

Section 508 Checklist – Word Preparing for PDF

This checklist is meant to be used by someone who is preparing a Word document that will transition to be a PDF document in its final form (i.e., what will be distributed to individuals to use).

Disclaimers:

- This checklist goes beyond strict Section 508 requirements and also includes general accessibility best practices. Some agencies/organizations may have additional requirements beyond those listed here. Always confirm with your agency/organization.
- Completing this checklist alone will not ensure a Section 508-compliant PDF. When creating a PDF, there are several additional steps that must be taken to ensure compliance. It is highly recommended to have a trained professional complete these steps.

Document-Level Properties

Completing these items will ensure that all users are able to identify the document.

- There is a title and author listed in the document properties (author can be the agency name).
- There is a subject specified in the document properties.
- Tags are listed in the document properties. Tags should summarize the content – not duplicate the document title or author.

Primary Remediation

This is where you will complete the bulk of your work.

Headings

- The document title is styled as a Heading 1, not Title.
- The first heading in the document is styled as a Heading 2.
- No heading levels are skipped (e.g., the Heading 4 style is never used unless there is a Heading 3 above it)
- Blank lines, images, or page breaks are not styled as headings.
 - Tip: Open the Navigation Pane (**View** tab, **Show, Navigation Pane**) and go to the Headings tab. If you see any blank lines in the list, those are non-text elements that are styled as headers. Select them and remove the Heading style.

Text

- All font is a common, non-script, font (e.g., Aptos, Calibri, Open Sans, Arial, Times New Roman).
 - Tip: Sans-serif fonts (e.g., Aptos, Calibri, Open Sans, Arial) are easiest to read.
- All text has appropriate color contrast; 3:1 for 14pt and bold or 18pt and higher, 4.5:1 for smaller text.
 - [WebAIM: Contrast Checker](#) can help you determine the color contrast ratio.

Links

- Any text that is underlined is actually a link; remove underlines from non-linked text.
 - Tip: If an underline is used for emphasis, the word can be **bolded** instead.
- All links have the same formatting throughout the document.
 - E.g., if one link is 14pt blue underlined, all links are 14pt underlined.
- Full link URLs are not used; all links have associated, descriptive text.
 - E.g., do not write a link as “https://www....” or link it to a generic phrase like “click here.” Instead, link it to a descriptive phrase like “FMPedia SharePoint page.”

Tables

- The built-in Microsoft table formatting options are used to create the table (i.e., no tabs, text boxes, etc. are used to create spacing or table layout).
- Rows are set to **not** break across pages. Highlight the table, right-click and select **Table Properties**. Under the **Row** tab, **Options**, un-select the checkbox next to **Allow row to break across pages**.
- Data tables have a designated header row that is set to repeat at the top of each page. Highlight the header row and then right-click and select **Table Properties**. Under the **Row** tab, **Options**, select the checkbox next to **Repeat as a header row at the top of each page**.
- All tables have appropriate color contrast; 3:1 for 14pt and bold or 18pt and higher, 4.5:1 for smaller text.
 - [WebAIM: Contrast Checker](#) can help you determine the color contrast ratio.
- No table elements use only color to convey meaning.

Lists

- Multi-level bulleted lists have a unique bullet style for each level.
- The built-in Microsoft list formatting options and styles (i.e., discs, circles, squares) are used to create the list (i.e., no tabs are used to create spacing or list layout).

Primary Image Remediation

- All graphics have appropriate color contrast; 3:1 for 14pt and bold or 18pt and higher for text and all graphic elements, 4.5:1 for smaller text.
 - [WebAIM: Contrast Checker](#) can help you determine the color contrast ratio.
- No graphics use only color to convey meaning.
- All graphics/images used for decorative purposes (and should not be read by a screen reader) are marked as decorative.

Secondary Image Remediation

This next section details steps to take to ensure that informational graphics or images are able to be effectively read by assistive technology. Depending on the kind of image or graphic present, different steps must be taken to ensure compliance and a user-friendly experience for all users.

Simple images – alt text can be captured in 255 characters or less.

- All simple images that are not decorative have alt text defined (255 characters or less) that describes them; the alt text does not start with “image of” or “picture of.”

Complex images that contain a lot of text – alt text cannot be captured in 255 characters or less.

- The image is marked as decorative and:
 - All text in the image is fully included in the body of the document already, **or**
 - Text to fully describe the image is added in the body of the document and the image is floated on top of the text to visually hide it. The hidden text should use the appropriate heading and list styles, as needed, to convey the information.

Charts or graphs – alt text cannot be captured in 255 characters or less.

- Simple charts have visible titles, series labels, data labels, and a legend. As long as the text is there, they can later be tagged as lists or tables in the PDF.
- Complex charts are marked as decorative and:
 - All data in the chart is already listed in the body of the document, **or**
 - A data table is inserted in the body of the document containing all data from the chart and the chart is floated on top of the table to visually hide it. The hidden data table should have a title (likely styled as a heading) and a designated header row (see above).

Final Remediation

- Run an accessibility check and correct any remaining errors. Select **Review, Check Accessibility**.