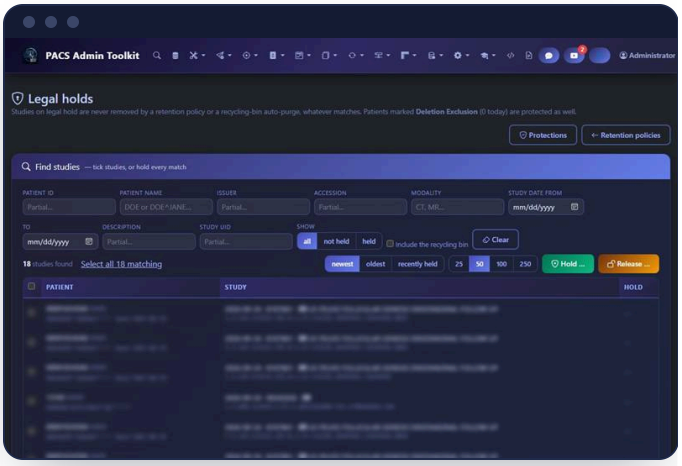
5
Runs and logs
The policy runs in its windows, oldest first, pausing itself if numbers look wrong; every study is logged.

IN THE PRODUCT

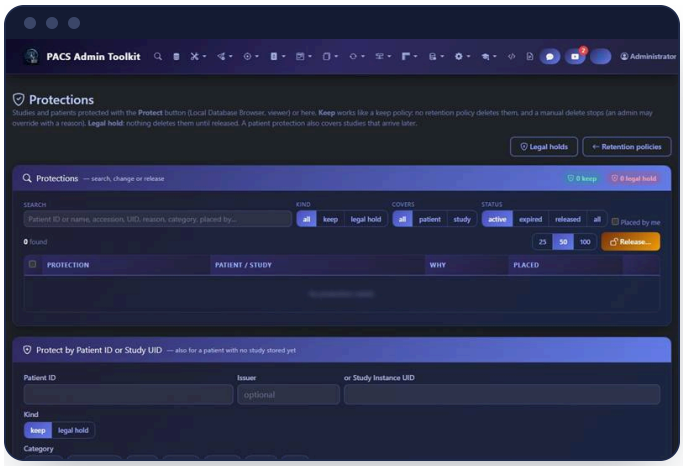
See it in action



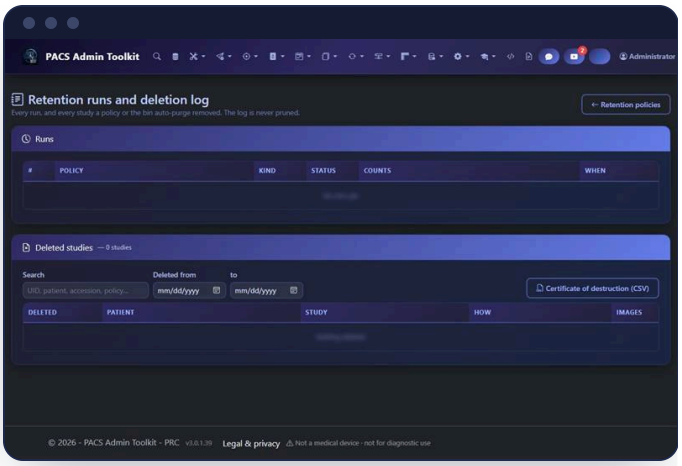
Every delete and keep policy with its state and next run



Legal holds: search, select up to 100,000 studies, hold with a reason



Protections placed with the Protect button, with category, reason and end date



The deletion log, exportable as a certificate of destruction

USE CASES

Where it pays off

State retention schedule on a regional cache server

CHALLENGE	The local cache keeps everything forever, and the disk alert fires every quarter. The state requires adults for 7 years and minors until age 25.
WITH PATK	The adults / minors template becomes a delete policy to the recycling bin, with a keep policy for mammography for 10 years; the records officer signs off the dry-run CSV.
OUTCOME	**Storage growth levels off, the rule is written down where anyone can read it, and every removal is in the log.**

Litigation hold on one patient

CHALLENGE	Risk management asks that every study for a patient be preserved, including studies that have not arrived yet.
WITH PATK	A patient-level legal hold from the browser covers every study of that Patient ID and issuer, now and later; no policy, purge or admin can remove them until the hold is released with a reason.
OUTCOME	**A hold that cannot be bypassed by accident, with placement and release in the audit log.**

Clearing a temporary or divested site

CHALLENGE	A mobile unit or a closed clinic sent studies under its own issuer; after six months they should leave the edge server.
WITH PATK	The one-issuer template removes that issuer's studies older than six months, capped per run and paused automatically if the count looks wrong.
OUTCOME	**The site's data is cleared on schedule, with a certificate of destruction for the file.**

3T

Trust · Truth · Transform

Trust

Nothing runs without a dry run and a typed approval; legal holds are checked again inside the delete itself; safety stops pause a policy before a mistake becomes a mass deletion.

Truth

See exactly what a rule would remove before it removes anything, what each hold kept back, and a permanent per-study record of what went, when and under which policy.

Transform

Retention stops being a yearly fire drill: written once, approved once, and run quietly every night inside its window.

VALUE MODEL

What it can be worth

An example edge or cache server that keeps growing until someone purges it by hand.

Storage released per year by retention policies	40 TB
All-in cost of primary storage plus its backup, per TB per year	$300
Administrator time on manual purges avoided	8 hours a month (96 hours a year)
Records and legal requests answered from the deletion log instead of by search	20 a year, 2 hours saved each
Blended staff cost per hour	$55

$19,500

Estimated yearly value

Illustrative example. Your volumes, staffing and costs will differ; we will build this model with your own numbers.

DIFFERENTIATORS

Why it stands out

- **Safer than a purge script**
  Dry runs, typed approval, per-run caps and automatic pauses are built in, where a script deletes whatever its query returns.
- **Holds that really hold**
  Legal holds win over every policy, every manual delete and the bin purge, and are re-checked at the moment of deletion.
- **Proof for the records officer**
  A permanent deletion log and certificate-of-destruction export, which disk-cleanup tools and scripts do not keep.
- **Scoped for multi-site**
  A policy written by a facility or site user only touches that unit's studies when Access Topology is licensed.

SPECIFICATIONS

At a glance

Scope	Studies stored in PATK's own database and files; never other systems
Conditions	Patient, study, series and calculated fields; AND / OR groups; lists up to 1,000,000 values; dynamic dates
Safety	Per-run cap, share-of-all-studies pause, jump pause, recent-arrival protection, recycling bin by default
Protection	Keep policies, legal holds, Protect button (study or patient), Deletion Exclusion patients
Record	Deletion log kept forever, certificate of destruction (CSV), audit log for holds and overrides
Permissions	Separate approve, permanent delete, release hold, place hold, override and bin auto-purge rights

See Study Retention Policies with your own data

Ask for a guided demo or a trial license. PACS Admin Toolkit installs on your own Windows server in under an hour, and every module comes with step-by-step guides and in-app guided tours.

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