

Creating
accessible
Word
documents

Consultants and Contractors

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Introduction

Under the Australian Government's Web Accessibility National Transition Strategy, any content published on IHPA's website must comply with the Web Content Accessibility Guidelines 2.0 (WCAG 2.0).¹ These guidelines were developed by the World Wide Web Consortium (W3C) to improve website accessibility.

By using the guidelines, content becomes accessible to a wider range of people with disabilities, including blindness and low vision, deafness and hearing loss, learning disabilities, cognitive limitations, limited movement, speech disabilities, photosensitivity and combinations of these. It also makes web content more usable in general.

To comply with WCAG 2.0, agencies are required to:

- publish an alternative to all PDF documents, preferably in HTML
- not rely on Microsoft Word as proof of WCAG 2.0 conformance as Word documents may not be accessible and therefore are not a suitable alternative to PDF documents
- publish alternative formats at the same time.

Further, it is not appropriate for agencies to publish information in inaccessible formats and rely on complying with WCAG 2.0 obligations by providing alternative formats on request.

Compliance with WCAG 2.0 is also important in terms of ensuring IHPA meets its requirements under the [Disability Discrimination Act 1992](#).

Providing documents in Word format and in compliance with the accessibility requirements of WCAG 2.0 will enable IHPA to create and publish alternate formats such as HTML.

¹ <http://www.w3.org/WAI/WCAG20/quickref/>

How to use this guide

As stated in *IHPA's Accessibility policy for online documents*, IHPA will publish online documents in the following formats:

1. **IHPA generated content** - content developed by IHPA will be provided as an accessible Word document or Excel file and published in both HTML and PDF formats as a best practice approach.
2. **Third party content** – reports and publications provided to IHPA through contractual arrangements will be provided as an accessible Word document and published as accessible Word and PDF formats (HTML will not be produced for third party documents).

What does that mean for IHPA consultants and contractors?

All procurement contracts include a requirement that any content produced for IHPA must be compliant with WCAG 2.0. This Guide has been developed to help consultants and contractors with these requirements. Consultants and contractors are required to provide content to IHPA as a fully accessible Word document.

These guidelines provide consultants and contractors with guidelines regarding how to create an accessible Word document. Further advice can also be obtained by speaking to your IHPA project manager.

These guidelines provide the minimum requirements that third parties must comply with when producing content for publication on the IHPA website. It is not meant to be an exhaustive list of the conformant requirements that exist under WCAG 2.0.

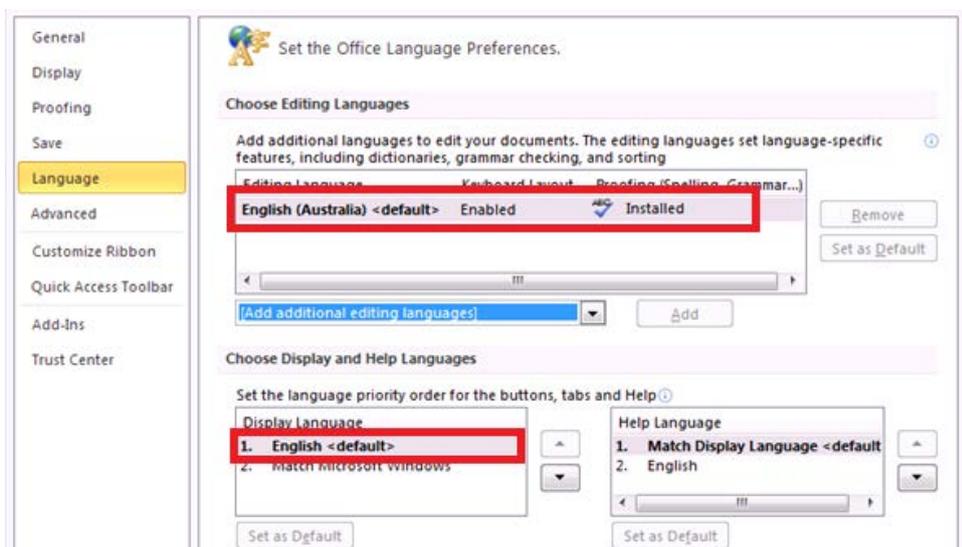
Creating an accessible Word document

Microsoft Word is currently the most common program used to create files that become PDFs. This guide provides key features to assist in making your document accessible.

1. Specify document language

The English (Australian) language should be the standard default for word documents.

1. Go to menu item: *File*
2. Select *Options* from the list in the left window pane
3. Select *Language* from the list in the left of the Options dialogue
4. Under Choose Editing Languages, select English (Australian).



2. Turn on automatic language detection

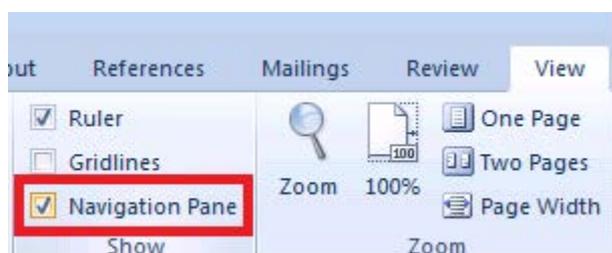
1. Go to menu item: *Review*
2. In the *Language* section, select the Language button
3. Select *Set Proofing Language*
4. In the Language dialogue, select the *Detect language automatically* check box



3. Turn on navigation pane

It is important to turn on the navigation pane so that you can see whether the heading hierarchies are correct and identify other issues with spacing and formatting.

1. Go to menu item: *View*
2. Tick *Navigation Pane*
3. Below the search box click the first icon on the left (browse the headings in your document)



4. Use heading styles

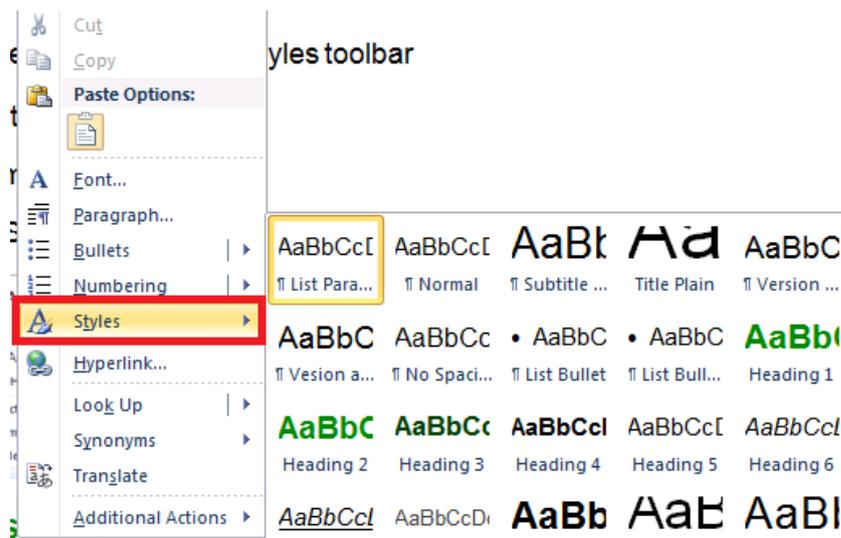
Styles should be used for titles, headings and paragraphs of text to provide the document structure.

Heading styles must follow an order where heading 2 is subordinate to heading 1 and heading 3 is sub-ordinate to heading 2 etc. Heading levels should not be skipped.

Most organisations will have templates created with the organisation's heading styles. Alternatively the standard Word headings styles can be used.

To apply headings to selected text:

1. Select text with mouse
2. Right-click and select *Styles*
3. Select the heading style from the list



To apply headings using the Styles toolbar

1. Select text with mouse
2. Go to menu item: *Home*
3. In the styles section at the top of the page select the heading you wish to apply



5. Styles for presentation

Styles must also be used for document presentation. For instance to **bold** a word, go into the style box and choose 'Strong'.

Likewise, to italicise a word go to the styles box and choose '*emphasis*'.

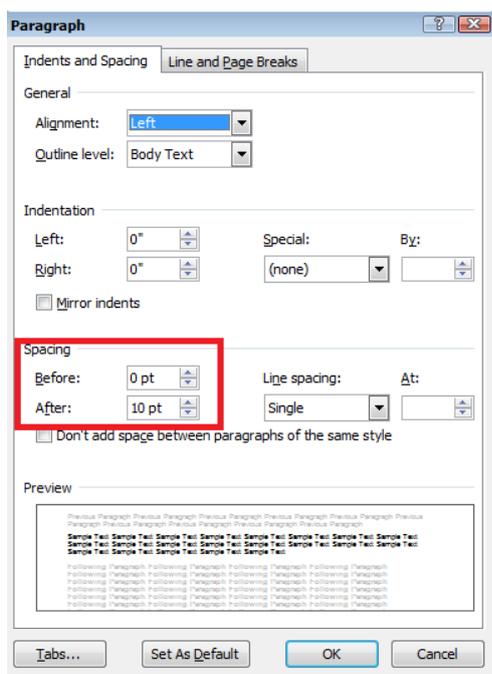
This assists a screen reader when translating the document.

6. Formatting

The layout of the document **should not** contain multiple characters for formatting e.g. returns, spaces or tabs as these are perceived as blanks by people using screen readers.

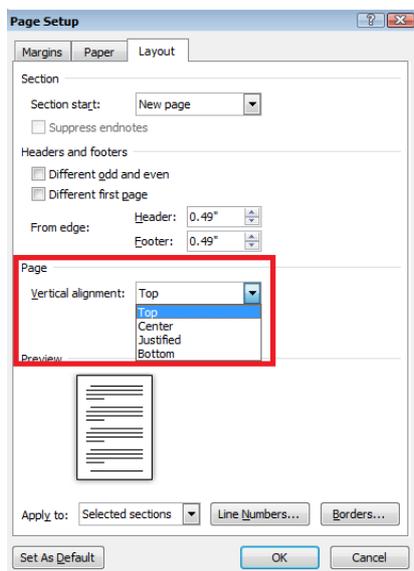
Use paragraph settings, page breaks or column breaks to control spacing and format. Columns are formatted using section and column breaks, **not** tables or text boxes.

Text boxes are inaccessible and should not be used. A similar effect to a text box can be generated using paragraph borders.



Go to Page layout options

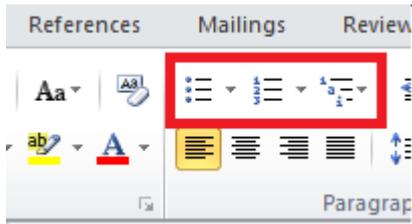
1. Go to menu item: *Page Layout*
2. Select *Margins*
3. Select *Custom Margins* at the bottom of the list
4. Select *Layout* tab
5. Set the vertical alignment as required



7. Lists

If the Style Set of your document includes a Bullet List and/or a Numbered List style to create an ordered and unordered list then use the bullet or number function.

1. On the **Home** tab, in the **Paragraph** group, click on the **Bullets** icon



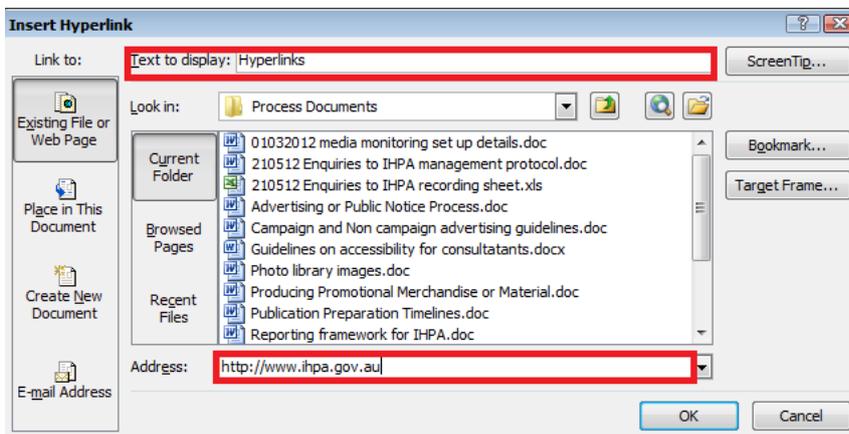
8. Links

Hyperlink text should provide a clear description of the link destination and not just provide the URL. For word documents that may be printed you should place the URL in a footnote, appendix or include the URL in brackets after the descriptive text, e.g. See Vision Australia: Complex Data Table Markup Toolbar (<http://www.visionaustralia.org/business-and-professionals/digital-access/resources/tools-to-download/complex-data-table-markup-toolbar>).

Hyperlinks should contain meaningful text, that is, they do not contain 'click here' or 'at www...'

To add a hyperlink:

1. Select the text with your mouse
2. Go to menu item: *Insert* (or press CTRL+K)
3. Select *Hyperlink*
4. Type or paste the URL in the Address field.



Note: Email addresses, which are also a form of URL, should be displayed in full e.g.: Paul.Smith@health.gov.au

9. Tables

While sighted users can visually scan a table, non-sighted users cannot make these visual associations unless a table has been marked-up correctly. A marked-up table allows non-sighted users to hear the column and row headers associated with the appropriate data.

A correctly marked up table should:

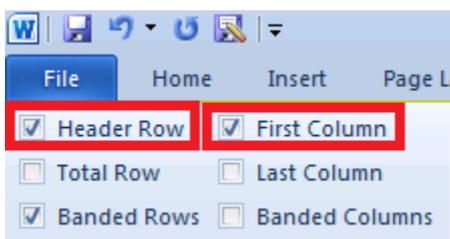
- Specify column header rows in tables
- Identify tables through captions or headings
- Provide meaningful alt text
- Check the reading order.

When creating a table ensure that related data are in the same row and mark column and row headers. Don't use paragraph returns to align text in adjoining columns. Think of how the text would read if tabbing.

Empty table cells must be avoided wherever possible. Instead use appropriate words such as 'not available', 'not applicable', or 'unknown' instead of a blank cell. Avoid using a dash ('-'), which may not be read out by screen readers by default.

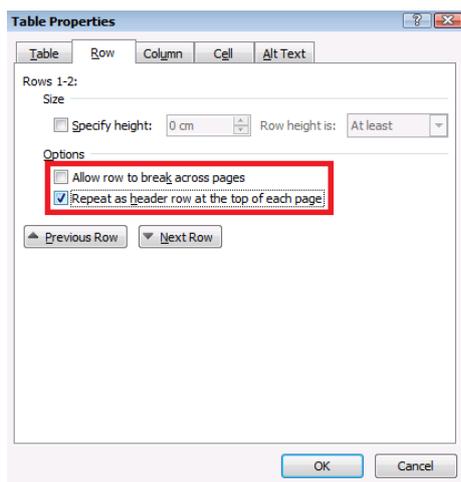
For column and row headers:

1. Highlight the table and select *Insert*
2. Select *Table*
3. Select *Table Tools – Design*
4. Tick Header Rows and/or First Column



For tables that split across pages:

1. Got to menu item *Table Tools- Layout*
2. Select repeat as header row at the top of each page



Provide meaningful Alt Text / table summaries

- Create a text summary of the essential table contents. Any abbreviations used should be explained in the summary.
- Table descriptions should answer the question "what is the table's purpose and how is it organised?" (e.g., "A sample order form with separate columns for the item name, price and quantity").*

Note: In the Alt Text fields neither the spelling nor grammar checker work, so it is safest to form the text in the document, then copy and paste your entries into the Alt Text fields.

*Please refer to the next chapter which provides examples on providing alternative text for tables.

Check the reading order

To test the table structure, do the following:

1. Select the first cell of the table.
2. Press the **Tab** key repeatedly to make sure that the focus moves across the row and then down to the first cell of the next row.

Other issues

Avoid using blank cells for formatting

Tables should only be used for **tabular information** and not for formatting. When building a table you should avoid leaving empty rows—or even empty cells. Use appropriate words (in empty cells) such as 'not available', 'not applicable', or 'unknown' instead of a blank cell. Avoid using a dash ('-'), which may not be read out by screen readers by default.

If a table (such as a form) requires blank cells place in your alt text a description that the table is a template and has empty rows and columns.

Avoid using merged or split cells

Tables should be simple avoiding merged cells, nested tables (e.g., tables within a table) and where possible avoid dividing complex data sets into separate smaller tables. Alternative text must be included for all tables and these tables must be identified in the alt text i.e table 1 is

10. Provide text alternatives for images, graphical objects and tables

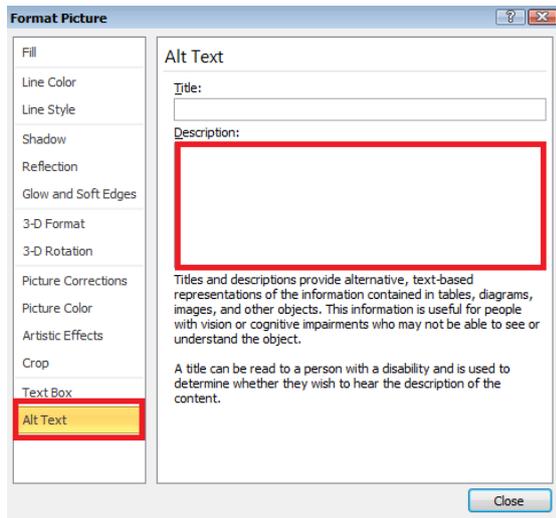
Alternative text should describe the meaning of an image or table rather than its appearance.

If an image is too complicated to concisely describe in the alternative text alone (artwork, graphs, flowcharts, etc.), provide a short text alternative for the alt text box and a longer description. Decorative images should contain a blank alt text i.e. “ ”.

Option 1

To add alternative text to images and graphical objects

1. Right-click the object
2. Select *Format Picture*
3. Select the *Alt Text* option from the list
4. Fill in the *Title*. If more description is required (e.g., for a chart or graph), provide a short description in the *Title* (e.g., a summary of the trend) and more detail in the *Description*.



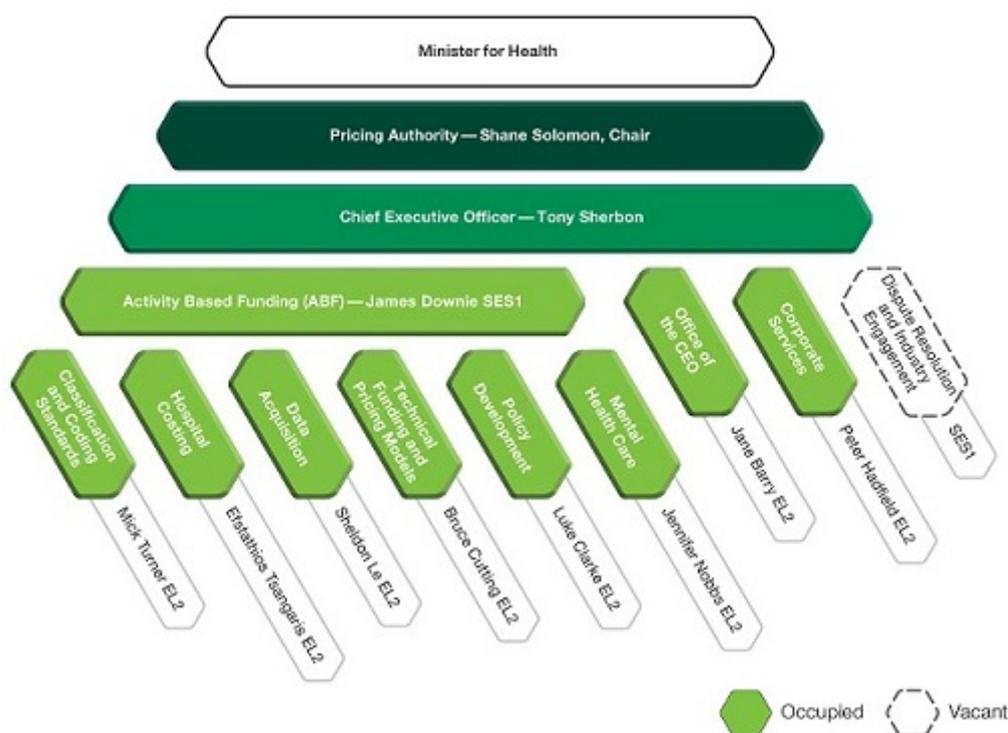
Option 2

A separate sheet can be provided to the IHPA project officer providing the Alt Text separately to the document for insertion during publication. This must be provided in a separate Word document clearly marking which table or image it relates to (by number).

For example:

Figure/table	Alternate text
Figure 1	Figure 1 describes
Table 1	Table 1 contains

Example of alt text for an image



The following alt text describes the org chart in IHPA's annual report:

Figure 1 Independent Hospital Pricing Authorities organisational structure at 30 June 2014

First tier: Minister for Health

Second tier: Pricing Authority Chair – Shane Solomon

Third tier: Chief Executive Officer – Tony Sherbon

Fourth tier: (below the Chief Executive Officer), from left to right

Activity based funding (ABF) – James Downie SES 1,

Office of the CEO–Jane Barry EL2

Corporate Service–Peter Hadfield EL 2 and

Dispute Resolution & Industry Engagement–vacant SES1

Fifth tier (below Activity Based Funding (ABF) and from left to right.

Classification and Coding Standards–Mick Turner EL 2,

Hospital Costing–Efsthios Tsangaris EL 2,

Data Acquisition – Sheldon Le EL 2,

Technical Funding and Pricing Models – Bruce Cutting EL 2,

Policy Development – Luke Clarke EL2,

Mental Health Care – Jennifer Nobbs EL2.

Example of alt text for a table

Table 7: Legal services expenditure 2013-14

Legal Service	Expenditure (Incl. GST)
Total external legal services expenditure	\$ 197,745.63
External expenditure on solicitors	\$ 196,427.24
External expenditure on counsel	n/a

Legal Service	Expenditure (Incl. GST)
Other disbursements on external legal services	\$1,318.39
Total internal legal services expenditure	n/a
Total legal services expenditure	\$ 197,745.63

Alt text - Table 7 consists of 2 column headings: column 1. A list of Legal services expenditure and column 2 shows the expenditure (which includes Goods and Services tax (GST) in Australian dollars.)

Note: there is no need to specify the number of rows as a screen reader can tab across each cell to read the tables content.

11. Set images and objects as 'inline'

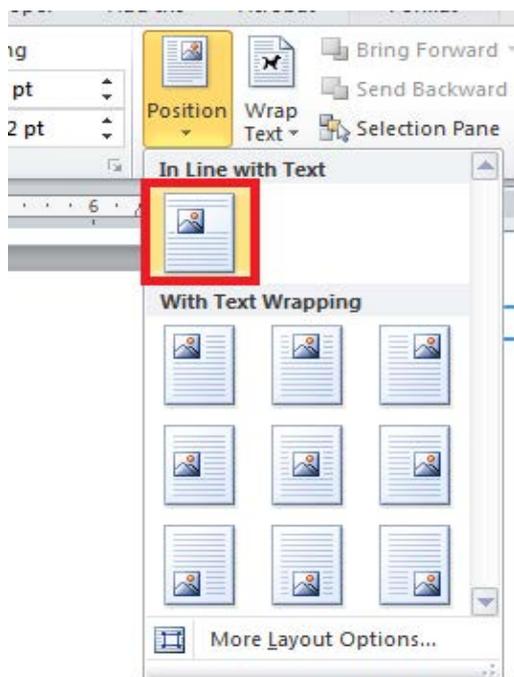
Objects that are not in-line with text are challenging to navigate and are inaccessible to users with vision impairment.

Images and objects inserted into Word 2010 documents should default to an 'in-line object'. In-line objects keep their position on the page relative to a portion of the text. Any 'floating' objects should be set to inline.

Avoid placing drawing objects directly into the document (e.g., as borders, to create a diagram). Instead, create borders with page layout tools and insert complete graphical objects. Do **not** use text boxes.

To prevent an image or object from "floating"

1. Select the object
2. Go to menu item: *Page Layout*
3. Select *Position* from the *Arrange* section
4. Select *In Line with Text*



12. Flow charts

Where flow charts are required, these should be included as an image as screen readers cannot logically read charts created in Word using text boxes. A text alternative describing the flow chart needs to be included.

To do this save the flow chart separately as a JPEG and re-insert into the document.

13. Contrast

A common sensory impairment is colour blindness. Therefore make sure there is sufficient contrast between a background and foreground colour and avoid writing '**Required fields are in red**' or '**error messages are shown in red**'.

It is important that colour is not used as the only way to convey information.

The visual presentation of text and images of text should have a contrast ratio of at least 4.5:1. To help you determine the contrast, here are some examples on a white background:

Very good contrast (Foreground=black, Background=white, Ratio=21:1)

Acceptable contrast (Foreground=#767676 (dark grey), Background=white, Ratio=4.54:1)

Unacceptable contrast (Foreground=#AAAAAA (lighter grey), Background=white, Ratio=2.32:1)

Also, always use a single solid colour for a text background rather than a pattern.

There are a range of useful tools on the web which can be used to check whether content has sufficient colour contrast for accessibility, many of which can be downloaded for free, such as the Paciello Group's [Colour Contrast Analyser](#) for Mac and Windows.

14. Colour alone and sensory characteristics

Colour should not be used as the only visual means of conveying information, indicating an action, prompting a response, or distinguishing a visual element. In order to spot where colour might be the only visual means of conveying information, you can create a screenshot of the document and then view it with online grey-scale converting tools.

Information that is conveyed using text colour is also styled using bold or emphasis or is described in text.

Information that is conveyed using colour (e.g. information in a pie chart where the colours and associated labels in the legend are the only way to distinguish sections) is also available in text.

Content that mentions the size, shape or position of an element within a document (e.g. "the quote on the right") contains additional information that allows the item to be located and identified without any knowledge of its shape, size, or relative position

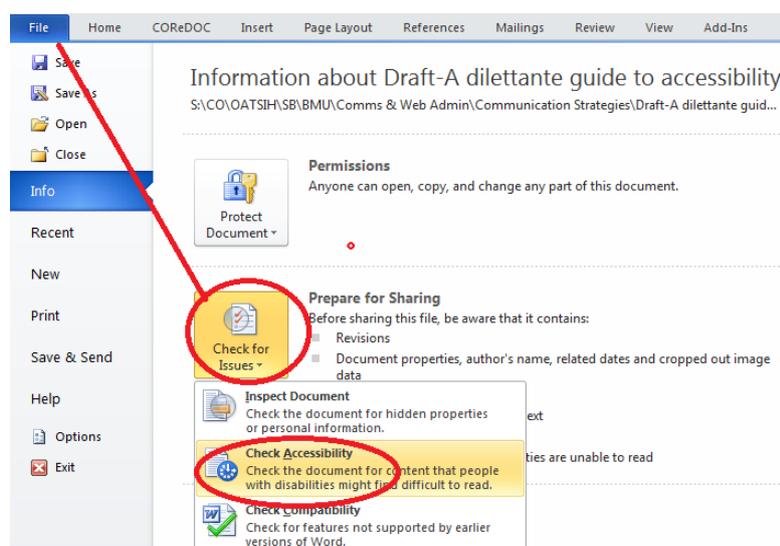
15. Microsoft Word accessibility checker

The Microsoft Word accessibility checker should be activated to check your document for issues. All word documents **must** be in the **docx** format to use the accessibility checker. The accessibility checker will check your file against a set of possible issues and classify any problems as *Errors*, *Warnings* or *Tips*.

Note: The accessibility checker doesn't pick up all accessibility issues; it assists in finding general issues. If you are unsure about anything contact the IHPA project officer.

To run the accessibility checker:

1. Select *File*
2. Select *Check for issues*
3. Select *Check for accessibility*.



All Errors need to be addressed, as they make it difficult or impossible for people with disabilities to understand.

Where possible, **Warnings** and **Tips** should be addressed, which help to improve the reader's experience.

