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**Creating Accessible Documents – Quick Start Guide for Sacramento County Employees (Draft Nov. 10 2021)**

The Americans with Disabilities Act (ADA), the California Fair Employment Act (FEHA) and other Federal and State civil rights laws require government entities such as Sacramento County to have effective communication with individuals with disabilities. This includes creating and publishing documents that are accessible to people who are blind, visually impaired, or who have sensory processing or cognitive disabilities.

When creating a new document, follow these guidelines to ensure the information it contains is accessible to and usable by people with disabilities.

**Start with Microsoft Word**

Microsoft Word is commonly used among people with a variety of disabilities because it is reasonably accessible. Word documents can be read by assistive technologies such as screen readers and Braille devices. However, in order for Word documents to be fully accessible, authors must follow some core principles.  Below are the basic steps for implementing these core accessibility principles.

* Use a 12 point Sans Serif font. Verdana is the recommended font used for Sacramento County documents. Arial is a common preference in the disability community.
* Use the Paragraph Spacing function, not a space or hard return to separate paragraphs or lists.
* Don’t use color as the only way of conveying meaning. Use sufficient contrast to ensure visibility for people with low vision.
* Use simple language; provide a table of contents for long documents.

**Use Headings**

Headings and sub-headings help people who are visually impaired to understand how the document is organized. Screen reader and Braille users can also jump between headings, which makes navigation much more efficient. Making text larger and bold does not make it a heading.

* Under Styles in the Home tab, use the built-in Heading styles like “Heading 1” and “Heading 2”. If there are additional levels of headings within the document’s outline, using “Heading 3”, “Heading 4”, etc.

**Use Lists**

Create lists using Word’s built-in tools for ordered (numbered) and unordered (bulleted) lists. Without using these tools, a list is not *really* a list, which makes the content more difficult for screen reader users to fully understand.

* Under Paragraph in the Home tab, select either the Bullets, Numbering or Outline option to create a list within the document.

**Use Meaningful Hyperlinks**

Include language in your document that conveys relevant information about the destination of the link. Link text should be unique within a page, should be meaningful when read out of context, and should help users to know something about their destination if they click on it. Link text such as “Click here” and “More” fail to meet these criteria.

Screen reader users can generate a list of links and navigate them alphabetically. Users of speech recognition technology can select a link with a voice command like “click” followed by the link text so it is also helpful to use unique link text that is short and easy to say.

* Highlight the relevant text, then right click and select *Hyperlink*. Include the URL in the *Address* field and select *OK*.
* Visit Microsoft website for more information about [creating accessible links](https://support.office.com/en-us/article/video-create-accessible-links-in-word-28305cc8-3be2-417c-a313-dc22082d1ee0?ui=en-US&rs=en-US&ad=US).

**Add Alternate Text for Images**

Alt text is a description of photos, illustrations or other graphic images that cannot be read by screen reading software or may not be usable by people who are visually impaired. Include alt text for all images that are informative to the content, but not for decorative images. It should be brief, but long enough for a person who is blind or visually impaired to get the same information as a sighted person would get from glancing at the image. If there is text in the image, it should be included in the alt text unless it appears nearby in the body of the document.

* In most versions of Word, you can enter alternate text by right clicking an image and selecting *Format Picture*. Within the *Format Picture* dialog, select *Alt Text* and enter information in the*Description* field.
* Visit (select resource – possibly WCAG) for more information about creating alternate text.

**Identify Document Language**

Most screen reader software is multilingual with ability to read content in English, Spanish, French, or other languages. To ensure screen readers read a document in the appropriate language profile, identify the document language. Identify the language of any content written in a language other than a document’s default language.

* In Office, select Tools > Language from the application menu to define the default language. To define a different language for part of the document, select each foreign language individually, then select Tools > Language to define the language for each.

**NOTE:** Currently language settings only effect accessibility of the Word document itself. They do **not** survive when exported to PDF. If PDF is the final format in which you intend to distribute your document, you will need to define language in the PDF directly using Adobe Acrobat Pro. For help see [Fixing Inaccessible PDFs Using Acrobat Pro](https://www.washington.edu/accessibility/documents/pdf-acrobat/).

**Use Tables Wisely**

Word has limitations when it comes to making tables accessible. Tables can be very difficult for screen reader users to understand unless they include markup that explicitly defines the relationships between all the parts (e.g., headers and data cells). Do not use tables to control layout.

For a simple table with one row of column headers and no nested rows or columns, Word is up to the task. However, more complex tables can only be made accessible within HTML or Adobe PDF (accessible table markup can be added to the PDF using Adobe Acrobat Pro).

Often complex tables can be simplified by breaking them into multiple simple tables with a heading above each. For simple tables, the only step necessary for accessibility is to identify which row contains the column headers.

* Select that row (Table > Select > Row), then right click the row and select “Table Properties”. This brings up the *Table Properties* dialog. In this dialog, click the *Row* tab, and check the checkbox that says “Repeat as header row at the top of each page”.
* When creating a table, two new tabs will appear in the ribbon. Select the *Design* tab to show the *Table Styles Option* group and define your Header Row.
* Visit Microsoft website for more information about [creating Accessible Tables](https://support.office.com/en-us/article/Video-Create-accessible-tables-in-Word-cb464015-59dc-46a0-ac01-6217c62210e5).

**Use the Accessibility Checker**

Microsoft products have a built-in accessibility checker which can help the document author test the overall accessibility of the document. The checker provides Inspection Results, feedback about the importance of each item, and tips on how to repair issues.

* Select the Review tab, then click on Check Accessibility

**Exporting from Word to PDF**

When exporting to PDF, take specific steps to preserve the accessibility features of the Word document, including heading structure, alternate text for images, and markup that explicitly identifies lists, tables, document language, and other content that is important for accessibility.

**Do not print to PDF**. This method of creating a PDF does not preserve the document’s accessibility features.

* Go to File > “Save As…” and select PDF from the choices provided. By default this produces a PDF that preserves the document’s accessibility features.
* When saving, select *Options* and be sure that “Document structure tags for accessibility” is checked. This is checked by default, but could become unchecked under certain circumstances.
* If you select “Minimize Size” to reduce the size of your PDF, be sure to repeat the preceding step, as this option might uncheck the “Document structure tags for accessibility” checkbox.

For details see [Creating Accessible PDFs from Microsoft Word](https://www.washington.edu/accessibility/documents/pdf-word/).

For more information on accessible document formats, visit the Accessible Document Resources page or contact DTech for assistance.

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