Accessibility Using Word and DocuSign
Accessibility and DocuSign

Going paperless should be accessible to everyone. The introduction of DocuSign at UCSC includes making technology available to all students and faculty who rely on assistive technology.

Assistive technology (AT) is used by individuals to help them understand electronic information. For example, screen readers or text-to-speech software is one tool available and assists individuals who are blind, have low vision, or a learning disability. This technology interprets words on the page and translates them to a computerized voice that reads the information. Accessible documents work in partnership with assistive technology to ensure individuals with disabilities have access to information.

Our goal at UCSC is to make the available technology within easy reach of anyone who wishes to sign, send and receive documents electronically. DocuSign’s Accessibility Support Feature empowers blind and visually impaired users to interact with all features of the platform.

Creating a document using Microsoft Word is one of the best ways to create a document when using DocuSign. Microsoft Word allows you to create content using tools that optimize documents in a way that is easily understood by assistive technology such as screen readers. It also has a built-in Accessibility Checker that verifies documents are compliant and suggests solutions in the areas that it is not.

After you complete a document, you can run the Accessibility Checker by selecting the Review tab and then clicking on the ‘Check Accessibility’ button.

If you are using an earlier version, you can use the ‘Check for Issues’ button followed by the ‘Check for Accessibility’ link. Word checks for issues it finds and provide suggestions on how to fix them. When the results appear, you can click on the items in the results tree. More information will display to allow you to understand why the issue was flagged and how to fix it.
Creating an Assistive Technology Document

Use Headings and Document Styles to create a navigable structure
Because screen reading software reads aloud anything that is visible on the screen, using Styles is helpful because it gives your document structure.

Screen reading software will use audio to tell users whether a particular section of the text is a title, heading, subheading, or normal/body text. This allows users to make logical sense of the document and to skip to certain headings and topics. However, in order for the software to do this, the writer of the document needs to make those distinctions clear! Otherwise, the whole document will read as one big chunk of “Normal” body text.

Use at least the main style options: Title, Heading (with numbered levels), and Normal
Make sure you identify your headings in the correct order. This helps to create an easy-to-understand system for somebody navigating your text. For example, you can assign your paper title the Title style, use the Heading 1 style for your main section headings, use Heading 2 for your subsection headings, and so on.

Remember that you can customize how your Styles look without affecting accessibility. Feel free to change fonts, sizes, and colors. Just make sure that each heading or piece of text is “tagged” with the right Style label so that screen readers can identify it.

For longer documents, consider using Word’s built-in Table of Contents feature. This automatically uses your headings to create a linked Table of Contents that can make navigating your document easier for all readers.
**Use ALT TEXT**

People with visual impairments, whether they are blind or have partial sight, may lose out if you use a lot of images, charts, shapes, photographs, or clipart in your documents. This doesn’t mean you have to skip those features – you just have to add some alternative (or “alt”) text or captions to explain what they are. Screen reading software will read Alt text or captions aloud to make sure users with visual impairments don’t miss out.

To add Alt Text:

1. Right-click on your image.
2. Go to Format Picture > Alt Text.

Write a simple but complete description of the image or other visual feature in the title and/or description box (depending on its length) and click OK.

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**Ensure tables are accessible**

Tables are great for organizing data and information, but when they’re read by a screen reader, they can be confusing. Keeping these principles in mind can make them more accessible:

- Use clear and designated column headings. Just like you use Style headings throughout your text, use column headers to make your tables consistent and easy to navigate.
- Make tables as simple and logical as possible. If possible, avoid having merged or split cells only in certain columns or rows, because this will be confusing when the contents is read aloud. Stick to a standard, evenly laid out format.
• Try to make your tables read logically from left to right and top to bottom (if working in English). To get a better idea of how a screen reader will navigate your table, use the tab key on your keyboard to check the order that the cursor goes through your columns and rows.

**Use built-in features to create lists**

Lists are used to break-up and simplify content. Screen readers cannot infer meaning from just formatting (if you Tab and use a dash as a bullet). Using built-in list features creates a structure that screen readers can identify.

Go to Home > Paragraph and use Bullets, Numbering or Multilevel List features when putting lists in your document.

**Use Built-In Columns to organize content**

Columns are used to break-up and organize content. This item doesn’t mean that you are required to use columns, but when you are using a column layout, you must use the built-in column feature rather than creating the appearance of columns by using tabs or spaces. Screen readers and AT cannot read information in the correct reading order if just tabs or spaces are used. Columns create a structure that screen readers and AT can use to read information in the correct order (top to bottom and then left to right).

Go to Page Layout >Columns when creating columns in your document.
To use Column formatting:
1) Select content you want to make into columns.
2) Click on Columns.
3) Click on the icon representing the number of columns you want.

Once you have created the document, save the document as a PDF and select **Best for Electronic distribution and accessibility** option. This holds all of the work you’ve just performed in the document for accessibility when the recipient opens the document to sign.
Sending a Document

After you’ve created the document in Word with accessibility in mind, begin the DocuSign process using the same steps you would use to send an envelope.

Sign in to Docusign > New > Send an Envelope

Once the document is uploaded, just as you normally would, you’re able to drop tags into the document reflecting the information you’re requesting from the recipient.
**Tooltip**

As you add each tag from the palette, in this scenario the Signature tag, a dialog box opens on the right-hand side allowing additional information to be added for accessibility.

The Tooltip field allows you to add a short description of what’s being requested for the screen reader to relay.

You can also add that the tag entry is a required field by selecting the box in the upper-right.

The Tooltip becomes especially important to the recipient when you’ve used the Text tag in a document. Using the Tooltip allows you to enter a description of the information you’re requesting.

When all tags and Tooltips have been added, select SEND to send the document. When the sender completes the tagging within the document, select SEND to complete the process.