Guiding Principles: Making Accessible Word Documents

Accessibility Tip

Shortcut keys can easily create headings in your word documents (for Windows use ctrl+alt+1 buttons = heading one. In IOS use the command + option + 1 buttons = heading one).

Dos

- ✓ Use **Headings** with a **logical order** to structure your document. Heading one is your title, heading two is your subtitles or chapters (the same as a book).

- ✓ Use a clear and easy to read font - **Arial (14 point)** or **Verdana (12 point)**. Fonts must be sans serif, minimum 12-point with black text and white background.

- ✓ Provide **alternative texts** for **images or graphics**. Right click your picture and find "Edit Alt-text…" and enter your description (mouse-users).

- ✓ **Graphs, Tables and Images** must be used and created **carefully** and formatted "in line with text." Provide a description of a complex table.

- ✓ Check tables have **Column and Header Rows.** Setting found in the Table Properties options.

- ✓ Create **lists and numbering** using Word's built-within Automatic Features.

✓ Run the **accessibility checker** as part of your final review process.

Don'ts

☒ Use manual spaces, multiple returns or tabs to create blank spaces in your document.

☒ Use ALL CAPITALS or <u>underline</u> for emphasis.

☒ Use tables to organize or control the layout of information in your document such as forms or signature fields.

☒ Use hollowed-out bullets such as round circles or squares. These cannot be read for screen readers.

☒ Use Text boxes or Word Art.

☒ Use Password protection or Watermarks on your document.

Saving your files

1) Save your file as an extension "docx" with a concise and descriptive filename.

2) Before you do a final export of your word document as a PDF, go into the "Options" Setting and select "Document structure tags for accessibility." This will help you create a tagged pdf file.

Disclaimer: This is an internal document meant for use by CNIB, CNIB Foundation, Vision Loss Rehabilitation and CNIB Deafblind Community Service employees and volunteers only. It was created with the understanding the user of this tip sheet has a basic knowledge of Microsoft Word.

Guiding Principles: Making Accessible Excel Files

Accessibility Tip: Keep your data to the left! Screen readers will read first from left to right, then from top to bottom. Indicate where the content ends by typing "end of worksheet" after the last row of data in column A.

Dos

- ✓ Organize, describe, and **clearly label** your tables, sheet tabs, charts, URLs, and filename.

- ✓ In a complex workbook, provide an overview of the table, sheet, or index within A1. You can additionally give a written overview of your file in an accompanying email.

- ✓ Always specify **Headers rows/columns or regions** in your document and tables.

- ✓ Have each cell hold only one type of data or piece of information; one sheet has one chart or table **(Think 1:1).**

- ✓ Always add meaningful **Alt-Text** (alternative text) to charts, tables and any graphical or embedded object and explain the relationship to the data.

- ✓ Run the **Accessibility Checker** in Excel in the Review Pane.

Don'ts

- ☒ Merge or split cells together in the data portion of the table or worksheet.

- ☒ Start your table or data in a random position on a worksheet, such as B6.

- ☒ Use colour as the only means to convey important information.

- ☒ Leave blank cells, rows and columns, especially in tables and data.

Design Tip:

You can provide information for screen readers in a cell and then use a white font (white on white) to hide information or place a floating object over the cell.

Keyboard Shortcuts:

CTRL+9 = Hide Rows

CTRL+SHIFT+9 = Unhide Rows

CTRL+0 = Hide Columns

CTRL+SHIFT+0 = Unhide Columns

Retrofitting Inaccessible File

Retrofitting an excel file can be labour and time intensive. The layout and organization of the information may alter significantly or need to be redesigned to account for diverse learning styles. An inaccessible excel file is usually converted into a different file format (word or html).

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Guiding Principles - Making Accessible PDF Documents from Microsoft Word

Accessibility Tip

PDFs are all about being tagged before the file conversation, not after! A tag gives a pdf file structure similar to a heading in Word documents.

Dos

- ✓ Ensure your document has a logical and **organized hierarchical reading structure** (Heading Levels, Table of Contents, Bookmarks, Links, etc.).

- ✓ Always add **Alt-Text** (alternative text) for images and any graphical objects.

- ✓ Perform an **OCR** (optical character recognition) to make text readable for screen readers before your final save of the document (Adobe Software).

- ✓ Run an **Accessibility Checker** in Word and Acrobat Professional. This is found in the review pane in Word or in the Accessibility tab in Acrobat Professional.

- ✓ Use the "Convert to PDF" in Word to **generate tags** and tag tree for your file. This is found in the Options setting before the final save.

✓ Ask a colleague or personally **test** the document when finished with a screen reader.

Don'ts

☒ Save a scanned text document as an image file.

☒ Print your document directly as a PDF.

☒ Use a table to organize text into columns for forms created in Microsoft Word.

Optical Character Recognition (OCR)

When a textual document is created as a pdf or image the text must be recognized in a separate process so that screen readers can read the file. Specialized software will scan the image file and recognize individual characters of the words to make the document readable and editable in a digital form. This process is known as optical character recognition.

Retrofitting for Accessibility

If an existing PDF file is not accessible, you will need to use special software, such as Acrobat Professional, OpenBook or Kurzweil to perform optical character recognition (OCR). Also, it can take more time to correct an inaccessible file, rather than creating it from the start.

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Guiding Principles: Making Accessible PowerPoint Files

Accessibility Tip: Keep information short, simple and to the point. Ideally have one topic per slide, including three to five bullet points in a font no smaller than 18-point.

Dos

- ✓ Search for an **"accessible" theme** for your presentation. Ideally light background with dark font.

- ✓ Add slides with the "New Slide" menu. Use the slide layouts to order slides & **add descriptive titles** and information for every slide.

- ✓ Always add meaningful **Alt-Text** (alternative text) for images, charts, tables or any graphical objects.

- ✓ Ensure tables have defined **Heading and Colum Rows**.

- ✓ Use **captions or transcripts** for embedded videos or audios.

- ✓ Run the **Accessibility Checker** in PowerPoint found in the Review Pane.

Don'ts

- ☒ Use small fonts, text with a shadow, or glow effects.

- ☒ Use colour as the only means to convey important information.

- ☒ Use textboxes and WordArt.

- ☒ Use automatic or elaborate motion slide transitions.

- ☒ Place image or chart descriptions in the notes field of your presentation.

Design Tip:

Editing the master slide will make changes universally across your presentation, including layout, theme, and many other design elements.

Above & Beyond:

If your file is created correctly for accessibility, sharing your PowerPoint as a PDF can be more practical, to reduce the file size. Make sure the file is tagged for accessibility in your export, within the "Options" settings of the Publish as PDF or XPS in Microsoft PowerPoint settings. Accessibility can be potentially further improved if you have access to Adobe Acrobat Professional.

Retrofitting an Inaccessible File

To retrofit an inaccessible PowerPoint file is time and labour intensive. The style of information may need to be reconsidered and re-evaluated if the material does not have key elements (such as transcripts or text).

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Accessible Form Creation CNIB Guidelines

Version History
Prepared on March 25, 2019

Introduction
In working with service-users with diverse abilities, CNIB has outlined a series of guidelines for data development and collection for Forms. Be prepared to spend extra time in creating these documents as the design will heavily determine the document's accessibility. Some of these guidelines require basic knowledge around accessible documents in Word and being able to create an accessible PDF document.

All forms have specific requirements for the collection of information that relates to privacy laws or legislations, digital platforms as well as inclusive design principles. Creating an accessible form requires understanding a user-centric approach for both front-end and back-end. This means that a person with a disability will be able to interact with the information as a potential creator, consumer, and administrator. In other words, both the form and the process must be accessible for all employees irrespective of disability or other accessibility needs.

Inclusive Design
inclusive design ensures that information must be consumable for a wide range of human abilities. Information can be engaged with, represented and processed through multiple modalities (visual, auditory, written, etc.). Part of this process incorporates how all persons consume and work with the information obtained via any CNIB generated form.

Consider that a blind colleague in the future may come to inherit your form and they must also be able to use and process the information, without having to retrofit or create a new document or process. Any form must promote and respect the dignity and human rights of all persons interfacing with the organization,

irrespective of disability. Using inclusive design in your forms means that you are also indirectly future proofing your work.

General Recommendations

1. Provide a clear and concise overview, what materials and information is needed to complete the form.
2. Provide contact details for someone who may be able to help fill-in the form or in case of questions (name, email and phone number who must be reachable).
3. Use simple and plain language. If specialized language is used, a glossary/terminology list can be provided.
4. Provide clear submission guidelines/requirements.
5. Create alternative text for visual elements or mark as decorative.
6. Explain why this information is going to be collected, how it is stored, protected, and who will have access to the information.
7. Provide data validation both for incorrect and correct data input if these features are available in your platform of choice.
8. Prepare an alternate-format version based on the needs of the users (Word, PDF, paper copy, via intervenor, etc.).
9. Run accessibility checker where applicable.
10. Have the document tested for accessibility before going live.

Layout and Design

1. Make sure that you group sections and questions together in a logical order and/based on theme.
2. Use document headings to help with creating structure in the same manner you organize a word document.
3. Ensure required fields are visible and clearly marked or distinguishable.
4. Use a large sans serif font across the entire form (instructions, questions, response and text fields are minimum 14-point font size, such as Arial).
5. Use colour and contrast consistently across the form. Ensure that colour is not the only means of conveying information.

Form Fields

1. Make sure all form fields are labelled correctly.
2. Provide real-life examples to help with input (For example asking for present, please enter 03/25/2019 etc.). User should never guess how to input information.
3. Checkboxes are used for multiple selections and must match the size of text. Checkboxes must have a tooltip and label to explain the response so that users can understand the purpose. Ensure that the checkbox is the same size at the font you are using.
4. List box/dropdown box can be used for larger selections of only one option (such as Province or Country). Often users can simply enter the first letter or desired number and it can be faster to input data. Large selection also protects against user-input errors.
5. Radio Buttons can be used if you require a simple binary question (yes/no). This may not be available in all platforms.
6. Text fields or text boxes must be specified but remain at the same size. Text fields in Word can be problematic to manipulate and being consistent and providing enough contrast is essential. Use a single line for a single sentence response but increase the text box size if users write responses to help with editing at least 3 lines of text should be visible. Tooltips are also helpful.

Signature Requirements

1. Written digital signatures must be defined in specific field. This must be explained and an outline for alternate solution provided if possible.
2. Alternative signature methods such as a signature stamp, checkmark or other mark indicating an intent to sign may require to be performed in observation from a witness. The witness may need to provide their signature and date on the item.
3. If you offer to use initials as a substitute, a written disclaimer must be noted and an alternate method to verify an individual's identity or attestation must be included and documented.

Vulnerable Populations:
- Provide a space for signature for legal guardian or power of attorney or other legal representative's agreement. Follow provincial legal guidelines as required and provide supplementary documentation to prove the agreement as required by law.

Accessibility Note:

Digital signatures currently are not fully accessible (Microsoft and PDF digital signatures instructions and certificates). The issue has been flagged to these providers and alternate solutions must be considered.

PDF Form Restrictions

If you create a portable document format (PDF) file, you will be responsible to render that form accessible upon intake from the public or other stakeholders. This means having access to software to help with remediation or software able to perform optical character recognition (OCR). If you do not have access to such software, you must address this access before sending out a PDF form.

Current Platforms Available for CNIB staff:
1. Microsoft Word – internal/external
2. Microsoft Forms – online tool — internal only
3. PDF Form – internal/external
4. SalesForce – specific departments only.
5. SharePoint – internal only; must be requested and built with IT.

Errors to Avoid
- Using a table to structure the formatting of your form.
- Reading order is not defined or file is missing headings and tags (PDF document).
- Varying the colour and font and font size in your form fields.
- Relying only on one form for input.
- Using the wrong form field and not labelling your form fields or providing tooltips.

- Missing instructions for the user and not providing clarification for technical or specific terminology
- Focusing on your information needs first rather than the end-user.

Accessible Document Standards

Contents

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.