

HHS 508 Guidance: M/S Word Checklist

Document Information

Document Name/URL:	
Tester Name / Signature:	
Testing Date:	
Authorization Name / Signature:	
Authorization Date:	

Requirements Checklist

The following checklist should be used Department wide by HHS staff to verify that MS Word documents meet the requirements established by HHS. The checklist includes compliance with Section 508, in addition to other HHS requirements. It is intended to be used as a companion to WCD Training. HHS expectation is that a majority of MS Word documents are intended for conversion to PDF format. This Checklist therefore incorporates elements necessary for that conversion as well.

For guidance specific to a requirement, refer to the Requirement Guidelines section of this document, to your Web Council representative, or the Web Communications and New Media Division.

ID	1.0 Document Layout and Formatting Requirement	Pass	Fail	N/A	
1.1	Has the document been formatted using Style elements (Heading 1, Heading 2) and/or Outline in a hierarchical manner (i.e. Heading 1 to Heading 2 to Body Text)? (No odd style names. Use built in default Word style names)				DP
1.2	Does the document refrain from using flashing/flickering text and/or animated text?				NA
1.3	Are page numbering codes used as opposed to manually typed page numbers?				DP
1.4	If footnotes are present, have they been created through Word Footnote linking?				DP
1.5	If color is used to emphasize the importance of selected text, is there an alternate method?				E
1.6	Is the Bullet style being used as opposed to manually typed characters (e.g. Hyphens)? (Use only 2 hexadecimal bullets for passing the unicode character check in PDF)				DP

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ID	1.0 Document Layout and Formatting Requirement	Pass	Fail	N/A	
1.7	Have track changes been accepted or rejected and turned off?				DP
1.8	Have comments been removed and formatting marks been turned off?				DP
1.9	Has the Document been reviewed in Print Preview for a final visual check?				DP
1.10	Do all URL's contain the correct hyperlink and display the fully qualified URL (i.e., http://www.samhsa.gov and not www.samhsa.gov)?				E
1.11	Are all URL's linked to correct Web destinations?				E

ID	2.0 Document Images Requirement	Pass	Fail	N/A	
2.1	Do all images, grouped images and non-text elements that convey information have alternative text descriptions? (Editor will provide and edit, doc prep will enter.)				E
2.2	Do complex images (i.e., charts and graphs) have descriptive text immediately after the image?				E
2.3	Is the document free of background images or watermarks?				DP
2.4	Is the image text wrapping style "In Line with Text" used for all images?				DP
2.5	Are multiple associated images on the same page (e.g., boxes in an organizational chart) grouped as one object?				DP
2.6	Have all multi-layered objects been flattened into one image and use one Alternative Text (Alt Tag) for this image?				DP
2.7	Is the document free of Text boxes being used for simple graphics? (Doc prep will check the electronic version for text boxes/pull quotes, boxes around graphics, etc. Editor will negotiate how to represent the text or item without the box.)				E

ID	3.0 Document Tables	Pass	Fail	N/A	
3.1	Are tables being used to create a tabular structure (not tabs or spaces)?				DP
3.2	Do all tables have a logical reading order from left to right, top to bottom?				E
3.3	Do Data tables have the entire first row designated as a 'Header Row' in table properties?				DP

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ID	3.0 Document Tables	Pass	Fail	N/A	
3.4	Is the table free of Merged Cells? (Check with the editor if there are empty cells in a table. Empty cells won't pass PDF conversion. Doc prep will check for merged cells in the electronic file. Editors will negotiate with tech staff how to represent columns/rows without merges.)				E
3.5	Are all tables described and labeled (where appropriate)? Note: In some cases naming/numbering of tables may not be appropriate. For example, a small data table in a presentation may not need a reference.				E
3.6	In table properties, is "Allow row to break across pages" unchecked?				DP
3.7	Is the table free of empty cells. (Tables should not have empty cells.)				DP

ID	Notes/Additional Requirements	Pass	Fail	N/A	
A	Does the document file name not contain spaces and/or special characters? (Put the file name in the Document/URL box at the top of this checklist)				E
B	Is the document file name concise, generally limited to 20-30 characters, and makes the contents of the file clear in the context in which it is presented?				E
C	Does the document utilize recommended fonts i.e. Times New Roman, Verdana, Arial, Tahoma and Helvetica? (12 point font, no smaller than 8 point in tables)				DP
D	Are the Document Properties (i.e. Subject, Author, Title, Keywords, and Language) properly filled out? Note: For Author, do not use individuals name or contractor name. Should use government organization name (i.e., HHS) (Editor will provide edited properties, doc prep will copy and paste.)				E
E	If the document contains a Table of Contents (TOC), was it created using the TOC field (e.g., created using the TOC Command in MS Word)?				DP
F	Has a separate accessible version of the document been provided when there is no other way to make the content accessible? (Example: An organizational chart).				E

Requirement Guidelines

The following guidelines have been established by HHS/SAMHSA to ensure that MS Word documents meet Section 508 Compliance requirements.

1.0 Document Layout and Formatting

- 1.1. The document must be formatted using Style elements in a hierarchical manner (i.e. headings different from body text etc.) (Use styles based on Word defaults. Keep style names short and concise.)
- 1.2. The document must refrain from using flashing/flickering text and/or animated text.
- 1.3. Page numbering codes must be used as opposed to manually typed page numbers.
- 1.4. If footnotes are present, they must be created through Word Footnote linking.
- 1.5. If color is used to emphasize the importance of selected text, there must be an alternate method.
- 1.6. The Bullet style must be used as opposed to manually typed characters (e.g. Hyphens). (Use only hexadecimal bullets 2022 and 25E6.)
- 1.7. Track Changes must be accepted or rejected and turned off.
- 1.8. All comments and formatting marks must be turned off.
- 1.9. The Document must be reviewed in Print Preview for a final visual check.
- 1.10. All URL's must contain the correct hyperlink and display the fully qualified URL be hyperlinked with the full address (i.e., <http://www.samhsa.gov> not www.samhsa.gov)
- 1.11. All URL's must be linked to active Web destination.

2.0 Document Images

- 2.1. All images, grouped images and non-text elements that convey information must have alternative text descriptions.
- 2.2. Complex images must have descriptive text immediately after the image.
- 2.3. The document must be free of background images or watermarks.
- 2.4. The image text wrapping style "In Line with Text" must be used for all images.
- 2.5. Multiple associated images must be Grouped as One Object (i.e., Organizational Charts).
- 2.6. All multi-layered objects must be flattened into one image and use one Alternative Text (Alt Tag) for the image.
- 2.7. Text boxes must not be used for simple graphics.

3.0 Document Tables

- 3.1. Tables must be used, to create a tabular structure (not tabs or spaces). i.e. Do not use tabs or spaces to display columns of information.
- 3.2. All tables must read from left to right, top to bottom. (For proper reading order by the Screen reader)
- 3.3. Tables containing 'data' must have the first row designated as a 'Header Row' in table properties.
- 3.4. Tables must not use merged cells.
- 3.5. If tables are used, where appropriate, they should be described and labeled.
- 3.6. Rows should not break across pages as it will make it more difficult. In MS-Word, Table properties, the "Allow to break across pages" must be unchecked.
- 3.7. Tables should not have empty cells.

Notes/Additional Requirements

- A. The document file name must not contain spaces and/or special characters.
- B. The document file name must be concise, generally limited to 20-30 characters, and make the contents of the file clear in the context in which it is presented.
- C. The document must utilize the recommended fonts i.e. Times New Roman, Verdana, Arial, Tahoma and Helvetica. (Use at least a 12 point font, no smaller than 8 point for tables)
- D. The Document Properties (i.e. Subject, Author, Title, Keywords, and Language) must be properly filled out. Note: For "Author" do not use individuals name or contractor name. Should use government organization name (i.e., HHS).
- E. Files that contain a Table of Contents (TOC) must use the TOC field (e.g., created using the TOC Command in MS Word).
- F. A separate accessible version of the document must be provided when there is no other way to make the content accessible. (Example: An organizational chart).
- G. Many common symbols are not compliant. These include <, >, most bullets, all wingdings, most mathematical symbols, and many others. Check the list of approved substitutions.
- H. All bullets in the document will need to be replaced with compliant bullets. Currently, there are only 2 bullets that are read correctly with assistive technology.
- I. All mathematical equations will need to be cut from the document, converted to Windows metafiles, and reinserted as pictures with alt text descriptions. The alt text should read exactly like the equation.
- J. Subscript letters and numbers are not read correctly with our current technology. Therefore, P₁ reads as "P one" and not "P sub one".
- K. Text in text boxes cannot be read, this is especially true for text in banners (↓↑).

