Accessible Document Checklist

* For more information and links to resources, please visit <https://www.amherst.edu/go/ThinkAccessible>
* The following guidelines apply to all types of documents: Word, PDF, PowerPoint, email messages, course readings, syllabi, assignments, etc.!
* Our goal is to make documents accessible to users of assistive technology, but following these guidelines will make your documents more user-friendly for all.

# The Five Elements of Digital Accessibility

## 1: Searchable, Computer-Readable Text

* Can you select the text with your mouse, or copy and paste it? If not, it’s saved as an image, which is not accessible.
* Several tools are available to recognize text in an image-only PDF:
  + [SensusAccess/Robobraille](https://www.amherst.edu/mm/547491) is a useful and free web service for converting files.
  + [Recognize Text with Acrobat Pro](https://www.adobe.com/acrobat/how-to/ocr-software-convert-pdf-to-text.html)
  + [Kurzweil](https://www.amherst.edu/mm/547489) is a program that provides text recognition as well as text-to-speech and study support tools.
* Scans should be made from clean documents or books, free of notes or scribbles.

## 2: Proper Use of Headings and Structural Elements

* Users of assistive technology rely on heading levels to navigate documents and web pages.
* In Microsoft Word, [use heading styles](https://support.office.com/en-us/article/Make-your-Word-documents-accessible-d9bf3683-87ac-47ea-b91a-78dcacb3c66d#bkmk_macbuiltinheadings) to format text headings.
* Avoid floating elements like text boxes. In PowerPoint, [use built-in slide layouts](https://support.office.com/en-us/article/Make-your-PowerPoint-presentations-accessible-6f7772b2-2f33-4bd2-8ca7-dae3b2b3ef25#bkmk_maclayout) and don’t insert additional text boxes.
* Set [bulleted lists](https://support.office.com/en-us/article/Make-your-Word-documents-accessible-d9bf3683-87ac-47ea-b91a-78dcacb3c66d#bkmk_macbulletlists) and columns instead of formatting manually.

## 3: Images and Charts have Alternative Text

* Does an image represent or contain relevant information to your audience? Make sure to add a description for people who cannot see it.
* [Add image alt-text in Microsoft Word, PowerPoint, or Outlook](https://support.office.com/en-us/article/Make-your-Word-documents-accessible-d9bf3683-87ac-47ea-b91a-78dcacb3c66d#bkmk_winaltimages)
* Provide descriptions or alternatives for visual graphs or charts
* If possible, add a [properly formatted data table](https://support.office.com/en-us/article/Make-your-Word-documents-accessible-d9bf3683-87ac-47ea-b91a-78dcacb3c66d#bkmk_mactableheaders) as a replacement or supplement.
* Add alt-text that includes the relevant information or main “take away” from the chart.

## 4: Link Text is Descriptive, Helpful, and Unique

* Screen-reader users often use a keyboard shortcut to list all the links on a page. In such a list, the links have no surrounding text.
* Make your link names descriptive.
* Instead of “Click [here](https://www.amherst.edu/mm/676613) to go to Conversations with the President” say “Go to [Conversations with the President](https://www.amherst.edu/mm/676613).”
* Descriptive link names also make pages more scannable for sighted users.

## 5: Proper Use of Color & Adequate Contrast

* Don’t use color to convey meaning.
* Make sure font sizes and colors are large and easily readable.
* Limit use of background images which can make text difficult to read.
* Don’t set text to justify.

## Bonuses: Availability, Legibility, and Searchability

* Share digital materials as far ahead of time as you can.
* A physical piece of paper presents a barrier to people with print or vision disabilities. Always offer an additional (accessible!) digital version.
* Use simple, easy-to-read fonts.
* Accessible documents also are searchable documents!

## Run an Accessibility Checker

[Microsoft Word](https://support.office.com/en-us/article/rules-for-the-accessibility-checker-651e08f2-0fc3-4e10-aaca-74b4a67101c1) and [Adobe Acrobat](https://helpx.adobe.com/acrobat/using/create-verify-pdf-accessibility.html) both contain “Accessibility Checker" tools which scan your document for potential issues. These tools will catch some (but not all!) accessibility issues and offer tips on how to fix them. [Adobe Acrobat](https://helpx.adobe.com/acrobat/using/create-verify-pdf-accessibility.html) also now offers a Make Accessible wizard.

# How to Export from Word to PDF

* If you properly export a word document to PDF, it will retain your headings, alt-text, links, lists, etc.
* If you have Acrobat Pro installed on your computer, use the [Acrobat tab in Word](https://support.office.com/en-us/article/Get-the-Adobe-Acrobat-tab-to-appear-b83cbba3-7bc1-4c75-b8dc-511e07a283f0)to create a PDF.
* If you don't have Acrobat Pro, choose Save as (Mac) or Export (PC) and select PDF.
* Don’t Print to PDF, as this will not retain your structure, links, etc.
* Note about Google Docs: saving a Google Doc as a PDF will create a very inaccessible file. Save it as Word first, use the Accessibility Checker, then follow the instructions above to create a PDF which will retain the accessibility content.

PDF Accessibility and Searchability

* Creating a fully accessible PDF can be complicated, but these steps will let you solve basic problems and assess if you may need outside assistance.
* Bonus – making a PDF accessible also makes it searchable.
* These steps require the full version of Acrobat, currently called Adobe Acrobat Pro.   
  Adobe Acrobat Reader is a different application and **does not** contain these features.

## Make Accessible

* First use Adobe Acrobat Pro’s process to make a PDF accessible. Go to the Tools Tab > Action Wizard > Open > Make Accessible then click Start.
* The Action Wizard will lead you through the steps needed to make the PDF accessible.   
  Required items include title of the document (not file name), language of the document, alternate text for images, and accounting for form fields or skipping if not a form.
* At the completion of the Action Wizard, you will be prompted to run the Accessibility Checker to review other elements including those that may need a manual check.

## Accessibility Checker

* Start the Accessibility Checker by going to Tools Tab > Protect & Standardize > Accessibility > Accessibility Check (Full Accessibility Check)

## Common Issues Make Accessible Fixes

* Image-only PDF: This means the PDF does not have recognized text (it was probably a scan). Make Accessible runs text recognition also known as OCR (optical character recognition) and recognizes the text making it computer readable for accessibility and searchability.
* Tagged PDF: Tags give PDF’s structure and reading order and are necessary for screen reader accessibility and contribute to searchability. Make Accessible tags the document (guessing at the structure and reading order).
* Title: Document title is required for accessibility. Make Accessible prompts you to confirm the document title is correct or available. The title should not be the file name but instead the document title.
* Language: Document language is required for accessibility. Make Accessible prompts you to select a document language.
* Alternate Text for images: Alternate text is required for images unless they are only decorative such as lines or dots or marks on a page such as shadows. Go through the individual images and enter the alt-text or mark as decorative.

## Common Issues the Checker will Find

With any of these results, right clicking on the result will usually show a “fix” link that will take you to the place to address the issue.

* Logical Reading Order: See below for checking reading order.
* Color Contrast- See our section above about use of color.
* Tagged Annotations- these are tricky to fix and don’t general create an accessibility problem, feel free to ignore.

## Adding Links to a PDF

* Highlight the text you want to make a link. Make sure to use unique and meaningful
* Right click and select Create Links
* Enter the URL or website address.

## Adding a Figure tag to Enter Alternate Text for an Image or Figure

* First select the option **Scan and OCR (green printer icon)** from the Adobe right side navigation menu.
* Select **Recognize Text > In this File** then click **Recognize Text**.
* Go to an image or figure in the document and hover over it, the cursor icon should change from an arrow to a cross.
* Click and drag to draw a rectangle that highlights all of the image or figure.
* With the image or figure highlighted, in the Adobe top menu select **View > Show/Hide > Navigation Panels > Tags**.
* Click the **Options menu icon** and select the option **New Tag**.
* From the drop-down list select **Figure** as the type of new tag.
* Type in the desired alternate text that describes the image or figure.
* Click **OK** to save the new tag and the alternate text.

## Assessing Reading Order

* We suggest these steps to mainly analyze how problematic your PDF may be.
* Fixing reading order can get very complicated and there is no “un-do”.
* If your PDF is high-impact and has problems, you may want to outsource remediation or contact IT. For remediation, we recommend the vendors Accessible Document Solutions and CommonLook.
* Open the Accessibility Tools, and select Reading Order.
* You will see numbered boxes appear around the PDF content. The number indicates the order in which the PDF will read.
* If it looks mostly OK, your PDF is likely fine.
* If the numbers are wacky, you may want to get help.
* If there are minor adjustments to make, click the “Show order panel” on the Reading order window. Again, proceed with caution and save a copy of your PDF first, as there is no “un-do”.
* On the left you will see a list of content. You can drag this content to re-order it.
* Note that the buttons on the reading order panel are for creating new tags, which we don’t really recommend getting into!
* Note that even if things look good in Acrobat, it is not a 100% guarantee that the PDF will read nicely with screen readers. Results can be unpredictable outside of professional remediation.

## Forms

* To create a fillable form, you can use the Forms tools to add fields to your PDF.
* Again, this can get tricky and may be best done by a professional service for 100% accessibility.
* If you’ve added form fields, be sure to check the reading order to gauge how problematic the PDF may be.
* We have had great success with Accessible Document Solutions and [CommonLook](https://commonlook.com/) for remediating high-impact PDF’s into accessible and fillable forms.

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## [Contact IT](https://www.amherst.edu/mm/386300) For Help with Any of the Above!