Accessible Fillable PDF Forms

Start with Word

First, design the form's visual layout as an accessible Word document.

- Don't use tables to layout the form.

- Use all the techniques to make a Word document accessible:

    - Headings using Styles
    - Alternate text for logos and other graphics.
    - Good color contrast.
    - No use of color-only to convey information. (⃠Example: "Required fields are in red.")

- Use **TAB** stops and the **U**nderline button in the Home ribbon (or CTRL+U) to draw the lines. (Don't use SHIFT + minus sign.)
    Label: _____   **Label:** _____

- Use the **checkbox** from the **Legacy Tools** in the Developer ribbon.
    (Don't use the Square ☐ from the Symbols chart or from the bullet lists ☐.)
    Label: ☐ Yes   ☐ No

    - If you don't have the Developer ribbon, go to **FILE** > **Options** > **Customize Ribbon** and check the box next to Developer in the Main Tabs menu.

- Draw enough lines for essay boxes to answer the question in case the user prints the form to fill it out with a pen.

    _____
    _____
    _____
    _____
    _____
    _____

    Before and **After spacing** for the lines should be 0 pt. and **Line Spacing** should be **Single**.

Next, use the **Accessibility Checker** on the **Review** ribbon to make sure the Word document passes the checker before moving on.

Then, **SAVE** the Word document.

Convert the Word document to PDF

- Use **SAVE AS** on the **FILE** menu and choose PDF.

- OR, if you have Adobe Acrobat (not Reader) installed on your computer:
    - Use **Save as PDF** button on the **FILE** menu.
    - OR use **Create PDF** from the **Acrobat** tab.

DO NOT USE PRINT TO PDF.

In Acrobat, add form fields

- In the Tools, choose the Prepare Form tool:
- Make sure **Form field auto detection is ON**.
    - If it isn't, click the **Change** link.
    - Click the box next to **Automatically detect Form fields**.
    - Hit **OK**.
- The robots will read your mind and figure out what kinds of form fields to insert where and what the tooltips should be.
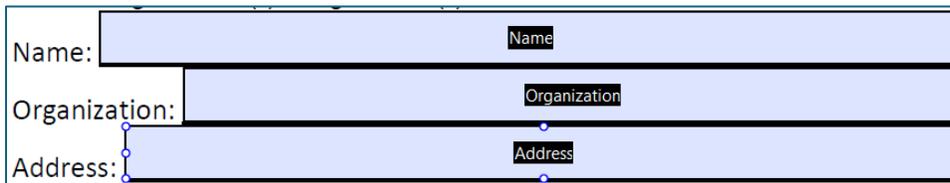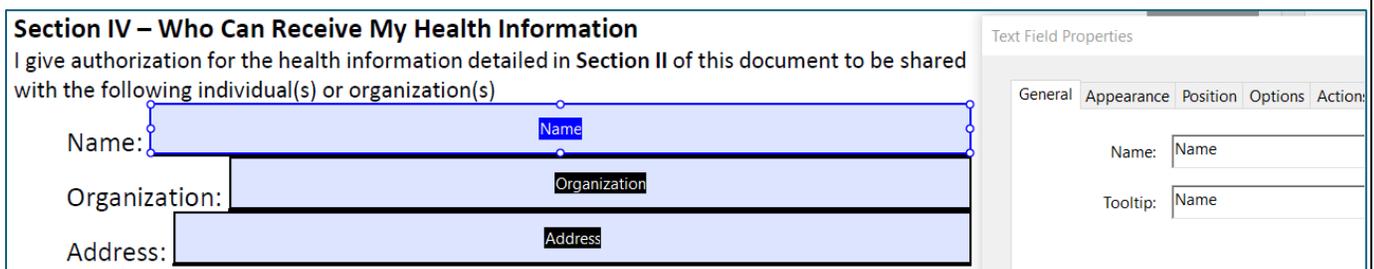
Name: [Name]
Organization: [Organization]
Address: [Address]

You're not done yet! When robots try to read your mind, they will occasionally be wrong.

- Double-click on the first form field. The Properties box will pop up.

Section IV – Who Can Receive My Health Information
I give authorization for the health information detailed in **Section II** of this document to be shared with the following individual(s) or organization(s)

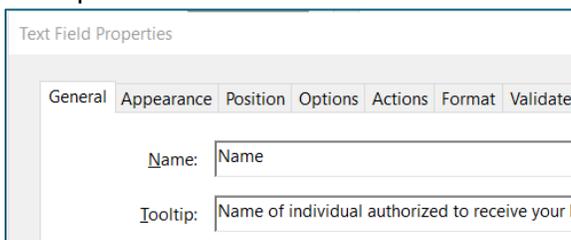Name: [Name]
Organization: [Organization]
Address: [Address]

Text Field Properties
General Appearance Position Options Action
Name: Name
Tooltip: Name

- The **Tooltip** is what the screen reader reads aloud so a blind individual knows what to type in the field. Make sure it describes exactly what needs to be filled in.
    - Example: in this case the **Name** that is being requested is not the name of the patient filling out the form, which one would expect. It's the name of the person who is being authorized to receive that patient's health information.
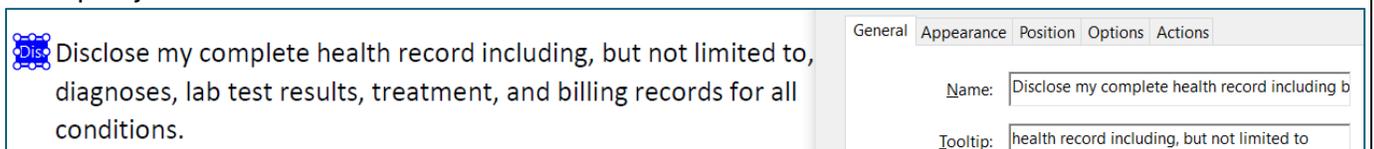   - Tooltip should be **Name of individual authorized to receive your health information**.

Text Field Properties
General Appearance Position Options Actions Format Validate
Name: Name
Tooltip: Name of individual authorized to receive your h

- **IMPORTANT:** When the label on a form field is longer than one line, Acrobat will truncate the Tooltip to just the first line.

General Appearance Position Options Actions
Disclose my complete health record including, but not limited to, diagnoses, lab test results, treatment, and billing records for all conditions.
Name: Disclose my complete health record including b
Tooltip: health record including, but not limited to

- Tooltip should be changed to include the entire label: **Disclose my complete health record including, but not limited to, diagnoses, lab test results, treatment, and billing records for all conditions.**

- **Essay boxes** will have one form field for each line you drew.

> Please detail the reasons why information is being shared. If you are initiating the request for sharing information and do not wish to list the reasons for sharing, write 'at my request'.
>
> write at my request 1
> write at my request 2
> write at my request 3
> write at my request 4
> write at my request 5

  - Delete all form fields except the first.
  - Click in the middle of the bottom border of the form field and drag it to cover all the lines.

> sharing information and do not wish to list the reasons for sharing write at my request 1

  - **Hint** – hit the up arrow three times with the form field selected to move it up just a little. The text typed will fall on the lines better.
  - Double-click on the form field. The **Properties** box will pop up.

> Text
>
> Font Size: 12   Text Color: ■
>
> Font: Helvetica

  - On the **Appearance** tab, change the **Font Size** to be the **same size font you used to draw the lines in Word**. This will help the words being typed line up with the lines.
  - On the **Options** tab, check **Multi-line** and uncheck **Scroll long text**.

> ☑ Check spelling
> ☑ Multi-line
> ☐ Scroll long text

What if the robots missed a form field or didn't read your mind correctly?

- Use the buttons on the Prepare Form toolbar to draw the missing field manually.
- Then double click on the form field to fill in the **Properties**.

Save your work frequently!

- **Save** the PDF using **FILE > SAVE**, **FILE > SAVE AS** or the Save Icon at the top of the page 💾.

Add form field tags to the Tags Tree

First, "walk the tags tree" to ensure the tags are correct and in the right order.

- Click on the **Accessibility Tags icon** in the Navigation Pane to open the Tags Tree.
  (If you don't have the icon in the Navigation Pane, **VIEW > Show/Hide > Navigation Panes > Accessibility Tags** to add it.)

- Click on the first tag in the Tags Tree to highlight it. Use the down arrow to move from tag to tag.
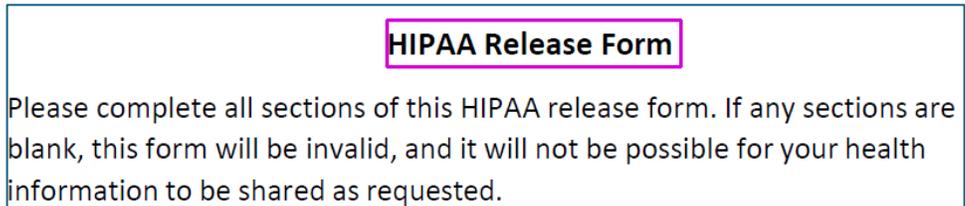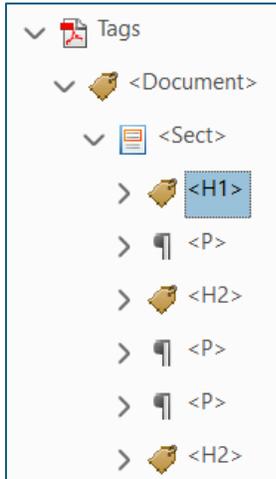
As you move down the tag tree, the text belonging to each tag will highlight.
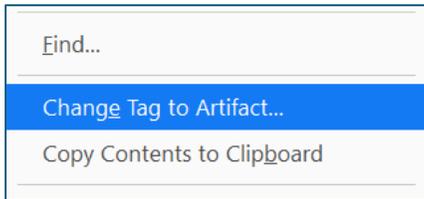
- Ensure the tags are in the correct reading order and that the text has the correct tag (<H1> = Heading Level 1, <P> = paragraph, etc.).

- If there are tags you don't want read by the screen reader, such as <Figure> or blank <P> for the form field underlines or checkboxes:
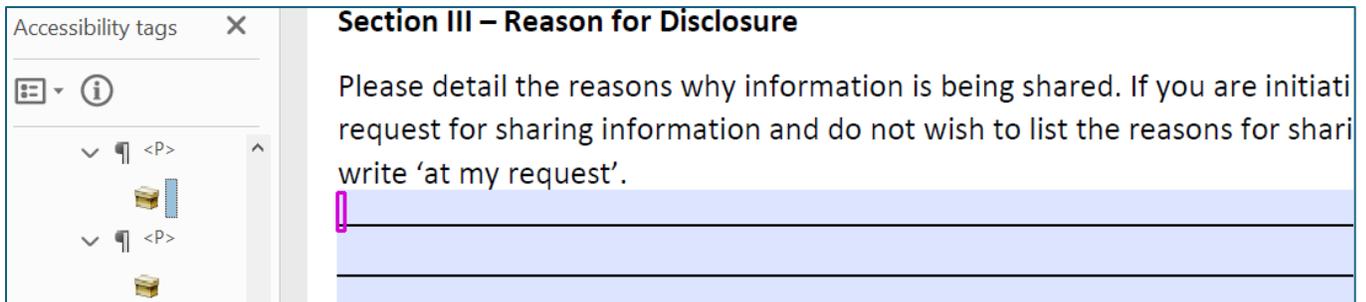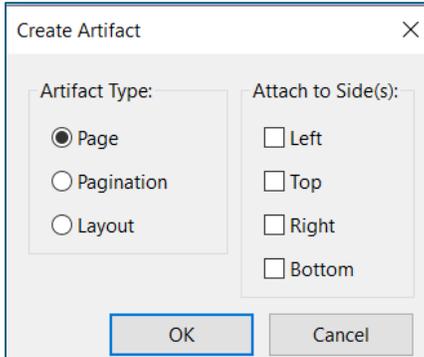
  - Open the tag.
  - Click on the contents of the tag (not the tag name) to highlight it (e.g., box with nothing beside it, or PathPathPathPath, NOT <P> or <Figure>).
  - Click on the **Accessibility Tags Options** menu icon.

- On the Options menu, choose **Change Tag to Artifact**.

  Find...

  Change Tag to Artifact...

  Copy Contents to Clipboard

- On the **Create Artifact** popup, leave everything as is and click **OK**.

  Create Artifact ✕

  Artifact Type:
  - ◉ Page
  - ◯ Pagination
  - ◯ Layout

  Attach to Side(s):
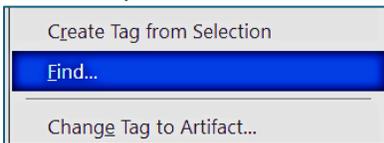 - ☐ Left
  - ☐ Top
  - ☐ Right
  - ☐ Bottom

  OK   Cancel

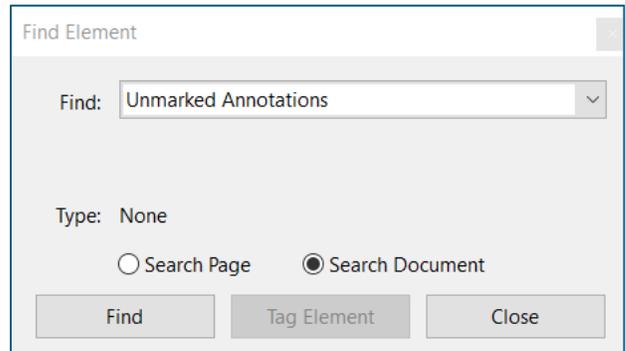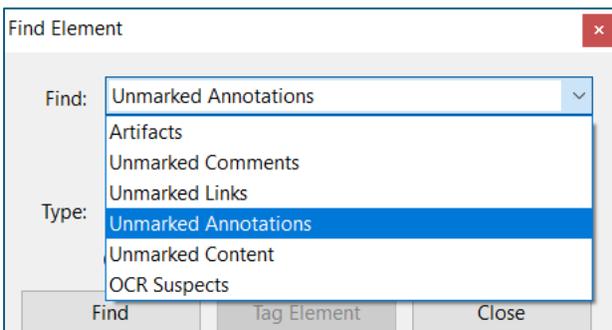**Once the tags for the text are correct, add the tags for the form fields.**

- Click on the Tags tag at the top of the tree to highlight it. ∨ 📕 Tags

- Click on the **Accessibility Tags Options** menu icon.

  Accessibility tags

  📋▾ ⓘ

- On the Options menu, choose **Find**.

  Create Tag from Selection

  Find...

  Change Tag to Artifact...

- On the Find Element popup, change the dropdown menu to **Unmarked Annotations** and choose the radio button next to **Search Document**. Then click the **Find** button.

  Find Element ✕

  Find: Unmarked Annotations ∨
  - Artifacts
  - Unmarked Comments
  - Unmarked Links
  - Unmarked Annotations
  - Unmarked Content
  - OCR Suspects

  Type:

  Find   Tag Element   Close

  Find Element

  Find: Unmarked Annotations ∨

  Type: None

  - ◯ Search Page   ◉ Search Document

  Find   Tag Element   Close

- Each time the Find function locates a form field that is not in the tags tree, it will stop, highlight the form field, and ask you what you want to do with it.
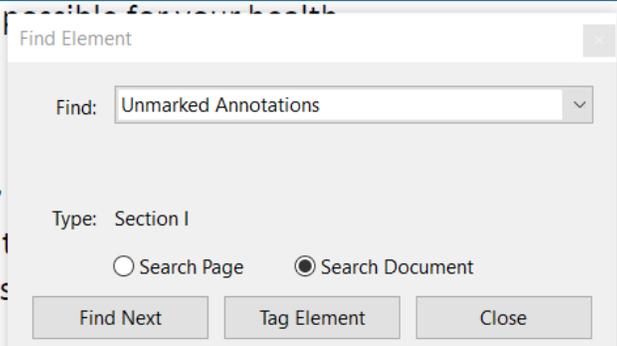
blank, this form will be invalid, and it will not be possible for your health information to be shared as requested.

Section I

I,
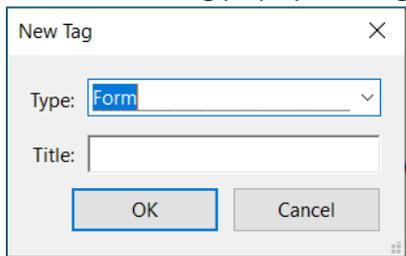
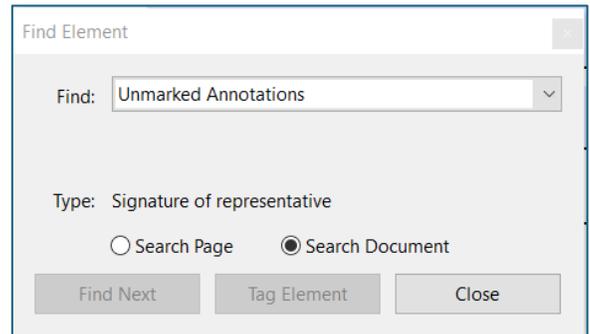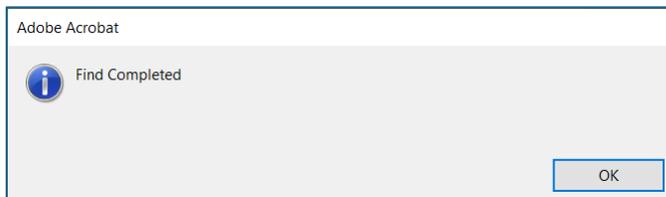listed in **Section II** of this document with the pers have specified in **Section IV** of this document.

Find Element

Find: Unmarked Annotations

Type: Section I

○ Search Page   ● Search Document

Find Next   Tag Element   Close

- Click the **Tag Element** button.

- On the New Tag popup, change the dropdown menu to **Form**. Then click **OK**.

New Tag   ✕

Type: Form

Title:

OK   Cancel

- The Find will continue until all the untagged form fields have been found.

Adobe Acrobat

ⓘ Find Completed

OK

Find Element

Find: Unmarked Annotations

Type: Signature of representative

○ Search Page   ● Search Document

Find Next   Tag Element   Close

Click **OK**. Then click **Close**.

Now move the form tags into the proper reading order.

- Click on the arrow next to the Tags tag at the top of the tree to open it. ∨ 📄 Tags

- You'll see all the form tags you just created grouped at the bottom of the tags tree.

∨ 📄 Tags

> 🏷 <Document>

> 🏷 <Form>

> 🏷 <Form>
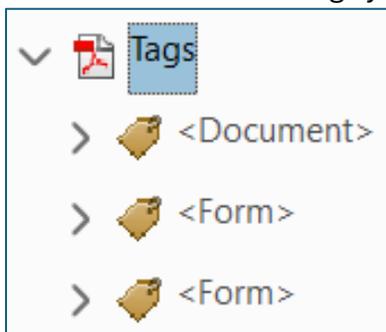
- **Drag & Drop** or **Cut & Paste** the <Form> tags to move them into their place in the tags tree for proper reading order.
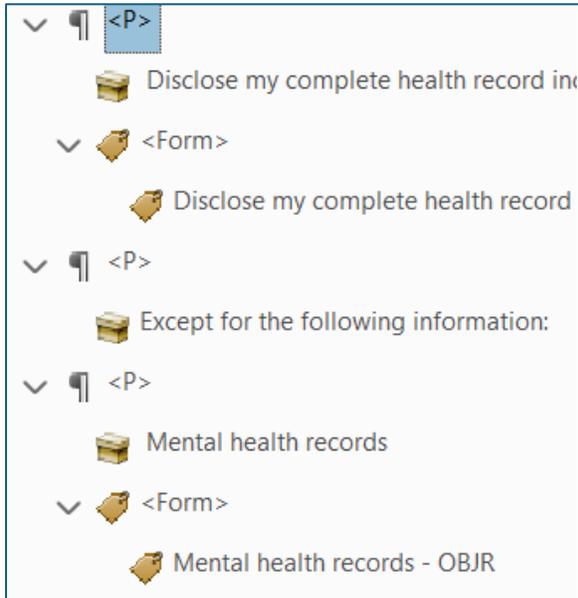
Paid Training Resources

Karen McCall – On demand

- **Accessible PDF Documents: The Basics of Tagged PDF**
- **Accessible Fillable PDF Forms**

CHAX Accessibility Training – Live (online)

- **Document Testing with Adobe Acrobat** – **Next session July 10**
- **Accessible PDF Forms**
- **PDF Tags Tree Basics**

Microassist – On demand

- **PDF Accessibility Fundamentals**

Microassist – Live (online)

- **Testing & Remediation Strategies for PDF Accessibility: The Basics** – **Next sessions July 03, August 07**
- **Testing & Remediation Strategies for PDF Accessibility: Intermediate** – **Next sessions July 10, August 14**
- **Testing & Remediation Strategies for PDF Accessibility: Advanced** – **Next sessions July 24, August 28**

Free Training Resources

Creating & Testing Accessible PDFs

Minnesota IT Services' Office of Accessibility (MNIT website)
- **Accessible PDF Training Series**
    1. PDF Basics
    2. Document Properties
    3. Tags
    4. Walk the Tag Tree
    5. Document Structure and Bookmarks
    6. Hyperlinks
    7. Color
    8. Images
    9. Lists
    10. Tables
    11. Testing

University of Alabama Center for Instructional Technology (YouTube)
- **Creating Accessible PDFs with Adobe Acrobat Pro DC**
- **PDF Remediation Basics**

Section508.gov (website)
- **How to Test and Remediate PDFs for Accessibility**
    1. What is a PDF?
    2. Testing a PDF for Accessibility
    3. Remediating PDFs for Accessibility
    4. Converting Scanned Documents into Section 508 Conformant PDFs

Accessible PDF Forms

California Department of Social Services Accessibility Playlist (YouTube)
- **Creating Accessible PDF Forms**
    1. Understanding Form Accessibility
    2. The Auditory Form
    3. Tagging Form Fields
    4. Accessibility Check

University of Alabama Center for Instructional Technology (YouTube)
- **Advanced PDF Accessibility with Adobe Acrobat Pro DC: Forms**