Security and Data Ownership Overview

Plain-language boundaries for firm-controlled client data, provider integrations, and governed automation.

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Data ownership and location

The law firm owns its client data, original documents, Microsoft 365 environment, storage destination, retention policy, legal holds, and administrative control. Client uploads default to the firm's approved storage location. Chapter Verity retains only the authorized structured data, provenance, audit evidence, and temporary processing material required to perform and verify the service.

Core safeguards

- Tenant-, role-, matter-, assignment-, and purpose-based authorization.
- MFA and least-privilege provider access.
- Encrypted transport, controlled object access, file validation, malware scanning, and rate/abuse controls.
- Source digests, version history, audit events, approval receipts, and retrieval links traceable to the firm's storage record.
- Fail-closed legal packages and human release boundaries.
- Backup, recovery, retention, deletion, and incident procedures defined in the customer agreement and configuration schedule.

Shared responsibility

TSG secures and operates the Chapter Verity service within the contracted scope. The firm controls its users, devices, Microsoft 365 tenant, account recovery, client engagement, permissions, retention instructions, and legal decisions. Microsoft, Stripe, and other approved service providers remain responsible for their own services under their terms.

AI boundary

AI output is advisory. Approved context is minimized and logged; model, prompt, retrieved sources, output schema, and attorney disposition are recorded where AI is used. AI may flag an urgent condition but cannot independently create legal effect.

Assurance

Production activation requires identity, isolation, storage, integration, workflow, recovery, and attorney-release evidence. Security claims and service levels are governed only by the executed agreement; this overview does not claim a certification or guarantee uninterrupted availability.

Important boundary	Chapter Verity provides attorney-controlled workflow and decision-support technology, not legal services. AI and automation have operationalAuthority=false and cannot approve advice, select exemptions, authorize a filing, or create legal effect.