

Microsoft Excel Accessibility Checklist

A step-by-step checklist for creating accessible Microsoft Excel workbooks. This checklist covers table headers and structure, cell descriptions and navigation, alt text for charts, avoiding merged cells, color-coding alternatives, worksheet navigation patterns, and the built-in Accessibility Checker. It includes common errors and how to fix them.

Content

Microsoft Excel Accessibility Checklist

Resource type: Tier 1 Flagship — Accessibility

Library home: L09 Accessibility & Plain Language Library

Companion to: WCAG 2.2 AA Flagship Module; Microsoft Word Accessibility Checklist; PDF Accessibility Checklist

Standards reference: WCAG 2.2 AA; §508 Rehabilitation Act; Title II ADA; Microsoft Accessibility documentation

What this is

A step-by-step checklist for creating accessible Microsoft Excel workbooks. This checklist covers table headers and structure, cell descriptions and navigation, alt text for charts, avoiding merged cells, color-coding alternatives, worksheet navigation patterns, and the built-in Accessibility Checker. It includes common errors and how to fix them.

Use this checklist whenever you create an Excel workbook that will be shared with colleagues, clients, or the public — including data tables, tracking sheets, reporting templates, dashboards, and schedules.

Why this matters for DSD

Excel workbooks are widely used in DSD for data tracking, reporting, scheduling, and planning. If these workbooks are not accessible:

- Staff and clients who use screen readers cannot navigate the data or understand the structure
- People using keyboard-only navigation become trapped in complex cell structures
- People with visual impairments encounter charts and graphs they cannot interpret
- Data that relies on color coding (red/yellow/green status indicators) is meaningless to people who are colorblind — approximately 8% of men have red-green color deficiency

Under the DOJ's 2024 Title II ADA Final Rule, Excel workbooks shared as part of program delivery must be accessible. DSD's Resolution 26 requires WCAG 2.2 AA compliance for all digital content.

The core requirements

Accessible Excel workbooks must:

1. Include descriptive text in cell A1 of each worksheet
2. Use formal table structure with properly named header rows
3. Have descriptive names for all tables and worksheets
4. Avoid merged cells, split cells, and nested tables
5. Include alt text for all charts and visual elements
6. Not rely on color alone to convey information
7. Use sufficient color contrast for text and cell backgrounds
8. Have descriptive named ranges for key data
9. Include accessible hyperlink text
10. Pass the built-in Accessibility Checker

Step-by-Step Checklist

Step 1: Add a Descriptive Start in Cell A1

Screen readers begin reading an Excel worksheet from cell A1. Whatever is in that cell is the first thing a screen reader user encounters.

Best practice for cell A1:

- If the worksheet is primarily a data table: use A1 as the table's title or first column header
- If the worksheet is complex (multiple data ranges, mixed content): add a brief description of what the sheet contains and how it is organized
- Example for A1 in a complex sheet: "Staff roster as of January 2025. Column A: Last name. Column B: First name. Column C: Unit. Column D: Start date. See row 1 for headers."

Hiding the description from sighted users:

If you want the descriptive text in A1 to be available to screen readers but invisible to sighted users, format the text to match the background color. The text remains in the cell and is read by screen readers but is visually invisible.

Why it matters: Without a clear starting point, screen reader users cannot orient themselves in complex workbooks. A simple description in A1 dramatically improves navigability.

Common error: A blank A1 cell, or a cell with a logo or decorative element. Fix: Add a descriptive title or overview to A1.

Step 2: Format Data as a Proper Table with Header Rows

Excel has a formal "Table" structure that is distinct from simply arranging data in rows and columns. Using the formal Table structure provides accessibility benefits: screen readers can identify header rows and

announce them as users navigate cells.

How to create an accessible table:

1. Click in your data range
2. Go to Insert > Table (or press Ctrl+T)
3. Confirm the range and check My table has headers
4. Click OK
5. In the Table Design tab > Table Style Options, check Header Row
6. Type clear, descriptive column headings in the first row

Naming the table:

1. Click anywhere in the table
2. Go to Table Design tab
3. In the Table Name field (upper left), replace the default name ("Table1") with a descriptive name ("StaffRoster," "Q1Enrollment")
4. Table names cannot contain spaces — use camelCase or underscores

Why it matters: Screen readers use the table header row to provide context as users navigate. In a properly structured table, when a user is in cell C4, the screen reader can announce "Row 4, [header of column C], [cell value]." Without a header row, users hear only cell coordinates and values with no context.

Common error: Data arranged in rows and columns without using the formal Table structure, or a table with the first row visually formatted to look like headers (bold, shading) but not actually set as a header row. Fix: Select the range and format as a Table using Insert > Table.

Step 3: Name All Worksheets Descriptively

Screen readers announce worksheet names when users navigate between sheets. Vague names like "Sheet1," "Sheet2," or "Data" do not communicate what the sheet contains.

How to rename a worksheet:

1. Right-click the sheet tab at the bottom
2. Click Rename
3. Type a descriptive name (example: "Q1 Enrollment Data," "Staff Contact List")
4. Press Enter

Requirements:

- Every worksheet that contains content gets a descriptive name
- Remove or hide any blank worksheets (blank sheets can confuse screen reader users)
- Keep names concise — very long sheet names are cumbersome to navigate

Why it matters: When a screen reader user presses F6 to navigate to the sheet tab area, they hear the worksheet names. Descriptive names let them jump directly to the sheet they need.

Common error: Leaving worksheets named Sheet1, Sheet2, Sheet3. Fix: Rename all content sheets before sharing.

Step 4: Avoid Merged Cells

Merged cells are one of the most common and most severe accessibility barriers in Excel. When a screen reader navigates a table with merged cells, it loses count of columns and rows and can no longer provide accurate position information.

Requirements:

- Do not merge cells in data tables
- Do not merge cells in header rows
- If you need a visual span across multiple columns (e.g., a section label), use alternative formatting instead

Alternatives to merged cells:

- Center Across Selection: Instead of merging cells, select the cells you want the text to span, go to Format Cells > Alignment tab > Horizontal: Center Across Selection. The text appears centered across the cells visually, but the cells are not merged and screen readers can count them correctly.
- Use a separate row for section labels, formatted differently from data rows

How to find merged cells:

1. Go to Home > Find & Select > Find
2. Click Options > Format > Alignment tab
3. Check Merge cells > Find All

Why it matters: Merged cells break the grid structure that screen readers rely on for positional orientation. A cell merged across A1:C1 looks like one cell but is three cells — screen readers report being "in column A" but the content spans to C, creating disorientation.

Common error: Merging the entire first row for a document title or section label. Fix: Use Center Across Selection instead, or use a separate formatted row for section labels.

Step 5: Add Alt Text to All Charts and Visual Elements

Every chart, image, SmartArt, diagram, and embedded object in an Excel workbook needs alternative text.

How to add alt text to a chart:

1. Click the chart to select it
2. Right-click the chart border (not an element inside the chart)
3. Select Edit Alt Text
4. Type a description of the chart and its key data finding

Writing alt text for charts:

- Focus on the key information the chart is meant to convey
- Include the type of chart, what is being measured, and the key finding or trend
- Example: "Bar chart comparing enrollment across five DSD programs in 2024. CDCS had the highest enrollment at 1,240 participants, followed by DD Waiver at 987."
- If the chart data is available in the spreadsheet itself, note that: "See Table 2 on this sheet for the underlying data."

For images and other visuals:

- Right-click > Edit Alt Text
- Mark purely decorative images (logos, dividers) as decorative

Why it matters: Charts in Excel are graphical objects. Screen readers cannot interpret the visual representation — they can only read alt text. Without alt text, a chart is invisible to screen reader users.

Common error: Charts with auto-generated alt text that just says "Chart" or lists the file path. Fix: Right-click each chart, select Edit Alt Text, and replace any auto-generated text with a meaningful description.

Step 6: Replace Color-Only Status Coding

Excel workbooks frequently use red/yellow/green color coding for status tracking — "Red = behind schedule, Yellow = at risk, Green = on track." This is inaccessible to people who are colorblind (approximately 8% of men have red-green color deficiency) and completely invisible to screen reader users.

Requirements:

- Do not use color as the only indicator of status or meaning
- Add a text label, symbol, or separate column alongside any color coding

Accessible alternatives:

- Add a text column: "Status: On track / At risk / Behind schedule"
- Use symbols in addition to color: ' , !, ' (or words: Yes/No/Pending)
- Use conditional formatting with both color AND a symbol
- Example: A cell that is red also shows the text "LATE" in the cell

Accessible conditional formatting:

1. Select the data range
2. Go to Home > Conditional Formatting
3. Set color rules for visual users
4. Also set icon sets (checkmarks, exclamation marks, X icons) alongside the colors

Why it matters: Color-only coding excludes both colorblind sighted users and screen reader users. Adding a text or symbol equivalent makes the information available to everyone.

Common error: A project tracker where a row is shaded red to indicate overdue status, with no text

indicator. Fix: Add a "Status" column with text labels, or add icon sets alongside the color shading.

Step 7: Ensure Sufficient Color Contrast

Text and cell content must meet the same WCAG 2.2 contrast requirements as any other digital content:

- Normal text (standard cell content): 4.5:1 contrast ratio against the cell background
- Large text (18pt or larger): 3:1 contrast ratio
- UI elements (borders, chart elements): 3:1 contrast ratio

High-risk situations in Excel:

- Light gray text on white cell backgrounds
- Dark text on dark colored cell fills
- White text on medium-blue, green, or orange cell fills
- Low-contrast headers in styled tables

How to check contrast:

1. Use the Colour Contrast Analyser tool (<https://www.tpgi.com/color-contrast-checker/>)
2. Or run the Accessibility Checker (Step 9) — it flags some contrast issues

Common error: Using light gray text for secondary or metadata-level content. Fix: Use font color #595959 or darker on white backgrounds.

Step 8: Name Key Cells and Ranges

Named ranges allow screen reader users and keyboard users to jump directly to important areas of a workbook using the Name Box or the Go To dialog (Ctrl+G).

How to name a range:

1. Select the cells you want to name
2. Click in the Name Box (top left of the screen, next to the formula bar)
3. Type a descriptive name (no spaces — use underscores or camelCase)
4. Press Enter

Examples of useful named ranges:

- "DataTable" for the main data table
- "TotalRow" for a summary row
- "ContactList" for a key reference range

Navigation for screen reader users:

- Press Ctrl+G to open the Go To dialog
- Type or select a named range to jump directly to it
- This is the equivalent of clicking a heading link in a Word document

Why it matters: In large, complex workbooks, screen reader users navigating cell by cell through thousands of rows face a significant barrier. Named ranges provide navigation shortcuts that parallel what headings do in Word.

Common error: Large workbooks with no named ranges and no way to jump to key sections. Fix: Name at least the main data tables and summary areas in complex workbooks.

Step 9: Use Descriptive Hyperlink Text

Any hyperlinks in an Excel workbook must have descriptive text — not raw URLs and not vague text like "click here."

How to add a hyperlink:

1. Select the cell where you want the link
2. Go to Insert > Link
3. In Text to display, type the descriptive link text
4. In Address, paste the URL
5. Click OK

Why it matters: Screen readers can navigate a list of links. Non-descriptive link text makes navigation impossible.

Common error: Pasting a raw URL into a cell as both the displayed text and the hyperlink. Fix: Select the cell, use Insert > Link to set descriptive displayed text.

Step 10: Run the Built-In Accessibility Checker

Excel's Accessibility Checker finds common accessibility errors.

How to run it:

1. Go to Review > Check Accessibility
2. The Accessibility pane opens
3. Review Errors, Warnings, and Tips
4. Click each item to jump to the issue
5. Follow the suggested fixes

What the Excel Accessibility Checker finds:

- Missing alt text for charts, images, and visuals
- Sheets without descriptive names
- Blank sheet names or sheets with default names
- Merged cells in tables
- Tables without header rows
- Missing table names (default Table1, Table2)
- Insufficient color contrast (some cases)

- Missing cell descriptions (for complex sheets)

What it does NOT find:

- Color-only coding
- All contrast issues
- Quality of alt text
- Navigation structure problems in complex workbooks

Run the Accessibility Checker before every share.

Common Errors and How to Fix Them

Error — Impact — Fix

Blank or vague cell A1 — Screen reader users cannot orient — Add descriptive title or overview to cell A1

Data arranged without formal Table structure — No header row recognition by screen readers — Select range, use Insert > Table

Default worksheet names (Sheet1) — Screen reader users cannot identify sheets — Right-click tab > Rename with descriptive name

Merged cells in tables — Screen reader loses position in table — Remove merged cells; use Center Across Selection

Charts with no alt text — Blind users cannot access chart data — Right-click chart > Edit Alt Text > add description

Color-only status coding — Colorblind and screen reader users miss status — Add text column or icon set alongside color

Low contrast text on colored cells — Low-vision users cannot read text — Adjust text or background color to meet 4.5:1

Raw URLs as hyperlink text — Screen reader link list is unintelligible — Use Insert > Link > set descriptive display text

No named ranges in complex workbooks — Keyboard/screen reader navigation is very slow — Name key ranges for direct navigation

Blank worksheets left in workbook — Can confuse screen reader users — Delete or hide blank worksheets

Where to Get Help

- Microsoft Excel Accessibility Documentation: <https://support.microsoft.com/en-us/office/make-your-excel-documents-accessible-to-people-with-disabilities-6cc05fc5-1314-48b5-8eb3-683e49b3e593>
- WebAIM Excel Accessibility: <https://webaim.org/techniques/excel/>
- Section508.gov — Creating Accessible Spreadsheets: <https://www.section508.gov/create/spreadsheets/>
- Colour Contrast Analyser: <https://www.tpgi.com/color-contrast-checker/>
- One DSD Equity Team: Contact for accessibility review support

Connection to DSD's Six Program Goals

DSD Program Goal — Excel Accessibility Connection

Equity and inclusion — Data reports and tracking sheets shared with or about people DSD serves must be accessible

Cultural and linguistic competence — Workbooks tracking LEP populations, language needs, or community data must be navigable by all staff

Olmstead implementation — Tracking and reporting on community integration progress must be accessible to staff with disabilities

Workforce development — Staff with disabilities need accessible tracking tools and templates

Quality improvement — Accessible workbooks are better structured and less prone to data errors

Leadership and accountability — Leaders are accountable for ensuring accessible data tools across DSD programs

Sources

- Microsoft — Accessibility best practices with Excel spreadsheets: <https://support.microsoft.com/en-us/office/make-your-excel-documents-accessible-to-people-with-disabilities-6cc05fc5-1314-48b5-8eb3-683e49b3e593>
- Section508.gov — Creating Accessible Spreadsheets: <https://www.section508.gov/create/spreadsheets/>
- WebAIM — Microsoft Excel Accessibility: <https://webaim.org/techniques/excel/>
- Web Content Accessibility Guidelines 2.2, W3C, December 2024: <https://www.w3.org/TR/WCAG22/>
- DOJ ADA Title Two Web Accessibility Final Rule, April 2024: <https://www.ada.gov/resources/2024-03-08-web-rule/>

Accessibility is everyone's responsibility. When in doubt, ask people with disabilities what works for them.

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Include descriptive text in cell A1 of each worksheet

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Avoid merged cells, split cells, and nested tables

Include alt text for all charts and visual elements

Use sufficient color contrast for text and cell backgrounds

Include accessible hyperlink text

For consultant operations, use Microsoft Excel Accessibility Checklist to draft, structure, test, and distribute communication in usable formats; adapt the guidance to the request, test assumptions, document advice, and route authority questions. Start by use this checklist whenever you create an Excel workbook that will be shared with colleagues, clients, or the public — including data tables, tracking sheets, reporting templates, dashboards, and schedules.

Do not replace official legal, policy, clinical, supervisory, program, or Tribal authority.

Do not infer an individual's identity, preferences, needs, or experience from group-level information.

State uncertainty, use current authoritative sources, and escalate when the decision exceeds the user's role.

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