



# Document Accessibility Checklist

## MICROSOFT EXCEL

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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.
  - Avoid blank cells.
  - Do not merge cells or split cells.
- Add text to cell A1, such as a table title or an overview of the sheet contents.
  - Please note that screen readers begin reading on cell A1. If the cell is blank, the screen reader will read out “blank” or “empty cell.”



### 3. Column Headers

- Provide descriptive column header and row header labels that clearly identify the data within the column or row.

### 4. Formatted Data Tables

- Use **Format as Table** under the Style section within the Home tab to create accessible tables.
  - Select the data range that is to be included in the table starting with the row that has the column headers.
  - Choose banded rows with sufficient contrast for readability.
  - Select the **My table has headers** option when creating a table.
- Center the data table's title across the data table without merging cells.
  - Enter a title in the row above the data table.
  - Select the range of cells where the title will be centered. Go to the alignment section and choose more alignment options. Under horizontal text alignment choose the option **Center Across Selection**.

### 5. Table Names

- Provide meaningful names for tables to help screen reader users navigate tables within a spreadsheet.
  - Click on a cell within a table.
  - Select the Table Design tab at the top of the workspace.
  - Enter a descriptive name for the table in the **Table Name** field located at the top left of the Table Design tab.



## 6. Color and Contrast

- Ensure sufficient contrast between text and background colors.
- Use Excel's **Color Contrast indicator tool** or **High-contrast only** feature when choosing font and fill colors to ensure sufficient contrast between text and background.
- Check **Color and Contrast** within the Accessibility Assistant to improve the contrast of any text flagged with **Hard-to-read text contrast**.
  - Avoid using color alone to convey meaning.
  - Do not use red and green color combinations, which are problematic for people who have red-green color blindness.
- Insert borders around all cells to help with visual focus.

## 7. Font Selection and Symbols

- Use sans serif fonts such as Calibri, Aptos, or Arial.
- Use a font size of at least 12 pt.
- Use symbols that screen readers will read aloud, such as an asterisk (\*) rather than a period (.) for redacted information.

## 8. Hyperlinks: Accessible Link Text


- Add descriptive link text to URLs to create accessible hyperlinks. Highlight or select the URL, go to the **Insert** tab and choose **Links > Insert Link**. Enter the descriptive text in the **Text to display** entry field. Example: **2023 SPP/APR Submission, Part B — Alaska**.
- Indicate if the link opens a new window or performs a function. Example: **Download Assessment Report**.
  - Avoid using “Click here” for link text.
  - Avoid using vague link text such as “Read More.”
  - Do not display URLs in text.



## 9. Alternative Text Descriptions

- Add concise, descriptive text to all images, charts, and graphs; this is called alternative text, or alt text.
- Mark images with no purpose other than visual decoration as “decorative.”
- Use 120 characters or fewer (approximately 1-2 complete sentences).
  - Avoid the phrases “image of” or “picture of.”

## 10. Accessibility Assistant

- Fix any issues flagged by the Accessibility Assistant.
  - To access the Accessibility Assistant, either select **Check Accessibility** under the Review tab or select the **Accessibility** icon  at the bottom left corner of the workspace.

## 11. Save as Accessible PDF

- To save Excel document as a tagged PDF, go to **File > Save as > PDF**.
  - From the “Save as” dropdown menu options, Select **PDF**.
  - Click **More options...** directly below the Save as filetype dropdown menu.
  - By default Optimize for: **Standard (publishing for online and printing)** should be selected.
  - Go to **Options** and ensure **Document structure tags for accessibility** is selected.
  - Click **Save** to save the PDF.
- Check that bookmarks, structure tags, and alt text are included in the PDF version.