

# CMS Section 508 Quick Reference Guide – MS Excel 2013

## Worksheet Layout and Formatting

Element	Description	Quick How To
<b>Blank Cells</b>	Avoid blank cells in tables.	--
<b>Bookmarks</b>	Use Bookmarks to link to a specific area on your worksheet or to a different worksheet within the same file.	<ol style="list-style-type: none"> <li>1. Click "Insert" then "Hyperlink."</li> <li>2. Select "Link to: Place in This Document."</li> <li>3. To bookmark to data on the same worksheet, type cell location in the "Type the cell reference" field.</li> <li>4. To bookmark to a different worksheet(s) in the same file, either "Type the cell reference" or "Select a place in the same file."</li> </ol>
<b>Color Contrast</b>	Text must be easy to read in comparison to the background. Use very dark-colored lettering on a white or light-colored background.	Test color contrast by printing in grayscale or by using one of the color contrast analyzer tools found online.
<b>Color Emphasis</b>	Do not use color for emphasis without providing an alternative method of emphasizing text (e.g., bold, italics, or both); do not use color alone.	Example: Use the <a href="#">provider directory</a> to find a list of doctors in your area.
<b>Comments and Tracked Changes</b>	Remove all comments from the text. Accept or reject tracked changes and turn off Track Changes.	<ol style="list-style-type: none"> <li>1. Click "Review" then "Delete Comment."</li> <li>2. Click "Review," "Track Changes," then "Accept/Reject Changes."</li> </ol>
<b>Descriptions and Labels</b>	Right above the table, type a table name (description or title) and a table number (if applicable). Keep the table name and number separate from the actual data table.	Keep a blank row between the table name and the data table. This will enable screen readers to state these content elements separately.
<b>Flashing, Flickering, or Animated text</b>	Do not use flashing, flickering, or animated text.	--
<b>Fonts</b>	Use recommended fonts: Times New Roman, Verdana, Arial, Tahoma, Helvetica, or Calibri.	--
<b>Logical Reading Order</b>	Use a logical reading order for tables, from left to right, top to bottom.	--
<b>Merged Cells</b>	Avoid merged cells in the data section of the table.	Exceptions: Merged cells are acceptable only in the table's title or header row, or if the final format will be PDF or HTML.
<b>Print Preview</b>	View the worksheet in Print Preview and check to see if it fits entirely inside the left and right margins and flows correctly from page to page. Look out for image placement, table format, and stray ("orphaned" or "widowed") lines and characters.	Click "File" then "Print." A preview of the worksheet automatically appears on the right-hand side of the screen.
<b>Row and Column Headers</b>	Provide a descriptive heading for each row and column in a data table, starting with the first left-hand column.	Row and column headers should be clear, concise, and easy to identify.
<b>Tab Name</b>	Give each worksheet a clear and concise name in the tabs at the bottom of the workbook, so readers can easily identify the source and contents of the table.	Right click on the worksheet tab and select "Rename." Type a clear and concise name that describes the table, and press the Enter key.
<b>Table Header Row</b>	If your table spans multiple pages, repeat the header row at the top of the table as it goes from one page to another. This will enable screen readers to re-state the header row information as the table continues from one page to another.	Place cursor right below the header row. Click "View," "Freeze Panes," then "Freeze Panes" again.
<b>Tables per Worksheet</b>	Each worksheet should contain only one table.	--

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Element	Description	Quick How To
<b>URLs and E-mail Links</b>	All Web citations (URLs) and e-mail addresses must be correct, complete, and linked to an active Web or e-mail destination.	Example: <a href="http://www.cms.gov">http://www.cms.gov</a> not <a href="http://www.cms.gov">www.cms.gov</a> Example: <a href="mailto:Jane.Doe@cms.hhs.gov">Jane.Doe@cms.hhs.gov</a>

## Images and Graphics

Element	Description	Quick How To
<b>Alternative Text (Alt Text)</b>	Provide alternative text descriptions (“alt text”) for all images, graphics, grouped images, and non-text elements that convey information. Do not provide alt text for images that are purely decorative.	Right click on image. Select “Format Picture” then “Alt Text.”
<b>Background Images or Watermarks</b>	Do not use background images or watermarks.	Click “Page Layout.” Select “Delete Background.”
<b>Chart Colors</b>	Provide sufficient contrast between colors.	Test color contrast by printing in grayscale or by using one of the color contrast analyzer tools available online.
<b>Chart Labels</b>	All charts must have a title, a legend, and axis labels (where applicable).	--
<b>Chart Placement</b>	A chart must be in a separate worksheet (tab) or placed next to its associated data table.	--
<b>Descriptive Text</b>	Provide descriptive text near a complex image, such as a chart or graph.	In a paragraph right above or below the image, describe the information the image is intending to convey.
<b>Grouping Images</b>	Individual images, objects, or graphics on a page that make up one combined graphic image must be grouped.	<ol style="list-style-type: none"> <li>1. Hold the Shift key and click on each object.</li> <li>2. Right click on one of the objects and select the “Group” drop-down menu.</li> <li>3. Click “Group.”</li> </ol>
<b>Text Boxes</b>	As a general rule, do not use text boxes for graphics or floating text.	Exception: Text boxes are okay if the final format will be PDF or HTML.

## File Name

Element	Description	Quick How To
<b>Be Concise</b>	The file name must be concise, clear, and generally no more than 30 characters in length.	Example: OfficeSupplyBudget.xlsx
<b>Spaces and Special Characters</b>	Do not use spaces or special characters in file names. Hyphens (-) are acceptable in file names.	Example: PartAClaimsByMonth.xlsx or Part-A-Claims-By-Month.xlsx

## Document Properties, Complex Content, and PDF Conversion

Element	Description	Quick How To
<b>Complex Content</b>	If there is no other way to make the content accessible, provide a separate accessible version.	Example: Organizational charts are often complex. Provide a separate full-text version that is 508-compliant.
<b>Converting to PDF (if you have Adobe Acrobat Professional)</b>	Convert documents to PDF by using the Acrobat add-in on your toolbar (preferred method) or by clicking “File,” “Save as Adobe PDF.” Do not use “Print,” “Printer,” “Adobe PDF.”	If the Acrobat add-in on your toolbar doesn’t convert all the formatting elements in your original document, try “File,” “Save as Adobe PDF.”
<b>Document Properties</b>	Fill out Title, Author, Subject (description), and Tags (keywords). Note: Author must be a government organization (e.g., CMS).	Click “File,” “Info,” “Properties.” Choose item in “Properties” you wish to update.