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Summary and Checklist: MS Word Accessibility

Summary

In this course, you learned the steps needed to create an accessible Word document. The key ideas to keep in mind are to use real, semantic elements such as real headings, real lists, real tables, real columns, etc. Ensure that all images, graphs, charts, etc. have alt text. Avoid text boxes and other floating objects. Ensure that all information is conveyed in a way that does not rely on color, and that there is sufficient color contrast throughout your document. The simpler the document, the easier it is to make accessible.

Checklist

Structural & Semantic Elements

Headings
- Word Styles SHOULD be used to create real headings (instead of using big bold text or other visual modifications to create fake headings).
- Headings MUST be accurate and informative.
- Headings SHOULD NOT skip hierarchical levels.

Table of Contents
- A Table of Contents based on heading structure SHOULD be included in long documents.

Language
- The language of the document (and any language of parts, if present) MUST be specified.

Headers and Footers
- Vital information within headers and footers MUST be duplicated in the body of the document.

Footnotes and Endnotes
- Footnotes and endnotes SHOULD be created using the insertion tool on the References tab.

Abbreviations and Acronyms
- Abbreviations and acronyms SHOULD be accompanied by an explanation.

Columns
- If text columns are included, they MUST be created using the Column insertion tool.

Superscripts & Subscripts
- Superscripts and subscripts SHOULD be avoided (with some exceptions).

Page Numbers
- Page numbers SHOULD be used.

Links

Designate Links Correctly
- Links MUST be semantically designated as such.

Link Text
- A link MUST have programmatically discernible text.
- The purpose of each link SHOULD be able to be determined from the link text alone.
- The link text SHOULD NOT repeat the word "link."
- The full hyperlink SHOULD be included in the document.

Visually Distinguishable from Text
- Links MUST be visually distinguishable from surrounding text.

Styles & Appearance

Word Styles
- Meaning MUST NOT rely on visual styling alone.

Color Contrast
- Small text and images of small text (under 18 point regular font or 14 point bold font) MUST have a contrast ratio of at least 4.5 to 1 with the background.
- Small text (under 18 point regular font or 14 point bold font) SHOULD have a contrast ratio of at least 7 to 1 with the background.
- Large text and images of large text (at or over 18 regular font or 14 point bold font) MUST have a contrast ratio of at least 3 to 1 with the background.

Color to Convey Meaning
- If color is used to convey information, it MUST be accompanied by a text alternative.
- The text alternative for information conveyed by color MUST accurately convey the same information without color.
- If color is used to convey information, it MUST be accompanied by a visible alternative (text, image, graph, etc.) that does not depend on color for meaning.

Borders
- Borders MUST NOT be used as the sole way to convey meaning (such as grouping categories or creating emphasis).

Line Spacing
- Line spacing SHOULD be set to at least 1.5.

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Styles & Appearance (continued)

Line Justification

- Lines SHOULD be left justified and SHOULD NOT be fully justified.

Flashing or Blinking

- Flashing or blinking content MUST be avoided (unless it meets the specific WCAG permissible criteria).

Text & Fonts

Fonts and Typography

- Overly decorative fonts SHOULD be avoided.

Font Size

- Font size SHOULD be set to at least 10 points.

Capitalization

- Capitalization MUST NOT be used as the sole way to convey meaning.
- Excessive capitalization SHOULD be avoided.

Bold, Italic, Underline

- Font styling such as bold, italic, and underline MUST NOT be used as the sole way to convey meaning.
- Bold, Italic, and Underline SHOULD be used sparingly to draw visual attention.

Strikethrough

- If strikethrough is used, users MUST be alerted.

Highlighting

- Highlighting MUST NOT be used as the sole way to convey meaning.
- Highlighting MAY be used to benefit sighted users.

Dropcap

- Dropcap MUST NOT be used.

Symbols & Special Characters

- If a symbol is used to convey meaning, it MUST be communicated in plain text, as well.

Word Art

- Word Art SHOULD be avoided.

Text Effects

- Text Effects SHOULD be avoided.

Images, Shapes, Smart Art, etc.

Alt Text

- Images that convey content MUST have programmatically discernible alternative text.
- The alternative text for informative images MUST be meaningful (accurately conveying the purpose of the image, and the author's intent in a way that is useful to those who cannot see the image).
- Alternative text SHOULD NOT include words that identify the element as a graphic or image.
- The length of the alternative text for informative images SHOULD be concise (no more than about 150 characters).
- Images that do not convey content, are decorative, or are redundant to content that is already conveyed in text MUST be given alt text that identifies them as such.

Long Descriptions

- Complex images MUST be briefly described using alt text AND MUST have a more complete long description.
- The long description (or a link or button to access the long description) SHOULD be visible to sighted users.

Captions for Images

- Captions MAY be used for images.

Watermarks & Backgrounds

- Using watermarks and background images to convey information SHOULD be avoided.
- Watermarks and background images MUST NOT interfere with readability of the text.

Floating Objects

- Floating objects SHOULD be avoided.

Text Boxes

- Text boxes SHOULD be avoided.
- Users MUST be alerted to the presence of any text boxes.
- Text boxes SHOULD be positioned inline with the text.
- Text boxes SHOULD have alt text.

Smart Art

- Smart Art Objects MUST be positioned inline with the text.
- Smart Art Objects MUST include alt text (and a long description, if needed).

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Images, Shapes, Smart Art, etc. (continued)

Shapes

- A user MUST be alerted to the presence of meaningful shapes.
- Shapes that convey meaning MUST have a text alternative.

Tables

Data Tables

- Tabular data SHOULD be represented in a table.
- Tables MUST NOT be created using the Draw Table tool.
- Data Tables SHOULD have a title.
- Table headers MUST be designated correctly.
- Data tables MUST have only one header row and/or one header column.
- Tables MUST NOT contain nested tables, split cells, or merged cells.

Layout Tables

- Layout Tables SHOULD be avoided, if possible.
- Layout Tables MUST NOT have table data header designations.

Charts & Graphs

- Charts MUST be positioned inline with the text.
- Charts MUST have alt text and MUST have a detailed long description (if needed).

Embedded Files

- Embedded files MUST have alt text.

Forms

- Accessible forms are created first in MS Word, and then accessible features are added in Acrobat PDF.

Math & Equations

- The built-in equation editor SHOULD be avoided.
- Inaccessible math work MUST have a text description.

Tracking and Reviewing Changes

- If the track changes feature is used, a user MAY be provided with the original document.

Saving & Exporting

- Keeping the original document in Word format is best if the person must be able to edit the original document.
- The best format for general accessibility is HTML, but you may lose some of the visual layout and styles of the original document.
- The best format for e-Readers is EPUB 3, which can be just as accessible as HTML.
- The best format to retain print-ready visual layout and styles is PDF.