Checklist: accessible Word

Status: 08.03.2024

# Introduction

This document provides assistance in creating Word documents that are as accessible as possible. However, in order to make a Word document fully accessible in accordance with the EN 301 549 guidelines, our extended checklist in accordance with EN 301 549 is required. You can find explanations on how to implement the individual aspects in the " Implementation guide for an accessible Word".

The checklist consists of a table with four columns. The first column is for ticking off and numbering the aspects. The second column categorises the aspects to be considered, which are explained in more detail in the third column. The fourth column provides a help desk for which needs this aspect is particularly helpful.

Please bear in mind: In any case, the list of requirements is exemplary, but not exhaustive!

# Notes on using the checklist

When creating a new document, it is recommended that the integrated accessibility check in Word is activated from the start date and runs parallel to the creation process. This allows some barriers to be recognised and prevented immediately. The "Check accessibility" option is helpful, but does not guarantee complete accessibility, which is why it should be used in addition to a manual check.

Please note that further requirements must be taken into account when exporting the document to a PDF (see ["PDF accessibility" checklist](https://openmoodle.uni-bielefeld.de/mod/resource/view.php?id=1878)). If you want to make your material available, we recommend using the original format (e.g. Word, PowerPoint) to prevent further adaptations and ensure accessibility.

This checklist is not suitable if at least one of the following cases applies:

* Scripts are used (e.g. VBScript)
* There are embedded objects (except online videos)
* Form fields appear (Word form field function)

In these cases, the catalogue of requirements in section 10 of EN 301 549 should be consulted directly.

# Authorship and licence

Authors: Jule Günter and Christin Stormer. The project [SHUFFLE – Hochschulinitiative digitale Barrierefreiheit für Alle](https://www.shuffle-projekt.de/) is financially supported by the foundation [Innovation in der Hochschullehre](https://stiftung-hochschullehre.de/). This document is released under [CC BY 4.0 licence](https://creativecommons.org/licenses/by/4.0/)

# Checklist

| Check/No. | Type | Aspect | In digital education, **particularly** helpful for individuals who... |
| --- | --- | --- | --- |
| 1.1 | General | A reference to internal or external textual or graphic objects is made by explicit naming, not solely by means of a description via visual or auditory features. | ... would like to orientate themselves in the document.  ... primarily use a sensory channel. |
| 1.2 | General (colour) | The use of colours is generally sparing. | ... do not perceive all colours clearly.  ... be distracted by colours.  ... perceive stimuli strongly.  ... work independently of colour display. |
| 1.3 | General (colour) | If colours are used to convey information (e.g. in diagrams or to mark text), labels, symbols or patterns also convey the same information. | ... work independently of colour display.  ... be distracted by colours.  ... perceive stimuli strongly.  ... do not perceive all colours clearly. |
| 2.1 | Document  (language) | The main language of the document corresponds to the language set for the spell checker. | ... use a voice output or a screen reader. |
| 2.2 | Document | The title is stored with the metadata, is meaningful and easy to understand and corresponds to the first heading of the document. | ... use a voice output or a screen reader.  ... want to find a document via a search engine. |
| 2.3 | Document | Extensive documents have a table of contents at the start date. | ... would like to orientate themselves.  ... need/want structure.  ... want to find their way around quickly. |
| 2.4 | Document | The header and footer are created with appropriate format templates and are free of relevant information (page numbers are permitted). | ... use a voice output or a screen reader and do not want to be interrupted in their reading flow. |
| 2.5 | Document | Footnotes, endnotes and references are based on the functions that Word offers under "References". | ... use a voice output.  ... navigate with the keyboard only. |
| 3.1 | Text  (language) | The text passages that differ from the main language are marked with the appropriate language (language change). | ... use a voice output or a screen reader. |
| 3.2 | Text | The font is sans serif (e.g. Arial, Helvetica) and not too thick or too thin. | ... have difficulty following the reading flow.  ... have difficulties recognising/reading the text.  ... need/want structure. |
| 3.3 | Text | Emphasis using capital letters, italics, bold, underlining or text effects (colour gradient as colour fill, glow effects, text outline) are used sparingly. | ... have difficulties following the reading flow.  ... have difficulties recognising/reading the text.  ... need/want structure. |
| 3.4 | Text | The line spacing is at least 1.2 pt. | ... have difficulty concentrating on the flow of the text.  ... recognise/read the text.  ... need/want structure. |
| 3.5 | Text | The text is left-aligned. | ... have difficulty following the reading flow. |
| 3.6 | Text | Paragraphs are not created with tabs or soft line breaks, but with paragraph breaks (i.e. there are no blank lines in the document). | ... use a voice output or a screen reader. |
| 3.7 | Text | Page or column breaks are not created with blank lines, but with the page or column break. | ... use a voice output or a screen reader. |
| 3.8 | Text (columns) | Columns are not created with tabs, but via the "Layout" menu.  The space between the columns is large enough to visually separate them from each other. | ... use a voice output or a screen reader.  ... have difficulties recognising/reading the text. |
| 3.9 | Text (list, enumeration) | Only content that is actually a list/enumeration is output as a list/enumeration. These are created with list or enumeration formats. | ... use a voice output or a screen reader. |
| 3.10 | Text (colour) | Texts have a sufficient contrast ratio to the background of at least 4.5:1. | ... do not perceive all colours clearly.  ... cannot see well.  ... read the document in poor lighting conditions (or via the projector). |
| 4.1 | Link | URL does not appear as plain text in the body text. Instead, hyperlinks are inserted, clearly named and easy to understand. | ... can be easily interrupted in the flow of reading.  ... want to find their way around quickly.  ... use a voice output or a screen reader. |
| 4.2 | Link | If a link opens another programme (e.g. browser, email programme), this is indicated in the link text. Example: "Contact address" (opens email programme)". | ... use a voice output.  ... can be easily interrupted in the flow of reading. |
| 5.1 | Heading | Headings are created using style sheets. | ... use a voice output or a screen reader. |
| 5.2 | Heading | The first heading has the style "Title" or "Heading 1". | ... use a voice output or a screen reader. |
| 5.3 | Heading | There are no headings below level 6. | ... use a voice output or a screen reader. |
| 5.4 | Heading | If there are subheadings, there is every level without skipping a level. | ... use a voice output or a screen reader. |
| 5.5 | Heading | The heading is labelled exclusively with Arabic numerals ("1"), not with Roman numerals ("I"). | ... use a voice output or a screen reader. |
| 5.6 | Heading | Headings, figure and table captions only appear once, are meaningful and easy to understand. | ... use a voice output or a screen reader.  ... need/want structures. |
| 6.1 | Graphic /  text field | Inserted graphics and text fields are anchored in the appropriate place. | ... use a voice output or a screen reader.  ... navigate in the document using the keyboard only. |
| 6.2 | Graphic | Graphics contain a short, concise alternative text. Graphics with no substantive meaning are marked as decorative. | ... use a voice output or a screen reader. |
| 6.3 | Graphic | Complex images (e.g. comics, SmartArts, diagrams) have a detailed descriptive text alternative. | ... use a voice output or a screen reader.  ... cannot see well. |
| 6.4 | Graphic | No images or WordArt are used to display text ("font graphics").  Exception: Essential font graphics have a meaningful alternative text. Redundant font graphics are labelled as decorative. | ... use a voice output or a screen reader.  ... enlarge images.  ... want to change the colour of the foreground and/or background. |
| 6.5 | Graphic | Graphic information-bearing elements (e.g. lines, neighbouring surfaces) have a minimum contrast of 3:1 to the background. | ... do not perceive all colours clearly.  ... do not see well.  ... read the document in poor lighting conditions (or via a projector). |
| 6.6 | Graphic | No animated graphics (GIFs) are used. | ... react sensitively to light stimuli.  ... are easily distracted. |
| 7.1 | Table | Tables are created via "Insert table". | ... use a voice output or a screen reader. |
| 7.2 | Table | All column headings (first row) are marked as "Header", all row headings (if available) are marked as "First column".  The header is repeated on every page. | ... use a voice output or a screen reader.  ... need/want structures.  ... find it difficult to concentrate. |
| 7.3 | Table | Page breaks in table rows are disabled for tables that extend over more than one page. | ... use a voice output or a screen reader.  ... quickly lose their bearings. |
| 7.4 | Table | Cells are not connected to each other. | ... use a voice output or a screen reader.  ... enlarge the table. |
| 7.5 | Table | Complex tables are divided into several simple tables. | ... use a voice output or a screen reader.  ... need/want structures  ... find it difficult to understand the content of complex tables. |

# Sources (in german):

Deutscher Blinden- und Sehbehindertenverband: [leserlich: Schritte zu einem inklusiven Kommunikationsdesign](https://www.leserlich.info/). Last accessed on 17.03.2023.

Hochschulreferat Studium und Lehre. TH Köln (2018): [Leitfaden zur Erstellung barrierefreier Dokumente](https://digitale-lehre.tu-dortmund.de/storages/digitale-lehre/r/Dokumente/leitfaden_barrierefreie_dokumente.pdf) (PDF). Last accessed on 17.03.2023.

ZAB Universität Bielefeld: [Barrierefreie Dokumentenerstellung in Word 2019/ Word 365](https://www.uni-bielefeld.de/einrichtungen/zab/digitale-barrierefreiheit/barrierefreie-dokumente/anleitungen/word-2019/). Last accessed on 17.03.2023.