

Toronto District School Board

Operational Procedure PR749

Title: **DIGITAL ACCESSIBLE DOCUMENTS FORMAT**

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1. RATIONALE

The Digital Accessible Documents Format Procedure (the “Procedure”) supports implementation of the Accessibility Policy (P069), the Accessibility for Ontarians with Disabilities Act, and the Web Content Accessibility Guidelines (WCAG) through the creation of digital accessible documents which improves accessibility and universal access for all TDSB users.

2. OBJECTIVE

- To outline system-wide expectations with regard to digital documents at the TDSB.
- To define a process for development and management of digital documents in accessible formats; and,
- To outline roles and responsibilities of staff engaged in creating and managing digital documents.

3. DEFINITIONS

Accessibility Checker refers to an audit and informational tool found in document creation and processing software, such as Microsoft Word and Adobe Acrobat, which help identify non-compliant issues with a digital document and suggest recommendations to address the accessibility errors.

Accessible by Design refers to a method for developing digital documents where accessibility requirements are specifically considered at the outset and throughout the document development process.

Accessible Formats refer to document formats that meet accessibility guidelines and standards, which may include, but are not limited to, large print, recorded

audio and electronic formats, braille, and other formats usable by persons with disabilities (P069).

Alternative Text or Alt Text refers to a description of a photo, image or graphic. Assistive technology reads this text, allowing the user to understand what photos and images are being used, even though the person may not be able to see them.

Assistive Technology refers to assistive, adaptive, and rehabilitative devices for people with disabilities, examples shown include:

- Screen readers such as JAWS or NVDA
- White Cane
- TTY (Teletypewriter)
- Braille
- Hearing Aid

Board is the Toronto District School Board, which is also referred to as the “TDSB”.

Digital Accessibility refers to the design and development of documents, websites, tools, and technologies so that people with disabilities can use them. Information includes data, facts and knowledge that exists in any format, including text, audio, digital or images, and that conveys meaning. It does not include product and product labels, unconvertible information or communications, and information that the Board does not control directly or indirectly through a contractual relationship (P069).

Multi-Year Accessibility Plan (MYAP) refers to a requirement under the Accessibility for Ontarians with Disabilities Act, 2005 (AODA). It is a five-year plan to identify, remove, and prevent accessibility barriers across the organization by committing to specific initiatives and outcomes aimed at making sure so that staff and students with disabilities can fully participate; learn and work to their full potential.

PDFs or Portable Source Documents are typically created from a source document such as a Microsoft Word, Adobe InDesign, or Microsoft PowerPoint file, and then are exported into the PDF format. Alternatively, many PDF files are simply images of text that are created by scanning hard copy documents. Image-based PDFs are completely inaccessible as they are and require conversion into text using optical character recognition (OCR) software before they are accessible.

Source Documents refer to the original document created by the document owner. It is generally a Microsoft Word, Adobe InDesign, or Microsoft PowerPoint file, and not the re-produced PDF or portable document format, unless it is an Accessible PDF and accessible by design.

TDSB is the Toronto District School Board, also referred to as the “Board”

WCAG refers to the World Wide Web Consortium Web Content Accessibility Guidelines which help make web content more accessible to persons with disabilities.

4. RESPONSIBILITY

Associate Director, Organizational Transformation, Accountability and Legal and Accessibility Coordinator, People and Culture

5. APPLICATION AND SCOPE

This Procedure applies to TDSB employees who create, modify or publish source documents.

6. PROCEDURE

6.1. General Principles

- 6.1.1. All TDSB employees who create, modify, share or publish source documents have an obligation to ensure that documents are in accessible format and are expected to apply the accessible by design method.
- 6.1.2. Employees involved in creating, modifying or publishing source documents will complete mandatory accessibility training to gain practical knowledge of accessibility requirements for digital documents.
- 6.1.3. [Accessibility and training materials](https://tdsbweb.tdsb.on.ca/tdsbaccessibility/) will be provided by the Accessibility Office and will be available to all employees through the TDSB's internal website:
<https://tdsbweb.tdsb.on.ca/tdsbaccessibility/>
- 6.1.4. Employees will use document accessibility checkers to inspect and maintain accessibility features of the documents when creating or modifying source documents in [Microsoft Word](#), [Adobe PDF](#), Microsoft Excel, Google Docs and other programs.
- 6.1.5. Employees will provide or arrange for the provision of alternate accessible formats of digital documents upon request, in accordance with the TDSB's Accessibility Policy (P069).
- 6.1.6. The TDSB's Accessibility Office can be contacted (accessibility@tdsb.on.ca) when employees require assistance with digital accessible documents format compliance requirements or support when requested to provide alternate accessible formats.

6.2. Creating Documents

- 6.2.1. Employees who create the source document will be responsible for ensuring that each document meets accessibility compliance requirements.

- 6.2.2. All documents, whether source documents and reproduced documents, will be accessible and include accessibility design features such as appropriate font size and style, headers, alternative text, document structure and colour contrast (see Appendix A).
- 6.2.3. Managers/supervisors will review digital documents that are regularly created by their business units and will develop, and use document templates based on the accessible by design method and consistent with the accessibility requirements (see Appendix B).
- 6.2.4. All documents will be created using a defined structure (e.g., title, headings, sub-headings) in the source document or native format (e.g., Microsoft Word, Microsoft PowerPoint, or Adobe InDesign), then converted into an accessible Adobe Acrobat PDF document, if necessary.
- 6.2.5. Documents with images must include alternative text to describe what information the image is conveying, replicate any text in the image and should not exceed two sentences in length.
- 6.2.6. During the conversion to PDF, Adobe will create tags from the style elements outlined in section 6.2.3 above. The tags then become bookmarks describing the layout of a document, enabling a screen reader to navigate and read it correctly in Adobe.
- 6.2.7. PDF documents should not be used as the source document. PDF documents are generally created by exporting from the source document or native format (e.g., Microsoft Word, Microsoft PowerPoint, or Adobe InDesign) into the PDF.
- 6.2.8. A source document must be fully accessible in its native format before exporting into PDF. To create an accessible PDF from a source document, employees will follow all accessibility best practices (see Appendix A). The process of exporting the source document to PDF must preserve accessibility features of the original file (see Appendix B).
- 6.2.9. Existing PDF files with no source document available can be remediated for accessibility directly within Adobe Pro or any other comparable software such as PAC.

6.3. Compliance

- 6.3.1. The Accessibility Office will support TDSB departments and employees with digital accessible documents format compliance.

- 6.3.2. Periodic accessibility checks will be conducted by the Accessibility Office to help ensure system compliance. Methods may include use of an automatic testing software such as Common Look or Site Improve to scan and access file accessibility.
- 6.3.3. TDSB's Accessibility Office can be contacted (accessibility@tdsb.on.ca) when departments and employees require assistance with digital accessible documents format compliance requirements or need support when requested to provide alternate accessible formats.

7. EVALUATION

This Procedure will be reviewed at a minimum, every five (5) years, after the effective date.

8. APPENDICES

- Appendix A – Accessibility Features Guide
- Appendix B – Creating an Accessible Template

9. REFERENCE DOCUMENTS

Legislation:

- Accessibility for Ontarians with Disabilities Act, 2005 (AODA)
- Accessibility Standard for Customer Service; Ontario Regulation 429/07
- Integrated Accessibility Standards, Ontario Regulation 191/11
- Ontario Human Rights Code
- Ontario with Disabilities Act, 2001

Policies:

- Accessibility (P069)
- Communications (P104)

Other:

- TDSB Accessibility - <https://tdsbweb.tdsb.on.ca/tdsbaccessibility/>

APPENDIX A

ACCESSIBILITY FEATURES GUIDE

Elements of an accessible document include:

- Use of standard styles and sizes of fonts;
- Adding Alt Text for images, objects and links;
- Descriptive hyperlinks
- Use of proper colour contrast;
- Captions for images, video and audio content in digital documents;
- Use of plain language;
- Avoiding use of tables for design layout;
- Avoiding use of text boxes in Word documents;
- Use of templates for specific documents;
- Use of Heading styles or creating a custom style based on an existing one for headings;

Font Style and Sizes

- Use 12-point font or greater for text in a Word document and 18-point font minimum for PowerPoint slides
- Font styles to use should be sans serif (e.g., Arial, Verdana, Myriad Pro) and not serif (e.g., Times New Roman, Cambria). A serif is a slight projection finishing off stroke of a letter in certain typefaces.
- Bold, Italics, Underline
- Bold:
- Use bold to emphasize important words or phrases.
- Avoid using bold solely for decorative purposes; it should enhance understanding.
- Ensure there's enough contrast between bold text and the background for readability.

Italics:

- Use italics to indicate the titles of books, movies, or works and for emphasis.
- Avoid using italics for large blocks of text, as it may be difficult for some users to read.
- Make sure there's sufficient contrast between italicized text and the background.

Underline:

- In most cases, avoid underlining text, as underlined text is commonly associated with hyperlinks.

- If underlining is necessary, ensure it doesn't create confusion with hyperlinks.
- Consider using alternatives like bold or italics for emphasis.

Alternative (Alt) Text: Adding Alt Text to an Image or Object in Word

Alternative (Alt) text should summarize the image's main content or subject in the first sentence. In the second sentence, provide context or describe the image's significance, ensuring relevance to the surrounding content.

Instructions:

- Right-click on the image (alternatively, you can click with the Ctrl key pressed)
- Select "Edit Alt Text"
- In the area "Alt text", include a description for the image in one or two sentences.

More Information:

- [How do I add "Alt Text"?](#) (Infographic on 11x17 " paper if printed)

Colour Contrast

Colour contrast accessibility refers to the degree of contrast between text and its background colour in a digital interface, document or webpage. WCAG

Recommends a contrast ratio of at least 4:5:1 for regular text and 3:1 for large text. The following is an example of colour contrast tool that can help with colour selection to establish the minimum ratio – [Web Aim Colour Contrast Analyzer](https://webaim.org/resources/contrastchecker/)
<https://webaim.org/resources/contrastchecker/>.

Tables

The following tips improve accessibility when creating tables:

- Provide a Meaningful Caption
- Use Clear and Concise Headers
- Organize Rows and Columns Logically
- Avoid Merged Cells

Tracked Changes in Documents

Creating a document with tracked changes requires additional considerations to ensure accessibility compared to a regular document. The key differences is making the tracked changes and comments understandable and navigable for all users.

File Names/Naming Conventions

Naming a document in an accessible way involves providing a clear and meaningful title that accurately represents the content. Use a descriptive title that gives users a clear idea of the document's content and include key information such as the topic, date, or version number.

Heading Structure Accessibility

Creating a document with logical heading structure accessibility involves organizing content with clear main headings and descriptive subheadings, ensuring a logical flow of information.

Documents that are longer than a few paragraphs require structuring to make them easier for readers to understand. True Headings should be used to create logical divisions between paragraphs.

True headings are more than just bolded, enlarged, or centered text; they are structural elements that order and levels provide a meaningful sequence to users of assistive technologies.

Use the default headings styles provided ("Heading ", "Heading 2", etc.)

To apply headings to selected text:

1. Select text
2. Right-click and select Styles
3. Select the heading style from the list

To apply headings using the Styles toolbar

1. Select text
2. Go to menu item: Home
3. In the Styles section, select the heading you wish to apply

Note: You can scroll through the multiple heading styles using the arrows on the right side of the Styles section. You can also change the Style design by selecting the Change Styles button on the right.

To modify heading styles:

1. Go to menu item: Home
2. In the Styles section, right-click* the style you wish to use from the Styles Gallery
3. Select Modify
4. In the Modify Style dialog, make the appropriate changes to style characteristics
5. Select OK

To return to the default heading styles:

1. Go to menu item: Home
2. In the Styles section, select Change Styles
3. Select Style Set
4. Select Word 2010 or equivalent from the list

APPENDIX B

CREATING AN ACCESSIBLE TEMPLATE

To create an accessible template:

1. Create a new document (from the default blank template or from one of the prepackaged templates)
2. Include accessibility features provided in this Procedure
3. When you are finished, check the accessibility of the document
4. Go to menu item: File > Save As
5. Select Templates
6. In the Save as type list, select Word Template
7. In the File name box, type a name for the template. Using a descriptive File name (e.g. "Accessible Report Template") may increase the prominence of the accessibility status. Filling in the text box labeled Tags with the term "accessibility" may improve discoverability as an accessible file.
8. Select Save

To begin working from your existing accessible template:

1. Go to menu item: File > New
2. Under Available Templates, select My Templates
3. In the New document dialog, select your accessible template from the list
4. Select OK
5. A new document based on the template will be displayed. If you have chosen an accessible template, the document will be accessible at this point.
6. Consider accessibility features when adding context to your document to ensure preservation of accessibility.

APPLYING THE ACCESSIBLE TEMPLATE TO NORMAL DOTX FILE

To use Style changes from an accessible template and apply them to another document :

1. In a new-inaccessible document
 - a. Press Alt + t key (shortcut) then,
 - b. (the letter) "i"
2. The Templates and Add-ins window opens
 - a. Click the Attach button

- b. Select the, Normal template
- c. Click the Open button
- d. Select the Automatically update document styles check box
- e. Click the OK button

All the accessible styles options created (and saved) will be available to be applied to the new document.

Additional Accessibility Resources

The following list of resources may require access using VPN on the internal website (available to TDSB staff only)

Source: [Accessibility Ressources](http://tdsbweb.tdsb.on.ca/tdsbaccessibility/Resources) (<http://tdsbweb.tdsb.on.ca/tdsbaccessibility/Resources>)

Document and Application Accessibility

Desk Side Checklist for MS Office 365

- 7.1.1 [Desk Side Checklist for MS Office 365](#) - Including Word, Outlook & PowerPoint

Microsoft Word Documents

- 7.1.2 [How to Make Documents Accessible in Microsoft Word](#)
- 7.1.3 [Accessible Word Document Checklist](#) (Queens University)

Microsoft PowerPoint Presentations

- 7.1.4 [How to Make Your PowerPoint Presentations Accessible](#)
- 7.1.5 [Microsoft PowerPoint Accessibility Tips](#)
- 7.1.6 [Accessible PowerPoint Presentation Checklist](#) (Queens University)

Microsoft Excel Spreadsheets

- 7.1.7 [How to Make Your Excel Spreadsheets Accessible](#)
- 7.1.8 [Microsoft Excel Accessibility Tips](#) (Government of Canada)
- 7.1.9 [Accessible Excel Spreadsheet Checklist PDF](#) (Montclair University)

Desk Side Checklist for Adobe Pro

- 7.1.10 [PDF Checklist for Adobe](#) Acrobat Pro DC

PDF Documents

7.1.11 [How to Create Accessible PDF's](#)

Accessible Forms

7.1.12 [Creating Accessible PDF Forms Using Adobe Acrobat Pro](#)

7.1.13 [Accessible Word and PDF Forms](#) (Queens University)

GSuite

7.1.14 [Making a Document or Presentation More Accessible in Google Docs or Slides](#)

7.1.15 [Making Google Sheets Accessible](#)

General Accessibility Resources

7.1.16 [Microsoft Accessibility Resources YouTube Channel](#) - Microsoft Accessibility
YouTube

7.1.17 [Clear Print Accessibility Guidelines](#) - CNIB - Print That's Easy On the Eyes

7.1.18 [Accessible Presentations](#) - How to Make Your Presentations Accessible to All