

Redaction Process Checklist



This checklist was created to help you gather the information you need to setup your redaction processes. While you'll need to do this for each document containing sensitive data, you can reuse this list to make sure you don't miss a step.

Initial Discovery:

- Call together a few people from different departments. (People generating reports, business users, and legal counsel.)

What to discuss:

- What types of information should be redacted?
- What types of reports might contain this information?
- What are our current processes?
- Are there applicable legal restrictions to redacting specific information?
- Are there applicable legal restrictions to retaining specific information?

Identifying Redactable Content

Where to Start:

- Start with a list of reports or documents that contain information in need of redaction.
- If you need help scanning your current repository, you might start by having someone technical write a script that will find data matching certain patterns like SSN's or your internal account numbers.
- Plug potential knowledge gaps by conducting discovery interviews with end-users. Ask if they have discovered sensitive information in the execution of their job function.

Start Redacting

- Choose a document to start with.
Document Name: _____
- Identify sensitive information in need of redaction.
- Consider your options for how to redact the information.
Circle those that apply: *Page Region, Pattern Matching, Manual*

Almost There

- Determine when the data will be redacted.
Circle the option that applies: *At Acquisition, After Job Completion, Before Distribution, Before Archiving, Before Deletion*
- Before implementation, consult key stakeholders and legal counsel for approval of the new workflow.
- Create the redaction process.
- Train those who will use the new redaction process.

Follow up and review the content to make sure the process is taking root. Have someone with technical skills ensure redacted content leaves no trace of the original content.

Start Again!

Choose your next document and follow the process again.