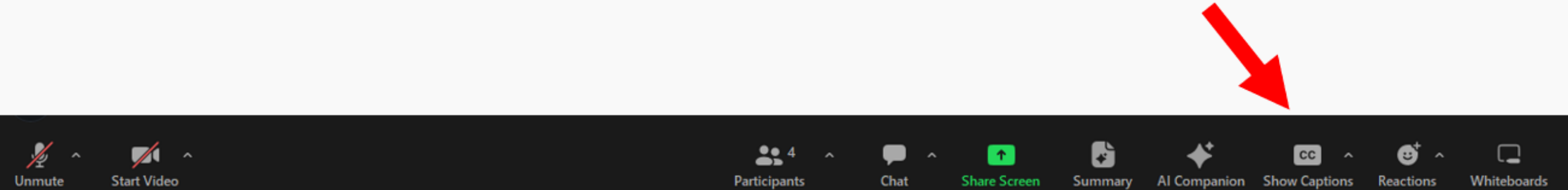
Welcome! We will begin shortly.

- This presentation will be recorded.
- Microphones and cameras will be disabled upon entry.
- Feel free to use the chat function to share questions and comments. We also encourage the use of the built-in Zoom reactions!
- We will be launching Zoom Polls and using prompts throughout this presentation to get your feedback and insights.
- We will close with general Questions & Answers.

Live Captions Provided.

Two options:

1. Access the StreamText link available in the Zoom Chat
2. Access the “Closed Captions” option in the Zoom Toolbar



Making IDEA Data Reporting Accessible Using Excel

Practical Tips & Strategies

07/16/2026



RHONDA WEISS CENTER
FOR ACCESSIBLE IDEA DATA

aem

Today's Presenters

Shilan Wooten, Technical Assistant

Norah Sinclair, Accessibility Specialist

Today's Agenda

#1: Welcome

#2: Weiss Center Excel Accessibility Resources

#3: What, How, and Why of Making Excel Workbooks Accessible

#4: Excel Accessibility and Artificial Intelligence (AI)

#5: Questions and Answers

Who We Are

- The Rhonda Weiss Center for Accessible IDEA Data, or Weiss Center, is a technical assistance data center, funded by the Office of Special Education Programs (OSEP).
- The Weiss Center improves state capacity, under Part B and Part C of the Individuals with Disabilities Education Act (IDEA), to provide IDEA data in formats that are accessible to people with disabilities.

Opportunities to Improve Digital Accessibility

- Lack of effectively coded headings on websites and documents
- Lack of keyboard access and visual focus
- Lack of Alternative Text for images
- Ineffective color contrast
- Inaccessible Tables
- Inability to resize text
- Inaccessible forms, labels and error notifications
- Inability to reach out regarding lack of access
- Inaccessible video content
- Inaccessible documents (Word, PDF, Excel, PowerPoint)

Strategies for Making Digital Content Accessible

- Organized content using headings for easier navigation
- Keyboard-friendly interactions that support diverse access needs
- Text alternatives that make images understandable to everyone
- High-contrast colors that improve readability
- Well-structured tables that communicate data clearly
- Flexible text sizing for comfortable reading
- User-friendly forms with helpful guidance and feedback
- Clear accessibility support and contact options
- Inclusive multimedia with captions and transcripts
- Documents designed to be accessible across devices and assistive technologies

Accessible Spreadsheets Improve Access

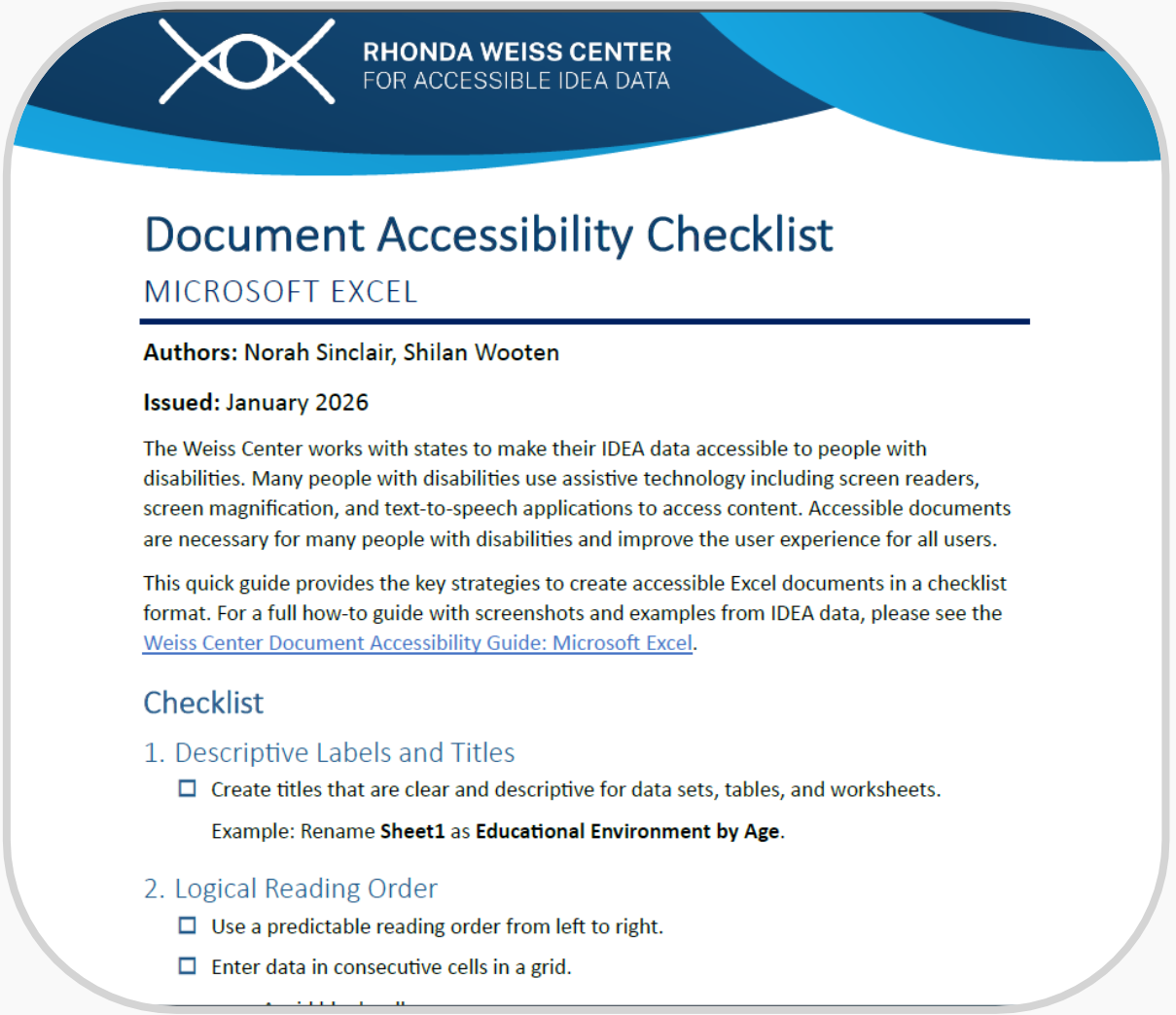
- **Screen reader users can access content** through clear table structures, descriptive headers, and meaningful worksheet names.
- **Individuals with limited motor accessibility are supported** by allowing content to be accessed via a keyboard alone.
- **Individuals with visual barriers are supported** by providing sufficient color contrast and avoiding the use of color alone to communicate meaning.
- **Individuals with cognitive barriers are assisted** by use of clear labels, consistent formatting, and plain language.
- **All users** experience improved usability.

Weiss Center Document Accessibility Resources

- Quick Guide and Checklist with key strategies to create accessible Excel spreadsheets
- Designed to be a companion resource along with the Weiss Center Document Accessibility Guide for Microsoft Excel
- Strategies and concepts in this guide can also be applied to other programs, such as Google Sheets

Accessibility Checklist: Microsoft Excel

[Document Accessibility Checklist: Microsoft Excel]



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Document Accessibility Checklist

MICROSOFT EXCEL

Authors: Norah Sinclair, Shilan Wooten

Issued: January 2026

The Weiss Center works with states to make their IDEA data accessible to people with disabilities. Many people with disabilities use assistive technology including screen readers, screen magnification, and text-to-speech applications to access content. Accessible documents are necessary for many people with disabilities and improve the user experience for all users.

This quick guide provides the key strategies to create accessible Excel documents in a checklist format. For a full how-to guide with screenshots and examples from IDEA data, please see the Weiss Center Document Accessibility Guide: Microsoft Excel.

Checklist

1. Descriptive Labels and Titles

- ☐ Create titles that are clear and descriptive for data sets, tables, and worksheets.

  Example: Rename **Sheet1** as **Educational Environment by Age**.

2. Logical Reading Order

- ☐ Use a predictable reading order from left to right.
- ☐ Enter data in consecutive cells in a grid.

Web Content Accessibility Guidelines (WCAG)



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Web Content Accessibility Guidelines (WCAG): Perceivable, Operable, Understandable, Robust (POUR)

POUR Principle	Accessibility Feature	What to Do	Why It Matters (Plain Language)
Operable, Understandable	Descriptive Labels and Titles	Use clear sheet names, descriptive column headers, and table names	Helps users understand and navigate content quickly
Operable, Understandable	Logical Reading Order	Arrange content in a clear left-to-right order	Supports keyboard navigation and screen reader flow
Perceivable	Text Alternatives	Add alt text to images, charts, and graphs	Ensures all users can access visual information
Perceivable	Color Contrast	Use strong contrast between text and background	Makes content easier to see, especially for low vision users
Operable, Understandable	Formatted Tables	Use simple tables with column headers (no merged cells)	Improves navigation and readability for assistive technology
Operable, Understandable	Layout	Use consistent spacing, white space, column widths, and row heights	Reduces clutter and improves readability
Robust	Assistive Technology Support	Format excel tables and provide predictable order	Ensures compatibility with screen readers and other tools

How to Make Excel Workbooks Accessible



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Activity – Which Table is Most Accessible

Choose the most accessible version of the table

- A
- B
- C

Example A

CUMULATIVE NUMBER OF INFANTS AND TODDLERS WHO RECEIVED EARLY INTERVENTION SERVICES					
FROM	07/01/2025	TO	06/30/2026	(SPECIFY EXACT DATES)	
D. CUMULATIVE COUNT OF INFANTS AND TODDLERS, AGES BIRTH THROUGH 2, BY RACE/ETHNICITY					
				TOTAL	PERCENT*
TOTAL (ROWS 1-7)				5432	100%
1. HISPANIC/LATINO				2456	45%
2. AMERICAN INDIAN OR ALASKA NATIVE				340	6%
3. ASIAN				250	5%
4. BLACK OR AFRICAN AMERICAN				356	7%
5. NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER				124	2%
6. WHITE				4213	78%
7.TWO OR MORE RACES				497	9%
Calculated Total					

Example B

Cumulative Count of Infants and Toddlers Who Received Early Intervention Services July 1, 2022 – June 30, 2023		
Race/Ethnicity	**Total**	**Percentage**
Total (All Categories Below)	8,273	100%
Hispanic/Latino	2,456	30%
American Indian or Alaska Native	340	4%
Asian	250	3%
Black or African American	356	4%
Native Hawaiian or Other Pacific Islander	124	1%
White	4,213	51%
Two or More Races	497	6%

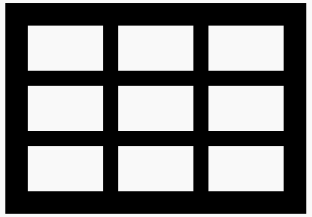
Example C

Cumulative Count of Infants and Toddlers Who Received Early Intervention Services July 1, 2022 – June 30, 2023

Race/Ethnicity	Total	Percentage
Hispanic/Latino	2,456	30%
American Indian or Alaska Native	340	4%
Asian	287	3%
Black or African American	356	4%
Native Hawaiian or Other Pacific Islander	124	1%
White	4,213	51%
Two or More Races	497	6%
Total (All Categories Below)	8,273	100%

Key Strategies Overview Introduction

- Descriptive labels and titles
- Logical reading order
- Minimize use of merge and split cells
- Formatted data tables
- Column headers
- Adequate color contrast
- Column and row size for improved readability
- Easy-to-read fonts
- Recognizable symbols
- Accessibility Ribbon and Assistant – New Tools in Excel



Descriptive Labels and Titles



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Descriptive Labels and Titles - Examples

Use clear and descriptive labels

- Worksheets
- Tables
- Column headers
- Hyperlinks



	A
1	CUMULATIVE NUMBER OF INFANTS AND TODDLERS WHO RECEIVED EARLY INTERVENTION SERVICES



Logical Reading Order



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Logical Reading Order Example

Table Title in cell A1

- Use a **simple table structure** with predictable layout from left to right, top to bottom
- No **empty or blank** cells or **merged** or **split cells** – confusing layout

	A	B
1	**Distribution of Students by Educational Environment**	
2	**Educational Environment**	**Percent**
3	Inside regular class ≥ 80% of the day	67%
4	Inside regular class 40%–79% of the day	22%
5	Inside regular class < 40% of the day	10%
6	Separate School	1%
7	Correctional Facility	0%
8	Homebound/Hospital (ages 5K–21)	0%
9	Parentally Placed in Private School	0%
10	Residential Facility	0%

Formatted Tables



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Example Data – Not Formatted as Excel Table

Cumulative Count of Infants and Toddlers Who Received Early Intervention Services July 1, 2022 – June 30, 2023		
Race/Ethnicity	**Total**	**Percentage**
Total (All Categories Below)	8,273	100%
Hispanic/Latino	2,456	30%
American Indian or Alaska Native	340	4%
Asian	287	3%
Black or African American	356	4%
Native Hawaiian or Other Pacific Islander	124	1%
White	4,213	51%
Two or More Races	497	6%

Example - Formatted as Excel Table

	A	B	C
1	Cumulative Count of Infants and Toddlers Who Received Early Intervention Services July 1, 2022 – June 30, 2023		
2	Race/Ethnicity	Total	Percentage
3	Total (All Categories Below)	8,273	100%
4	Hispanic/Latino	2,456	30%
5	American Indian or Alaska Native	340	4%
6	Asian	287	3%
7	Black or African American	356	4%
8	Native Hawaiian or Other Pacific	124	1%
9	White	4,213	51%
10	Two or More Races	497	6%
11			

Formatted Data Tables

- Format data as a table using Excel's built-in table formatting tools.
- Select the data range that should be included in the table beginning with row that includes the column headers.
- Select the "**My table has headers**" option when creating a table.



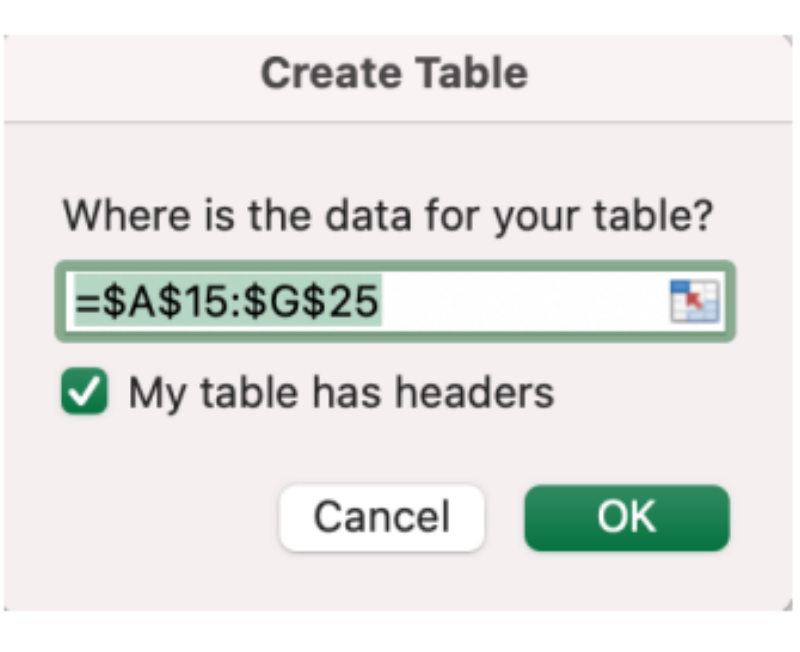
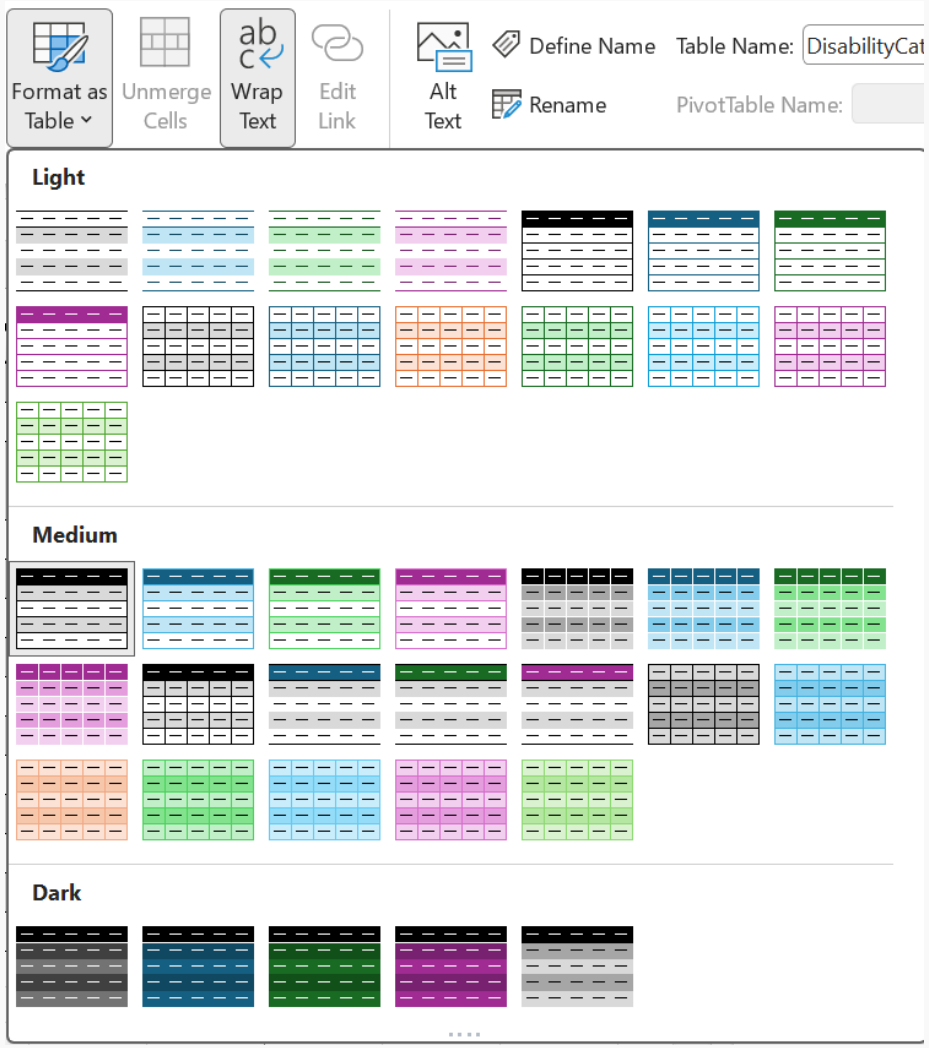


Table Titles and Names

- Enter Title in the row above the data table.
- Use **Center Across Selection** alignment option to center title across the range of cells without merging cells.
- Provide meaningful names for tables following Excel naming requirements, (ex. LifeExpectancy).

Color and Contrast

- Ensure sufficient contrast between text and background colors.
- Avoid using color alone to convey meaning.
- Avoid using red and green color combinations, which are problematic for people who have red-green color blindness.



Color and Contrast Banded Rows Example

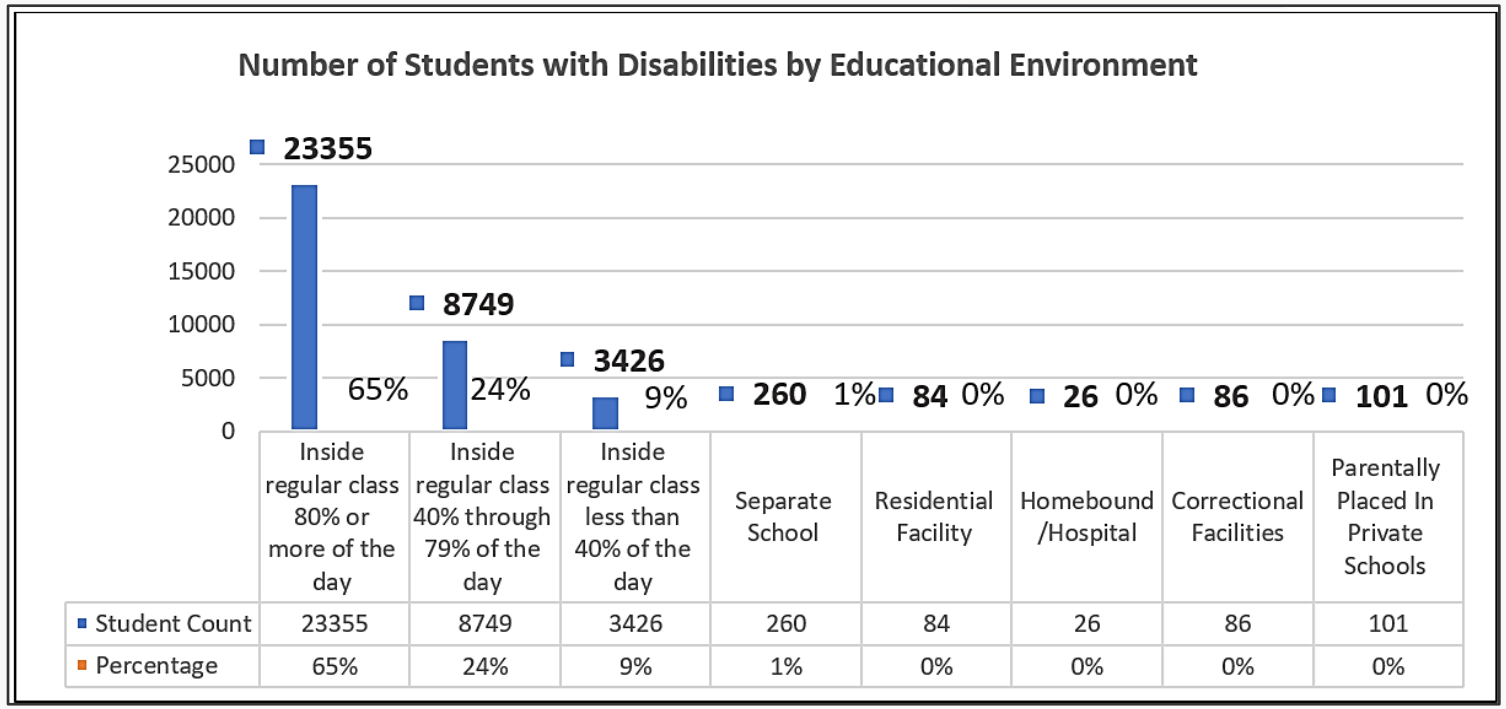
- Use **good contrast** between font colors and background colors, including the use of **banded row** table styles
- Do not rely on color coding alone to convey meaning. If color is used to convey meaning, add text description or alt text description.

	A	B	C
1	Cumulative Count of Infants and Toddlers Who Received Early Intervention Services July 1, 2022 – June 30, 2023		
2	Race/Ethnicity	Total	Percentage
3	Total (All Categories Below)	8,273	100%
4	Hispanic/Latino	2,456	30%
5	American Indian or Alaska Native	340	4%
6	Asian	287	3%
7	Black or African American	356	4%
8	Native Hawaiian or Other Pacific	124	1%
9	White	4,213	51%
10	Two or More Races	497	6%
11			

Easy to Read Fonts

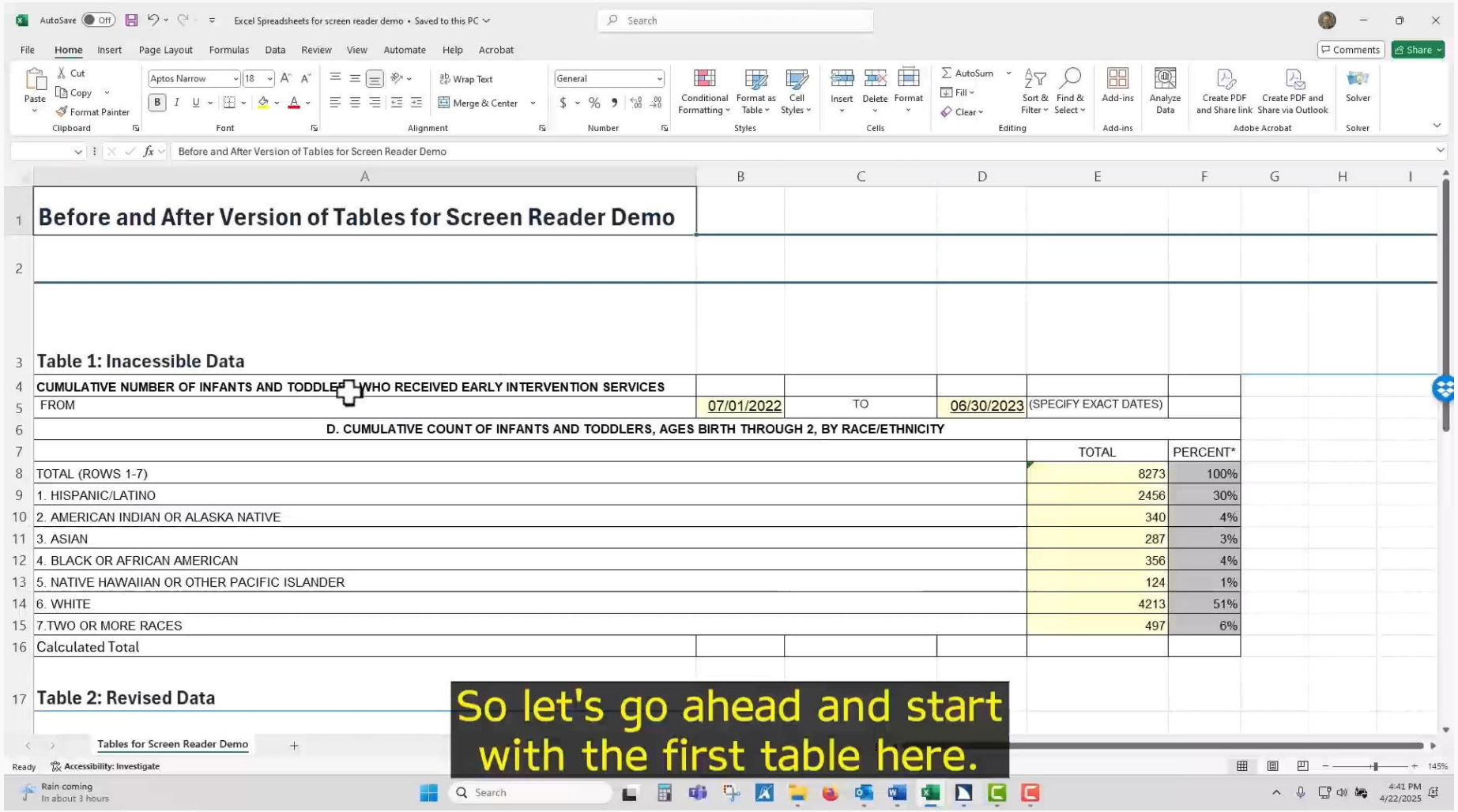
- Use sans serif fonts that are easy to read such as Calibri, Aptos, Arial, and Tahoma.
- Use a font size of at least 12 pt.
- Apply **bold** font to important rows such as the header row or total row
- Do not use ALL CAPS or UPPER
- Use **symbols** that a screen reader will read aloud. For example, a screen reader will read some symbols such as an asterisk (*) aloud but will skip and not always read a period (.) aloud.

Alt Text for Charts and Graphs



Alt Text: A bar graph showing the number of students with disabilities by educational environment. The chart includes the following breakdown: 65% of students are inside the regular class 80% or more of the day. 24% of students are inside regular class 40% through 79% of the day. 9% of students are inside the regular class less than 40% of the day. 1% of students attend a separate school. Fewer than 1% of students are in other environments outside of the school.

Excel Tables Screen Reader Demonstration



Excel Accessibility Tools

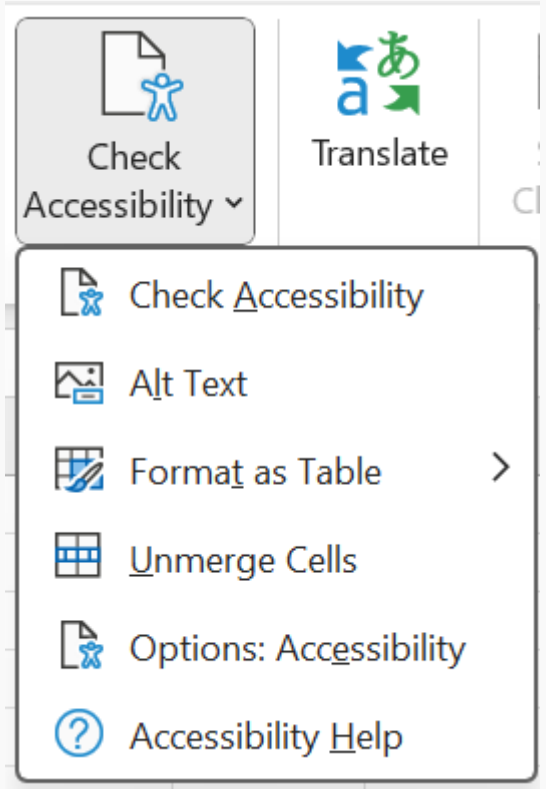


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Accessibility Assistant and Checker

- Use the Accessibility Assistant to identify and fix issues as you are working.
- Always run the built-in Accessibility Checker (Review > Check Accessibility) before sharing the document with others. **Check Accessibility** menu below.



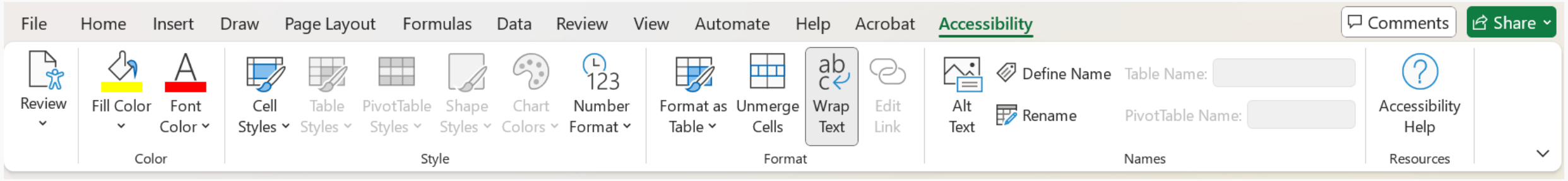


Access the Accessibility Tools

- Check Accessibility still available in **Review** Tab
- New Accessibility Investigate button in Windows Version

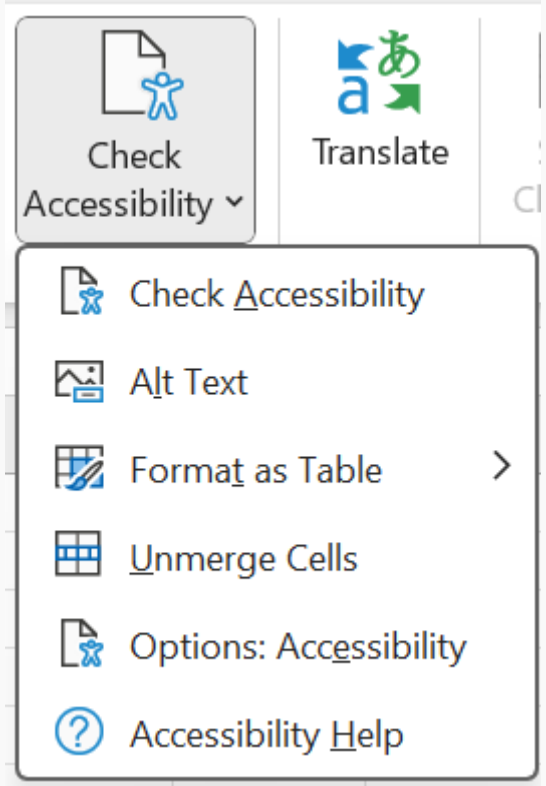


Accessibility Tab



Use the Accessibility Assistant

- Check Accessibility still available in **Review** Tab
- **Check Accessibility** before sharing your document or exporting to a PDF.



Excel Accessibility Tools and Table Demonstration

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Artificial Intelligence (AI) Tools and Accessibility

Excel Considerations



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Original Spreadsheet

IDEA School Age Child Count and Educational Environments for School Year 2024-2025

*** Indicates less than 10 students in the subgroup**

Total of the education unit	4,198

Subtotal 3 - Children with disabilities, by disability category

Disability category	Student count	Percentage
Intellectual disability	150	4%
Hearing impairment	40	1%
Speech or language impairment	43	1%
Visual impairment	56	1%
Emotional disturbance	45	1%
Orthopedic impairment	43	1%
Other health impairment	435	10%
Specific learning disability	2,568	61%
Deaf-blindness	453	11%
Multiple disabilities	243	6%
Autism	34	1%
Traumatic brain injury	54	1%
Developmental delay[1]	34	1%
Calculated subtotal	**4,198**	**100%**

Subtotal 4 - Children with disabilities, by racial ethnic

Subtotal 6 - Children with disabilities, by educational environment

Educational environment	Student count	Percentage
(A) Inside regular class 80% or more of the day	1,275	30%
(B) Inside regular class 40% through 79% of the day	35	1%
(C) Inside regular class less than 40% of the day	45	1%
(D) Separate school	56	1%
(E) Residential facility	*	
(F) Homebound/hospital	200	5%
(G) Correctional facilities	*	
(H) Parentally placed in private schools	*	
Calculated subtotal	**4,198**	100%

High-Quality Versus Low-Quality Prompts

High-Quality (CoPilot Premium)

Copilot Prompt: Accessibility Maturity Roadmap-1.pdf Document Accessibility Checklist - Microsoft Excel.pdf Use the attached documents, roadmap and checklist, as reference to analyze the attached spreadsheet and make recommendations for creating an accessible version of the spreadsheet. FSM Child Count Excel version.xlsx

Low-Quality (CoPilot Basic)

Copilot Prompt: Make this document accessible

Low-Quality Prompt Output

IDEA School Age Child Count and Educational Environments for School Year 2024-2025

** Indicates less than 10 students in the subgroup*

Total of the education unit	4,198

Subtotal 3 - Children with disabilities, by disability category

Disability category		Percentage
Intellectual disability	150	4%
Hearing impairment	40	1%
Speech or language impairment	43	1%
Visual impairment	56	1%
Emotional disturbance	45	1%
Orthopedic impairment	43	1%
Other health impairment	435	10%
Specific learning disability	2,568	61%
Deaf-blindness	453	11%
Multiple disabilities	243	6%
Autism	34	1%
Traumatic brain injury	54	1%
Developmental delay[1]	34	1%

Subtotal 6 - Children with disabilities, by educational environment

Educational environment	Student count	Percentage
(A) Inside regular class 80% or more of the day	1,275	30%
(B) Inside regular class 40% through 79% of the day	35	1%
(C) Inside regular class less than 40% of the day	45	1%
(D) Separate school	56	1%
(E) Residential facility	*	
(F) Homebound/hospital	200	5%
(G) Correctional facilities	*	
(H) Parentally placed in private schools	*	
Calculated subtotal	4,198	100%

Subtotal 2 - Children with disabilities, by age

Age	Student count	Percentage

High Quality Prompt

Disability Category

This sheet contains the disability category section reformatted as a single accessible table with clear headers.

** indicates fewer than 10 students in the subgroup.*

Disability Category	Student Cou	Percentag
Intellectual Disability	17	1.2%
Hearing Impairment	40	2.9%
Speech or Language Impairment	77	5.6%
Visual Impairment	59	4.3%
Emotional Disturbance	*	*
Orthopedic Impairment	34	2.5%
Other Health Impairment	60	4.4%
Specific Learning Disability	934	67.8%
Deaf-blindness	*	*
Multiple Disabilities	39	2.8%
Autism	68	4.9%
Traumatic Brain Injury	*	*
Developmental Delay	42	3.0%
Calculated Subtotal	1378	100.0%

Overview | Disability | Environment

Prompt Outputs

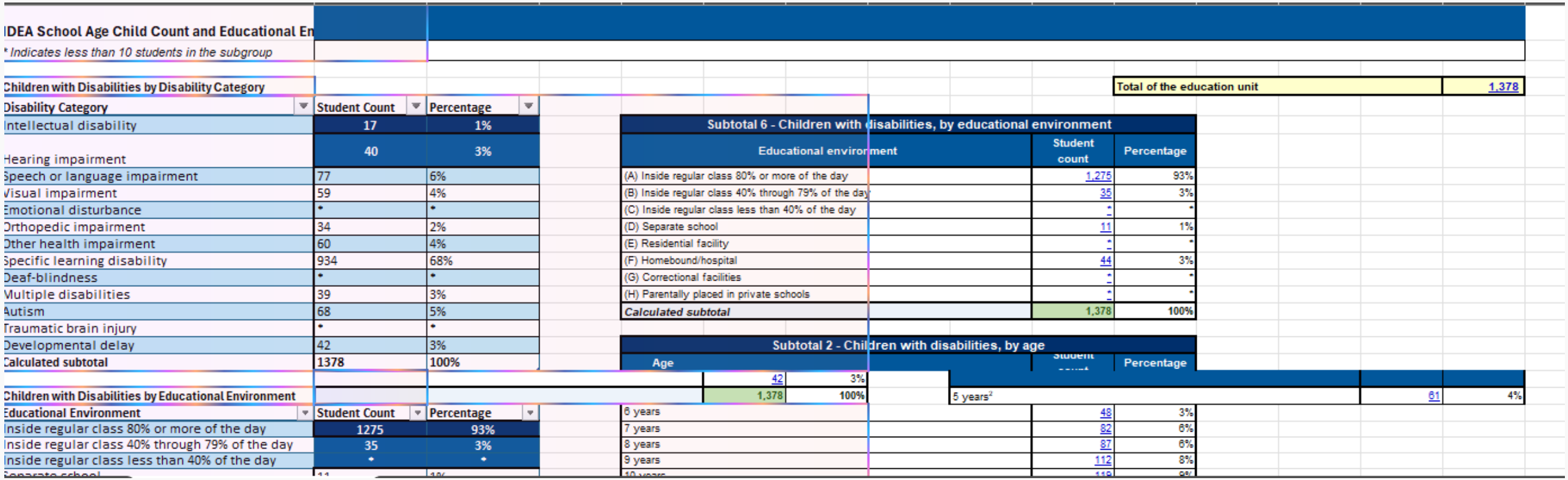
High-Quality

- Remediated workbook to align with accessibility guidelines outlined in checklist and guide
  - Logical reading over
  - Formatted tables properly
  - Fixed blank/irregular cells and layout issues

Low-Quality

- More accessibility issues than the original
  - New hard-to-read contrast text issues
  - Alt text is still missing
  - Merged cells still exist

Same Low Quality Prompt With Guide Attached



IDEA School Age Child Count and Educational En

* Indicates less than 10 students in the subgroup

Children with Disabilities by Disability Category

Disability Category	Student Count	Percentage
Intellectual disability	17	1%
Hearing impairment	40	3%
Speech or language impairment	77	6%
Visual impairment	59	4%
Emotional disturbance	*	*
Orthopedic impairment	34	2%
Other health impairment	60	4%
Specific learning disability	934	68%
Deaf-blindness	*	*
Multiple disabilities	39	3%
Autism	68	5%
Traumatic brain injury	*	*
Developmental delay	42	3%
Calculated subtotal	1378	100%

Children with Disabilities by Educational Environment

Educational Environment	Student Count	Percentage
Inside regular class 80% or more of the day	1275	93%
Inside regular class 40% through 79% of the day	35	3%
Inside regular class less than 40% of the day	*	*
Separate school	11	1%

Total of the education unit: 1,378

Subtotal 6 - Children with disabilities, by educational environment

Educational environment	Student count	Percentage
(A) Inside regular class 80% or more of the day	1,275	93%
(B) Inside regular class 40% through 79% of the day	35	3%
(C) Inside regular class less than 40% of the day	*	*
(D) Separate school	11	1%
(E) Residential facility	*	*
(F) Homebound/hospital	44	3%
(G) Correctional facilities	*	*
(H) Parentally placed in private schools	*	*
Calculated subtotal	1,378	100%

Subtotal 2 - Children with disabilities, by age

Age	Student count	Percentage
3	42	3%
Calculated subtotal	1,378	100%
5 years[2]	61	4%
6 years	48	3%
7 years	82	6%
8 years	87	6%
9 years	112	8%
10 years	118	9%

Issues

- Spreadsheet formatting breaks down
- Accessibility assistant indicates 18 merged cells while Copilot said there are no merged cells in the worksheet
- Font type and sizing became inconsistent throughout spreadsheet

AI Considerations

- Use AI to draft alt text descriptions, not as the final product.
- Verify all numbers, trends, percentages, and comparisons against the source data.
- Ensure the description communicates the chart's purpose and key takeaway.
- Remove any sensitive or confidential information before using external AI tools.
- Review AI-generated content for plain language, accuracy, and accessibility.
- For IDEA data, data managers should verify that descriptions correctly represent the underlying data, preserve confidentiality requirements, and clearly communicate important trends, comparisons, or findings rather than simply describing the chart's appearance

QUESTIONS & ANSWERS



We value your input!

Please take a moment to complete our **brief 3-minute survey**.

Your anonymous feedback will be used to inform future Weiss Center technical assistance, webinars, and resources.

Participants will also receive this survey in a follow-up email.

Webinar Evaluation Survey URL: https://www.research.net/r/Weiss_Webinar_071626_Participant



Resources and Support

Weiss Center Resources:

- Document Accessibility Guide: Microsoft Excel
- Document Accessibility Checklist: Microsoft Excel

Weiss Center Support:

- Find your Weiss Center Technical Assistance Liaison
- Visit the Weiss Center Website: weissta.org

Thank you!

The contents of this presentation were developed under a grant from the US Department of Education, H373Q220002. However, those contents do not necessarily represent the policy of the US Department of Education, and you should not assume endorsement by the Federal Government. Project Officers: Juliette Gudknecht and Eric Caruso.



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