

# Microsoft Word Accessibility Checklist

This checklist was created as a guide to get you started in determining Microsoft (MS) Office 2007 Word document accessibility. Ctrl + Click on a checklist item to go to more information about how to make your document more accessible.

Note: It is easier to design an accessible document at its creation than to go back and make it accessible later. Accessibility should not be an afterthought!

## *Checklist Summary*

### Check these for every document:

- |                              |                             |   |
|------------------------------|-----------------------------|---|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | <a href="#">Did you use appropriate structure?</a>        |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | <a href="#">Did you use styles to control formatting?</a> |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | <a href="#">Did you use appropriate fonts?</a>            |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | <a href="#">Did you spell check your document?</a>        |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | <a href="#">Did you avoid full justification?</a>         |

For documents that have images, hyperlinks, lists, tables, etc.:

- |                              |                             |   |
|------------------------------|-----------------------------|---|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | <a href="#">Did you provide alternative text for figures?</a>                   |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | <a href="#">Did you use meaningful hyperlink text?</a>                          |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | <a href="#">Did you format lists using either list styles or the list tool?</a> |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | <a href="#">Did you make your table accessible?</a>                             |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | <a href="#">Did you use the column tool for columns?</a>                        |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | <a href="#">Did you make your form accessible?</a>                              |

## ***Did you use appropriate structure?***

Structure is the foundation of accessibility. Structure is created in a document by adding meaningful headings, created with appropriate styles (H1, H2, H3, etc). The structure of a document can be viewed in its Document Map and automated Table of Contents. To add structure to your document:

1. Add meaningful headings and apply the appropriate style to each of them:
  - **Heading 1** (H1) for the title of a short document or each chapter heading in a longer document
  - **Heading 2** (H2) for each main topic in the chapter or short document
  - **Heading 3** (H3) for subtopics of each H2



2. Use named styles for lists:
  - **List** for groups of definitions and other lists where the items need no bullets or numbers
  - **List Bullet** for unordered lists
  - **List Number** for step-by-step directions, priority rankings, and other ordered lists
3. Use shorter paragraphs. One idea per paragraph is a good rule of thumb.

## ***Did you use styles to control formatting?***

Headings and lists must be created by using styles for documents to be accessible to people who use assistive technologies to read them. Styles are named formatting definitions that can be applied to text. The use of styles provides labels for assistive technologies that help users understand a document's structure.

## ***Did you use appropriate fonts?***

Agency Communications has recommended the Verdana (for headings) and Georgia (for body text) fonts as the defaults for our Normal (blank document) template. You may use other fonts, but should choose them for simplicity and readability.

In terms of font accessibility, there are a number of things to keep in mind:

- Avoid using graphics instead of text (i.e. using a picture of a word instead of typing the word) — not readable by assistive technologies
- Select basic, easy-to-read fonts, such as:
  - Verdana (for headings)
  - Georgia (for body text)
  - Arial and Tahoma are appropriate substitutes for headings
  - Times New Roman and Calibri are appropriate substitutes for text
- Additional font information
  - Use a limited number of font styles — no more than three on a page
  - Avoid using fonts smaller than 12 points
  - Use character styles Strong and Emphasis instead of bold and italic – screen readers will be able to convey your meaning better
  - Avoid using ALL CAPITAL LETTERS
  - Underlining indicates hyperlinks – don't use it for emphasis.

### ***Did you spell check your document?***

Spell check is located on the ribbon's Review tab, on the far left (Keyboard shortcut = F7). Ensuring that your document contains correctly spelled words and is grammatically correct helps everyone understand your document. However, you should not rely on the spell check feature alone – do your own proof reading as well. Moose and mousse are both correctly spelled words, but if you write one when you mean the other you could describe a very unappetizing dessert.

### ***Did you avoid full justification?***

In fully justified text, the spaces between words (and within words) are stretched or compressed in order to make the text align with both the left and right margins. This makes the text difficult to read. For people with certain cognitive disabilities, it makes it impossible to read. Use left-aligned text instead.

### ***Did you provide alternative text for figures?***

Figures, equations and other non-text elements are inaccessible for people who use screen readers unless you place them properly and provide alternative text. Here's how:

- 1) Placement
  - a) Select the figure, a new tab will appear on the ribbon – Format
  - b) Select the Format tab, then the Position drop-down
  - c) Choose “In Line with Text”
- 2) Description
  - a) Right click and choose the **Size** option. If the **Size** option does not appear, choose the **Format Picture** option.
  - b) Select the **Alt Text** tab.
  - c) Type a brief description of the image. If the image displays text, be sure to include the text as part of the description.
  - d) If the image is for decoration only, leave the Alt Text field blank, press the Enter key and close the window.
- 3) Bar graphs, organization charts, and other complex images may require special handling.
- If the image is made up of different parts, group all the parts, then position and add alt text as described above.
- Complex images should have descriptive text below the image.

If your image is of a form that needs to be filled in by hand, please be sure to indicate that. For example: *"Form 2B - Special Permit Application Form must be printed out and filled manually."*

### ***Did you use meaningful hyperlink text?***

Screen readers can generate a list of links found in a document. Taken out of context, hyperlinks that read “Click Here” or “Read More” do not describe what the link will provide. Be sure to use brief but descriptive link text that can stand alone in this list of links. Examples: [TCEQ Homepage](#) and [T-Net Accessibility Center](#).

### ***Did you format lists using either the list styles or the list tool?***

Avoid creating lists by typing in a number or using a symbol to indicate list items. Both the list styles and the list tool  give people who use screen readers helpful information about the upcoming list — for example, the number of items it contains.

- The preferred method is to use named styles for lists:
  - Use **List** for groups of definitions and other lists where the items need no bullets or numbers
  - Use **List Bullet** for unordered lists
  - Use **List Number** for step-by-step directions, priority rankings, and other ordered lists

### ***Did you make your table accessible?***

Assistive technologies will work with tables if you follow these guidelines.

- 1) Only use tables for positioning objects or text if absolutely necessary. Try other means of presenting information first!
  - 2) Create your table using the table tool from the Accessibility tab. Choose **Table>Insert Table**. Do not use the Draw Table option.
  - 3) Make your table as simple as possible. Complex tables are harder for screen reader users to understand.
- Avoid merging or splitting cells. This makes it difficult (or impossible) for screen reader users to navigate the table.
  - Identify the header row. This is done by:
    - selecting the top row of the table,
    - choosing Properties in the Tables group on the Accessibility tab, then click on the Row tab,
    - check the box labeled “Repeat as header row at top of each page.”
  - Restrict the table to page width. This is done by:
    - selecting the table,
    - choosing Properties in the Tables group on the Accessibility tab, then click on the Row tab,
    - uncheck the box labeled “Allow row to break across pages.”
  - Bookmark the first cell:
    - Put your cursor in the first cell of the header row.
    - Go to the **Accessibility** tab and select **Bookmark in the Links group**.
    - Type **Bookmark name:** “Title”. If your document has more than one table, name the bookmark for the second table “Table2” and so on.

### ***Did you use the column tool for columns?***

Columns should be used for text that is to be read down one column, then down the next.

Use the column tool () , located in the ribbon’s Accessibility tab to create columns. This allows screen reader users to hear the text as it should be read.

Do not separate content into different columns by using the tab or space key!

## *Did you make your form accessible?*

### Form fields

Screen readers have a forms mode for users to enter data into form fields, which doesn't read the text between fields. To make form fields accessible:

1. Right click on each field and choose the **Properties** option.
2. Click the **Add Help Text** button.
3. Click on the text box underneath **Type Your Own**.
4. Type the label for that field. For example, if the field is requesting a phone number, type "Phone Number".

**Note:** Be as descriptive as needed. A listener using a screen reader won't be hearing much of the associated text while using Forms Mode. For example, in the list below, the user may not see the label "Choose One Pizza Topping:" (Follow steps 1 and 2 above to see the help text in the form fields below.)

#### **Choose One Pizza Topping:**

- Anchovies
- Canadian Bacon
- Onion
- Pepperoni
- Pineapple

5. Click OK for each dialog box.

### Protecting your form document

After creating a form, be sure to protect it by following the steps below. This lets screen reader users know to treat the documents as a form instead of an editable document.

1. After creating a form click on the **Review** tab, then click **Protect Document**.
2. Choose the **Restrict Formatting and Editing** option.
3. In the options that appear in the right sidebar, go to the drop down box labeled "**2. Editing restrictions**"
4. Make sure **Allow only this type of editing in the document** checkbox is checked.
5. In the drop down box right below it, choose the **Filling in forms** option.
6. Click the button labeled "**Yes, Start Enforcing Protection**". A dialog box will pop up asking for passwords. If you don't want to password lock the document, click **OK**.