Checklist for Making Accessible Microsoft Office and PDF Documents

Remember: you are creating files for not just students, but your colleagues at the University and anyone coming into contact with the Hopkins community. The guidelines below must be followed regardless if the file is distributed online or solely in a face-to-face environment.

# General Accessibility Requirements for All Documents

| General Document Requirements | Yes | No |
| --- | --- | --- |
| If the application has built–in styles (ie; Heading 1, Heading 2, Normal Text, etc.) did you use those built–in styles rather than changing font sizes and styles by hand?  [Add heading styles in Microsoft Office](https://support.office.com/en-us/article/Add-a-heading-3eb8b917-56dc-4a17-891a-a026b2c790f2) |  |  |
| Did you use built–in bullet and list tools instead of making them by hand?  [Make lists in Microsoft Office](https://support.office.com/en-us/article/Add-bullets-or-numbers-to-a-list-2c01600e-3d2c-473d-a909-a1030bc8e51d) |  |  |
| Do all images and non–text elements that convey information have meaningful alternative text descriptions?  [Add alternative text descriptions in Microsoft Office](https://support.office.com/en-us/article/Add-alternative-text-to-a-shape-picture-chart-table-SmartArt-graphic-or-other-object-44989B2A-903C-4D9A-B742-6A75B451C669)  [Create meaningful descriptions of graphs, charts, and equations](http://diagramcenter.org/table-of-contents-2.html) |  |  |
| Did you provide text alternatives to any sound or video embedded into the file?  Contact your divisional accessibility resource center for assistance with captioning and transcripts. |  |  |
| Did you avoid using color as the only means of distinguishing information?  [Tips to not rely on color alone](https://www.wuhcag.com/use-of-colour/) |  |  |
| Does all text have high contrast with the background?  [Check the colors you use for proper contrast](http://contrastchecker.com/) |  |  |
| Did you indicate the destination or purpose of all links in the link text?  [Ten tips for writing meaningful link text](http://www.4syllables.com.au/resources/link-tips/) |  |  |
| Is the document free from printing or copying restrictions which will prevent assistive technology from reading the document?  [Remove protections in Microsoft Office](https://support.office.com/en-us/article/Add-or-remove-protection-in-your-document-workbook-or-presentation-05084cc3-300d-4c1a-8416-38d3e37d6826) |  |  |

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| Requirements for Tables in Documents | Yes | No |
| Does the table have a title row, caption, or descriptive (alternative) text? |  |  |
| Is the first row in all tables with data marked as the header row?  [Mark a table row as the header row in Microsoft Office](http://accessibility.psu.edu/microsoftoffice/microsofttableheaders/) |  |  |
| Is the header row repeated if the table spans multiple pages?  [Repeat table header rows in Microsoft Office](https://support.office.com/en-us/article/Repeat-a-table-heading-on-subsequent-pages-2ff677e0-3150-464a-a283-fa52794b4b41) |  |  |
| Did you avoid merging cell tables and rows? |  |  |
| Did you avoid empty cells in the tables? |  |  |
| Do your tables contain only text and not links or images? |  |  |

# PowerPoint-specific Checklist

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| --- | --- | --- |
| PowerPoint | Yes | No |
| Did you use a PowerPoint template and apply layouts from a slide master such as “Title Slide” and “Slide with a Table”?  [Use templates](https://support.office.com/en-us/article/Apply-a-template-to-your-presentation-d3d4ece5-e965-45eb-9423-c34e61b34616). [Use slide masters](https://support.office.com/en-us/article/Apply-one-or-more-slide-masters-to-a-presentation-dc684a1d-9d14-4ead-9bb5-2303d4fedba8). |  |  |
| Did you use PowerPoint tables instead of screen shots of tables?  [Insert a table into a PowerPoint slide](https://support.office.com/en-us/article/Add-a-table-to-a-slide-fe397b00-1bae-4325-a2ad-2e40aa3e6a66) |  |  |
| Did you look at the “Arrange: Selection Pane (Windows) or Reorder Objects (Mac)” view on each slide to make sure all items on the slide are in the correct reading order?  [Use the Selection Pane](https://support.office.com/en-us/article/Select-individual-slide-components-that-are-stacked-3537a8b4-26f1-41d2-9879-c99d06c64d0e) |  |  |
| Does the document refrain from the use of flashing/flickering text, animations, and slide transitions? |  |  |
| Windows only: Did you run the Accessibility Checker?  [Run the Accessibility Checker](https://support.office.com/en-us/article/Check-for-accessibility-issues-a16f6de0-2f39-4a2b-8bd8-5ad801426c7f) |  |  |

# Word-specific Checklist

| Word | Yes | No |
| --- | --- | --- |
| Did you check the outline view or print preview to make sure that all items in the document are in logical order?  [Switch to the outline view in Word](https://support.office.com/en-us/article/Create-a-document-outline-in-Outline-View-cfdd43c9-021f-4d5d-a678-34a182f4433c?ui=en-US&rs=en-US&ad=US) |  |  |
| If you use a table of contents, did you use the built–in table of contents tool rather than making one by hand?  [Use the table of contents tool in Word](https://support.office.com/en-us/article/Create-a-table-of-contents-5eaadd8f-efa5-4791-84ba-746383b97ecb) |  |  |
| Windows only: Did you run the Accessibility Checker?  [Run the Accessibility Checker](https://support.office.com/en-us/article/Check-for-accessibility-issues-a16f6de0-2f39-4a2b-8bd8-5ad801426c7f) |  |  |

# Excel-specific Checklist

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| Excel | Yes | No |
| Did you use Excel’s table tools to turn the rows and columns in your document into a table?  Windows: Home -> Format as Table  Mac: Highlight the rows and columns, right click, and select “Table Styles” |  |  |
| Did you provide a text alternative for embedded graphs or charts?  [Add alternative text descriptions in Microsoft Office](https://support.office.com/en-us/article/Add-alternative-text-to-a-shape-picture-chart-table-SmartArt-graphic-or-other-object-44989B2A-903C-4D9A-B742-6A75B451C669) |  |  |
| Windows only: Did you run the Accessibility Checker?  [Run the Accessibility Checker](https://support.office.com/en-us/article/Check-for-accessibility-issues-a16f6de0-2f39-4a2b-8bd8-5ad801426c7f) |  |  |

# PDF Checklist

Due to the complexity of making PDF files fully accessible, we recommend that you provide original Word, PowerPoint, or Excel files where possible. Divisional accessibility specialists can work with you to make PDF files accessible.

| PDF | Yes | No |
| --- | --- | --- |
| Did you run the accessibility checker in Adobe Acrobat Pro?  [Run the full accessibility check in Acrobat Pro](https://accessdp.wordpress.com/checking-for-pdf-accessibility/) |  |  |
| Are scanned pages included as plain text within the same PDF?  [Use the Recognize Text tool in Acrobat Pro](http://computers.tutsplus.com/tutorials/how-to-ocr-text-in-pdf-and-image-files-in-adobe-acrobat--cms-20406) |  |  |
| If you made any changes to your PDF after creating the PDF, did you run the accessibility checker one more time to make sure no new issues arose? |  |  |

Note: if you are using forms, programing scripts, or scans of book/journal pages in your PDF files, you will need to work with a divisional accessibility specialist to address issues with scripts, forms, and optical character recognition in PDF files.

# Rich Text Editors in Web Browsers (ie; Blackboard, CoursePlus, WordPress, Site Executive, etc.)

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| Browser–based Text Editors | Yes | No |
| Did you build the content in the rich text editor, rather than copying and pasting from Word? |  |  |
| Did you use built-in bullet and list tools instead of making them by hand? |  |  |
| Do all images, equations, and non-text elements that convey information have meaningful alternative text descriptions? |  |  |
| Does all text have high contrast with the background? |  |  |
| Did you indicate the destination or purpose of all links in the text for the link? |  |  |
| Do tables have a title or descriptive text? |  |  |
| Is the first row in all tables with data marked as the header row? |  |  |
| Did you avoid merging cell tables and rows? |  |  |