

# How to redact a document part 1

Successful redaction of an electronic document requires more processes than the old-fashioned method of printing out a document, redacting with the thick black marker pen and then rescanning the document. Finally saving this as a.pdf and emailing it to the recipient.

Although I say, old-fashioned, that method still works very well and should not be excluded as an option.

In the current pandemic and with a wish to reduce our carbon footprint, many are looking for a complete electronic method of redaction.

To make redaction easier, particularly with large documents a proprietary redaction software should be used, the current application utilised by the Trust is Adobe **Acrobat Professional**, this should not be confused with the wide range of other Adobe products used within the Trust (if you are unsure if you have this product then the IG Team will check for you).

Sometimes we need to redact just a small amount from a small document on the occasional basis, and in this guide, we will look at some of the aspects involved in safe redaction, without using specialist software.

## Redaction – “It’s not just about the words.”

Redaction of electronic documents is not just about the words; it is equally about the information that you can’t see. This is often referred to as metadata, but in essence this is data that is embedded in an electronic file, is readable to all (if you know how to find it) and often contains data that you would not wish the recipient to have.

As an example, it may contain revisions of text, track changes, author details. Pictures may include GPS co-ordinates, tags, hidden text, Excel can hold links to other worksheets and workbooks etc.

Care must also be taken over email addresses (incorrect redaction can allow a recipient to click and open an email addressed to the redacted address) and hyperlinks to other information.

## Planning redaction – “What should go and what should stay?”

This is a difficult one to cover, as the variables are many and often contextual, but here are a few things that may be worth considering.

- Names and initials (including aliases and nicknames)
- Addresses and locations (postcodes)
- Phone numbers
- Email addresses
- Gender specific words (he, she, Mr, Mrs)
- Job titles (particularly if there is only one post holder)

If you are unsure what to redact or wish to understand more in relation to your particular task, then please contact the IG team who will be happy to advise.

## Redaction – “The words first.”

For this guidance we will just look at redacting a simple word paragraph in word:

*Lorem ipsum dolor sit amet, eonseetetur adipiscing elit. Aenean sagittis, dui nee volutpat blandit, risus leetus sagittis areu, vel malesuada libero massa ut metus [wilbur.kerr@eastamb.nhs.uk](mailto:wilbur.kerr@eastamb.nhs.uk). Fusee vitae nibh purus. Duis rhoneus orci sed dolor eonvallis egestas. Phasellus iaeulis sit amet sem id venenatis. Aenean non ipsum ut leetus aeeumsan plaerat in et nulla. Nam non elit eget nune elementum feugiat nee sit amet sem. Integer a sagittis nune. Morbi vitae semper sapien*

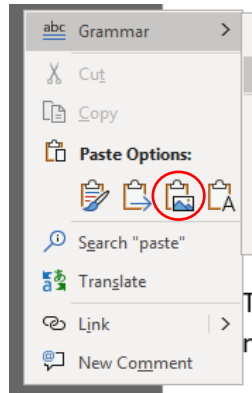
It's in Latin, and in the middle is an email address that we wish to redact (it includes a hyperlink that will open an email to the email owner).

To redact this we have 2 options, replacing the text with symbols (but mind the tracked changes or reversible revisions!) or we can cover the text with black highlighter, then when we save it to a pdf its redacted safely? Wrong, this is the most common mistake.

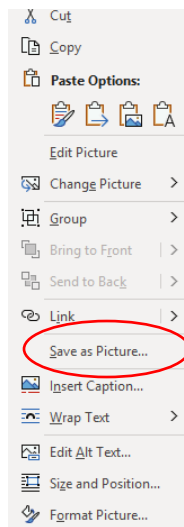
In this case we will use the highlighter, but we will also go through another step to prevent the redaction from being reversed.

*Lorem ipsum dolor sit amet, eonseetetur adipiscing elit. Aenean sagittis, dui nee volutpat blandit, risus leetus sagittis areu, vel malesuada libero massa ut metus [REDACTED]. Fusee vitae nibh purus. Duis rhoneus orci sed dolor eonvallis egestas. Phasellus iaeulis sit amet sem id venenatis. Aenean non ipsum ut leetus aeeumsan plaerat in et nulla. Nam non elit eget nune elementum feugiat nee sit amet sem. Integer a sagittis nune. Morbi vitae semper sapien*

The text is still there as is the hyperlink, but now I am going to select the whole paragraph and copy it, then I open a new blank word document and then right mouse click to paste, but not using normal paste.

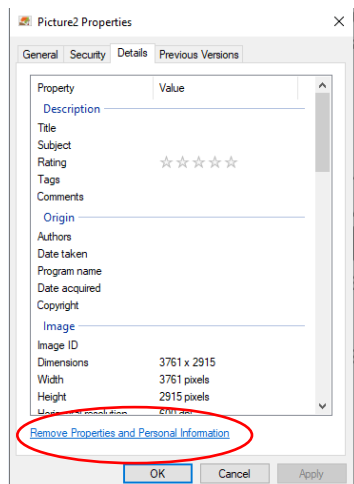


I have put a red circle round the paste option to choose. This will paste the text into the new word document as a picture. One must then select the image a second time.

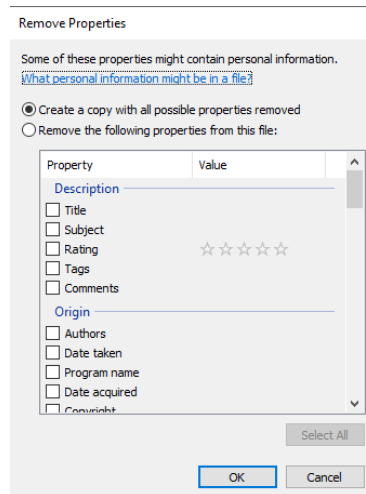


At this point you can save the image as a .tif file (an older picture format that is used for producing fixed images of documents, and is the system used to image paper PCR's).

Next, we need to open the image and click file, then choose properties, which will open the following window.



Click on the remove properties and personal information link and then you will open the next window.



Whilst you can choose which items you would like to remove or remain the default setting is ‘create a copy with all possible properties removed’, and this is by far the best option.

## The Finishing Touch – “Watermarking.”

The next step is to insert this image (the one with properties removed) into a new blank word document and then insert a text box which says something like:



Generally, I like to place this just overlapping some of the text so that this cannot be overlaid again.

Once this has been done then save as a .pdf using the standard MS Word pdf.

You now have an image that is unalterable and sanitised (the technical term for removing hidden data).

## **So, I can send it ! – “Not just yet. ”**

Getting redaction wrong can cause considerable problems, worry, and harm for individuals. It can also leave the Trust open to legal action, reputational damage, and criminal prosecution.

So before sending carry out the following checks.

- If I copy the document onto a new blank word document is anything revealed?
- Have I removed the metadata (sanitised the document)?
- Are all the hyperlinks removed?
- Have I redacted all the information I intended to redact?
- Could another individual workout whose details have been redacted?

We are almost at the final stage, and that is quality assurance. No matter how careful one has been we are all human, therefore, a document such as this which has had so much time vested in it should be checked by another person who should carry out the same checks as above.

## **So, I'm ready ! – “well things can still go wrong”.**

At this point you must be wondering what else, I have made up the document, it's been quality assured I have checked it twice!

This is where we must think again and not lose concentration, or be harried by a deadline, do we have the correct email address to send the document to, is it wilbur.kerr@eastamb.nhs.uk or wilber.kerr@eastamb.nhs.uk?

Does the file need to be encrypted? Do I have the right software to encrypt if it does? How should I choose a password for an encrypted document (not password123!)?

## **It's Gone! – “but it think something went wrong.”**

Don't panic, lets go through the actions to take:

1. Recall the email.
2. Send an email to the recipient and ask them to delete the message and attachment and to confirm that action has been taken (this point may be complicated by a range of variables)
3. Raise a Datix.
4. Contact the Information Governance Team
5. Keep together a copy of the items sent, the recipient address.
6. Wait for the IG team to contact you and provide further guidance.

## **Wow! – “ is it really that complex?”**

In a word “yes”, using a completely manual method is this complex, when you want to achieve a safely redacted document. Using specialist software can make the whole thing considerably easier, but still requires one to follow a particular process.

But many of the considerations cannot be automated, they require context, rationale, and an understanding of legislation.

If you are in any doubt, contact the IG Team:

**[Informationgovernance@eastamb.nhs.uk](mailto:Informationgovernance@eastamb.nhs.uk)**

The Information Commissioners Office (ICO) has also produced guidelines to assist with redaction, a copy can be found at The Information Governance Knowledge Base [here](#)