Accessible Word and PDF forms

To make forms that are accessible to all users, start with a new Word document. This will become the fillable version, and allow you to export a PDF as the static printable version.
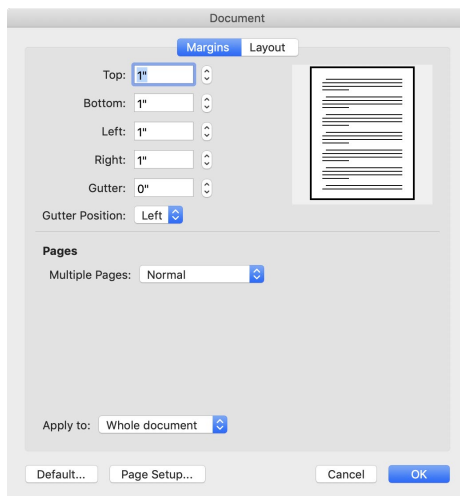
1. Document defaults

Note: You will first need to ensure that the Developer tab is available in Word (Preferences › Authoring and Proofing Tools › View › Ribbon › Show developer tab).

Margins and colors

Create a new Word document with the following defaults:

1. Set page margins to **1"** (1 inch). Format › Document and select Apply to: "Whole document".

2. Set Heading 1 color to **#000000** black. Ribbon: Home › Styles Pane › Heading 1 › down arrow › Modify Style… In the font color bar, select Color Picker › More Colors… › RGB Sliders › Hex Color # and input the alpha-numeric value (e.g. "000000"). Check "Add to template" and "Automatically update" before saving.

3. Set Heading 2 color to **#CC4E00** dark orange and top margin to 12 pt. Ribbon: Home › Styles Pane › Heading 1 › down arrow › Modify Style… In the font color bar, select Color Picker › More Colors… › RGB Sliders › Hex Color # and input the alpha-numeric value (e.g. "CC4E00").
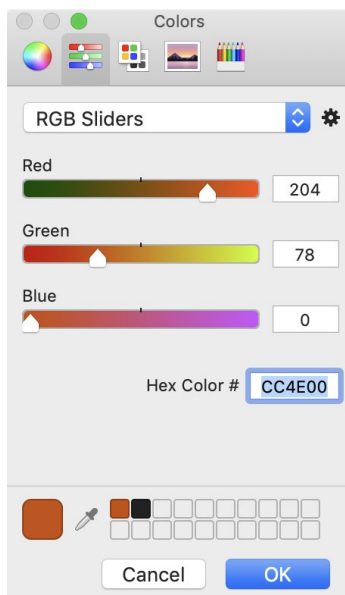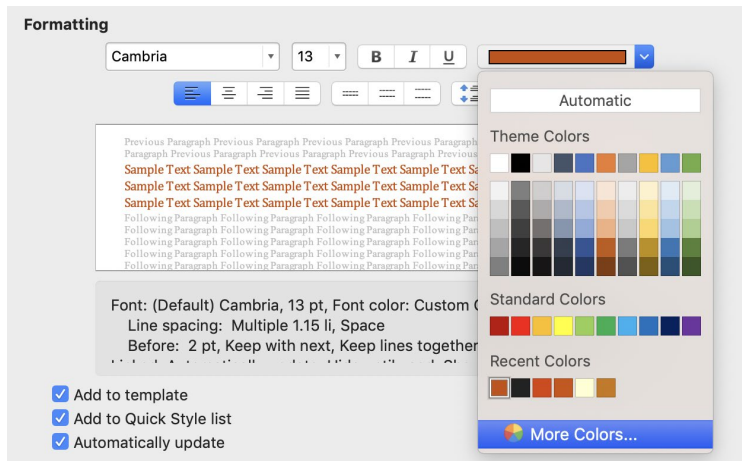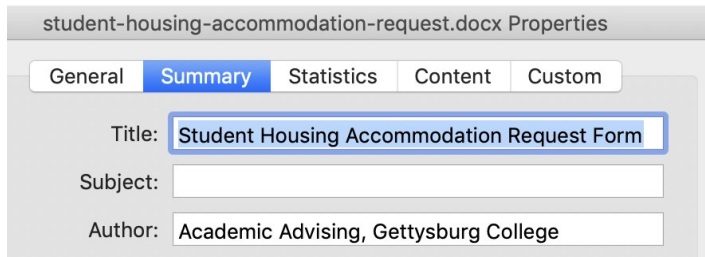
Navigate to Format › Paragraph and adjust Spacing Before to 12 pt. Check "Add to template" and "Automatically update" before saving.

4. Repeat Step 3 for Headings 3 and 4 using **#222222**, very dark grey, as the color value.

2. Title and filename

Title

Give your document a metadata title and author (File › Properties › Summary):

student-housing-accommodation-request.docx Properties

| General | **Summary** | Statistics | Content | Custom |

Title: Student Housing Accommodation Request Form

Subject:

Author: Academic Advising, Gettysburg College

If you need to add date information so that users know which version they are using (e.g. "My Document 2019") this is the place to do it.

> **Tip:** Search engines will attempt to use the document title to name your file on results pages. This is what users will click on when they access your file from Google.

Filename

Save the file using standard **URL naming** practices:
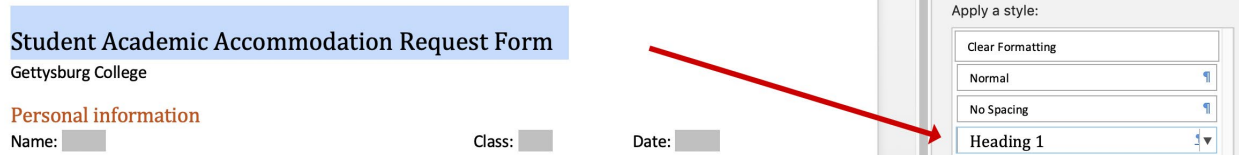
hyphen-separated-lowercase-keywords.docx

Do not include date information in the filename (use Title instead).

3. Form structure

Headings need to be applied to the main document title as well as subheadings within the form.

Main heading

Use the Styles Pane to set the title of the document to Heading 1

The words "Gettysburg College" are not part of the title and should simply be a normal paragraph below the title.

Subheadings

Be sure to group all information in the form under Heading 2 subheadings. If the original form doesn't do this it is up to you to create a meaningful second level heading for the information.

Personal information

Name: ▮ Class: ▮ Date: ▮

ID Number: ▮

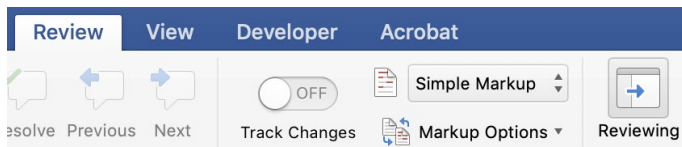|	
No Spacing	¶
Heading 1	¶a
Heading 2	¶a
Heading 3	¶a

Use your judgement to create concise, meaningful subheadings. Add subheadings that are 1–3 words in length throughout your document and move more verbose headings to body text.
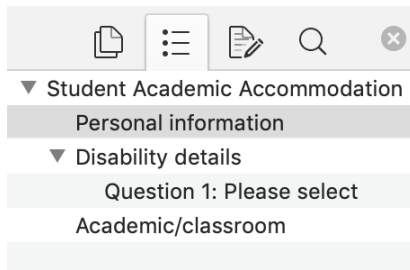
Outline generation

Adding headings organizes the form visually, and generates a table of contents that allows the user to have the document quickly summarized, or to jump to a specific section.

To view the outline in Word, first reveal the Reviewing Panel (Ribbon › Review › Reviewing)

Review   View   Developer   Acrobat

esolve Previous Next   OFF Track Changes   Simple Markup   Markup Options ▾   Reviewing

Then select the Document Map tab:

▼ Student Academic Accommodation
   Personal information
   ▼ Disability details
      Question 1: Please select
      Academic/classroom

Tip: Word sometimes fails to generate a heading (e.g. if you didn't select all text on the line). The Document Map allows you to confirm that the outline is being generated correctly.

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4. Form inputs

To add form inputs, use the Developer tab.

erences   Mailings   Review   View   Developer

abl   ☑   ▾   Options   Frame   Shading   Protect Form
Text   Check   Combo
Box   Box   Box
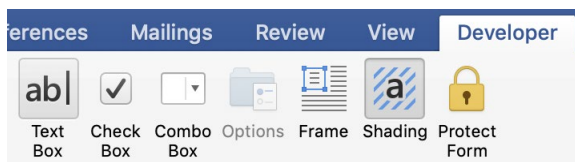
There are only two useful options:

1. Text Box (a standard text input field), and
2. Check Box (a standard check box field).

> **Tip:** These two fields have good print analogs, so they allow you to turn a static form into a fillable one and vice versa without having to change the form (unlike a Combo Box).

Text boxes

Put the insertion point where you want the field to go and click its icon in the Developer tab. Fields are shaded by default so that you can identify them easily (the Shading icon turns this on and off).
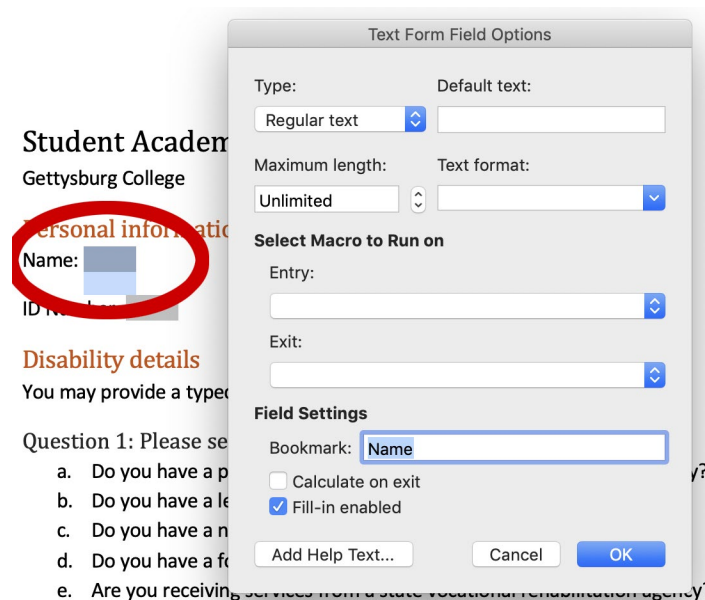
In the above example, a Text Box has been placed after the "Name" label in the document. Double click the field to edit its properties (or click Options in the Developer tab).

Most text input fields will be of type "Regular text". Allow the length to be "Unlimited". This means the text input will grow to accommodate as much text as the user types into it. The rest of the document will naturally reflow to adjust for this.

Provide a meaningful "Bookmark" label for the field.

Field Settings

Bookmark: Text1

☐ Calculate on exit
☑ Fill-in enabled

[Add Help Text...]

Click on "Add Help Text…", select "Type your own" then add the equivalent of a HTML form label that tells the user what data goes in the field. Then click on Help Key and reselect "Type your own" and add the label a second time. This ensures the user will have contextual help when the field has keyboard focus while they filling out the form (e.g. AT can voice the label).

1 Form Field Help Text

Status Bar   Help Key (F1)

○ None
○ AutoText entry: - PAGE -   ⌄
⦿ Type your own:

Your full name

[Cancel]   [OK]

2 Form Field Help Text

Status Bar   Help Key (F1)

○ None
○ AutoText entry: - PAGE -   ⌄
⦿ Type your own:

Your full name

[Cancel]   [OK]
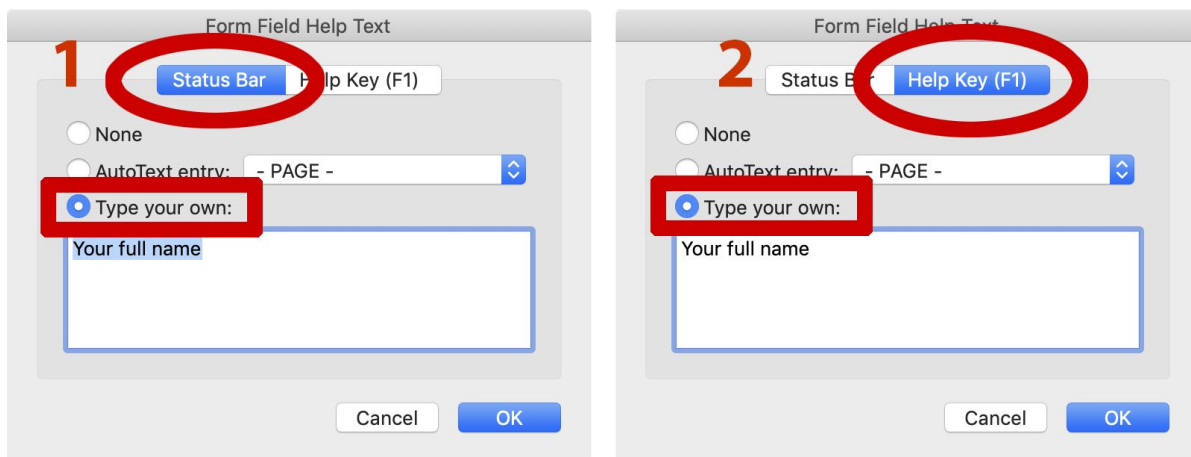
Tip: See pages 3–5 of the California DOR's Word and PDF accessibility guide (PDF) for tips on adding help text. WebAIM's guides on web, PDF, and Word techniques are also very useful.

Check boxes

Check Box labels (e.g. Yes, No) must appear *to the left* of the input so that when the label is clicked the keyboard focus is placed on the appropriate checkbox. Word always wants to put the focus to the right, so the label needs to be on the left.

click ➜ YES ☐   NO ☐

focus ➜ YES ☐   NO ☐

Give checkbox pairs bookmark names that are specific but match on a common keyword.

Similarly, ensure that help text fully describes the meaning of selecting the field, even if a very similar sounding question is right next to the field.

Reminder: don't forget to add your help text to both the "Status Bar" and "Help Key (F1)" tabs of the Form Field Help Text dialog box before clicking OK.

Signatures

Like any field signatures should be fillable for users that depend on AT to enter information into the form. Provide help text that indicates what the user is expected to do.
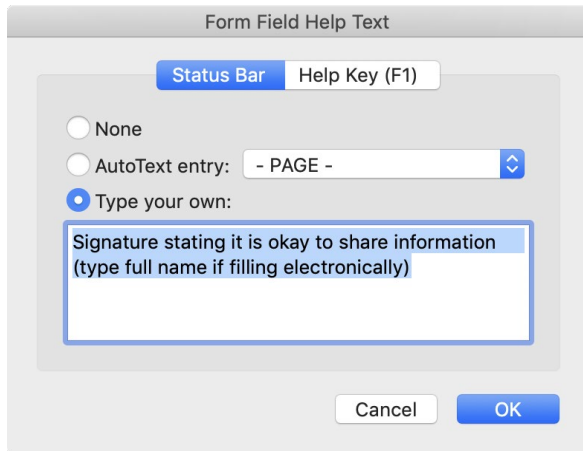
For example, "Signature stating it is okay to share information (type full name if filling electronically)." In the static form this will simply be space for a handwritten signature.

5. Form layout

Question spacing

For questions that require multi-line responses from the user, increase the amount of negative space after the input so that the appropriate amount of writing is implied.
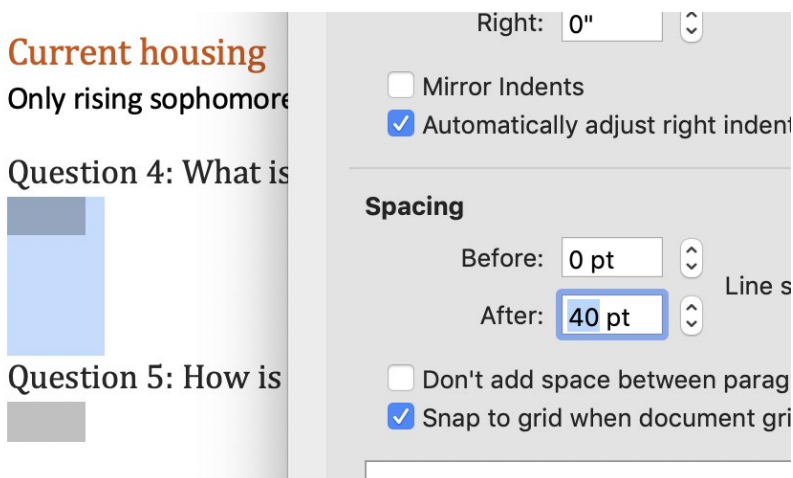
Right click on the paragraph containing the field and select Paragraph, then adjust the "Spacing After" value (this also provides more room for handwritten responses).

'Office use only'

Sections that require internal use can be called out using background shading and a border.

This section to be completed by Dining Services

Date:

Dining Services representative signature:

Here the area that the user should not complete is demarcated with a section heading, a border, and a background color tint. Select the text then Format › Borders and Shading.
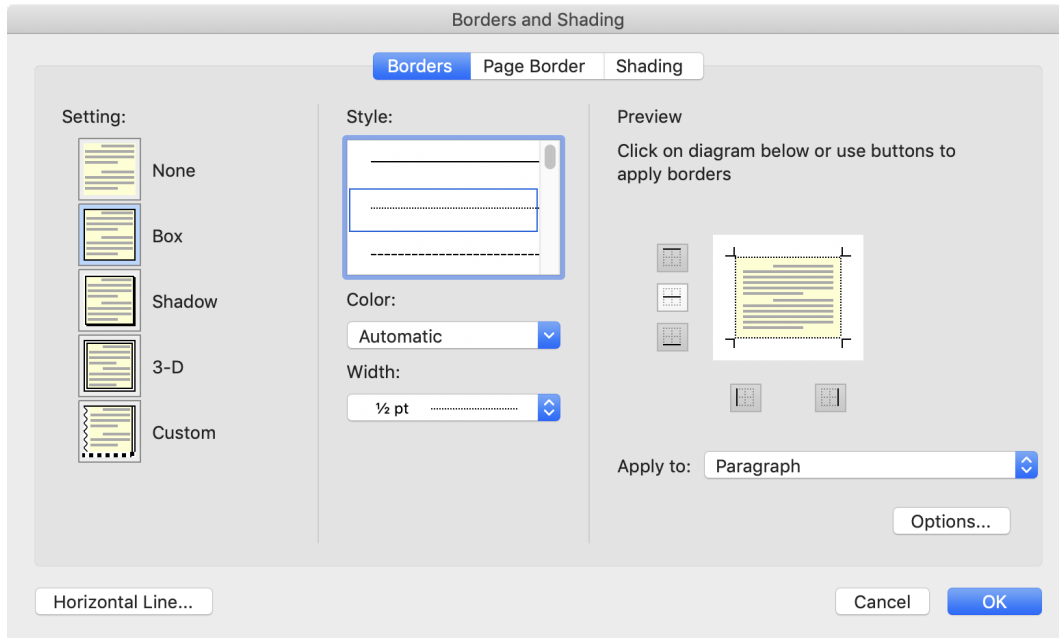
Use a dotted line as the border style and a light background color to help set the section apart visually. Use "Options" to increase the amount of padding around the bordered text (e.g. 10 pt).
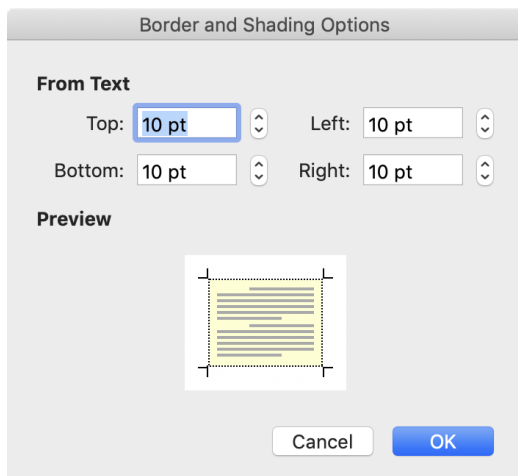
6. Readability

Other factors to keep in mind:

1. A little emphasis goes a long way (bold, italics, etc.). Avoid using all caps for emphasis.
2. Make sure that links function correctly and observe standard web linking practices.

7. Testing

Test and "protect" (lock) the form to ensure that it is working as an accessible, fillable document.

Word accessibility check

Use the Accessibility Checker to catch any issues in the Word document before exporting to PDF (Ribbon › Review › Check Accessibility).
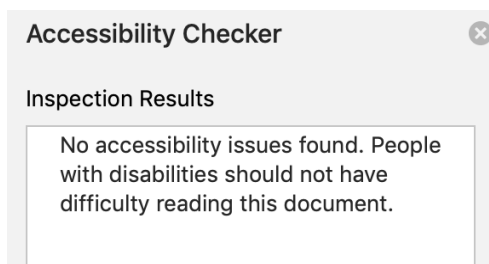
Protecting the form

To test the document as a fillable form, use "Protect Form" (Developer › Protect Form). This puts the form in user mode.
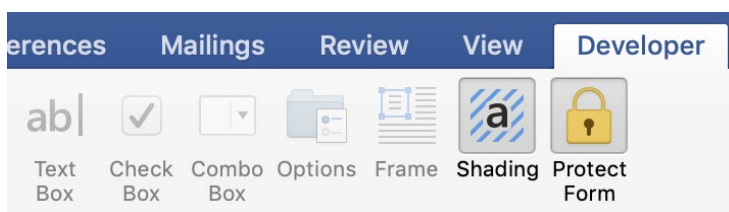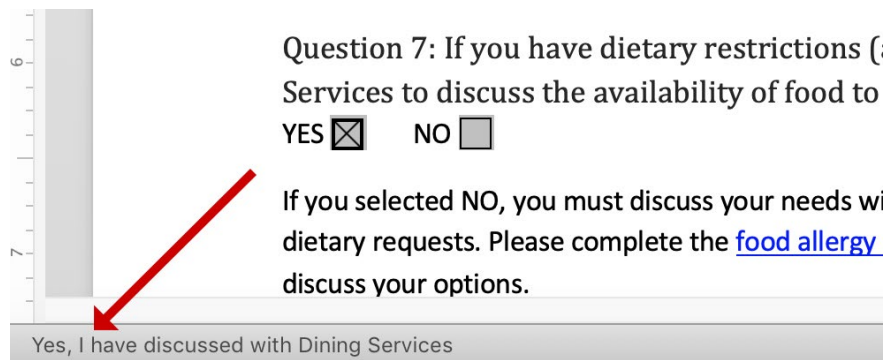
Testing the form

Run through each of the following steps to test your fillable Word form:

● Using Tab (and Shift + Tab) to move the insertion point between fields.
● Typing text into the fields and editing text in fields.
● Using Space to check and uncheck boxes.

- Note the appearance of help text in the status bar:

Question 7: If you have dietary restrictions (
Services to discuss the availability of food to
YES ☒   NO ☐

If you selected NO, you must discuss your needs wi
dietary requests. Please complete the food allergy
discuss your options.

Yes, I have discussed with Dining Services

8. Generating the PDF

Export to Acrobat

Once you have checked accessibility and tested your form you are ready to export it to PDF format and perform final accessibility review in Acrobat (Ribbon › Acrobat › Create PDF):

Home	Insert	Design	Layout	References	Mailings	Review	View	Developer	Acrobat

Create PDF   Preferences
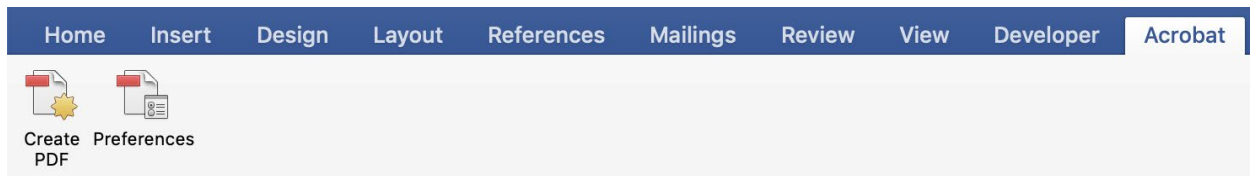
This will open your file in Acrobat Pro. Save the file using standard **URL naming** practices:

hyphen-separated-lowercase-keywords.pdf

Do not include date information in the filename (see the Title and Filename section for details).

Acrobat accessibility check

Run the Acrobat accessibility "Full Check," create a report, and review any issues that need fixing in the Accessibility Checker.
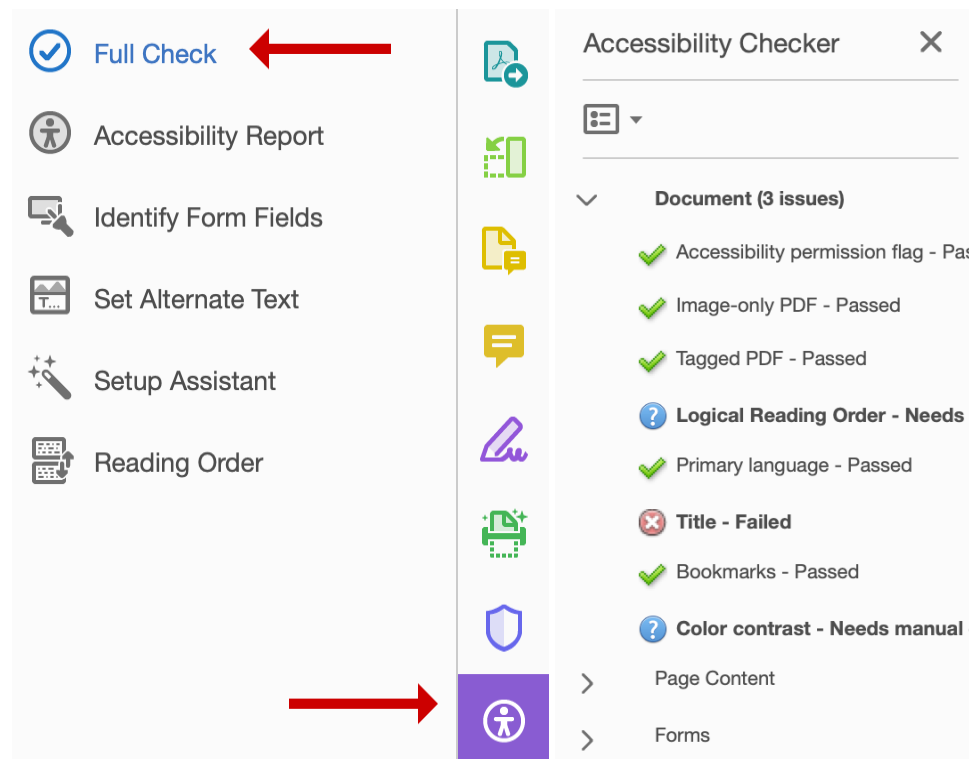
The most common issues that need addressing are:

1. Fixing the title (Right click Title - Failed › Fix)
2. Checking for appropriate color contrast
   a. If in doubt about a color combination, sample the colors
   b. Then use the WebAIM Contrast Checker to see if the ratio is acceptable
      i. If it is, continue
      ii. If it is not, go back to Word and fix there, then repeat from Step 8
   c. Right click Color contrast - Needs manual check › Pass
3. Checking that the Reading Order is logical

Open the Reading Order dialog box and review each page to ensure that each item of content appears in series moving from left to right and top to bottom on each page of the document.

If you need to adjust items in the reading order, use the Order panel on the left to click and drag items to their appropriate place.