How to Redact Personal Identifying Information (PII)

This guidance is designed to help committees redact personally identifiable information (PII) of committee members or contributors on documents or communications, including emails, before submitting them to the NYS Public Campaign Finance Board (PCFB). PII includes any information that can be used to directly or indirectly identify an individual, including data that is associated with or can be linked to a specific person. Committees are required to retain the original unredacted documents in their files for five years.

Why does the PCFB want me to redact financial information? The PCFB is committed to protecting sensitive data and complying with privacy best practices. To avoid retaining personally identifiable information (PII) without a legal requirement, we request that you redact such information before submitting documents. This safeguards your committee and the individuals whose data may appear in your records.

What is redaction? Redaction is the process of removing confidential or sensitive information from documents in a way that it can no longer be seen or accessed by others.

What types of personally identifiable information (PII) must be redacted before submitting documents to the PCFB?

To protect the privacy of contributors and committee members, treasurers must redact sensitive financial information before submitting documents to the PCFB. The following types of personally identifiable information (PII) should be redacted:

- **Full account numbers from financial institutions** (except the last four digits)
- **Full credit card numbers**
- **Check routing numbers**
- **Social Security numbers**

Committees must retain unredacted versions of these documents in their internal records, but redacted versions should be submitted to the PCFB.

What are the proper methods for redacting PII?

There are two main ways to redact personally identifiable information (PII) from documents: **manual (non-electronic)** and **electronic (digital)**. Whichever method you choose, the key is to ensure that the PII is completely and permanently removed—not just hidden.

Manual (Non-Electronic) Redaction

If you're submitting paper documents or scanning physical copies, this is the most straightforward approach:

- **Start with a photocopy** of the original document. Never redact the original.

- **Use a permanent black marker** (such as a Sharpie) to thoroughly block out the PII. Make sure the ink fully obscures the information and cannot be read, even when held up to the light.
- You may also use an **opaque sticker or label** to cover the information instead of a marker.
- **Make a second photocopy** of the redacted version. This copy should be visually inspected to ensure the redacted information is fully covered and cannot be seen from the front or back.
- **Submit only the final (second) photocopy** to the PCFB. Keep the original unredacted version in your committee's records.

Electronic (Digital) Redaction

If you're submitting documents electronically (e.g., PDFs), you may use digital redaction tools—but it's important to use them correctly:

- Use a trusted **PDF editing tool with redaction features**, such as **Adobe Acrobat Pro**, **PDF-XChange Editor**, or **Preview on Mac**.
- **Do not simply place a black box or white rectangle** over the text—this only hides the information visually and does **not** remove it from the file.
- Use the software's **official redaction tool**, which removes the content from the file and deletes any associated metadata.
- After redacting, **double-check that no PII remains**, including in metadata, comments, document properties, or hidden layers.
- Save a **new version of the redacted file** and keep the original unredacted version securely on file.

If you're unsure about using digital tools or whether a redaction tool has properly removed all data, it's safer to use the manual method described above.

When should I start redacting information and do I have to resubmit redacted versions of documents already submitted?

You should begin redacting all documents submitted to the PCFB as soon as possible. Redaction is not required for documents that have already been submitted—you do not need to resubmit redacted versions of past filings.

While the PCFB will not reject documents that contain PII, we strongly encourage you to submit only redacted versions going forward. Doing so helps protect your contributors, committee members, and your own records from unnecessary exposure of sensitive information.