

**Excel Requirements Checklist**

The following checklist should be used to verify that all content meets the requirements established by VA for Section 508 conformance. For guidance specific to a requirement refer to the Requirement Guidelines section of this document.

| <b>ID</b> | <b>1.0 Document Layout and Formatting Requirements</b>                                                                               | <b>Evaluation</b> |
|-----------|--------------------------------------------------------------------------------------------------------------------------------------|-------------------|
| 1.1       | Do spreadsheets with numerous complicated formula cells have them indicated by a comment to alert users of their functionality?      |                   |
| 1.2       | Are merged cells only used for formatting purposes within the table header?                                                          |                   |
| 1.3       | Are all tables prefixed with the table name and table number?                                                                        |                   |
| 1.4       | Are the header rows formatted to repeat on the top of the table if it goes from one page to another?                                 |                   |
| 1.5       | Do all worksheet cells that contain hyperlinks display the full Web address i.e. <a href="http://www.va.gov">http://www.va.gov</a> ? |                   |
| 1.6       | Are all of the worksheet hyperlinks active?                                                                                          |                   |
| 1.7       | Are all of the active worksheets (within a workbook) given clear and concise names?                                                  |                   |

## Section 508 Compliance Checklist

MS Excel

| ID  | 2.0 Document Image Requirements                                                                                        | Evaluation |
|-----|------------------------------------------------------------------------------------------------------------------------|------------|
| 2.1 | Do all of the worksheet graphics (images and non-text elements) have Alternative Text (Alt Text) associated with them? |            |
| 2.2 | Do all of the worksheets that have multiple associated images on the same page have them grouped as one object?        |            |
| 2.3 | Do all worksheets that have grouped images have Alternative Text (alt text) associated with the images?                |            |
| 2.4 | Were all of the charts created in Excel?                                                                               |            |
| 2.5 | Do all of the charts have a Title, Legend and Axis (X & Y) labels?                                                     |            |
| 2.6 | Do all complex images (i.e. charts, graphs, flowcharts, etc.) have descriptive text immediately after the image?       |            |
| 2.7 | Do decorative images that do not convey information have an empty Alternative Text (Alt Text) (i.e., alt="")?          |            |

| <b>ID</b> | <b>3.0 Document Table Requirements</b>                                                     | <b>Evaluation</b> |
|-----------|--------------------------------------------------------------------------------------------|-------------------|
| 3.1       | Do all of the worksheets have tables that have a logical layout based on Rows and Columns? |                   |
| 3.2       | Do all columns start with a clear and concise column header?                               |                   |
| 3.3       | Do all rows start with a clear and concise row header?                                     |                   |
| 3.4       | Are merged cells absent from the tabular data area of the table?                           |                   |
| 3.5       | Do the row and column headers all start in the first left-hand column of the table?        |                   |

| <b>ID</b> | <b>4.0 Additional Requirements</b>                                                                                                                                                                                                                 | <b>Evaluation</b> |
|-----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|
| <b>A.</b> | Is the document file name concise, limited to 20-30 characters, and makes the contents of the file clear in the context in which it is presented.                                                                                                  |                   |
| <b>B.</b> | Do not save an Excel Spreadsheet to PDF. The only way to effectively convert an Excel spreadsheet to PDF is to “Copy and Paste” the spreadsheet into MS Word using landscape page setup and then convert it to a PDF from the Word format.         |                   |
| <b>C.</b> | Has a separate text-only version of the document been provided when there is no other way to make the content accessible? (Example: An organizational chart must have a text-only version.)                                                        |                   |
| <b>D.</b> | Does the document utilize recommended fonts i.e. Times New Roman, Verdana, Arial, Tahoma, Calibri and Helvetica?                                                                                                                                   |                   |
| <b>E.</b> | Are the Document Properties (i.e. Subject, Author, Title, Company, Keywords, and Language) properly filled out? Note: For “Author” do not use individuals name or contractor name. Should use government organization name (i.e., Section 508 VA). |                   |

**Excel Requirement Guidelines**

The following guidelines have been established by VA/VA to meet Section 508 Compliance requirements.

**1.0 Document Layout and Formatting Guidelines**

- 1.1. Normally, users of assistive technology have no problem reading formulas. However, in those instances where there are numerous complicated formulas in a spreadsheet the addition of comments in those cells containing the formula to explain its function is advisable.
- 1.2. Merged cells should only be used for formatting purposes i.e. within the non-data section of the table. For example, merging the cells within a table header would be acceptable (see table example below) but would not be acceptable within the data area of the table.

| <b>Drivers for Vet Centers in Alabama</b> |                                  |                                     |                                  |                                  |
|-------------------------------------------|----------------------------------|-------------------------------------|----------------------------------|----------------------------------|
|                                           | <b>Birmingham<br/>Vet Center</b> | <b>Hunsville<br/>Vet<br/>Center</b> | <b>Mobile<br/>Vet<br/>Center</b> | <b>Montgomery<br/>Vet Center</b> |
| <b>Drivers</b>                            | 17                               | 21                                  | 12                               | 8                                |
| <b>Inactive</b>                           | 6                                | 19                                  | 9                                | 19                               |

- 1.3. Tables should be prefixed with the table name and table number (if applicable). This information should be separated from the actual data table so that the screen reader can present it prior to reading the data table.

**Table 1. Drivers for Vet Centers in Alabama**

|                 | <b>Birmingham<br/>Vet Center</b> | <b>Hunsville<br/>Vet<br/>Center</b> | <b>Mobile<br/>Vet<br/>Center</b> | <b>Montgomery<br/>Vet Center</b> |
|-----------------|----------------------------------|-------------------------------------|----------------------------------|----------------------------------|
| <b>Drivers</b>  | 17                               | 21                                  | 12                               | 8                                |
| <b>Inactive</b> | 6                                | 19                                  | 9                                | 19                               |

- 1.4. Table header rows are formatted to repeat on the top of the table is if goes from one page to another. This will allow the screen reader to re-state the header information to the user as the table continues from one page to another.
- 1.5. All hyperlinks should display the full Web address i.e. <http://www.VA.gov>.
- 1.6. All hyperlinks should be active i.e. validate to an active Web destination.

- 1.7. All active worksheets in the workbook should have clear and concise meaningful names that allow the user (and screen reader) to identify the source and contents of the table.

### 2.0 Document Images Guidelines

- 2.1. All slide graphics (images and non-text elements) should have Alternative Text (Alt Text) associated with them.
- 2.2. All instances of multiple images in a table should have the images grouped as one image
- 2.3. Instances of grouped multiple images should also have Alternative Text (Alt Text) associated with the grouped image.
- 2.4. All charts should be created within Excel. Charts created outside of Excel should be identified as images and treated as such.
- 2.5. All charts should have a Title, Legend and Axis labels associated with them. This will give users a number of references point to use in order to correctly interpret the information being presented.
- 2.6. Do all complex images (i.e. charts, graphs, flowcharts, etc.) have descriptive text immediately after the image?
- 2.7. Images used only for decoration (do not convey information) should have an empty Alt Text: `alt=""`.

### 3.0 Document Tables Guidelines

- 3.1. All tables should have a logical layout of the information based on rows and columns. In addition, the tables should be oriented so that they are read from left to right and top to bottom.
- 3.2. All tables should have clear, concise and readily identifiable column headers.
- 3.3. All tables should have clear, concise and readily identifiable row headers.
- 3.4. The data are of the table should be absent of merged cells. Merged cells are only acceptable in the header row of the table.
- 3.5. Row/column headers should start in the first left-hand column of the table.

**4.0 Additional Requirements Guidelines**

- A. The document file name should be concise, generally limited to 20-30 characters, but make the contents of the file clear in the context in which it is presented.
- B. Do not save an Excel Spreadsheet to PDF. The only way to effectively convert an Excel spreadsheet to PDF is to “Copy and Paste” the spreadsheet into MS Word using landscape page setup and then convert it to a PDF from the Word format. Then use the PAW plug-in to convert.
- C. A separate text-only version of the document should be provided when there is no other way to make the content accessible. Organizational charts, complex graphics, flowcharts, etc. are examples of documents that will require a text equivalent.
- D. The document must utilize the recommended fonts i.e. Times New Roman, Verdana, Arial, Tahoma, Calibri and Helvetica.
- E. The Document Properties (i.e. Subject, Author, Title, Company, 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., Section 508 VA).

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