



Document Accessibility Guide

Microsoft Word

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The Weiss Center works closely with states to help them make Individuals with Disabilities Education Act (IDEA) data accessible. IDEA data may be produced in a variety of formats including Microsoft Word. While Microsoft Word is the most widely used word processing program, the strategies and concepts in this guide can also be applied to other programs such as Google Docs.

Documents that are formatted to be accessible will work well with assistive technology. Many people with disabilities use assistive technology including screen readers, screen magnification, and text to speech to access content. Accessible documents are necessary for people with disabilities and improve the user experience for all users. This guide contains examples from State Performance Plan/Annual Performance Reports (SPP/APR) required under IDEA.

Key Strategies

Use the following key strategies to create accessible Word documents:

1. Format Headings and subheadings in a logical order using the Styles group on the Home Ribbon.
 2. Use built-in tools to format accessible bulleted and numbered lists.
 3. Create tables with a simple structure identifying column and row headers.
 4. Add alternative (alt) text descriptions to images, charts, and graphs.
 5. Choose fonts that are easy to read such as sans serif fonts like Calibri, Arial, and Tahoma. Microsoft's default font is now a sans serif font. Use a font size of at least 12 pt.
 6. Use appropriate color and contrast settings. Do not use color alone to convey information.
 7. Format hyperlinks with meaningful context.
 8. Save files with descriptive file names.
 9. Use Microsoft Word's Accessibility Checker to check your document and fix accessibility problems.
 10. Save accessible source documents, including MS Word documents as accessible PDFs.
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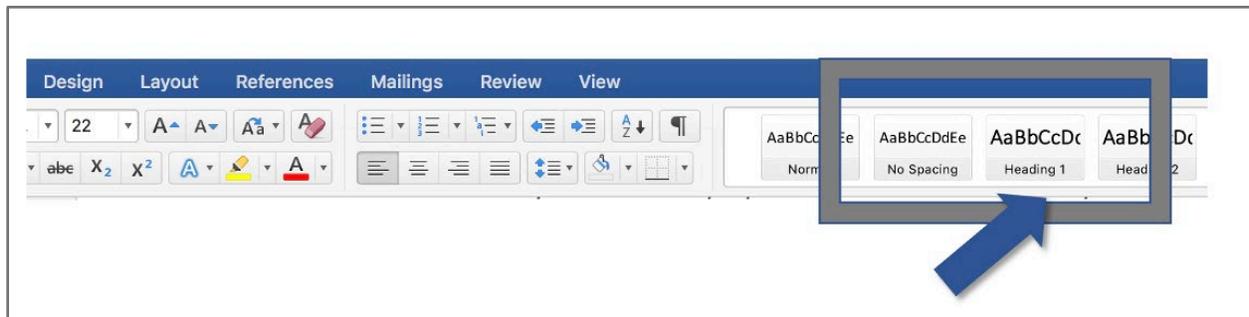
Headings and Subheadings

Users of assistive technology use headings as navigation points. Microsoft Word has built-in styles that can be used to format headings so that they are recognized by assistive technology. Headings and subheadings also provide a visual structure that is useful for all users.

Format Headings with Logical Order

Format the main headings in the document as Heading 1. Format subheadings as Heading 2. For example, format the main sections of an annual report as Heading 1 with sub sections as Heading 2.

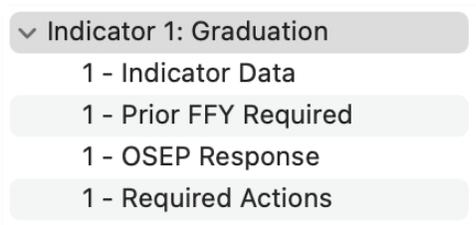
To format a heading, select the text, go to the Styles group on the Home tab and choose the appropriate heading level. Formatted headings can be viewed in the Navigation pane (View > Show > Navigation Pane) and can be used to create a table of contents for long documents.



Example Headings from IDEA SPP

- Heading 1: “Indicator 1 Graduation”
 - Heading 2: “1 – Indicator Data”
 - Heading 2: “1 – Prior FFY Required”

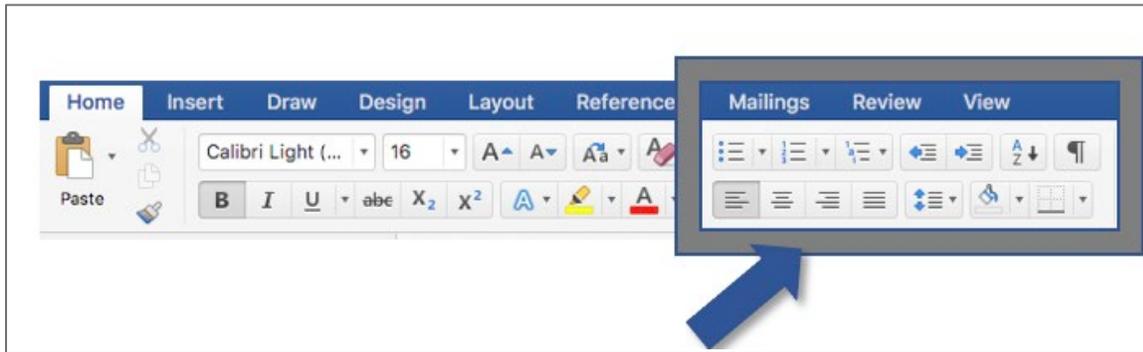
The screenshot below shows the headings viewed as a nested list in the Navigation Pane.



Bulleted and Numbered Lists

Use Word’s built-in list formatting tools to create bulleted and numbered lists. Screen readers will identify lists and the number of items in the list to a screen reader user. When you format a list using the built-in list tools, the list formatting will be preserved when exporting a file to another format, such as a PDF.

To format the list, highlight list items, go to the Paragraph group on the Home tab, and select numbered or bulleted list.



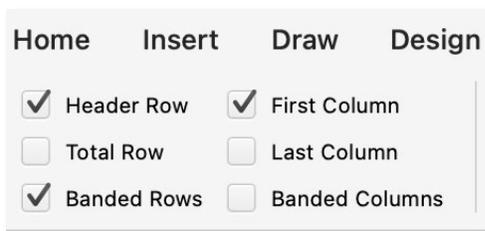
Tables

Use a simple table structure that is easier to understand for all users. A simple table structure includes data in adjacent cells with no blank or merged cells and includes clear and meaningful column header and row header labels that will be identified to screen reader users.

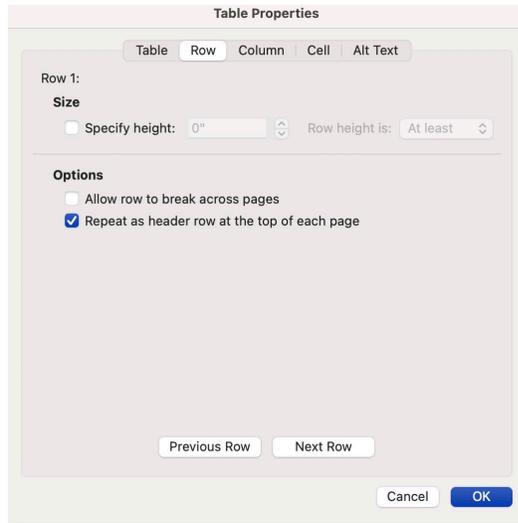
Format the table using Word's built-in table formatting options to ensure appropriate table structure with adequate header labels and logical reading order.

To add a table with clear headers:

1. Go to the Insert tab.
2. In the Tables section, select the Add a Table dropdown menu.
3. Select the number of rows and columns and insert the Table.
4. Enter data in the cells, including column header labels in the top row.
5. To format column and row headers, select the Table and then go to Table Tools > Design.
6. In the Table Styles Options group, select the Header Row check box. It will be selected by default.

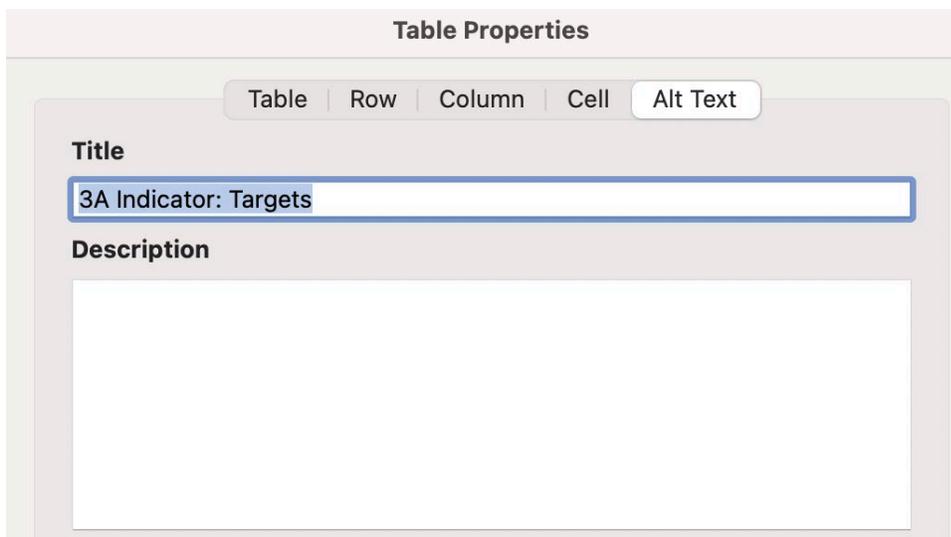


7. Once you have entered all of the data in the Table, right Click on the Table and choose Table Properties, select the Row tab and check "Repeat as header row at the top of each page" and deselect "Allow row to break across pages."



8. Add a Title to the table, by selecting the Alt Text tab in the Table Properties section. Provide a meaningful title for the table in the Title section of the alt text dialogue box. The table title will help a screen reader user navigate tables within a document more easily. Without the title, the screen reader will identify tables as table 1, table 2, etc. The decision as to whether the table needs an alt text description depends on the length of the table and whether the content of the table is clearly described in the document text. The example below includes a table title but does not include an alt text description. The screen reader will identify the number of columns and rows in the table.

Example Alt Text Table Properties Title below: 3A Indicator: Targets



9. Using banded color styles with appropriate contrast can help users keep track of data in tables with many rows.

Example Table from Part B – SPP 3A Indicator: Targets

Subject	Group	Group Name	2021	2022	2023	2024	2025
Reading	A >=	Grade 4	95.00%	95.00%	95.00%	95.00%	95.00%
Reading	B >=	Grade 8	95.00%	95.00%	95.00%	95.00%	95.00%
Reading	C >=	Grade HS	95.00%	95.00%	95.00%	95.00%	95.00%
Math	A >=	Grade 4	95.00%	95.00%	95.00%	95.00%	95.00%
Math	B >=	Grade 8	95.00%	95.00%	95.00%	95.00%	95.00%
Math	C >=	Grade HS	95.00%	95.00%	95.00%	95.00%	95.00%

The column headers in row 1 of this table have been identified. When reading this table, a screen reader will read the headers in row 1 before reading the cell data. For example, when moving through row 2, a screen reader user will hear: Subject Reading, Group A >=, Group Name Grade 4, 2021 95%, 2022 95%, 2023 95%, 2024 95%, 2025 95%. With no column headers, the screen reader user will hear the cell data, but not the header labels that the data refers to.

Alt Text Descriptions

Alternative Text Descriptions (alt text) help readers using a screen reader to access the content and function of the image. Alt text should be descriptive and concise. Best practice for adding alternative text to images is 120 characters or less.

Consider the **purpose** of the image when adding alternative text descriptions.

Images generally fall into one of **three categories: Informational, Decorative, and Functional (used as a button or link)**.

- **Informational** - If the image's purpose is to convey information or meaning, determine what information it is conveying and write a short, concise text description that will convey that information.
- **Decorative** - If the image is decorative, mark the image as Decorative so the screen reader will skip the image altogether. A decorative image does not convey information or have a functional purpose.
- **Functional** - If the image performs a function, the alt text should indicate the functional purpose of the image, for example "Link to Homepage."

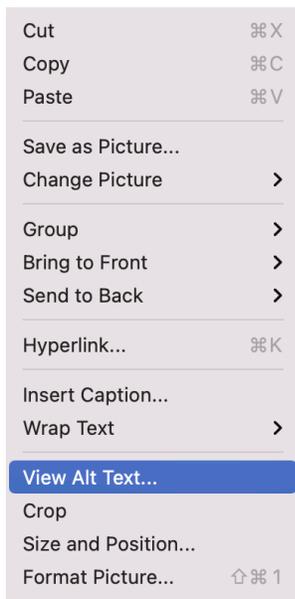
Use complete sentences with proper punctuation when writing alt text descriptions. Avoid using abbreviations or acronyms unless they have been previously defined. Do not duplicate information present in a caption.

Example Alt Text Description: Rhonda Weiss Center Logo

Alt text description on the logo below reads: “Rhonda Weiss Center for Accessible IDEA Data logo.”



To add alt text to images, right-click the image in your document, then select “View Alt Text.” In the text box, enter an alt text description. Check the “Mark as decorative” box if the image is there for decoration only.



- Your alt text description should be short and descriptive of the image and how it relates to the text in your document.
- Avoid using “image of” or “picture of” since assistive technology already informs the user that it is an image.

Font Design

Choose fonts that are easy to read such as sans serif fonts like Calibri, Arial, and Tahoma. Microsoft’s default font is now a sans serif font. Use a font size of at least 12 pt.

Color and Contrast

Colors must have sufficient contrast between text color and background. This includes text on images, icons, and buttons. It also includes colors used to convey information on diagrams, maps, and other types of images.

Do not use color as the sole indicator of information. When color is used to convey information, add additional labels. For example, rather than just using the color red to indicate required information, also add an asterisk and the label “required” as alt text.

Hyperlinks

Accessible hyperlinks help all users make an informed decision about which links they want to follow. Hyperlinks in your document should be clear and descriptive of where the link leads to.

- Avoid common phrases such as “Click Here” that do not inform the user where the link will take them.
- Hyperlinks sometimes perform specific functions such as opening a new page. If your hyperlink performs a function, be sure to include the function in the description.
- Ensure your hyperlink has a meaningful description. An example of a meaningful description could be “Federal Fiscal Year 2020 Alaska State Performance Plan/Annual Performance Report (Opens New Window).”

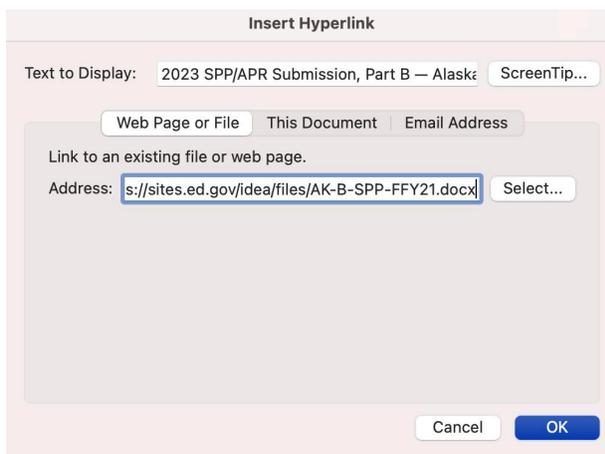
Example Hyperlink

URL: <https://sites.ed.gov/idea/files/AK-B-SPP-FFY21.docx>

Text to display: 2023 SPP/APR Submission, Part B — Alaska

Accessible hyperlink with context: [2023 SPP/APR Submission, Part B — Alaska](#)

To add a hyperlink, highlight text > go to Insert tab > select Hyperlink in the Links group. Enter the Text to Display and the URL address.



White Space and Line Spacing

Use Word's default margins and line spacing options to create adequate white space in your document. Adequate white space improves readability of the document and improves understanding of the content. Additional tips to improve the white space and readability of your document include:

- Use formatted headings and subheadings to divide content into manageable chunks.
- Keep paragraphs short.
- Use bulleted and numbered lists.
- Use a font size of 12 pt.
- Use "Normal" default margins of 1 inch whenever possible.
- Use default spacing between paragraphs. When spacing is reduced the text becomes difficult to read.

Descriptive File Name and Document Properties

Provide a descriptive file name that identifies the content and makes the document easier to find. A document's title is unique and descriptive of the general topic of the document.

- The file name should include a date that is relevant to the document.
- Add the Title of the document to the Title section of the Document Properties. If appropriate, add the organization's name as the author.

Example: Descriptive File Name

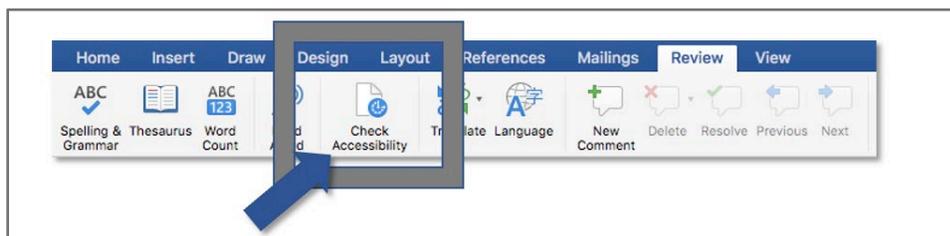
2023 SPP/APR Submission, Part B — Alaska

To access the Document Properties, go to File> Info> Properties, and select Summary.

Accessibility Checker

Microsoft Word has a built-in Accessibility Checker that will inspect your document and produce a report noting accessibility errors and warnings such as missing alt text and unclear hyperlinks.

To access the accessibility checker, go to the Review Tab and select Check Accessibility.



There are limitations to the accessibility checker. The accessibility checker cannot tell if you are using a certain color to apply meaning or whether alt text is accurate. The accessibility checker will break down the results of the check into three categories:

- **Error:** Content that makes the document difficult or impossible to read and understand for people with disabilities.
- **Warning:** Content that in most (but not all) cases makes the document difficult to understand for people with disabilities.
- **Tip.** Content that people with disabilities can understand but that could be presented in a different way to improve the user's experience.

Save as PDF

MS Word includes the option to Save and Export accessible formatting such as headings and alt text when the doc is saved as a PDF. To export your Word doc to an accessible PDF format, go to File > Save as **Adobe PDF**.

The PDF will include Bookmarks for navigation and structure, while also retaining other accessibility features that include formatted lists and alternative text descriptions, and tags, which will enhance functionality for screen reader accessibility.

