Microsoft Document Compliance Checklist

Below are questions that will help you establish if your Microsoft Office document is accessible. We provide the Success Criteria in reference with WCAG 2.1: [How to Meet WCAG - Quick Reference](http://www.w3.org/WAI/WCAG21/quickref/) and the [Canada.ca Content Style Guide](https://www.canada.ca/en/treasury-board-secretariat/services/government-communications/canada-content-style-guide.html).

Remember to answer NA (not application) if a question is not relevant to your document. For example, there are no table of content in Excel documents.

**If you answer ‘No’ to one of the following questions,**

**then your document IS NOT accessible.**

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# A. General information

| ID  (Success Criteria) | Requirement | Result |
| --- | --- | --- |
| A1  (2.4.2) | Are document Properties filled out properly (title, author, subject)? |  |
| A2  (3.1.1) | Is the language of the document properly set? |  |
| A3  (4.1.1) | Did the document fully pass the Accessibility Checker[[1]](#footnote-1)? |  |
| A5  (1.3.1) | Is the document free from content carried over from Office such as comments, track changes, etc? |  |
| A6  (1.3.2) | Is the order of the content accurate and logical? |  |
| A7  (1.4.4) | Can all the text be resized and still be considered readable when magnified to 200%? |  |
| A8  (3.3.2) | Is the document free from electronically fillable forms? |  |
| A9  ([[2]](#footnote-2)) | Does the readability grade level meet the target audience?  (grade 8 for public general audience) |  |

# B. Color

| ID  **(Success Criteria)** | **Requirement** | **Result** |
| --- | --- | --- |
| B1  (1.4.1) | Does any information conveyed with color have a non-color method for understanding (is the information available when you remove the colors)? |  |
| B2  (1.4.3) | Does all text (with the exception of logos) have a contrast ratio of 4.5:1 or greater no matter the font size? |  |

# C. Links

| ID  **(Success Criteria)** | **Requirement** | **Result** |
| --- | --- | --- |
| C1  (1.4.1) | Links are identified with a method other than color  (such as underline and bold)? |  |
| C2  (2.4.4) | Does the hypertext links alone defines the context? |  |
| C3  (2.4.4) | Does generic link text have sufficient context  (not using the words Link or click here)? |  |

# D. Images

|  |  |  |
| --- | --- | --- |
| ID  **(Success Criteria)** | **Requirement** | **Result** |
| D1  (1.1.1) | Do all informational images have alt text that provides the same level of understanding a visual user would gain? |  |
| D2  (1.1.1) | Do all decorative images have “ “ in the alt text field  (or alt=’decorative’)? |  |
| D3  (1.1.1) | Are multi-layered objects grouped (or flattened) into one (object) and the group use only alternative text description? |  |
| D4  (1.1.1) | Do complex informational (not decorative) images have an alternate accessible means of understanding (usually a long description)? |  |
| D5  (1.4.5) | Is the document free from any content that should not be included as an image? (Picture of a table with text, image of text) |  |
| D6  (2.3.1) | Is the document free from content that flashes more than 3 times per second? |  |

# E. Tables

| ID  **(Success Criteria)** | **Requirement** | **Result** |
| --- | --- | --- |
| E1  (1.3.1) | Was the table created with the built in table styles (not with spaces or indent)? |  |
| E2  (1.3.1) | Does the table structure match the visual table layout (simple layout structure – no merge or split cells)? |  |
| E3  (1.3.1) | Do all tables have define header row(s)? |  |
| E4  (1.3.1) | Is the document free from tables used for content that is not a data (tables used for layout only)? |  |
| E5  (1.3.1) | Is the document free from data tables with merged cells, both column and row header cells? |  |

# F. Lists

| ID  **(Success Criteria)** | **Requirement** | **Result** |
| --- | --- | --- |
| F1  (1.3.1) | Does the document contain only lists built with list styles? |  |
| F2  (1.3.1) | Are multiple lists in the same document properly organized (grouped or at levels)? |  |

# G. Headings

| **ID**  **(Success Criteria)** | **Requirement** | **Result** | |
| --- | --- | --- | --- |
| G1  (1.3.1) | Is all the text that acts as a visual heading marked with the proper heading style? |  | |
| G2  (1.3.1) | Do headings follow a logical hierarchical progression?  (for example, H1-H2-H3) |  |
| G3  (1.3.1) | Are all the headings visually modified via the Heading Style? |  |
| G4  (2.4.6) | Does the heading text accurately describe the following content? |  |
| G5  (2.4.6) | Does the document contain a heading style for each section identified? |  |

# H. Other elements

| **ID**  **(Success Criteria)** | **Requirement** | **Result** |
| --- | --- | --- |
| H1  (1.3.1) | Is the table of contents (TOC) generated with the built in office styles? |  |
| H2  (1.3.1) | Are citations and footnotes/endnotes created with the built in office styles? |  |
| H3  (3.1.2) | Is the language properly set for foreign words or phrases? |  |
| H4  (1.3.1) | Is information in the header, footer, watermark, speaker notes, etc. available in the main body of the document (except page numbering)? |  |

# Resources

* This document was built using information on [Making Files Accessible](https://www.hhs.gov/web/section-508/making-files-accessible/index.html) from the Digital Communications Division (DCD).
* Success criteria refer to [How to Meet WCAG 2.1 - Quick Reference](http://www.w3.org/WAI/WCAG21/quickref/)
* For more information on using plain language, refer to [Canada.ca Content Style Guide](https://www.canada.ca/en/treasury-board-secretariat/services/government-communications/canada-content-style-guide.html). Microsoft has numerous FREE videos on their Youtube channel [MSFTEnable](https://www.youtube.com/user/MSFTEnable) with good learning tool.
* Checklists (available by document type) are available on the IT SharePoint site under [Accessibility Toolkit](https://www.youtube.com/user/MSFTEnable)
* To find out about our services, consult ‘[‘Accessible Information and Communication Technology](http://iservice.prv/eng/imit/A11Y/index.shtml) ’ on iService

1. The Accessibility Checker is a useful tool found in Word, Excek and PowerPoint. It will really assist you in making your document accessible by telling you what is not accessible and how to fix it. To learn more about this tool, consult Microsoft [Rules for the Accessibility Checker](https://support.office.com/en-en/article/r%C3%A8gles-pour-le-v%C3%A9rificateur-d-accessibilit%C3%A9-651e08f2-0fc3-4e10-aaca-74b4a67101c1) [↑](#footnote-ref-1)
2. Refer to [Canada.ca Content Style Guide - Plain language](https://www.canada.ca/en/treasury-board-secretariat/services/government-communications/canada-content-style-guide.html#toc6). [↑](#footnote-ref-2)