Creating Digitally Accessible Documents Guide

Overview

The Americans with Disabilities Act (ADA) requires digital technology to be accessible to everyone, including electronic documents posted on both public websites and log-in required intranet portals. While many organizations have stated digital accessibility policies and compliant website platforms, the resources to produce and maintain accessible digital documents are often lacking. This Guide provides general instructions to create and update ("remediate") PDF, Microsoft Word, and Excel documents in accordance with 2.1 AA-level standards of the Web Content Accessibility Guidelines (WCAG), where feasible.

Important Disclaimer

The Guide does *not* provide definitive ADA legal compliance information. It is limited to basic technical instructions for creating—and remediating existing—documents based on WCAG standards. Contact your organization's accessibility office or legal counsel regarding specific digital accessibility compliance.

Resources

- Video: How to use the Accessibility Checker in Adobe
- WCAG information and development tools
- Federal Government Accessibility Toolkit
- Harvard University PDF Guide

Word Documents

Find the Accessibility Checker and follow the instructions in the menu to resolve all issues.
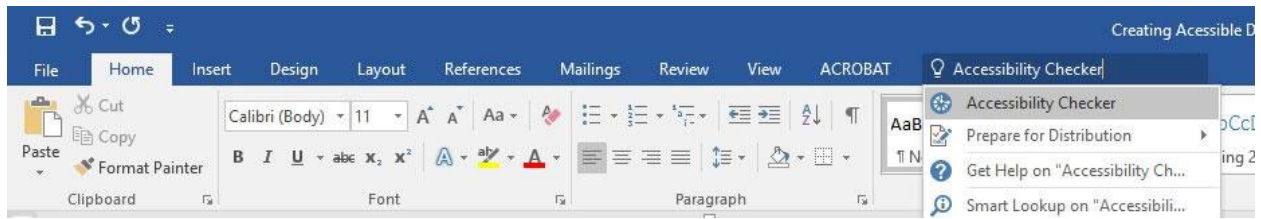
How to Set Up a Word Document to Pass Accessibility

1. Create a Title on top of the page
2. Use standard pre-set headers styles in the Microsoft Word menu (e.g., Heading 1, Heading 2)
3. Use standard fonts
4. Do not use colored backgrounds or watermarks
5. If inserting images and graphics, add Alt descriptions:
   - Right click on image > Format > Alt Text
   - Do no use images/graphics as a heading or section title
6. Use the Table of Contents tool if applicable
7. When making tables:
   - Add a title
   - Use first row as headers
   - Under table properties, choose "Row" and click "Repeat as header row" under Options:
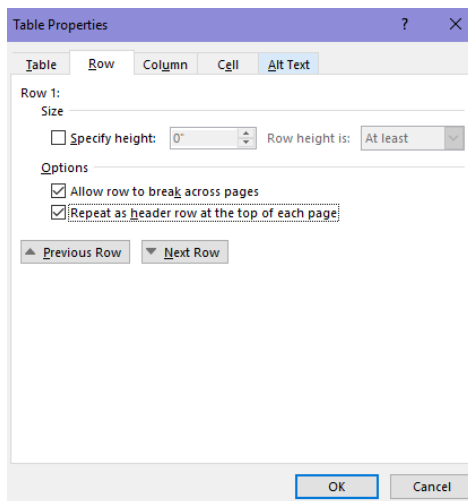
   - Add a description under "Alt Text"

8. If converting Word into a PDF, run the Accessibility Checker in Adobe Acrobat.

PDF

All PDFs should be scanned and fully remediated using the Adobe tool. To perform the Accessibility Check on PDFs, you must have Adobe Acrobat DC installed on your computer and open documents in it (not Adobe Reader). Add the Accessibility tool (under the Tools menu) to your sidebar. Adobe will scan the document, flag any issues, and provide a menu to fix the problems. Remember to solve all the issues in order to make the PDF compliant.
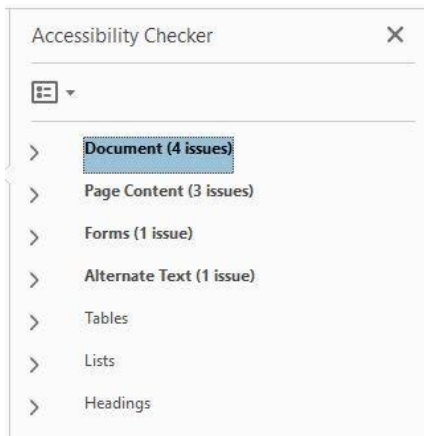
Don't forget to save the PDF when complete.

How to Remediate a PDF

1. Open in Adobe Acrobat DC
2. Check the document title: File > Properties: Fill in title field if needed
3. Fill out Subject and Keywords (optional but this will aid search engines)
4. Open the Accessibility menu to perform scans of the document:

   - Autotag Document: Click to run this function (if it indicates the document is already tagged, choose "No")

   - Autotag Form Fields: Click if the PDF has any fillable boxes

   - Reading Options: Click for the menu box. The "Tagged reading" order is the default. If the document has an unusual layout, choose "Infer reading order" or "Left-to-right, top-to-bottom":
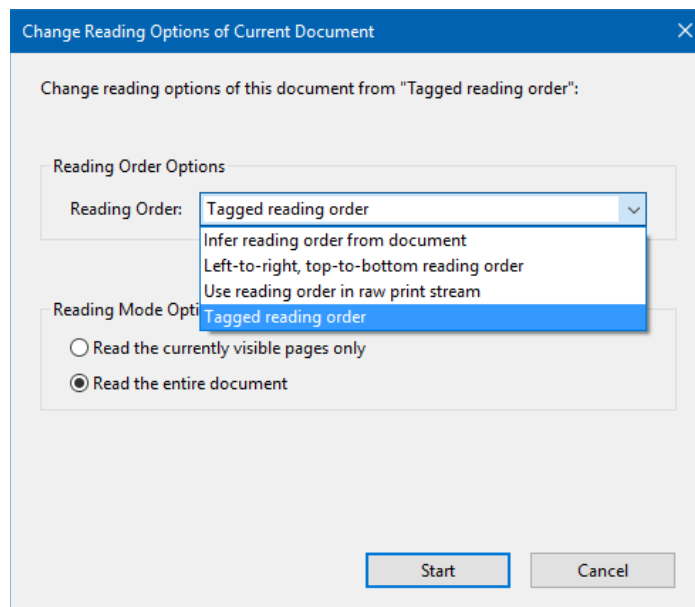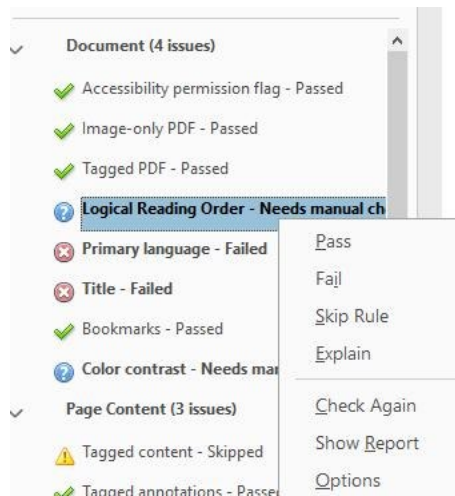
5. Accessibility Checker

- Click for a dialogue box (Leave all the default checked boxes)
- Select "Start Checking"
- The results will open in the left column and indicate the number of non-compliant issues to resolve.

Accessibility Checker   ✕

> **Document (4 issues)**
> Page Content (3 issues)
> Forms (1 issue)
> Alternate Text (1 issue)
> Tables
> Lists
> Headings

- Click the arrows under each heading and right click on the issue to open a menu:

Document (4 issues)
✔ Accessibility permission flag - Passed
✔ Image-only PDF - Passed
✔ Tagged PDF - Passed
❓ Logical Reading Order - Needs manual ch
❌ Primary language - Failed   Pass
❌ Title - Failed   Fail
✔ Bookmarks - Passed   Skip Rule
❓ Color contrast - Needs mar   Explain

Page Content (3 issues)   Check Again
⚠ Tagged content - Skipped   Show Report
✔ Tagged annotations - Passe   Options

6. Resolving Issues:

- Document:

  o Add the document Title and Primary Language ("English") if missing.

  o "Logical reading order" and "Color contrast" require visual inspection.

    If your document has straight-forward text paragraphs with images, tables, and form fields in regular order, you can choose "Pass".

    Designed flyers or marketing brochures with images and text in unusual configurations, or pages out of sequence, will need to be evaluated and updated for digital use. Color contrast refers to graphic backgrounds with text overlays which need to be sharply contrasted in order for low-vision/color-blind readers to distinguish text from the background.

- Page Content:

  o Page Content items usually pass if the document is first Autotagged

  o You may choose Pass on "Screen flicker", "Scripts", and "Timed Responses" if highlighted, as these do not apply to most documents

- Forms: Missing Field Descriptions are the most common fails. Follow these instructions:

  o Select "Close" in the upper right hand corner of the PDF
  o In the Search Tools Box, type in "Form"
  o Choose "Edit Form"
  o In each of the field boxes, right click and choose "Properties"
  o Under the General tab, type in the title of the field under "Name" and "Tooltip"
  o Close
  o Return to the Checker menu in the left column. If the issue isn't resolved, choose "Check Again"

- Alternative Text: Every image or graphic must have a description.
  o Click on each figure that failed
  o Choose "Fix"
  o Type in a description of the image/graphic (or click "Decorative Figure" if it's a design element)
  o Click "Save & Close"

- Tables: Tables require titles and headers set up in the original document.

- o If "Headers," "Regularity," or "Summary" still do not pass in Adobe, you can choose to "Skip" these optional elements, but the document will not be fully compliant.

- Lists: List items will pass if you are using standard formatting and run the Autotag.

- Headings:
  - o If you utilize the standard headings format in MS Word before converting to a PDF, this will pass. If the original document has a complex heading structure or Table of Contents, you will need to adjust the heading elements in the original document.

Excel

Microsoft Excel has an Accessibility Checker installed, but you must use the latest version of Excel. Find the Accessibility Checker and follow the instructions in the menu to resolve issues.
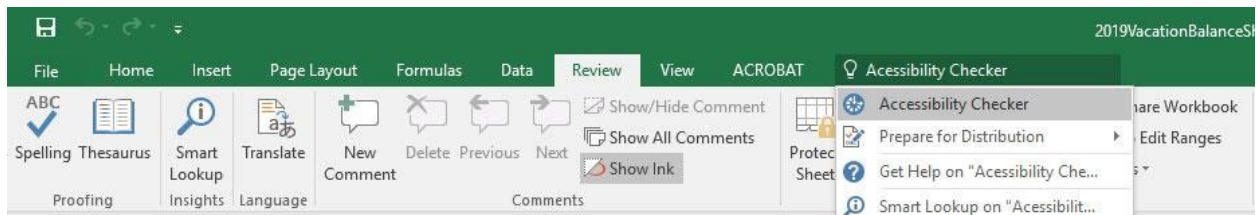
How to Set Up an Excel Spreadsheet to Pass Accessibility

1. Create a Title for the document
2. Add a heading row (missing headers are the most common accessibility issue)
3. Use standard font styles and sizes (nothing below 10pt font)
4. Avoid colored fonts and backgrounds in columns or rows (white text on a dark background is acceptable in headings)
5. Avoid merged fields that span multiple columns since they frequently fail accessibility in Excel and Adobe
6. If converting Excel Spreadsheets into a PDF, run the Accessibility Checker in Adobe Acrobat.