

Redaction Checklist Before Production (2026) + Tool Shortlist

<https://counterbench.ai/guides/redaction-checklist-before-production-2026> · Last updated: 2026-03-08

QUICK ANSWER

A defensible redaction workflow requires permanent redactions (not overlays), pre-defined categories/standards, file-type batching, and QA checks for text recovery, metadata leakage, and attachment misses before any production goes out the door.

BENCH-TESTED CHECKLIST

- Define what you are redacting (PII/PHI/trade secrets/privilege per your matter).
- Confirm production standard (searchable PDF, natives allowed, Bates, legends).
- Write the "no surprises" rule: redactions must be unrecoverable in text layers, comments, and metadata.
- Create a production inventory (doc ID, filename, file type, redaction needed Y/N).
- Batch by file type and assign an owner + separate QA reviewer.
- Treat attachments as their own batch when needed.
- Text recovery check: copy/paste around redactions; search for redacted terms; test selection under boxes.
- Metadata check: remove comments/track changes/hidden sheets as required; confirm filenames don't leak info.

Get templates + the full workflow: <https://counterbench.ai/guides/redaction-checklist-before-production-2026>