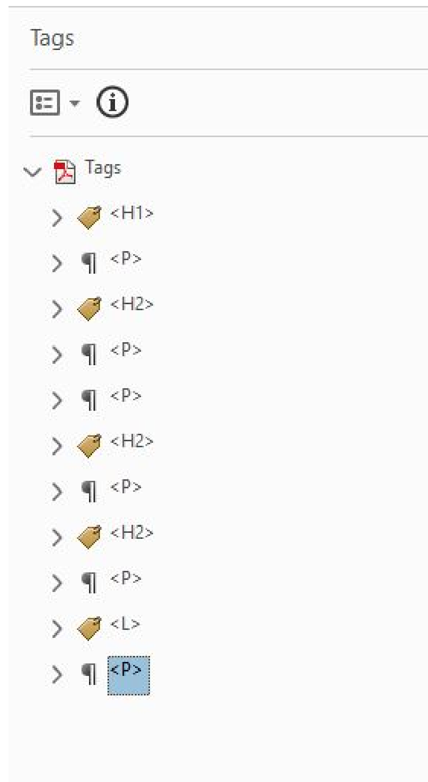
Instructions for Making PDFs ADA Compliant

Set Up

1. Open the PDF
2. Go to the tags panel. If this is not already on the left side of your screen, go to View>Show/Hide>Navigation Panes>Tags
3. If there are no tags, go to the Tools panel > select Accessibility under Protect & Signatures > select Autotag Document

Editing the Tags Panel

We want the tags to be neat and organized. Move through the document chronologically to verify all elements are nested and labeled correctly. *Please note that this document has been made ADA compliant so it can be referenced as an example for correct procedure.*



- All content elements must be nested properly. The Appendix of this document provides examples of correct labels and order. The title will always be Heading 1 (H1) and will be the first heading in the tags panel.
- **To change a tag label**: (E.G. from H2 to H3, or H2 to P) Right click on the element you want to change > select Properties > select the Type from the dropdown selection menu.
- **Dealing with <Sect> or <Part> tags**: if sections are nested in <Sect> tags or other similar <Part> tags, you can select all the tags and bring them into the same line up as the others, taking them out of the sections and putting them in the exterior lineup. If you empty a tag, or make it an artifact, delete the empty tag to keep a clean interface.

Tables

- Select the tag for the Table > right click > Table Editor
- *Header Cells*: select the cell you want to be Header Cell > right click > Table Cell Properties > Select Header Cell under Type > Select appropriate Scope from Select Drop Down menu > Give the cell an ID under Attributes > OK
- *Data Cells*: select the cell you want to be a Data Cell > right click > Table Cell Properties > Select Data Cell under Type > Select the add button on the Associated Header Cell IDs > select the appropriate associated headers from the drop down menu > OK
- *Tip*: You can select more than one cell at once and assign the same IDs to them all, but this will only work for cells that are identical at present, so choose your path wisely. You are going to have to go to each cell no matter what, so sometimes this is not helpful, but I find it nice when there are multiple header cells and I can just assign them all at once. Example:

Things I like				Things I don't like			
Places		Activities		Place		Activities	
Domestic	Foreign	Indoor	Outdoor	Domestic	Foreign	Indoor	Outdoor
Philly	Rome	Reading	Hiking	New Jersey	North Korea	Sitting	Inversion
Etc	Etc	Etc	Etc	Etc	Etc	Etc	Etc
Etc	Etc	Etc	Etc	Etc	Etc	Etc	Etc
Etc	Etc	Etc	Etc	Etc	Etc	Etc	Etc
Etc	Etc	Etc	Etc	Etc	Etc	Etc	Etc

First, create two header cells for "Things I Like" and "Things I Don't Like." The IDs for these cells could, for example, be assigned as "Like" and "Dislike" – whatever makes the most sense to you. There is no need to type out the entire phrase, it is merely the way the computer identifies the cell, it is not what the screen reader will read to the user.

Next, assign all of the cells under each category to the appropriate header.

Things I Like				**Things I Don't Like**			
Places		**Activities**		**Places**		**Activities**	
Domestic	**Foreign**	**Indoor**	**Outdoor**	**Domestic**	**Foreign**	**Indoor**	**Outdoor**
Philly	Rome	Reading	Hiking	New Jersey	North Korea	Sitting	Inversion
Etc	Etc	Etc	Etc	Etc	Etc	Etc	Etc
Etc	Etc	Etc	Etc	Etc	Etc	Etc	Etc
Etc	Etc	Etc	Etc	Etc	Etc	Etc	Etc
Etc	Etc	Etc	Etc	Etc	Etc	Etc	Etc

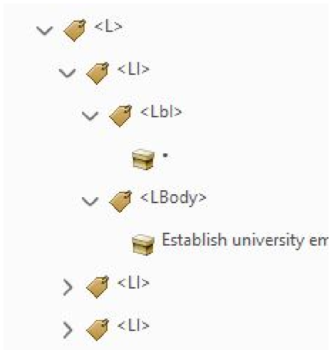
Then, make headers for the "Places" and "Activities" cells for both categories. For example, the IDs you assign could be "Like Places," "Like Activities," "Dislike Places," and "Dislike Activities." Follow the same process by selecting the cells by category and assigning them to the correct header.

Things I Like				**Things I Don't Like**			
Places		**Activities**		**Places**		**Activities**	
Domestic	**Foreign**	**Indoor**	**Outdoor**	**Domestic**	**Foreign**	**Indoor**	**Outdoor**
Philly	Rome	Reading	Hiking	New Jersey	North Korea	Sitting	Inversion
Etc	Etc	Etc	Etc	Etc	Etc	Etc	Etc
Etc	Etc	Etc	Etc	Etc	Etc	Etc	Etc
Etc	Etc	Etc	Etc	Etc	Etc	Etc	Etc
Etc	Etc	Etc	Etc	Etc	Etc	Etc	Etc

The first table is coded correctly and can be referenced in the tags panel (the rest have been labeled as figures and use alternate text).

Lists

Lists should have the following structure:



Images
Decide if the image is relevant to the user

- If relevant, give it alt text, by selecting the image (not just the Figure tag, the image will be inside of the figure tag) in the tags panel > right click > select Properties > fill in Alt Text field
  - Even if the image is a chart or complex image put the long description in the alt text input
  - Examples of relevant images: Any photos, charts graphics pertaining to document content
- If irrelevant, make it an artifact, by selecting the image in the tags panel > right click > select Change Tag to Artifact > Select Layout or Page > Select OK
  - Examples of irrelevant images: BYU seal, borders and decoration
- Alternatively, if you want to go through a page an just assign all alt text, or designate things as artifacts in one go, you can go to Tools > select the Accessibility tool > select Set Alternate Text (to mark something as an artifact select the Decorative Figure checkbox, be sure to Exit and Save rather than x out of the window.

Artifacts
Artifacts are document elements that are part of the page layout but that do not contribute to the content of the document. For example: page numbers, decorative elements like the BYU seal, or repeating page headers.

- Mark anything that does not contribute to the document as an artifact by selecting the image in the tags panel > right click > select Change Tag to Artifact > Select Layout or Page > Select OK.
- *Consider this*: If someone were reading this document to me out loud, what would I want them to read or describe? What would I want them to skip over?

Common Issues

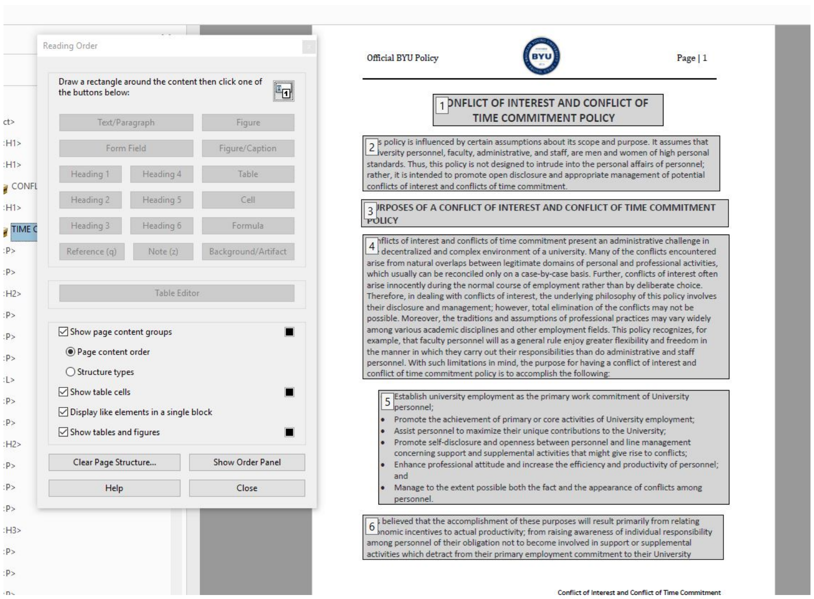
Path Elements

- Text mixed in with Path elements. This will typically look like “BrighamPathYoungPathUniversityPathPathPathPath.”
  - Click on the tag > go to the document and highlight the text you want to separate > right click on the selected tag again > select Create Tag from Selection
- To get rid of Path elements > right click on the Path tag > select Change Tag to Artifact > Select Layout or Page > Select OK
- Sometimes you may open a document and see that there are a ridiculous amount of miscellaneous and unnecessary path elements. This is usually caused by the way the document

was originally created. If this is the case, you can deleted all the existing tags, then Autotag the document. This usually eliminates the majority of unnecessary path elements.

Reading Order

- If a heading is separated into multiple headings (usually divided because it spreads onto two lines), go to Accessibility > Reading Order. Select the page element, then select the type (e.g. Heading 1, Paragraph, etc.)
- Sometimes the document does not recognize an image or chart. To have it included in the tag structure, use Reading Order to select the image and create a tag.



Highlighting Content

- Occasionally (especially after using Reading Order), clicking on the tags will no longer highlight the associated content on the document. To fix this, select the options icon on the tags panel then select "Highlight Content." It will resolve the issue.

Bookmarks

- Go to the Bookmark panel > Options > New Bookmarks from Structure > select all Headings > rearrange all of the bookmarks in their correct order and hierarchy outside of the untitled bookmark > delete the untitled bookmark
- If Bookmarks already exist, check to see if their structure matches the Heading structure of the updated tags, if it does, don't change anything, if it doesn't then do the above
- Go to the Page Thumbnails (the icon with the two papers) > select the first page > hold down shift and select the last page > right click on the last page > select Page Properties > select Use Document Structure > select OK

Document Properties

- **Change Document Title**. Go to File > select Properties > go to the Description Tab and fill in the Title input with the Title of the document not just the file name

- Go to the Initial View Tab and select Document Title from the Show drop down menu (found in the Window Options section)
- **Assign Language**. Go to the Advanced Tab and make sure the Language selection (in the Reading Options section) is set to English > select OK

Checking for Completion

- Run through and check if there are any color contrast issues, if this, or other edits, such as spelling mistakes, need to be made consult the owner of the document, and select > Edit PDF on the far right panel and use the tools to make the appropriate changes
- Read the content with NVDA, however NVDA will not read tables, so if you need to check those, you may need to go to the Accessibility Center and check them with JAWS
- If something sounds out of place go to the Order Tab and make sure everything on the pertinent page is in order, if not drag the relevant sections into the right order
- To run a final check, select the Tools panel > select Accessibility > select Full Check > select Start Checking.
- Logical Reading Order and color contrast will always say that they need manual check, so don't let them worry you.
- Tagged content will at times say failed, if when read by a screen reader these sections don't seem to have any problems, don't worry about them
- Don't worry about the Table Summary

References

- https://www.washington.edu/accessibility/documents/pdf-forms/
- https://accessinghigherground.org/wp/wp-content/uploads/2015/09/The-BasicsOfTaggedPDF20161.pdf
- https://www.nvaccess.org/files/nvda/documentation/userGuide.html
- https://cdl.ucf.edu/files/2014/01/Tag_Existing_PDF_Tutorial.pdf

Official BYU Policy Page | 1

Artifact

CONFLICT OF INTEREST AND CONFLICT OF TIME COMMITMENT POLICY

H1

This policy is influenced by certain assumptions about its scope and purpose. It assumes that University personnel, faculty, administrative, and staff, are men and women of high personal standards. Thus, this policy is not designed to intrude into the personal affairs of personnel; rather, it is intended to promote open disclosure and appropriate management of potential conflicts of interest and conflicts of time commitment.

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PURPOSES OF A CONFLICT OF INTEREST AND CONFLICT OF TIME COMMITMENT POLICY

H2

Conflicts of interest and conflicts of time commitment present an administrative challenge in the decentralized and complex environment of a university. Many of the conflicts encountered arise from natural overlaps between legitimate domains of personal and professional activities, which usually can be reconciled only on a case-by-case basis. Further, conflicts of interest often arise innocently during the normal course of employment rather than by deliberate choice. Therefore, in dealing with conflicts of interest, the underlying philosophy of this policy involves their disclosure and management; however, total elimination of the conflicts may not be possible. Moreover, the traditions and assumptions of professional practices may vary widely among various academic disciplines and other employment fields. This policy recognizes, for example, that faculty personnel will as a general rule enjoy greater flexibility and freedom in the manner in which they carry out their responsibilities than do administrative and staff personnel. With such limitations in mind, the purpose for having a conflict of interest and conflict of time commitment policy is to accomplish the following:

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- Establish university employment as the primary work commitment of University personnel;
- Promote the achievement of primary or core activities of University employment;
- Assist personnel to maximize their unique contributions to the University;
- Promote self-disclosure and openness between personnel and line management concerning support and supplemental activities that might give rise to conflicts;
- Enhance professional attitude and increase the efficiency and productivity of personnel; and
- Manage to the extent possible both the fact and the appearance of conflicts among personnel.

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It is believed that the accomplishment of these purposes will result primarily from relating economic incentives to actual productivity; from raising awareness of individual responsibility among personnel of their obligation not to become involved in support or supplemental activities which detract from their primary employment commitment to their University

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Conflict of Interest and Conflict of Time Commitment

Artifact

employment; and from implementing standardized disclosure and conflict management mechanisms for promoting individual accountability.

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CONFLICT OF INTEREST

H2

A conflict of interest situation may exist when personnel are in a position to influence the direction or decision of the University or one of its programs, or to inappropriately use University resources, in such a way that may lead to the personal financial gain of the individual or of his or her immediate family or other designee.

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Application

H3

This policy is applicable to all full-time personnel. However, if special circumstances warrant, line management may need to apply some portion of this policy to part-time personnel on an individual basis.

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Line Management Responsibility

H3

Although rigid distinctions cannot be drawn among personnel levels, the more comprehensive a responsibility personnel are assigned in the University's administration structure, the more likely such personnel may encounter potential conflicts of interest. Such conflicts may arise from subjective aspects of administrative decisions, from increased visibility, from increased exposure of expanded decisional impact, and from risk that the acts of such administrators may be deemed official acts of the University. The existing organization provides line management for all personnel, and such line management should include a concern for conflicts of interest at any level of responsibility.

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Implementation

H3

Line management shall obtain on an annual basis a Faculty Conflict of Interest and Conflict of Time Commitment Disclosure Statement signed by each full-time faculty member, and an Administrative/Staff Conflict of Interest and Conflict of Time Commitment Disclosure Statement signed by each full-time employee. These documents are designed to reflect the nuances in application of this policy to the varying employment conditions of both faculty and of administrative/staff personnel. The disclosure statement is available in the office of the Associate Academic Vice President-Faculty Development for faculty and in the office of the Assistant Administrative Vice President-Human Resource Services for administrative and staff employees. Line management shall maintain a copy of the current disclosure statement.

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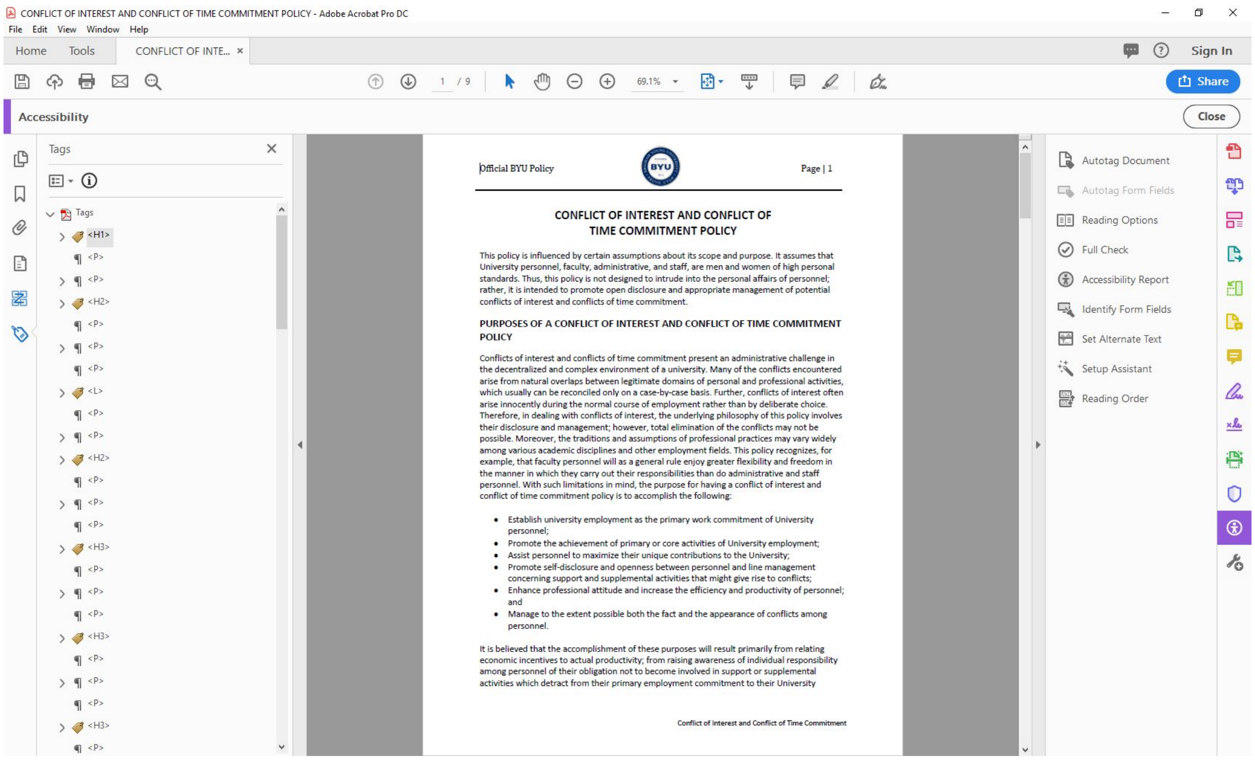
The individual and line management should meet annually to discuss and evaluate the potential of any activity or involvement for creating a conflict of interest. This can occur in conjunction with a discussion regarding each individual's assignments, projects, and productivity. (See Joint Planning Process/Annual Performance Plan Policy and Faculty Rank and Status Professorial and Professional Policies.) If no conflict is noted, the disclosure is kept on file by line management. If



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Conflict of Interest and Conflict of Time Commitment