Accessible Document Standards

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Part A - General Overview

CNIB's Accessibility Commitment Statement

Accessibility and inclusion are our collective responsibility. We will dedicate the time and resources to accessibility and inclusion so that every person is supported for success, irrespective of their roles, obligations and community engagement.

Who do these Standards Apply to?

These standards apply to all CNIB affiliated entities Vision Loss Rehab Canada (VLRC), Deaf Blind Community Services (DBCS) and the CNIB Foundation. This includes employees, volunteers, consultants and anyone entering into contractual engagements with any entity of the CNIB Group.

These guidelines and standards apply to documents newly created specific to internal and external programs, policies, goods and services related to CNIB entity activities in the digital environment. Document creators are responsible for the accessibility of their documents.

What items apply to Digital Document Accessibility?

There are many different types of digital and electronic documents. This means anything from a Word report, email correspondence, PDF advertisement flyer, online web form, as well as social media (videos, audio recordings, and other interactive web content). Formal and informal documents and communication platforms should also conform (such as email signatures, instant messaging, spreadsheets, presentations, videos and graphics.).

Why is this important?

These accessibility guidelines are developed to promote the understanding that visual modes of communication can be just as aesthetically pleasing and accessible in catering to diverse human needs. North American cultural standards give primacy towards visual methods of learning, communication and the consumption of information. As a commitment to our clients, workforce and communities at large, we must demonstrate how our organization and inclusive workplace can lead society in challenging this visual bias and promote alternate models of communication through good design, accessibility guidelines and empathy. These guidelines are not about "turn to text" only. They are about ensuring that the aesthetics (form) and structure elements (functions) come together through the creative spirit of every staff working in the promotion of a blindness culture.

What is Accessibility & Usability

Accessibility is more than just technical requirements. A clear and logical design impacts accessibility in a big way. Accessible products should be useable and easy to use for the widest audience possible. There is no point in making something technically accessible which no one is able to read with or without a disability.

Part One: Accessible Document Creation & Capture

1.1 What is an Accessible Document?

An accessible document means the document can be interacted with, consumed and manipulated by any user directly or mediated via any adaptive or assistive technology. An accessible document can be a template, Microsoft office document, or other forms of digital media (image, video or audio files). Formal and informal documents are treated equally by these standards and guidelines.

1.1.1 Ensure that accessible file formats are compatible with assistive technologies (for example docx, xlsx, pptx, etc.).

1.1.2 Web documents should adhere to Web Content Accessibility Guidelines (WCAG 2.1) Level AA at minimum.

1.1.3 Accessible documents are applicable to formal and informal documents and communication.

1.2 Alternate Formats Required:

There are instances when a person with a disability may request a specific document type or format that is different from a source file. Based on the Integrated Accessibility Standards Regulations and the Customer Service Standard O. Reg. 191/11 s. 12(4), these materials can be requested at no extra cost to the individual and within a timely manner. Therefore, a person may request an alternate format even though a document is considered accessible. Alternate formats for consideration may include Braille, plain language, Multi-lingual, Audio, digital format specification, etc.

1.2.1. Requests for the provision of alternate formats will be completed within a timely manner as upon request.

1.2.2. A source file will allow for multiple expressions into different alternative formats as requested.

1.3 File formats & Filenames

1.3.1 All documents require a meaningful and descriptive title of the document and be in proper file format.

1.3.2 Files and documents should have proper metadata including department, author, version history, tags where applicable).

1.4 Template documents

Any document that serves as a template ought to include the following:

1.4.1 Document follows Inclusive and Universal Design standards in the creation and presentation of information.

1.4.2. Instructions are clear and logical to help screen readers interact correctly with the template (use specific heading instructions, use sample text to navigate the input of information rather than fictitious words for visual design.

Part Two: Document Usability & Content Representation

Any digital or electronic document created should be created with inclusive design and accessibility best practices. Through good graphical design and creativity, the usability of digital documents will re-enforce the technical requirements for accessible digital documents.

2.1 Usability

The usability and content representation address the human dimensions around accessibility (look and feel).

2.1.1. All documents should be useable by the widest range of users possible including those with print disabilities. Tailor your document to your audience or users.

2.1.2. Only one universal file is to be created and shared with colleagues regardless of disability whenever possible.

2.1.3. Blind and partially sighted staff should be able to interact with the template and achieve the same outcome regardless of using assistive technology.

2.1.4. Remain consistent in your document format and structure. Choose the appropriate program or software for your document or process.

2.2 Structure & Logical Order

2.2.1. All documents need a clear and logical reading order, that is intuitive and easy to manipulate based on user needs/specifications.

2.2.2. Reading order should be preserved and follow that same structure as visual reading or comprehension. Heading styles and tags/bookmarks ideally will match the visual reading order.

2.2.3. If the document requires human input, make sure instructions are clear and that the user can contact the author or another individual, via email or telephone.

2.2.4. Provide a terminology list to help define definitions, abbreviations and other unique terminology.

2.2.5. Provide a table of contents for documents larger than 10 pages or if they are complex to navigate.

2.2.5. All documents require heading styles and proper paragraph settings, including a table of contents where necessary. If you are creating a PDF (portable document file) use tags and bookmarks.

2.2.6. If Headers and footers contain vital information, it should also appear in the body of the document. Logos in headers and footers should also have alt-text.

2.3 Textual Content Representation

2.3.1. Use simple and plain English or French and provide multilingual materials where necessary based on community needs. When designing web documents use the HTML lang attribute to make sure a screen reading device will detect language changes in your document.

2.3.2. For lists and ordered Lists use solid bullets and automatically generated, rather than through manual inputs.

2.3.3. Tables require header rows and textual descriptions wherever necessary. Alternative text may also be provided. Tables should be properly labeled and used to convey numerical data, rather than to format textual information. Tables (data table) should not be pasted as image objects. Use software automatic features to build these elements within your document when available.

2.3.4. Use descriptive and meaningful text for hyperlinks that give an indication of the location. Do not copy and paste the complete URL.

2.4 Visual Content Representations

2.4.1. Always provide textual descriptions for images (alternative text), unless they are decorative (line spacing etc.). For complex images provide captions in the document as well.

2.4.2. Use images carefully and that are meaningful. Minimize the use of decorative images.

2.4.3. Follow the latest version of Clear Print Guidelines in the specific elements, of layout, design, font and colour contrast, textual alignment and orientation dependent upon the document type.

2.4.4. Colours when used to convey meaning, should have textual supplements/equivalents. Colours cannot be used alone to convey meaning.

2.4.5. Test the colour contrast with ratio calculators or with inverting colours to ensure good differentiation between foreground and background colours.

2.4.6. All special elements (graphs or charts) need explanations in the document and have alternative text.

2.4.7. Avoid using watermarks in your documents.

2.5 Audiovisual Content Representation

2.5.1. Provide accurate closed captioning and described videos or search out videos with these features, including transcripts

2.5.2. Avoid flashing content of any kind or provide an alert.

2.5.3. Avoid using visual CAPTCHA whenever possible or provide an alternate method of security or verification.

Part Three: Accessible Document Storage and Distribution

3.1 Accessibility checks & Validation

Prior to distribution it is vital that some form of accessibility validation or check be undertaken.

3.1.1 Make sure to convert your document correctly for accessible printing into portable document file (PDF) or for file sharing.

3.1.2. Whenever available use the programs or platforms accessibility checker or verification process (Microsoft, Adobe, HTML editors' functions) to eliminate all warmings and errors from your document.

3.1.3. Test the document **yourself** with a screen reader/magnifier capability.

3.1.4. If you are uncertain about the accessibility of any document, its contents, features or characteristics, ask for testing or verification (contact the owner, ask your local accessibility champion or other local experts, etc.).

3.2 Archiving, digitization and file conversion

Any old files that are undergoing archival storage such as paper copy to electronic copy, older than 3 years.

3.2.1. Documents being digitized for archival purposes may not be accessible at the time of conversion but may be made accessible when required for interaction or upon request by the specific user.

3.3 Internal Document Sharing & Digital Collaboration

In an era of digital and cloud computing. It is vital to consider whether digital collaboration tools are used or whether they have accessibility barriers. Therefore, in collaborating digitally it is a best practice to ask for your teams' preferences.

3.3.1. Provide an overview in documents or an accessibility note if there are known barriers, such as via correspondence or as part of the document preface.

3.3.2. If you have the capability, perform an OCR on scanned image documents with textual information at the time of creation.

3.3.3. If inaccessible documents are shared prior to a meeting, the meeting can be postponed until all participants are able to obtain accessible documents.

3.4. Print & Public Dissemination

For documents following a traditional print distribution, see guidelines for alternate formats in 1.2.2 of this documents.

3.5, Emergent Devices, Platforms & Formats

Any emergent device, platform or format ought to be assessed for accessibility and usability.

3.5.1. Any emergent device, format or platform should be tested and documented for accessibility and usability prior to implementation within and externally on behalf of any CNIB entities.

3.5.2. Whenever possible, any member of CNIB should work with developers to help improve the accessibility and usability of a product, device or platform if identified by accessibility and usability testing or there are known issues.

3.5.3. When considering emergent devices, platforms and formats the accessibility and usability should be maintained across the entire ecosystem (front-end, backend, applications as well as peripherals and any other components etc.).

Part Four: CNIB Training & Enforcement

It is understood that accessibility and inclusive design will evolve as a result of a technological change or product lifecycle. Therefore, individuals and the organization should commit to the necessary time required for learning and training to maintain and adhere to accessibility standards.

4.1 Training Supports

4.1.1. CNIB business units and departments will offer onboarding training and support for all staff to acquire and sustain their digital accessibility skills and learning.

4.1.2. Training resources and supports will be kept current and in conformance with system-wide platforms and resources.

4.2 Quality Assurance & Enforcement

4.2.1 Departmental units will be asked on a quarterly basis to produce a series of documents for an accessibility scan.

4.2.2 The office of the chief accessibility officer is able to investigate and collect information in relation to accessible document standards.

4.2.3 Any stakeholder of the CNIB entities can ask for a verification or validation of a document's accessibility. If a document is not accessible, the owner must remediate the file forthwith. Any activities related to this document can be placed on hold.

Part Five: Approved Third Party Vendors

In the unique circumstance that a third party vendor is required, the guidelines in this document are equally applicable. However, an approved vendor ought to be used, and accessibility certification documented.

5.1 Third Party Documents to Circulate Internally

5.1.1. Documents from a third party should be accessible before being circulated internally.

5.1.2. A vendor from the approved vendor list ought to be used, unless one is not provided for the scope of the project. Review vendor information cited in the Resource Appendix of this document before working with or planning to work with vendors.

> a. If a vendor is not approved then accessibility procurement guidelines should be followed.

> b. if a vendor is not approved, a CNIB stakeholder should consult with the Office of the Chief Accessibility Officer.

5.1.3. Consultants working with CNIB should be given peer mentoring and guidance on accessibility standards related to their work for the organization. It is the role of the supervisor of the consultant to ensure that documents adhere to organizational accessibility standards.

5.1.4. Obtain accessibility commitments, statements and certifications in writing, ideally as part of the contract.

   a) Be specific-Include accessibility and timelines for implementing accessibility guidelines into vendor contracts
   b) Include a final verification and documentation of the accessibility of the final product.
   c) Fill out the "Vendor Evaluation Form" upon completion of work, this will inform others in the future regarding the vendors commitment to accessibility

Appendix A: Additional Resources & Support

Individual Support & Feedback

For any technical issues related to software or assistive technology, which may include lag, software crashing, compatibility issues, etc. Please contact the Service Desk

Any comments and questions related to these standards and guidelines, please contact accessibility@cnib.ca.

CNIB Internal Resources

Accessibility and Inclusion Portal on CNIB Today. (Tip sheets, standards guidelines, and other resources related to Accessibility at CNIB).

CNIB University Hands-on Training Resources (you will need your CNIB credentials to log-in). Contact Cornelia Schumacher or Matisse Hamel-Nelis if you experience any technical difficulties.

Clear Print Guidelines PDF document. For printing guidelines

Clearing Our Path Website Check out this resource related to physical environment, specific information for electronic and digital signs (colour contrast, letter heights and distance requirements of signage, etc.).

External Resources

Integrated Accessibility Standard O. Reg. 191/11 under the Accessibility for Ontarians With Disabilities Act (AODA) 2005.

Microsoft Accessibility Video Training

Information here is accessible with captions and transcripts available. You can further browse introductory videos for email, PowerPoint, excel and word documents.

WCAG2.0 Quick Reference Guide: For the basics in web accessibility standards and guidelines that are backwards compatible from WCAG 2.1.