How to Redact Documents

Before you submit documentation to the BACB, you must redact all personally identifiable information (e.g., client names, genders, dates of birth, addresses, images of faces) to keep such information safe. This resource will show you how to redact documents using the following methods:

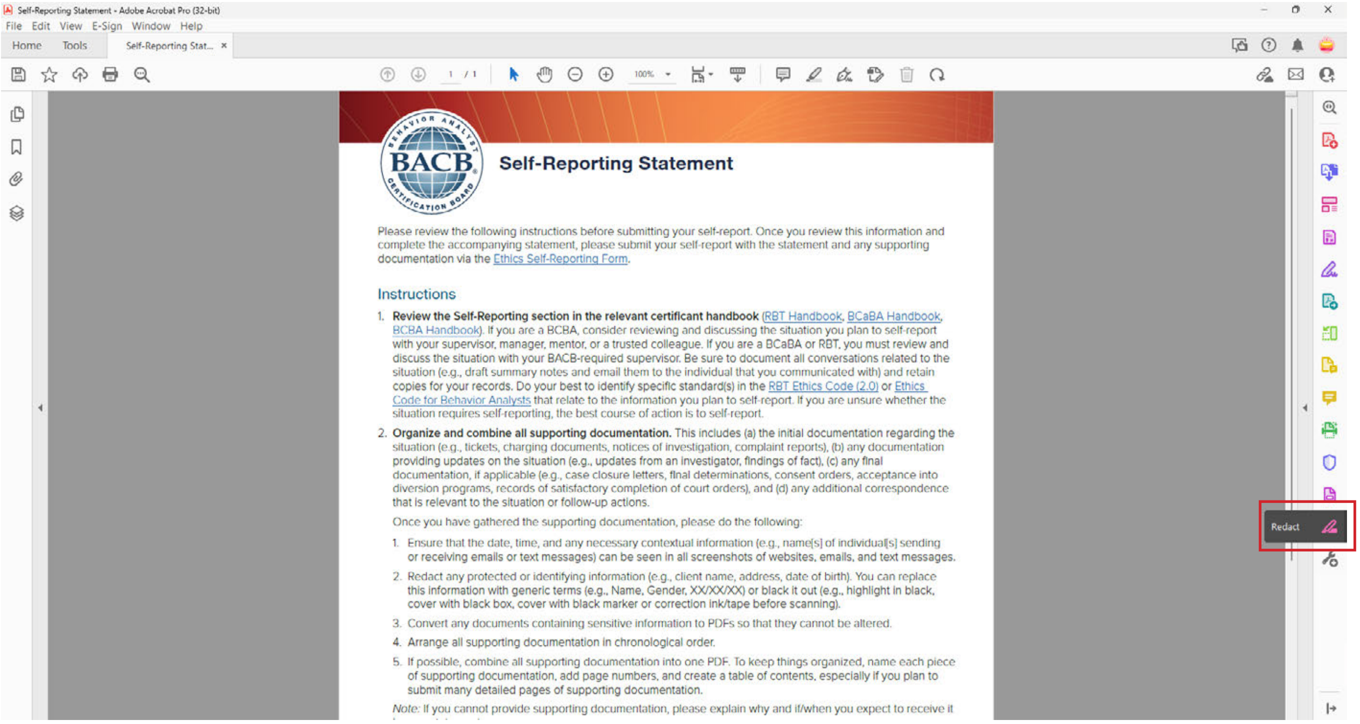
1. Adobe Acrobat (requires an Adobe Acrobat subscription)
2. Microsoft Word (requires Word editing privileges)
3. Microsoft Edge Web Browser (requires a Windows operating system)
4. Manual (e.g., print, draw/tape, scan, photograph)

Note: Some of these instructions may not apply to your computer's software or operating system.

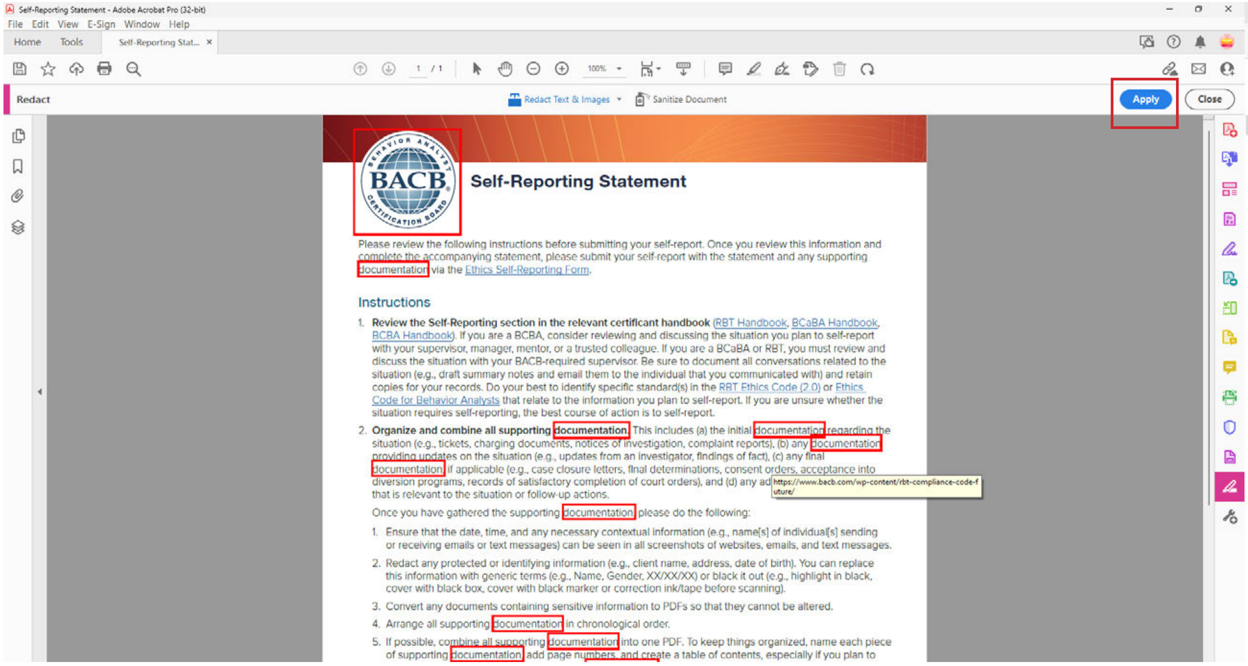
In the following examples, we will redact the word *documentation* and the BACB logo.

1. Adobe Acrobat

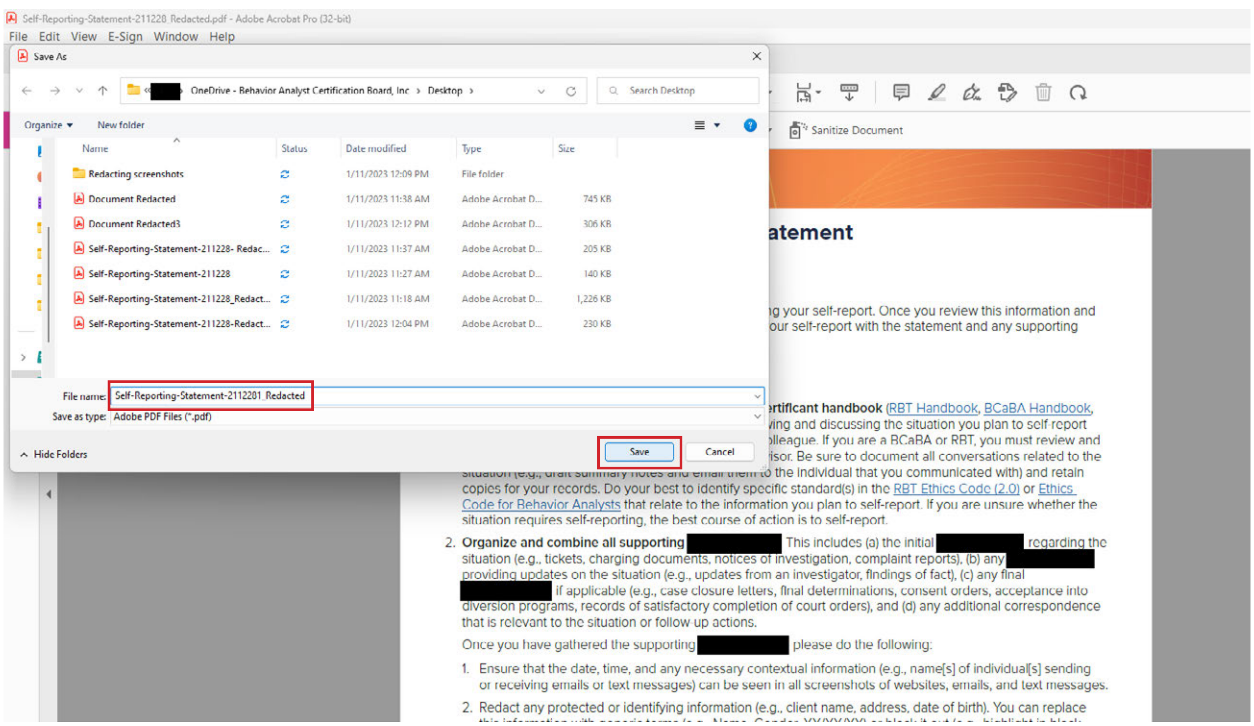
1. Open the PDF using Adobe Acrobat. Find and select the Redact tool.



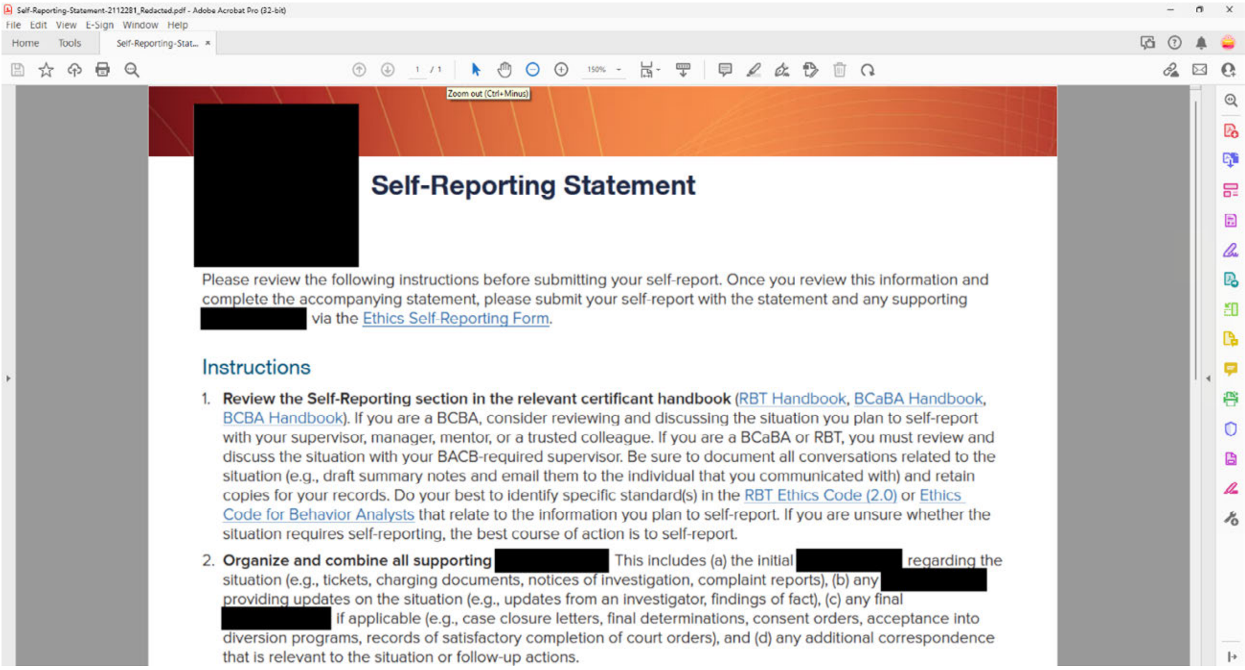
2. Select the information you wish to redact by highlighting the text or image(s).



3. Select Apply. This action removes the information highlighted in the document.
4. Rename and save the redacted document.



5. The document is ready to submit.



[redacted]

Self-Reporting Statement

Please review the following instructions before submitting your self-report. Once you review this information and complete the accompanying statement, please submit your self-report with the statement and any supporting [redacted] via the Ethics Self-Reporting Form.

Instructions

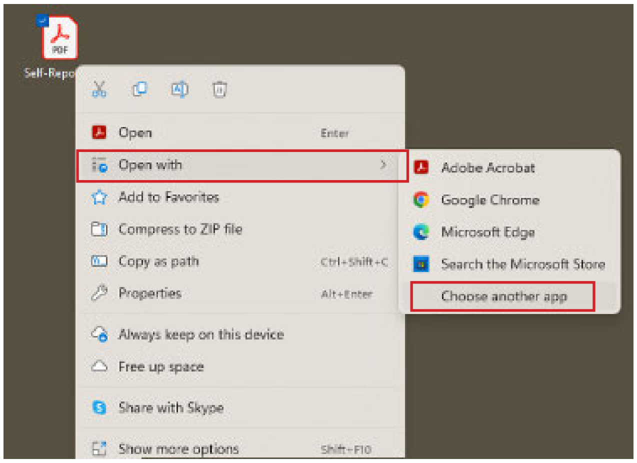
1. **Review the Self-Reporting section in the relevant certificant handbook** (RBT Handbook, BCaBA Handbook, BCBA Handbook). If you are a BCBA, consider reviewing and discussing the situation you plan to self-report with your supervisor, manager, mentor, or a trusted colleague. If you are a BCaBA or RBT, you must review and discuss the situation with your BACB-required supervisor. Be sure to document all conversations related to the situation (e.g., draft summary notes and email them to the individual that you communicated with) and retain copies for your records. Do your best to identify specific standard(s) in the RBT Ethics Code (2.0) or Ethics Code for Behavior Analysts that relate to the information you plan to self-report. If you are unsure whether the situation requires self-reporting, the best course of action is to self-report.
2. **Organize and combine all supporting** [redacted] This includes (a) the initial [redacted] regarding the situation (e.g., tickets, charging documents, notices of investigation, complaint reports), (b) any [redacted] providing updates on the situation (e.g., updates from an investigator, findings of fact), (c) any final [redacted] if applicable (e.g., case closure letters, final determinations, consent orders, acceptance into diversion programs, records of satisfactory completion of court orders), and (d) any additional correspondence that is relevant to the situation or follow-up actions.

2. Microsoft Word

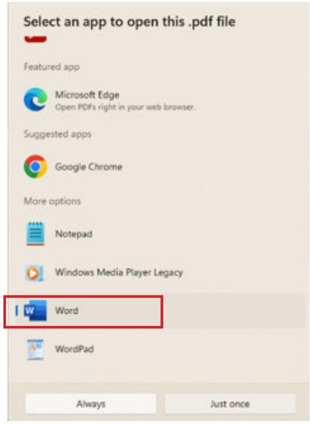
1. If you must redact a PDF and do not have an Adobe Acrobat subscription, follow these steps to convert it to Microsoft Word.

    a. On your desktop, right-click the PDF and select Open with.

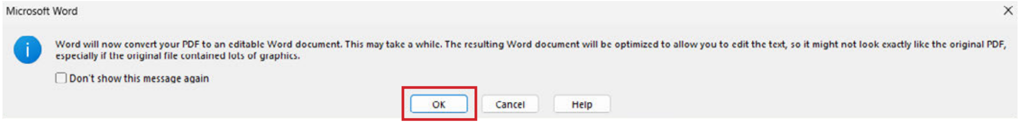
    b. Select Choose another app.



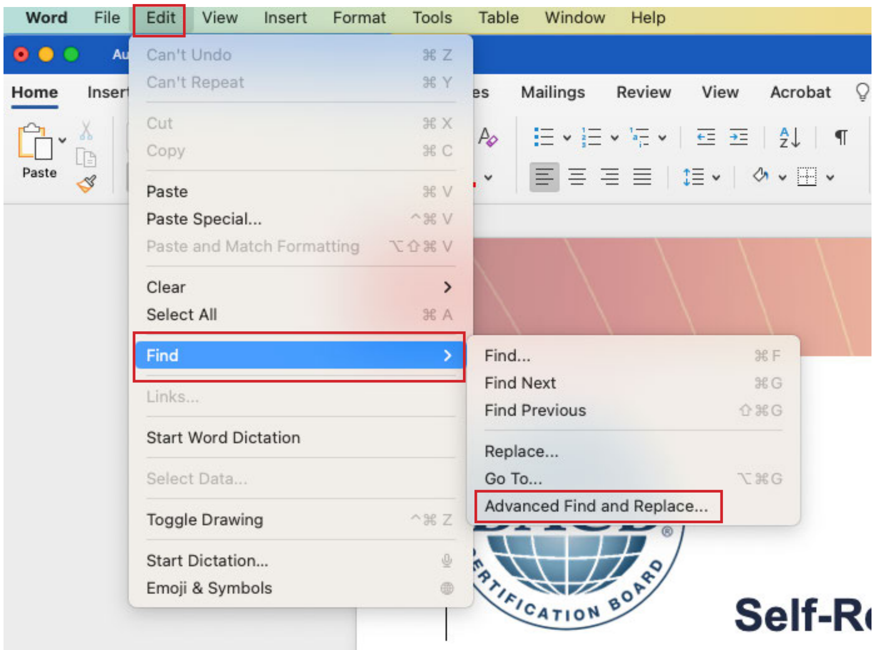
    c. Select Word.



    d. Select OK.



2. Under the Edit tab, select Find and then Advanced Find and Replace.



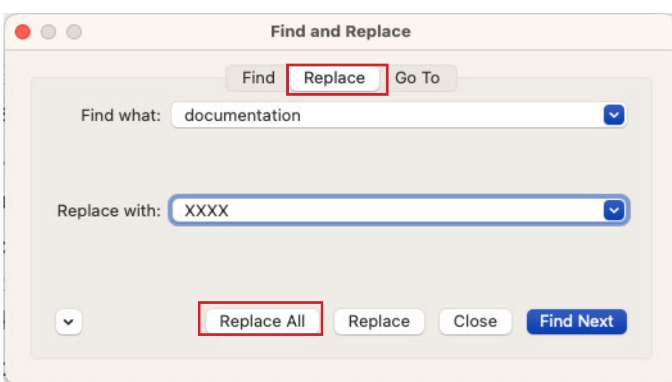
3. Use the Replace tool as shown in the following images. Here, we find the word *documentation*, replace it with XXXX, and then select Replace All.

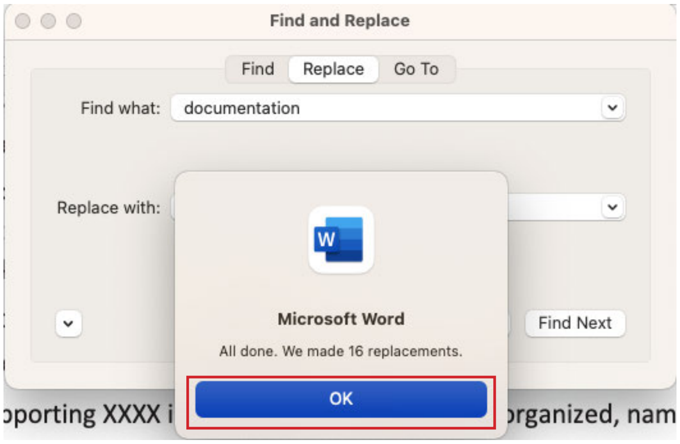
2. **Organize and combine all supporting documentation.** This includes (a) the initial documentation regarding the situation (e.g., tickets, charging documents, notices of investigation, complaint reports), (b) any documentation providing updates on the situation (e.g., updates from an investigator, findings of fact), (c) any final documentation, if applicable (e.g., case closure letters, final determinations, consent orders, acceptance into diversion programs, records of satisfactory completion of court orders), and (d) any additional correspondence that is relevant to the situation or follow-up actions.

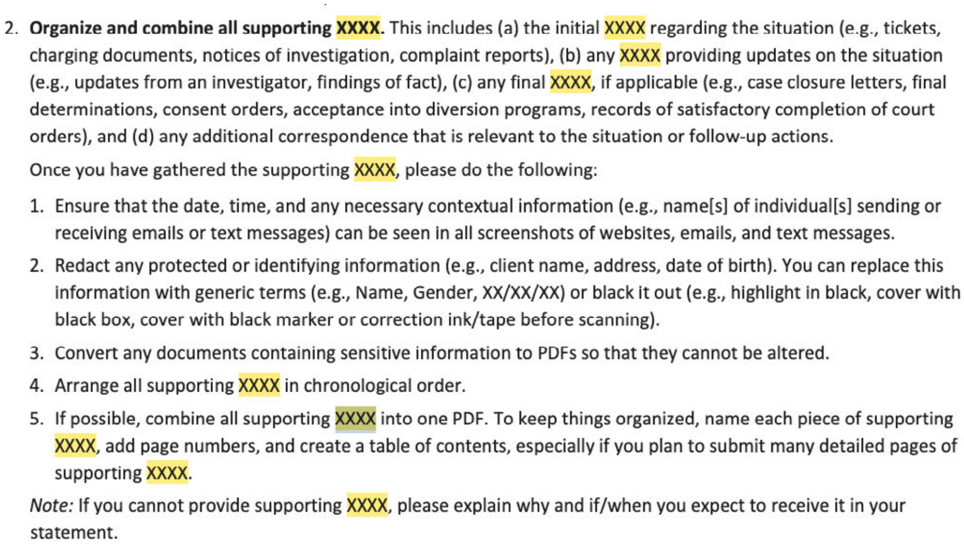
   Once you have gathered the supporting documentation, please do the following:

   1. Ensure that the date, time, and any necessary contextual information (e.g., name[s] of individual[s] sending or receiving emails or text messages) can be seen in all screenshots of websites, emails, and text messages.
   2. Redact any protected or identifying information (e.g., client name, address, date of birth). You can replace this information with generic terms (e.g., Name, Gender, XX/XX/XX) or black it out (e.g., highlight in black, cover with black box, cover with black marker or correction ink/tape before scanning).
   3. Convert any documents containing sensitive information to PDFs so that they cannot be altered.
   4. Arrange all supporting documentation in chronological order.
   5. If possible, combine all supporting documentation into one PDF. To keep things organized, name each piece of supporting documentation, add page numbers, and create a table of contents, especially if you plan to submit many detailed pages of supporting documentation.

   Note: If you cannot provide supporting documentation, please explain why and if/when you expect to receive it in your statement.







2. **Organize and combine all supporting XXXX**. This includes (a) the initial XXXX regarding the situation (e.g., tickets, charging documents, notices of investigation, complaint reports), (b) any XXXX providing updates on the situation (e.g., updates from an investigator, findings of fact), (c) any final XXXX, if applicable (e.g., case closure letters, final determinations, consent orders, acceptance into diversion programs, records of satisfactory completion of court orders), and (d) any additional correspondence that is relevant to the situation or follow-up actions.

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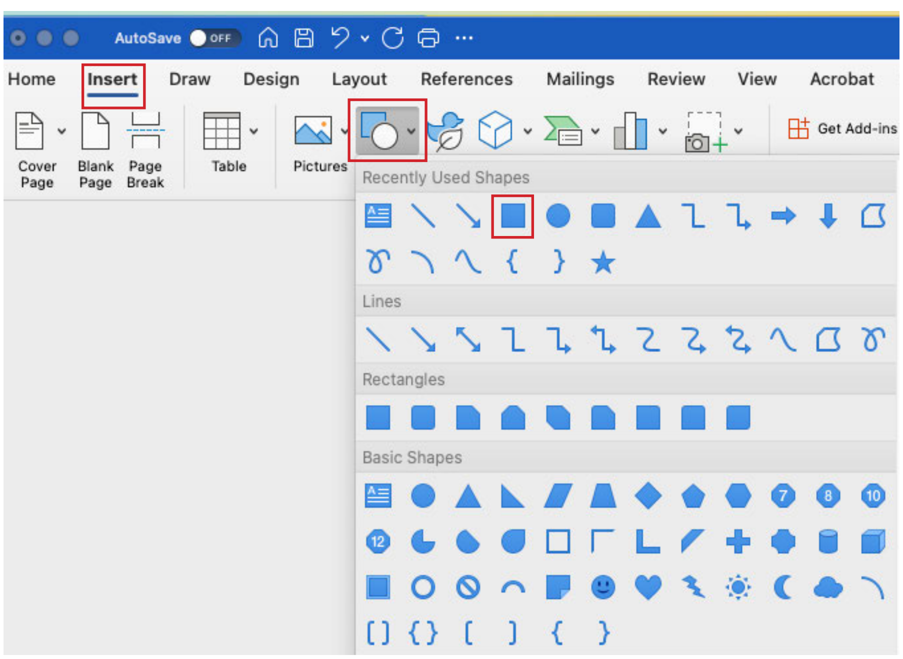
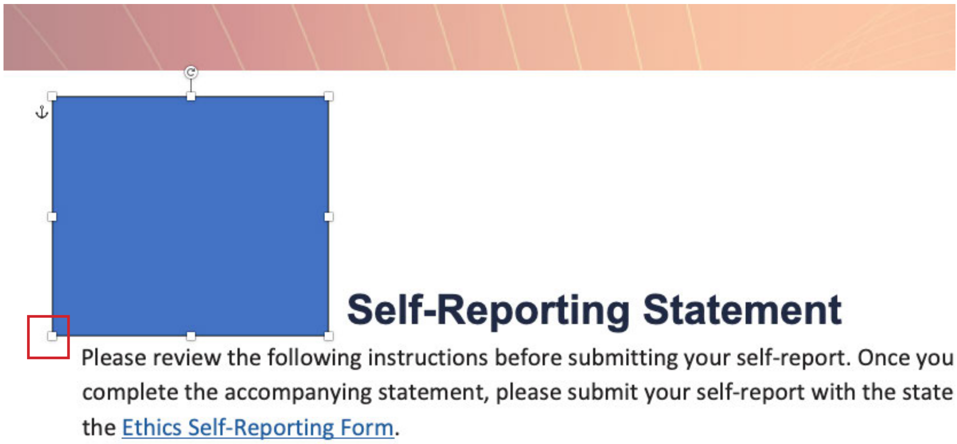
   3. Convert any documents containing sensitive information to PDFs so that they cannot be altered.
   4. Arrange all supporting XXXX in chronological order.
   5. If possible, combine all supporting XXXX into one PDF. To keep things organized, name each piece of supporting XXXX, add page numbers, and create a table of contents, especially if you plan to submit many detailed pages of supporting XXXX.

   Note: If you cannot provide supporting XXXX, please explain why and if/when you expect to receive it in your statement.

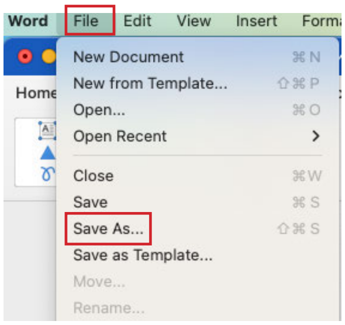
4. To readact images, use the Shapes tool under the Insert tab to create a square that can cover the image you must redact. Select, hold, and drag the square over the image. You may adjust its size using the white squares along its border.



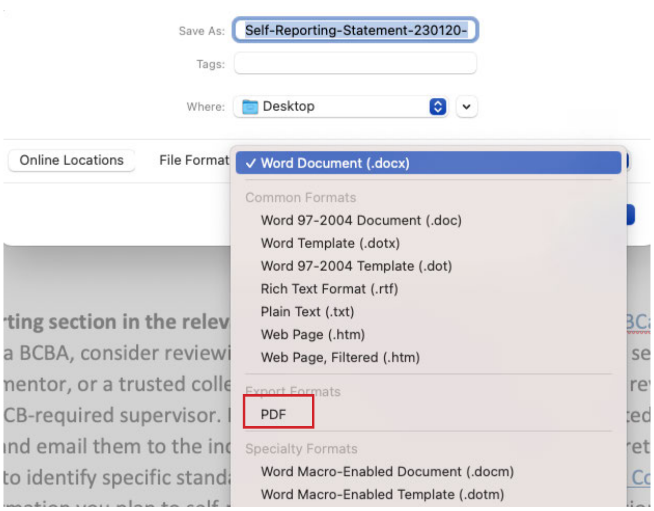


5. Save the file as a PDF. If you cannot convert the document to a PDF, you can print the document and take a picture of it. If you submit it as a Word document, the square used to cover the image(s) can be altered or deleted, revealing the personally identifiable information.

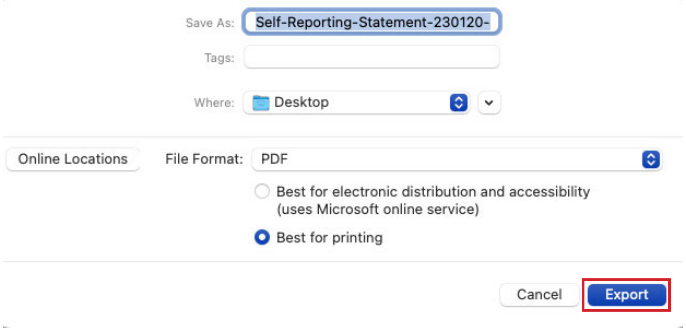
   a. Select File and then Save As.



   b. Select PDF.



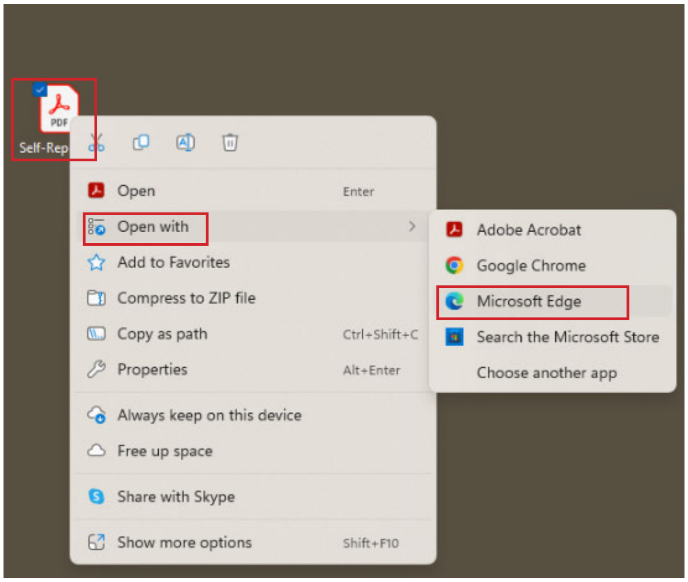
c. Select Export.



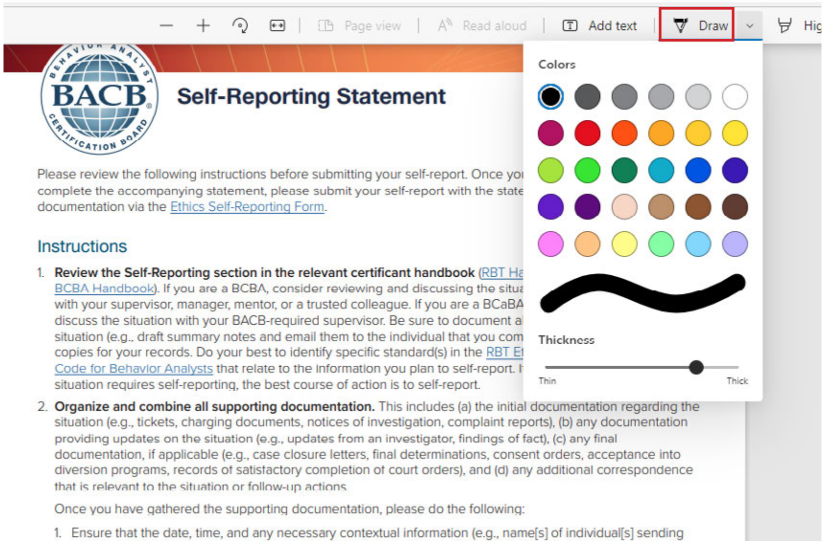
6. When the automatic notification pops up, select Yes. Then, you can rename the document as a new PDF.
7. The document is ready to submit.

3. Microsoft Edge Web Browser

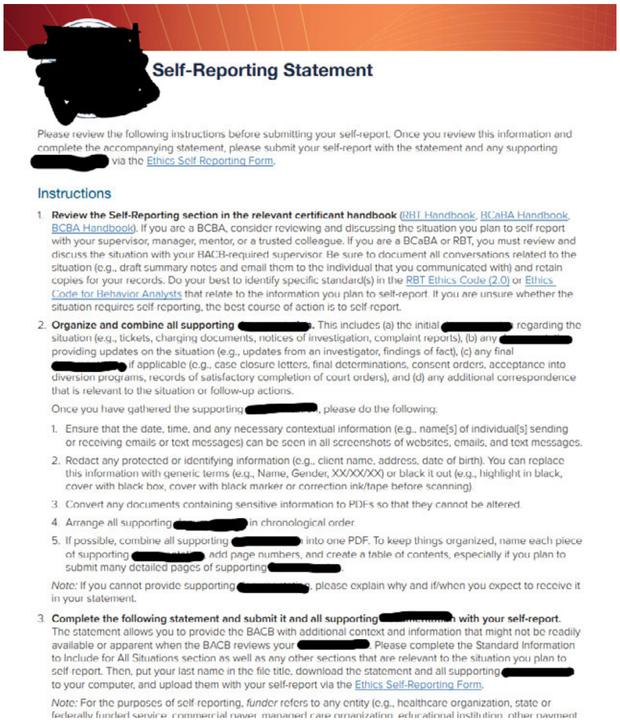
1. Right-click the document you must redact. Select Open with and then Microsoft Edge.



2. Select the Draw tool on the toolbar. Adjust its color and thickness as needed.



3. Draw over the areas that must be redacted.



[redacted] Self-Reporting Statement

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2. Organize and combine all supporting [redacted]. This includes (a) the initial [redacted] regarding the situation (e.g., tickets, charging documents, notices of investigation, complaint reports), (b) any [redacted] providing updates on the situation (e.g., updates from an investigator, findings of fact), (c) any final [redacted] if applicable (e.g., case closure letters, final determinations, consent orders, acceptance into diversion programs, records of satisfactory completion of court orders), and (d) any additional correspondence that is relevant to the situation or follow-up actions.

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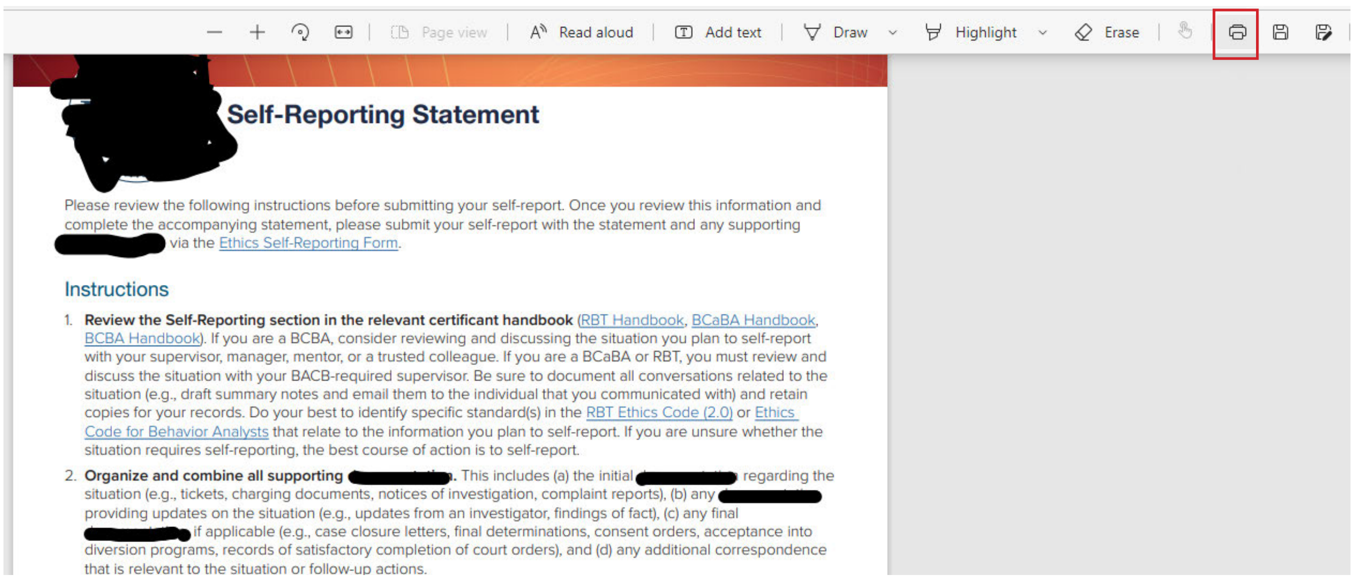
   5. If possible, combine all supporting [redacted] into one PDF. To keep things organized, name each piece of supporting [redacted], add page numbers, and create a table of contents, especially if you plan to submit many detailed pages of supporting [redacted].

   Note: If you cannot provide supporting [redacted], please explain why and if/when you expect to receive it in your statement.
3. **Complete the following statement and submit it and all supporting [redacted] with your self-report.** The statement allows you to provide the BACB with additional context and information that might not be readily available or apparent when the BACB reviews your [redacted]. Please complete the Standard Information to Include for All Situations section as well as any other sections that are relevant to the situation you plan to self report. Then, put your last name in the file title, download the statement and all supporting [redacted] to your computer, and upload them with your self-report via the Ethics Self-Reporting Form.

   Note: For the purposes of self reporting, *funder* refers to any entity (e.g., healthcare organization, state or federally funded service, commercial payer, managed care organization, educational institution, other payment

4. To save the redacted PDF, locate the printer icon in the toolbar. Saving with this method will remove metadata that may still be in the document (e.g., author's name) and prevent anyone from altering or erasing the redactions.



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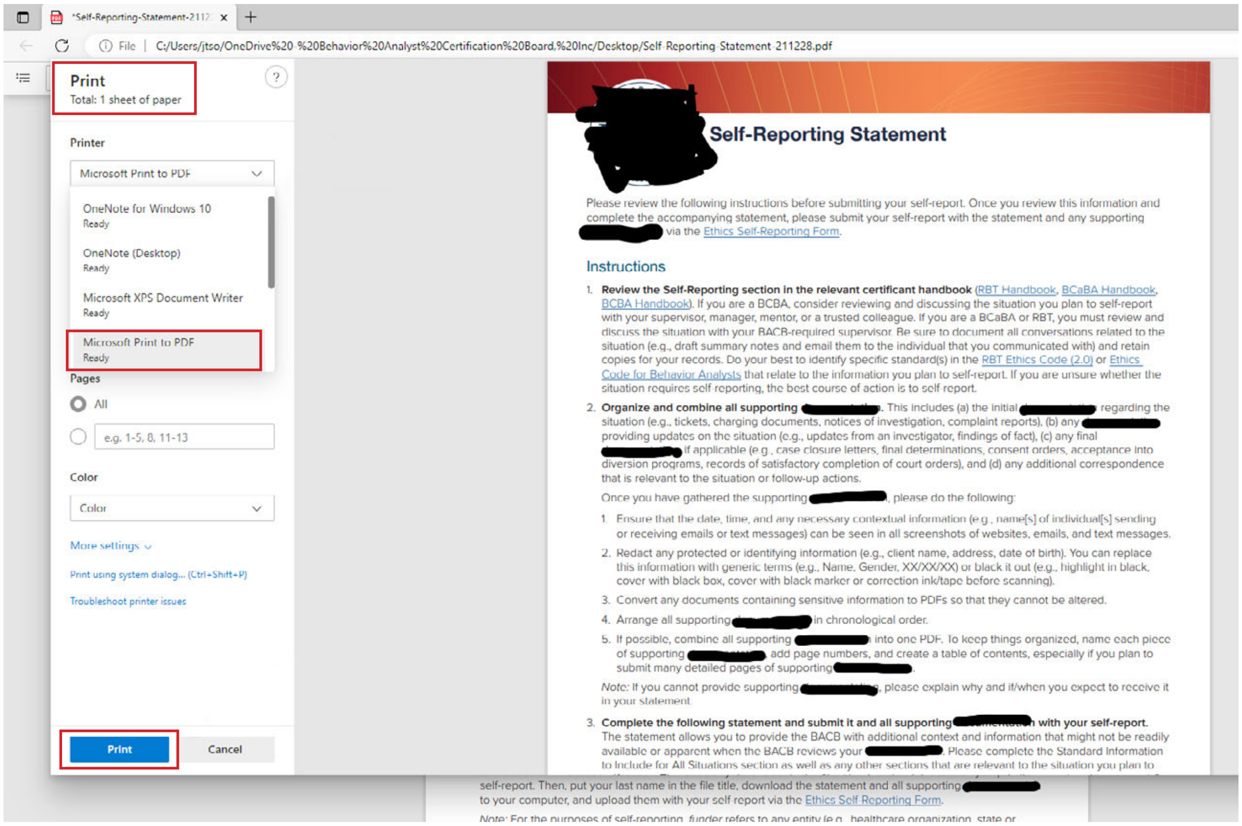
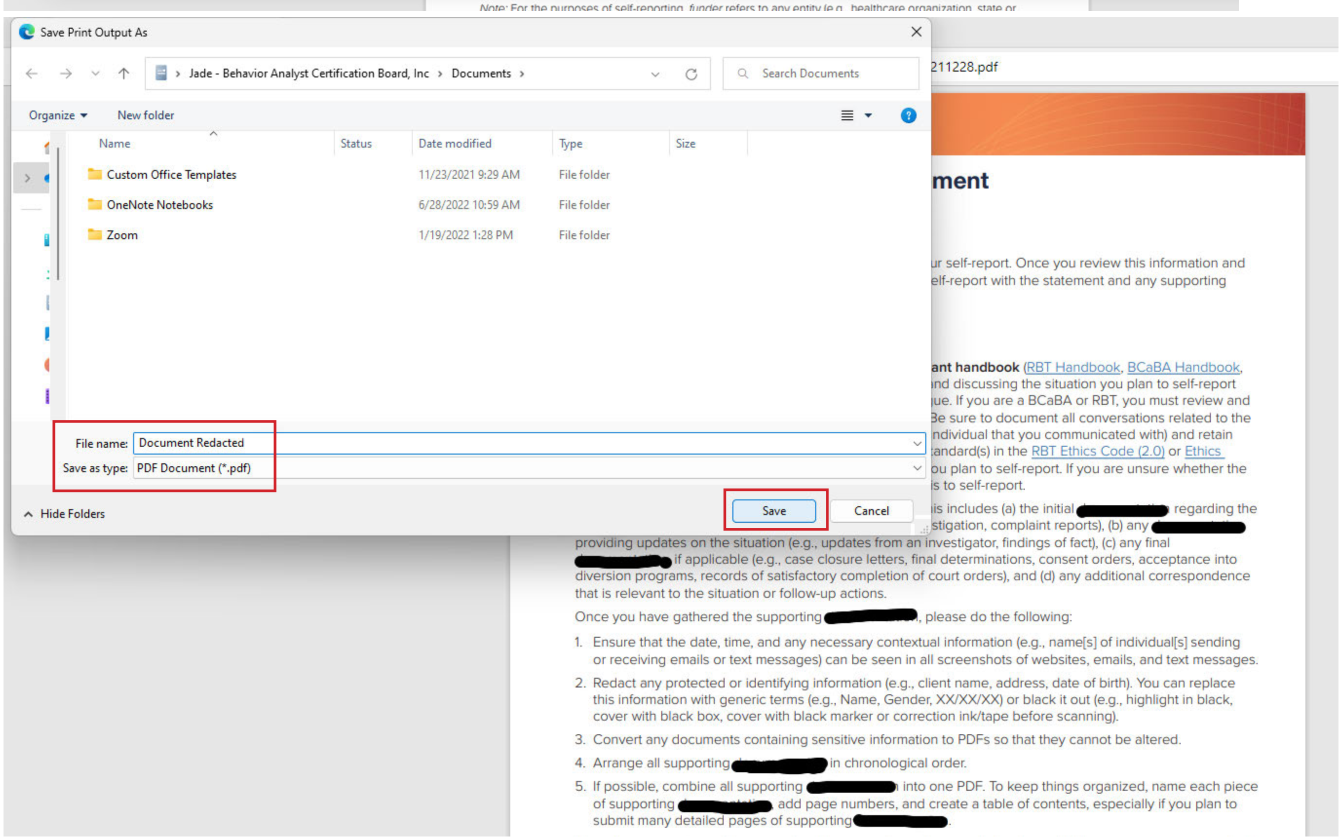
5. Open the Print dropdown menu and select Microsoft Print to PDF. This will generate a PDF with the redactions applied.





6. The document is ready to submit.

4. Manual Redaction

This method requires a hard copy of the document and a scanner or mobile phone that can take and send photographs.

1. On the hardcopy, use a black marker or opaque tape to cover the information that must be redacted.
2. Once the redactions are complete, scan the document to your computer or take a photograph of the document, send it to your computer, and save it. From there, you can submit the scanned document or photograph.

Note: Please ensure that submitted photographs are clear and readable.