



IAAP

International Association
of Accessibility Professionals



**IAAP ACCESSIBLE
DOCUMENT SPECIALIST
(ADS)**

Body of Knowledge

March 2021

United in Accessibility

www.accessibilityassociation.org

©2025

IAAP reserves the right to make changes to this handbook.



2021 Editor: Karen McCall

Contributors:

- Karina Boycheva, CPWA, ADS
- Dax Castro, ADS
- Bevi Chagnon, ADS
- Chad Chelius, ADS
- Samantha Evans, CAE, MBA, ADS
- Marinette Fargo, CPACC, ADS
- Duff Johnson, ADS
- Karen McCall, ADS
- Juliette McShane, WAS, ADS
- Rosemary Musachio, CPWA, ADS
- Paul Rayius, ADS
- Damian Sian, CPWA, ADS

To submit comments or suggest additional resources please email

certification@accessibilityassociation.org

Table of Contents

A. The Purpose of this Document	iv
B. IAAP Exam Preparation Resources.....	iv
C. About the ADS Designation.....	v
D. The ADS Exam Content at a Glance	vi
Additional Information	vii
1. Creating Electronic Documents	1
1.1. Write accessible inclusive content	1
1.2. Design, create, and assemble the final form documents that meet the needs of people with different types of disabilities	2
2. Remediating Electronic Documents.....	4
2.1. Implement alternative text or text equivalents in a remediation context.....	4
2.2. Review and correct structure	4
2.3. Remediate in final format	5
2.4. Remediate in authoring format.....	6
2.5. Use OCR (Optical Character Recognition/Text Character Recognition)	7
3. Auditing and Testing Document Accessibility	8
3.1. Identify and run automated testing processes to evaluate the conformance to standard.....	8
3.2. Identify and run manual testing processes to evaluate the conformance to standard	9
3.3. Identify the limitations of automated testing	10
3.4. Perform tests with assistive technologies	11
4. Document Accessibility Planning and Training	12
4.1. Create related reference guides and other instructional materials as needed	12
4.2. Assist in the development of online and/or face-to-face trainings on digital accessibility topics for staff who create content	13
4.3. Identify and provide training opportunities and resources.....	14
4.4. Develop a workflow to streamline related processes, including web requests, document submissions, remediation, and approvals	15
4.5. Document production plan for moving forward	15
4.6. Identify automated processes that result in inaccessible documents.....	16
4.7. Provide support related to accessibility	17
5. Policy Promotion, Advocacy, and Advising	18
5.1. Advise staff on organizational policy and best practices for creating accessible electronic documents.....	18
5.2. Consult others about current relevant policies, regulations, standards, and practical aspects of accessibility as related to documents, audio and video files, and other web-based postings	19
Education and Training Resources:	20

A. The Purpose of this Document

The IAAP Accessible Document Specialist (ADS) is a technical knowledge exam that allows individuals to certify their skillset in accessible document creation, remediation, training, workflow, policy, and advocacy.

This Body of Knowledge (BOK) document outlines the skills expected of candidates seeking to obtain the Accessible Document Specialist (ADS) designation.

ADS knowledge includes comprehending theory, principles, and fundamental information consistent with an intermediate level of skills and experience. For the purposes of the IAAP ADS designation, these are generally acquired in one to three years of hands-on work experience combined with formal and/or informal training in or with an accessible document team. Specifically, the three main purposes of this document are as follows:

- 1. Identify the categories of information covered in the exam**
- 2. Present general information about each category**
- 3. Identify additional resources to help test-takers prepare for the exam**

The Body of Knowledge is designed to be a starting point when studying for the ADS exam; it is not an exhaustive explanation of the concepts or questions on the exam. Use of this guide does not guarantee successful completion of the exam.

The 2020 ADS BOK covers concepts from WCAG 2.1, PDF/UA, and The Matterhorn Protocol 1 as well as resources on accessible document design from companies like Microsoft and Google on how to use their suites to optimize content for accessibility. If you discover any broken links, please contact certification@accessibilityassociation.org.

B. IAAP Exam Preparation Resources

Although IAAP lists a collection of ADS Exam resources for preparation that are both free and for purchase, candidates can study resources available from many qualified sources. You can find these resources on the IAAP “Prepare for the ADS Exam” webpage. Candidates should review each section of the ADS Content Outline to determine where they have the most background, where they have some knowledge, and identify sections that are less familiar where they will spend most of their time studying to prepare for the ADS Exam. Candidates may also utilize the ADS BOK for more detailed review and study preparation. All ADS Exam items are written from content contained in this ADS BOK.

C. About the ADS Designation

The IAAP Accessible Document Specialist credential is intended for accessibility professionals who are expected to have the ability to create accessible electronic documents. For the purposes of the IAAP ADS, electronic documents may be created in authoring tools that are word processing, spreadsheets, presentations, or desktop publishing programs. Accessible document authoring and remediation processes should follow published technical guidelines and best practices. The ADS credential represents an ability to express at a minimum an intermediate level of experience designing, evaluating, and remediating accessible documents. Awareness of how to properly guide and consult others for process, workflow, and policy development for accessible documents is also expected of the minimally qualified candidate. This exam is not intended for beginners or those without regular hands-on experience in authoring or remediating accessible documents across formats. Knowledge of automated processes alone will not provide the background necessary to successfully achieve the ADS credential. Hands-on experience and knowledge of authoring and remediating documents across platforms, as well as understanding the contextual implications for end users of assistive technology, are all required.

Accessible Document Specialists are expected to know and use the relevant document remediation technologies, not merely be aware of them. Relevant domains for the ADS designation include:

- 1. Creating electronic documents**
- 2. Remediating electronic documents**
- 3. Auditing and Testing Document Accessibility**
- 4. Document Accessibility Planning and Training**
- 5. Policy Promotion, Advocacy, and Advising**

Document accessibility refers to the inclusive practice of making documents usable by people of all abilities and disabilities with their technology of choice.

D. The ADS Exam Content at a Glance

1. Creating Electronic Documents (25%)

- 1.1. Write accessible inclusive content
- 1.2. Design, create, and assemble the final form documents that meet the needs of people with different types of disabilities

2. Remediating Electronic Documents (25%)

- 2.1. Implement alternative text or text equivalents in a remediation context
- 2.2. Review and correct structure
- 2.3. Remediate in final format
- 2.4. Remediate in authoring format
- 2.5. Use OCR (Optical Character Recognition/Text Character Recognition)

3. Auditing and Testing Document Accessibility (25%)

- 3.1. Identify the limitations of automated testing
- 3.2. Identify and run automated testing processes to evaluate the conformance to standard
- 3.3. Identify and run manual testing processes to evaluate the conformance to standard
- 3.4. Perform tests with assistive technology

4. Document Accessibility Planning and Training (15%)

- 4.1. Create related reference guides and other instructional materials as needed
- 4.2. Assist in the development of online and/or face-to-face trainings on digital accessibility topics for staff who create content
- 4.3. Identify and provide training opportunities and resources
- 4.4. Develop a workflow to streamline related processes, including web requests, document submissions, remediation, and approvals

- 4.5. Document production plan for moving forward
- 4.6. Identify automated processes that result in inaccessible documents
- 4.7. Provide support related to accessibility

5. Policy Promotion, Advocacy, and Advising (10%)

- 5.1. Advise staff on organizational policy and best practices for creating accessible electronic documents
- 5.2. Consult others about current relevant policies, regulations, standards, and practical aspects of accessibility as related to documents, audio and video files, and other web-based postings.

Additional Information

- [IAAP main web site](#)
- [General information about IAAP certification](#)
- [ADS Exam Content Outline](#)
- [ADS Frequently Asked Questions](#)
- [ADS Preparation Resources](#)
- [IAAP webpage: Process of creating a professional certification](#)



1. Creating Electronic Documents

1.1. Write accessible inclusive content

Overview:

Universally accessible electronic content begins with a complete understanding of accessibility best practices and guidelines in the authoring context. Whether authoring documents, presentations, or websites a complete understanding of how content structure, language, word-choice, graphics, and fonts affect accessibility are an essential foundation for the ADS skillset.

Study objectives:

- Understand plain language, Easy Read, and recommended reading levels
- Understand importance of Unicode font styles and sizes for accessibility
- Understand non-text color contrast ratio requirements to meet WCAG 2.1 AA
- Understand accessible phrasing for referencing content
- Understand meaningful headings (short, conciseness of words and sequential) and the benefit they offer to an accessible user experience
- Understand semantic elements in word processing, presentation, spreadsheet and desktop publishing software.

Resources:

- [WCAG 2.0 SC 3.15 Reading Level Understanding](#)
- [International Plain Language Federation definition of plain language and other resources](#)
- [Understanding WCAG Success Criterion 1.4.11: Non-text Contrast](#)
- [Non-text Content: Understanding WCAG SC 1.1.1](#)
- [Sensory Characteristics: Understanding WCAG SC 1.3.3](#)
- [Understanding WCAG Success Criterion 1.3.1: Info and Relationships](#)
- [Microsoft Word Creating Accessible Documents](#)
- [Make your documents or presentations more accessible \(Google Support\).](#)

1.2. Design, create, and assemble the final form documents that meet the needs of people with different types of disabilities

Overview:

While an ADS doesn't need to be an expert in design or graphic design, they do need to understand parts of a document, presentation, worksheet, or desktop published document. This includes an understanding and ability to implement the seven principles of Universal design as well as principles of Universal Learning Design (UDL) and Universal Design for Learning (UDL). An ADS must also understand the underlying structure of the various parts of digital content such as headings, lists, tables, columns and how to craft Alt Text for images. An ADS must understand the importance of good color contrast of text (and images if designed in-house). An ADS must understand various tools to convert the source document to an alternate format such as Braille, large print, PDF or EPUB.

Study objectives:

- Understand Unicode mapping
- Understand the contrast requirements for meaningful graphics and their adjacent colors
- Understand how to create headings via styles for navigation and structure in word processing and desktop published documents as well as the relationship between "headings" and slide titles in presentation authoring tools and structure in spreadsheet authoring tools.
- Understand alignment best practices for readability
- Understand how to place images in the proper sequence in documents
- Use word wrap and the resizing function to make the data more readable in spreadsheets
- How to export word processing, presentation spreadsheet and desktop published documents to preserve accessibility features
- Source documents/authoring format should be properly structured in order to transform the content to another format such as PDF, EPUB, Braille or large print.
- Understand use of color and pattern in shading behind text.
- Understand text properties (color, background patterns and color, Drop Caps, images of fonts and their affect on accessibility).

Resources:

- [Understanding WCAG Success Criterion 1.4.11: Non-text Contrast](#)
- [Understanding WCAG Success Criterion 1.4.1: Use of Color](#)
- [W3C Techniques for WCAG 2.0: G111: Using color and pattern](#)
- [Create and Verify PDF Accessibility \(Acrobat Pro\)](#)
- [Adobe Support: Accessible InDesign](#)
- [Matterhorn Protocol 04-001 – Color and Contrast – UA1:7.1-6](#)
- [Improve accessibility in documents with headings \(Microsoft Support video and transcript\)](#)
- [Rules for the accessibility checker \(Microsoft support\)](#)
- [Make your Word documents accessible to people with disabilities \(Microsoft support\)](#)
- [Make your PowerPoint presentations accessible to people with disabilities, Microsoft Support](#)
- [Make your Excel documents accessible to people with disabilities, Microsoft Support](#)
- [Make your document or presentation more accessible \(Google\)](#)

2. Remediating Electronic Documents

2.1. Implement alternative text or text equivalents in a remediation context

Overview:

When remediating documents, presentations, or websites a complete understanding of the need for, and uses of, alternative text is an essential foundation for the ADS skillset.

Study objectives:

- Understand WCAG Success Criteria
- Understand how to ensure that graphic elements in word processed, presentation, spreadsheet, PDF and EPUB (images, charts, diagrams or equations) have readable descriptions for assistive technologies
- Understand proper implementation of artifacts as they relate to decorative images in PDF documents
- Understand PDF/UA-1 compliance as it relates to the tagging of image-based content

Resources:

- [W3C Understanding Success Criterion 2.4.4 Link Purpose In Context](#)
- [Create and verify PDF accessibility \(Acrobat Pro\)](#)
- [W3C PDF13: Providing replacement text using the /Alt entry for links in PDF documents](#)
- [PDF Techniques for WCAG 2.0](#)

2.2. Review and correct structure

Overview:

An ADS has to be able to identify incorrect semantic structure as it's used in documents, and being able to fix those errors, is an essential foundation for the ADS skillset.

Study objectives:

- Understand that tables and spreadsheets should be used to convey data, not for formatting or design.
- Understand how and when to provide expanded forms of abbreviations
- Understand appropriate semantic tags for list items in PDF and EPUB content
- Understand appropriate semantic structure for tables in PDF and EPUB.

Resources:

- [W3C Understanding WCAG Success Criterion 3.1.4: Abbreviation](#)
- [W3C Understanding WCAG Success Criterion 1.3.1: Info and relationships](#)
- [Adobe Create and verify PDF accessibility \(Acrobat Pro\): Lists](#)
- [Using List tags for lists in PDF documents](#)
- [PDF Techniques for WCAG 2.0](#)
- [Tagged PDF Best Practice Guide: Syntax \(PDF Association\)](#)

2.3. Remediate in final format

Overview:

Often the ADS is presented with a “final” version of a document that may be in a different format than it was created in, for example, a PDF document that is a scanned image of a document or that was created in another authoring tool, or a word processed document that had been converted to a different word processing format/file extension. The ADS has to be able to remediate digital content in the format presented to them. For example, if they have a PDF document without access to the source document, the remediation must be completed in the final format, in this example, PDF.

Study objectives:

- Understand PDF and EPUB tagging strategies for CONTENT
- Alternative text, artifacts, AND DECORATIVE IMAGES
- Understand tags and role mapping
- Understand embedded media and media players

Resources:

- [Understanding WCAG Success Criterion 1.1.1: Non-text Content](#)
- [Understanding WCAG Success Criterion 1.1.1 Non text content](#)
- [PDF 4: Hiding decorative images with the Artifact tag in PDF documents](#)
- [PDF 14: Providing running headers and footers in PDF documents](#)
- [PDF Techniques for WCAG 2.0](#)
- [EPUB Accessibility 1.0 \(ipdf\)](#)

2.4. Remediate in authoring format

Overview:

An ADS must be proficient in authoring and remediating techniques common to word processor, presentation, spreadsheet and desktop publishing tools. When presented with a document in its authoring format, the ADS must be able to make the necessary remediations to that document.

Study Objectives:

- Understand the required elements to provide essential structures in a document such as tables, lists, headings and paragraphs.
- Understand the importance and how to implement meaningful/sequential headings in a document
- Understand how and when to add captions to images, charts and diagrams in a document
- Understand the importance of structural table elements for accessibility
- Understand how to use built-in table functionality in word processing, presentation, spreadsheet and desktop published documents
- Understand why document properties are an important part of an accessible document and how to add them.

Resources:

- [W3C PDF Techniques for WCAG 2.0, 18: Specifying the document title using the Title entry in the document information dictionary of a PDF document \(Document Properties dialog\)](#)
- [View or change the properties for an Office file, Microsoft Support](#)
- [Word and PowerPoint Accessibility Evaluation Checklist](#)

- [Rules for the Accessibility Checker, Microsoft](#)
- [Make your Word documents accessible to people with disabilities, Microsoft Support](#)
- [Make your PowerPoint presentations accessible to people with disabilities, Microsoft Support](#)
- [Make your Excel documents accessible to people with disabilities, Microsoft Support](#)
- [Make your Outlook e-mail accessible to people with disabilities, Microsoft Support](#)
- [Make your OneNote documents accessible to people with disabilities, Microsoft Support](#)
- [Make your documents or presentations more accessible, Google Support](#)

2.5. Use OCR (Optical Character Recognition/ Text Character Recognition)

Overview:

Knowing how to identify a document or part of a document that is text but that is only an image of text (scanned into the software) and understand how to use optical character recognition (OCR) to convert “non-selectable” text files into machine-readable or recognized text. Having the ability to render your document readable by adaptive software such as screen readers or text-to-speech applications is an essential foundation for the ADS skillset.

Study objectives:

- Understand how to determine if a document or any of its parts has scanned images of text/content
- Understand the proper order of process when using OCR
- Understand the manual verification process for documents after OCR

Resources:

- [Performing OCR on a scanned PDF document to provide actual text](#)
- [Scanned document accessibility, Adobe](#)
- [What is OCR and OCR Technology, ABBYY FineReader](#)
- [WC3, PDF Techniques for PDF, PDF7: Performing OCR on a scanned PDF document to provide actual text](#)

3. Auditing and Testing Document Accessibility

3.1. Identify and run automated testing processes to evaluate the conformance to standard

Overview:

Automated testing processes are an integral part of evaluating conformance to standards. They should be the first step when evaluating the conformance of a document. Automated testing processes are a fast and efficient way to check for a great many compliance issues. However, they do have limitations. An Accessible Document Specialist understands the appropriate use cases and limitations of automated testing for evaluating document conformance to standards.

Study objectives:

- Understand the order and process for the most effective auditing/testing process.
- Start with an automated checker
- Verify the logical reading order in word processed, presentation, spreadsheet, PDF and EPUB documents
- Verify Alt text on images and links (when applicable)
- Understand the importance of displaying document title attributes
- Understand the importance of a language attribute for text (either a base language for a document or language attributes for changes in language within the document)
- Understand the use of a “plain vanilla language” attribute on the end-user experience
- Understand the importance of having headings in documents and having them in sequential order

Resources:

- [Understanding WCAG Success Criterion 2.4.2: Page Titled](#)
- [Matterhorn Protocol 14-003 - Headings - UA1:7.4-1](#)
- [Specifying the document title using the Title entry in the document information dictionary of a PDF document \(document properties\)](#)
- [W3C PDF Techniques for PDF: Organizing a page using headings](#)
- [View or change the properties for an Office file, Microsoft Support](#)

3.2. Identify and run manual testing processes to evaluate the conformance to standard

Overview:

For a document to be accessible, it must be tested manually also in addition to using automated checking tools. Two of the tools available to test document manually are screen readers and text-to-speech tools. Screen magnification can also be used to evaluate the pixelation of fonts. The ADS should use the AT to read a document to see if headings, lists, tables, and paragraphs are conveyed correctly. AT such as screen readers and text-to-speech tools can also assist in determining whether the OCR/text recognition process has correctly added spaces between words or incorrectly added spaces between characters in words. Although automated testing can check if images have alt text and form fields have labels, human judgment can determine if the text identifies the purpose of each element properly. Human eyes can detect if a document has legible fonts regarding size and style. For PDF and EPUB documents, manual testing can involve inspecting the tag tree to see if all elements are tagged correctly.

Study objectives:

- Understand important elements to test manually using assistive technology
- Understand link annotations (PDF)
- Understand object/image properties (Alt text, language, expansion text, actual text...some of these apply to PDF, some don't)
- Understand keyboard manual testing processes
- Understand natural language settings for documents and parts of documents

Resources:

- [Tagged PDF Best Practice Guide: Syntax, PDF Association](#)
- [PDF/UA Reference Suite 1.1, PDF Association](#)
- [PDF Techniques for WCAG 2.0](#)
- [Rules for the Accessibility Checkers, Microsoft Support](#)

3.3. Identify the limitations of automated testing

Overview:

Automated testing plays an important role in the auditing and testing of accessible documents. However, there are limitations associated with automated testing in evaluating the overall accessibility of a document or the level of compliance to either the WCAG or PDF U/A standards. For example, an automated test can verify whether an attribute is present on a particular element that requires it to be present, but the automated test cannot verify the accuracy or meaning of that attribute in context to the document.

Study objectives:

- Understand standard and non-standard tag semantics for PDF or EPUB
- Understand what automated accessibility testing can and cannot identify in the auditing and testing process.
- How likely automated testing is to identify accessibility issues
- Understand the capabilities and flaws of automated testing tools and the differences between what they do and don't check for (for example, the Adobe Accessibility Check checks for different things than PAC 3) or CommonLook PDF Validator. The Microsoft "Rules for the Accessibility Checker are constantly changing, adding and deprecating items. An ADS must understand how to compensate for these issues.

Resources:

- [Rules for the accessibility checker, Microsoft Support](#)
- [Using the Adobe Acrobat Pro DC Accessibility Checker, Adobe](#)
- [Creating accessible PDF, Adobe InDesign, Adobe](#)
- [EPUB accessibility 1.0.ipdf](#)

3.4. Perform tests with assistive technologies

Overview:

Because automated tests do not identify all accessibility issues within documents, it's necessary to perform thorough manual tests using assistive technologies, which usually refers to screen readers, especially JAWS, NVDA, and VoiceOver or text-to-speech tools such as Read & Write Gold. The combined approach of automated and manual testing ensures that the greatest percentage of accessibility barriers can be identified and remediated.

Study objectives:

- Understand the requirements for alternative text for visual elements
- Understand how assistive technology (screen readers and text-to-speech tools) work

Resources

- [Evaluating Web Accessibility Overview, W3C](#)
- [Involving Users in Web Projects for Better, Easier Accessibility, W3C, Github](#)
- [Accessibility, Usability and Inclusion, W3C](#)

4. Document Accessibility Planning and Training

4.1. Create related reference guides and other instructional materials as needed

Overview:

An ADS must be aware of strategies, planning, process, procurement and policy creation and implementation to help guide an organization and its staff toward more accessible documents. This may mean providing high level overviews of what is needed, what is currently being done and where the needs are in the organization for training. The ADS should also be aware of the various out-sourcing options for remediation to assist the organization in making decisions about procurement as well as assisting with general procurement language.

Study Objectives:

- Understand the standards for documents posted to the web or used internally by an organization
- Understand how to engage with vendors when assistive technologies are not performing as expected during usability and accessibility testing and in use
- Understand the principles of web accessibility
- Perceivable
- Operable
- Understandable
- Robust

Resources:

- [W3C Web Content Accessibility Guidelines \(WCAG\) Overview](#)
- [PDF Techniques for WCAG 2.0, W3C](#)
- [Understanding the Four Principles of WCAG \(POUR\), W3c](#)
- [Tagged PDF Best Practice Guide: Syntax, PDF Association, based on PDF/UA 1](#)
- [EU EN 301 549 and WCAG 2.x, W3C](#)
- [The Marakesh Treaty, World Intellectual Property Organization \(WIPO\)](#)

4.2. Assist in the development of online and/or face-to-face trainings on digital accessibility topics for staff who create content

Overview:

Part of the job description for an ADS can include the design, creation and implementation training for staff on how to create and remediate their digital content/ word processed, presentation, and spreadsheet content to be accessible using best practices, guidelines and standards and to Develop training material (digital print or multimedia) on how to create and remediate documents for accessibility.

Study objectives:

- Understand color checkpoint
- Understand the importance of providing long descriptions for complex visual content
- Understand the importance of the visual document structure representing the desired semantic document structure
- Understand how to create modular training material in print or through multimedia.
- Understand captioning and video description of multimedia training material (know how to get it done)
- Ability to write in clear, concise manner providing step-by-step instructions

Resources:

- [WCAG 2.1 Understanding Use of Color](#)
- [WCAG 2.1 Understanding Non-text Content](#)
- [WCAG 2.1 Understanding Information and Relationships](#)
- [How to make your presentations accessible to all, W3C](#)
- [Developing Web Accessibility Presentations and Training: Overview, W3C](#)
- [Digital Foundations, free online course, WAI, W3C](#)

4.3. Identify and provide training opportunities and resources

Overview:

The ADS should be aware of potential training and professional development opportunities for themselves and staff. An ADS should be able to create and implement an “orderly” module based training program that allows staff to consume knowledge in short pieces and to go back and refer to elements of accessible document design and remediation they may need to brush up on.

Study Objectives:

- Understand Universal Design for Learning (UDL) and Universal Learning Design (ULD) as well as the seven principles of universal design
- Understand the use of plain language (possibly Easy Read) to create training material
- Understand the screen readers and text-to-Speech tools as well as screen magnification and voice recognition tools available for both Mac and Windows and their limitations

Resources:

- [Training Resources Adobe Accessibility, Adobe](#)
- [Find useful resources for improving accessibility, Adobe](#)
- [Digital Accessibility Foundations, Overview, WAI, WCC](#)
- [Developing Web Accessibility and Training, WAI, W3C](#)
- [Teach and Advocate: Overview, WAI, W3C](#)
- [The Business Case for Digital Accessibility, WAI, W3C](#)
- [The Business Case for Accessibility, Annotated Bibliography, WAI, Github, W3C](#)

4.4. Develop a workflow to streamline related processes, including web requests, document submissions, remediation, and approvals

Overview:

Efficiently and reliably producing accessible documents is the goal of an Accessible Document Specialist. The ADS assists an organization achieve this goal by ensuring accessibility is built into the process from the very beginning of the document lifecycle. This requires attention to all document creation pathways and clearly outlined organizational workflows.

Study objectives:

- Understand the value of accessible templates for automated document generation
- Understand the Principles of Accessibility and best practices to introduce them into workflows across the organization
- Understand how to develop a document accessibility plan

Resources:

- [The Business Case for Digital Accessibility, WAI, W3C](#)
- [The Business Case for Accessibility, Annotated Bibliography, WAI, Github, W3C](#)

4.5. Document production plan for moving forward

Overview:

An important task of an Accessible Document Specialist, within an organization, could include the creation (or re-working) of an accessible document production plan to ensure documents created within, or for, the organization, are accessible.

Study Objectives:

- Understand Quality Assurance as part of the document accessibility process
- Understand how to establish the components of an accessible document workflow
- Understand how to prioritize various aspects of an accessible document plan
- Understand how to clearly and concisely, either in writing or through presentation, outline, contribute, find resources and otherwise assist an organization in developing a strategic plan for accessible digital content, procurement of services around accessible digital content, and prioritize conformance to any local, regional or federal laws

Resources:

- [W3C – Planning and Managing Web Accessibility](#)
- [Making Your Organisation's Information Accessible for All: Implementing the Guidelines for Accessible Information, European Agency for Special Needs and Inclusive Education \(opens an accessible PDF\)](#)
- [WebAIM: Create an Implementation Plan \(while written from a generic web perspective, this model can be adapted for various types of documents\)](#)
- [Define Accessibility Criteria in Contracts, Section 508\)](#)
- [A Comprehensive Guide for Developing Accessibility Policies and Accessibility Plans, Accessibility for Ontarians with Disabilities Act, Access ON, Province of Ontario Canada \(this is a tagged PDF\)](#)
- [How to create an accessibility plan and policy, Government of Ontario, Canada](#)

4.6. Identify automated processes that result in inaccessible documents

Overview:

Not all PDFs are authored via desktop publishing applications. In fact, many millions of documents are generated each day for things like statements, letters, forms, and transaction confirmations. In addition, print-on-demand systems that create dynamically generated marketing, pension information, payroll stubs, credit card statements or tickets for transportation or events related documents have grown

in popularity as organizations seek to streamline workflows into data driven cross platform solutions. The Accessibility Document Specialist should be familiar with the unique accessibility challenges that present themselves in working in automated processes that combine data with templates to display a document on-screen (or that can be printed).

Study Objectives:

- Understand how to assess systems and templates for accessibility
- Identify common, automatically generated documents in different business sectors.
- Identify specific accessibility barriers and solutions within common types of automatically generated documents.

Resources:

- [Adobe: Text Variables](#)
- [Accessing Higher Ground Conference: Automation in PDF Accessibility \(opens a PDF\)](#)

4.7. Provide support related to accessibility

Overview:

An Accessible Document Specialist may frequently serve as a resource point for other members of an organization who may not have the same level of experience with creating accessible documents. Offering guidance and support can allow others to become more independent and skilled so that they are better able to produce accessible documents on their own, thereby decreasing bottleneck situations.

Study Objectives:

- Understand how to vet non-organizational resources/training material so that it reflects a consistent means of support for staff
- Network with other organizations and entities in the field of accessible document design/digital accessibility to keep up to date with current best practices, changes in tools/techniques and as a source of support
- Update training material in an orderly archived manner so that content is easy to find

5. Policy Promotion, Advocacy, and Advising

5.1. Advise staff on organizational policy and best practices for creating accessible electronic documents

Overview:

The ADS should be able to create a library of training material and resources that don't contradict each other to provide support for staff.

This "library" should include at its forefront, all policies, procedures, procurement language, examples of organizational/departmental strategies/plans related to implementing the organization wide accessible digital content policies.

The ADS may be called upon to conduct annual refreshers on policy, strategy and practices of the organization to showcase updates or confirm that there has been no change/make sure everyone stays on the same page

Study Objectives:

- Understand accessibility standards, guidelines and best practices as they relate to the organizations strategic plans and policies
- Understand how to illustrate and demonstrate the importance of document accessibility for business
- Understand how to incorporate new accessibility tools, techniques and third party training material into existing content

Resources:

- [W3C WAI: Module 5: Getting Started with Accessibility](#)
- [W3C WAI: Developing Organizational Policies on Web Accessibility](#)
- [W3C WAI: Planning and Managing - Initiate](#)

5.2. Consult others about current relevant policies, regulations, standards, and practical aspects of accessibility as related to documents, audio and video files, and other web-based postings

Overview:

An ADS must keep up to date with new tools, techniques and discussions on accessible digital content and design. This involves professional development such as conferences, workshops and subscribing to discussion lists. Additionally, an ADS needs to actively network with other people in similar positions to share and compare policies, strategies, ideas for training material and trends in legislative adoption.

Study Objectives:

- Understand where to find tips, strategies, and best practices for media accessibility
- Understand the standards in PDF/UA (ISO standard 14289-1)
- Understand ISO 32000-1:2008 Document Management – Portable document format – Part 1: PDF 1.7, and
- The ISO 14289-1 Tagged PDF Best Practice Guide: Syntax
- Understand how often and why to review policies and procedures for document accessibility

Resources:

- [Gov.UK Sample Accessible Documents Policy](#)
- [PDF/UA in a Nutshell,, PDF Association](#)
- [Tagged PDF Best Practices Guide: Syntax, PDF Association](#)
- [Create Accessible Office Documents, Microsoft](#)
- [Rules for the Accessibility Checker, Microsoft](#)
- [Make your documents or presentations more accessible, Google](#)
- [ISO 32000-1:2008 Document management — Portable document format — Part 1: PDF 1.7](#)

Education and Training Resources:

Microsoft

- [Create accessible Office Documents](#)
- [Microsoft Accessibility Fundamentals:
Creating accessible content with Microsoft Office 365](#)
- [Rules for the Accessibility Checker](#)

Google

- [Make your document or presentation accessible](#)

Adobe

- [Adobe Accessibility](#)
- [Adobe Creating Accessible PDFs](#)
 - [Adobe Accessibility Blogs](#)
- [Adobe Acrobat Pro DC PDF Accessibility Repair Workflow](#)
- [Adobe Acrobat Pro DC Accessible Forms and Interactive Documents](#)
- [Using the Accessibility Checker in Acrobat Pro DC](#)

Apple

- [Create accessible documents, spreadsheet, or presentations with Pages, Numbers, or Keynote](#)

PDF/UA

- [PDF/UA ISO 14289](#)
- [PDF/UA Best Practice Guide: Syntax](#)
- [PDF/UA Reference Suite](#)
- [Matterhorn Protocol 1.02](#)

State of Minnesota Digital Accessibility Resources

- [Minnesota State \(United States\) Accessible Document Reference Guide: Office 2013 \(opens PDF\)](#)
- Minnesota State (United States) Accessibility Quick Cards (opens PDFs)
 - [Microsoft Word Accessibility Quick Card](#)
 - [Microsoft PowerPoint Accessibility Quick Card](#)
 - [Microsoft Excel Accessibility Quick Card](#)
 - [PDF Accessibility Quick Card](#)









**IAAP ACCESSIBLE
DOCUMENT SPECIALIST
(ADS)**



United in Accessibility

www.accessibilityassociation.org