

Make Your Spreadsheets Accessible from Conception

Overview

Trying to remediate a spreadsheet can be shockingly difficult and time-consuming. The best course of action is to learn how to create spreadsheets in Excel that will pass accessibility guidelines as an Excel workbook (and when exported to PDF or shared online, align with WCAG 2.1 Level AA requirements under ADA Title II for public entities).

Steps to Take for Accessibility Success

1. Use Descriptive Sheet Names and Workbook Titles

— REQUIRED

- Rename default sheet tabs (e.g., Sheet1) to unique, descriptive names.
- Delete unnecessary blank sheets.
- Add a concise title or summary in cell A1 of the first sheet.
- Do NOT leave generic or blank sheet names.

2. Logical Structure and Navigation

- Use cell A1 for an overview.
- Avoid blank rows or columns in the main data area.
- Freeze panes for headers.
- Keep content in the main grid flow.
- Do NOT hide critical rows or columns.

3. Create Proper Tables

— REQUIRED

- Use Insert → Table for all datasets.
- Ensure header rows are enabled.
- Name tables descriptively.
- Avoid merged or split cells.
- Do NOT use tables for layout.

4. Images, Charts, Graphs, and Figures

- All visuals must include alt text.
- Decorative visuals should be marked as decorative.
- Charts must include titles, labels, and summaries.
- Do NOT use images of tables or charts.

5. Color and Contrast

— REQUIRED

- Ensure contrast meets WCAG 2.1 AA requirements.
- Avoid relying on color alone to convey meaning.
- Use high-contrast table styles.

6. Hyperlinks

- Use meaningful link text.
- Add ScreenTips where appropriate.
- Ensure links are visually distinct.

7. Fonts and Text Formatting

- Use sans-serif fonts at 11pt or larger.
- Avoid all caps and excessive formatting.
- Avoid text boxes or floating objects.

8. Final Excel Check Before Sharing

- Confirm structure, tables, visuals, contrast, and links.
- Run the Accessibility Checker.

9. Run Accessibility Checker

— REQUIRED

- Fix all Errors.
- Review and address Warnings.
- Re-check after fixes.

Exporting to PDF

- Use Save As → PDF or Export → Create PDF/XPS.
- Test PDFs with accessibility tools.

What Happens If These Rules Are Not Followed

- Screen readers may fail.
- Charts lack descriptions.
- Contrast failures occur.
- Remediation time increases.

Accessible Spreadsheet Creation Checklist

Workbook Setup (REQUIRED)

- ☐ Rename all sheet tabs to clear, descriptive names
- ☐ Delete unnecessary or blank sheets
- ☐ Add a concise title or summary in cell A1 of the first sheet

Logical Structure & Navigation

- ☐ Provide an overview or purpose in cell A1 (title)
- ☐ Avoid blank rows or columns within data
- ☐ Freeze header rows or columns as needed
- ☐ Keep content in the main grid flow (tables created with insert > table. No text boxes, floating shapes, images, using comments for instructions.)
- ☐ Do not hide critical rows or columns

Tables (REQUIRED)

- ☐ Use Insert → Table for all datasets
- ☐ Ensure header rows are enabled
- ☐ Assign descriptive table names
- ☐ Avoid merged or split cells
- ☐ Do not use tables for layout reasons within a document. Tables are for tabular data only.

Images, Charts & Figures

- ☐ Add alternative text to all visuals
- ☐ Mark decorative visuals as decorative
- ☐ Ensure charts include titles, labels, and summaries
- ☐ Do not use images of tables or charts

Color & Contrast (REQUIRED)

- ☐ Ensure color contrast meets WCAG 2.1 AA
- ☐ Do not rely on color alone to convey meaning
- ☐ Use high-contrast table styles

Links & Text

- ☐ Use meaningful hyperlink text
- ☐ Ensure links are visually distinct
- ☐ Use sans-serif fonts (11pt or larger)
- ☐ Avoid text boxes, floating objects, or excessive formatting

Final Review (REQUIRED)

- ☐ Run Excel Accessibility Checker
- ☐ Fix all errors and review warnings
- ☐ Re-run checks after corrections
- ☐ Test PDFs after export