

# Excel Accessibility Evaluation Checklist

The following checklist uses the Accessibility Checker in Microsoft Excel 2016 and newer.

To start the accessibility checker:

- On Windows:
  - Office 2016: **File** > **Check for Issues** dropdown menu > **Check Accessibility**
  - Office 365 or 2019: **Review** tab > **Check Accessibility**
- On Mac: **Review** tab > **Check Accessibility**

**Errors**, **Warnings**, and **Tips** indicate automated feedback from the Accessibility Checker. These may vary slightly based on your operating system and how recently your version of Office was updated. **Manual** review items will require manual checking for accessibility issues.

## Sheets

Principle	Review	Repair
Sheet tabs have a descriptive name.	<b>Warning: Default Sheet Names</b>	<b>Right click Sheet tab &gt; Rename.</b> Enter a descriptive name.

## Tables

Principle	Review	Repair
Tables may benefit from a descriptive caption that spans all columns (see Notes).	<b>Manual:</b> Review all tables for a missing caption, or a caption that does not span all columns.	<ul style="list-style-type: none"><li>• Add descriptive text to the first column for a missing caption. Select the cells above all columns. Table <b>Layout</b> tab &gt; <b>Merge Cells</b>.</li></ul>
The first row in a table contains correctly-defined column headers (see Notes).	<b>Error: No header row</b>	Table <b>Design</b> tab > Check <b>Header Row</b> checkbox
When the first column of a table should contain headers, they are correctly identified as row headers (see Notes).	<b>Manual:</b> Click within the Table <b>Design</b> tab > make sure the <b>First Column</b> checkboxes match the table header structure.	Check or uncheck the "First Column" checkbox to match the table header structure.
Tables have a simple structure, avoiding merged cells or split cells.	<b>Warning: Merged or split cells in table</b> Use the <b>Tab</b> key to ensure the order of the cells in the table is logical.	Table <b>Layout</b> tab > <b>Merge Cells</b> or <b>Split Cells</b>
Tables don't use blank columns or rows for visual formatting.	<b>Manual:</b> Visual Inspection	<b>Right Click</b> empty column or row > <b>Delete Cells</b>

### Notes:

- The Accessibility Checker will flag captions that span all columns with **Warning: Merged Cells**.
- Support for table headers is still incomplete in Office.

## Images

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Principle	Review	Repair
Images and other non-text content have alternative text (see Notes).	<b>Error: Missing Alt Text</b>	<ul style="list-style-type: none"><li>• <b>Right click &gt; Format Picture &gt; Size and Properties</b> tab &gt; <b>Alt Text</b>. Enter alternative text in the <b>Description</b> field.</li><li>• In newer versions, <b>Right Click &gt; Edit Alt Text</b></li></ul>
Alternative text is equivalent.	<b>Manual:</b> Inspect text in the <b>Alt Text &gt; Description</b> field, or <b>Alt Text</b> field in newer versions	Enter alternative text in the <b>Description</b> or <b>Alt Text</b> field.

### Notes:

- Please see “Charts” for information on adding alternative text to a Chart Area.
- There is not a reliable way to hide decorative images from screen readers in older versions of Excel. If an image is decorative, or if the alternative text is already presented in nearby text, we recommend leaving the image's **Alt Text** blank. Unfortunately, that means it will be shown as an error in Accessibility Checker.
  - If you have a newer version of Excel with the "Edit Alt Text" option, there is a "Mark as decorative" checkbox. Check this box if the image is decorative.
- Some newer versions have a "Generate a description for me" button. **Do not** select this. The quality of the automatically-generated descriptions is usually very poor, and a description of an image is often not the same as alternative text.
  - If a document has images with automatic descriptions, "**Intelligent Services: Suggested alternative text**" will appear in the Accessibility checker. Review and repair the alternative text of these images.
- Some older versions of Office will prompt you to add alternative text to tables. This is not recommended.

## Links

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Principle	Review	Repair
Hyperlink text is descriptive (see Note).	<b>Warning: Unclear Hyperlink Text</b> (not in all versions) <b>Manual:</b> Link text describes the link target	<b>Right click &gt; Edit Hyperlink &gt; Text to display</b>

**Note:** If you are creating a presentation that is intended to be displayed in a printout, you may want to include the URL and a description in the link text—e.g., "WebAIM Introduction to Web Accessibility (webaim.org/intro)."

## Color and Contrast

Principle	Review	Repair
Text, and images of text, have good contrast.	<b>Warning: Low-contrast text OR Hard-to-read Text Contrast</b> (Only present in newer versions) <b>Manual:</b> Search for text that has low contrast.	<b>Home</b> tab > <b>Font Color</b> to change in one place. <b>Home</b> tab > <b>Styles gallery</b> or <b>Design</b> tab > <b>Colors</b> to change document-wide.
Color is not used as the only way information is presented.	<b>Manual:</b> Visually review the document for color reliance.	Use text or other visual presentations in addition to color.

## Charts

Principle	Review	Repair
Chart Areas have alternative text.	<b>Error: Missing Alt Text OR Missing alternative text</b>	<ul style="list-style-type: none"> <li>• <b>Right click &gt; Format Chart Area &gt; Chart Options &gt; Size and Properties</b> tab &gt; <b>Alt Text</b>. Enter a high-level description of the chart, identifying its type, in the <b>Description</b> field.</li> <li>• In newer versions, <b>Right Click &gt; Edit Alt Text</b></li> </ul>
All chart data is provided in an accessible format.	<b>Manual:</b> Check to see if all of a chart's data is provided as text (often formatted as a data table). When all of a chart's data is not provided as text, check that accessible data labels are presented.	<ul style="list-style-type: none"> <li>• Provide the chart's data in an accessible text format: <ul style="list-style-type: none"> <li>○ Add all of a chart's data as text nearby the chart, and,</li> <li>○ Format the text as a data table when appropriate, <b>OR</b>,</li> <li>○ Add accessible labels to a chart.</li> </ul> </li> </ul>
When an accessible text alternative has not been provided for a non-text element in a chart, the non-text element may require a minimum of a 3:1 contrast with the color(s) of adjacent element(s), and/or the chart's background color.	<b>Manual:</b> Search for non-text chart elements that are required for understanding (e.g., the pieces of a pie chart), with no accessible text alternative present.	<ul style="list-style-type: none"> <li>• Add all of a chart's data as text nearby the chart, and,</li> <li>• Format the text as a data table when appropriate, <b>OR</b>,</li> <li>• Change the border/fill color of a non-text chart element, adjacent element(s), and/or the chart's background, to meet the 3:1 contrast requirement.</li> </ul>
Chart elements have sufficient whitespace.	<b>Manual:</b> Review a chart for elements without sufficient whitespace between them.	<ul style="list-style-type: none"> <li>• Resize and relocate a chart's elements to evenly distribute the whitespace.</li> </ul>

## Workbooks

Principle	Review	Repair
All text is legible.	<b>Manual:</b> Search for— <ul style="list-style-type: none"> <li>Text smaller than 10-point.</li> <li>Fonts that are overly-complex, fancy, or atypical.</li> <li>Ensure sufficient spacing around text.</li> </ul>	<ul style="list-style-type: none"> <li>Increase all text to a minimum of 10-points (when possible).</li> <li>Use common fonts such as <i>Arial</i>, <i>Calibri</i>, <i>Times New Roman</i>, etc.</li> <li>Increase the height of a row and/or the width of a column to increase the space around text.</li> </ul>
Workbooks have sufficient whitespace between all elements.	<b>Manual:</b> Search for "floating elements" (e.g., images & charts) overlapping content in cells.	Relocate "floating elements" to an area of the sheet with no content in the cells.
Workbook has a descriptive file name.	<b>Manual:</b> The filename that appears at the very top of the application window accurately describes the file.	<b>File &gt; Save As &gt;</b> <ul style="list-style-type: none"> <li><b>File Name</b> field in Windows</li> <li><b>Save As</b> field in Mac</li> </ul>
Workbook has a descriptive Title.	<b>Manual:</b> Verify that the Title is descriptive. <ul style="list-style-type: none"> <li>Windows: <b>File</b> tab &gt; <b>Title</b> OR <b>File</b> &gt; <b>Info</b> &gt; <b>Title</b></li> <li>Mac: <b>File</b> &gt; <b>Properties</b> &gt; <b>Summary</b> tab &gt; <b>Title</b></li> </ul>	Enter a descriptive document title in the <b>Title</b> field.
There are no spelling or grammar issues.	<ul style="list-style-type: none"> <li>Run the built-in spelling checker: <b>Review</b> tab &gt; <b>Spelling</b></li> <li><b>Manual:</b> Proofread for other spelling issues, and grammar issues.</li> </ul>	<ul style="list-style-type: none"> <li>Address the spelling issues identified by the automated review.</li> <li>Address the spelling and grammar issues identified by the manual review.</li> </ul>
Media has captions and/or transcripts.	<ul style="list-style-type: none"> <li><b>Manual:</b> Embedded and linked media have equivalent captions and or transcripts.</li> </ul>	Provide media with captions and/or transcripts.