

CLASS Accessibility Formatting Guide

Step-By-Step Procedures for CLASS Approval

Important – Please Read This First

This guide was developed based on **student feedback**. It explains **how to complete accessibility requirements for CLASS approval**. It is designed to offer “how to” instructions for each stage so you may want to skim it first then dip into it as needed.

💡 Before You Begin: Adobe Acrobat Pro

If you do **not** already have **Adobe Acrobat Pro** installed, figure out how you will get access. Students who are employed as TAs or RAs at UH may obtain it this way:

- Log in to **AccessUH**
- Go to **Software Downloads**, look for this blue icon (see below)
- Download **Adobe Acrobat Pro**



Software
Download

⚙️ It may take more than a day for UH IT to send you the access code, so it is important to start this early.

Alternatively, students can use Adobe Acrobat Pro for free in the UH Library Digital Commons and on several computers in the Writing Center. Make appointments for the computers on the Writing Center [self-service appointment system](#).

STEP 1 — FOUNDATION

Do Accessibility Work in Your Original Document

Nearly all accessibility work must be completed **before** converting your document to PDF. Most accessibility failures occur when this step is rushed or skipped.

You should complete this work **at the draft stage**, before final formatting.

In your word-processing software (usually Microsoft Word):

✓ Use built-in heading styles (Heading 1, Heading 2, etc.)

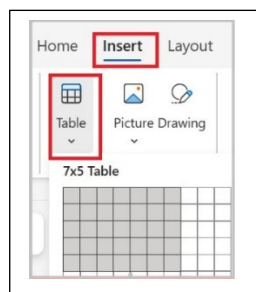
💡 Find MS Word Support [here](#), with clear instructions for both Windows and macOS.

(Do not format headings by font size or bolding alone.)

✓ **Create and Format Tables in MS Word**

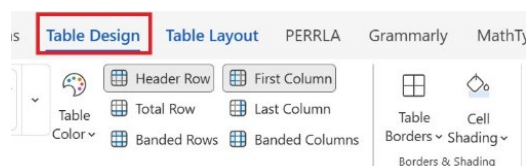
Insert a table

- Go to **Insert → Table**
- Select the number of columns and rows



After inserting a table, two tabs appear: **Table Design** and **Layout**

- In **Table Design → Table Style Options**, select: **Header Row**



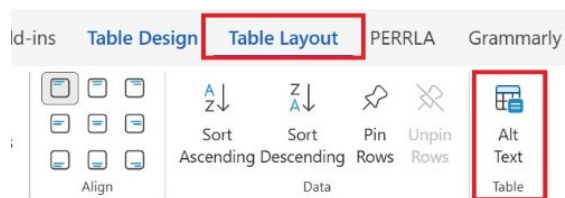
Add headings

- Enter column labels in the **first row**
- (If needed) enter row labels in the **first column**

These labels identify the content of the table and support navigation.

Add alt text

- Click anywhere in the table
- Go to **Layout → Properties** (or right-click → **Table Properties**)
- Open the **Alt Text** tab
- Add a short description of what the table shows



Accessibility guidelines

- Use **Insert → Table** (do not use tabs or spaces)
- Keep tables simple
- Avoid merged or split cells
- Do not nest tables
- Avoid blank cells
- Run the **Accessibility Checker**

⚠ Important: Avoid Merged and Split Cells Merged and split cells can disrupt table structure, cause accessibility issues for screen readers, and create problems during PDF conversion. Whenever possible, use simple tables with a consistent row and column structure.

✅ Add alt text to all figures, images, charts, and visual elements

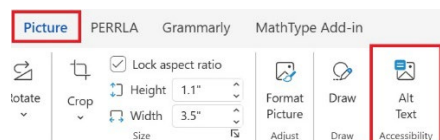
Insert the image

- Go to **Insert → Pictures**
- Select and insert your image

Add alt text

- Right-click the image → **Edit Alt Text**
- Enter a brief description of what the image shows

Focus on the **essential information**, not every visual detail.



💡 Microsoft Word may suggest alt text for **figures and images**, but students remain responsible for ensuring that all **alt text is accurate and meaningful**. Alt text for **tables** should be reviewed carefully and needs to be written manually.

⚠️ Common pitfall

Figures and tables that look correct but were created as regular text will not be recognized properly by screen readers or by Adobe's accessibility checker.

✅ Why this matters

When accessibility is built correctly into the source document, most later fixes are minimal or unnecessary.

💡 Helpful cheat sheet: [Microsoft Word 2016 \(Windows\)](#)

STEP 2 — USE THE TEMPLATES FOR THE FRONT MATTER

Use the **most recent UH Graduate School ETD template** for front matter and formatting. This shows the correct length and formatting for document elements such as dedication, acknowledgements, table of contents, table of tables, table of figures.

This guide also addresses required accessibility formatting for other parts of the document.

OPTIONAL BUT RECOMMENDED: Use the **CLASS Title Page fillable form** for your title page. This is the same format as the one in the Graduate School ETD template, but it contains dropdown menus to ensure that you correctly supply information such as the formal title of your degree. Using this template will ensure that you avoid some of the most common formatting mistakes, and thus will save you time at the end.

⚠ Important

Using the ETD template does **not** automatically make your document accessible, but it will help you successfully complete some of the process.

Completing the steps in this guide is still required.

Some tips; Pay attention to rules on page numbering:

- Use Roman numerals for all content prior to the Introduction or first page of Chapter 1 (i, ii, etc).
- Use Arabic numerals and RE-START the numbering on the first page of the substantive document (generally, Introduction or Chapter 1).

💡 MS Word Support offers [these](#) helpful instructions.

Once you have inserted headers into your document (as is required for Accessibility, see below) it will be easy to generate a Table of Contents in MS Word. If you don't know how to do this, you can find guidance on the internet. 💡 For example, find MS Word Support [here](#), with clear instructions for both Windows and macOS.

STEP 3 — RUN WORD'S ACCESSIBILITY CHECKER

⚠ Use the University-provided Microsoft Word (Microsoft 365).

This is the most up-to-date version and includes the full built-in MS Word Accessibility Checker required for CLASS submissions. All UH students may download this version for free by going through the software download icon on the AccessUH page. At this stage, avoid:

- Older desktop versions of MS Word
- Free or web-based alternatives
- Third-party word processors

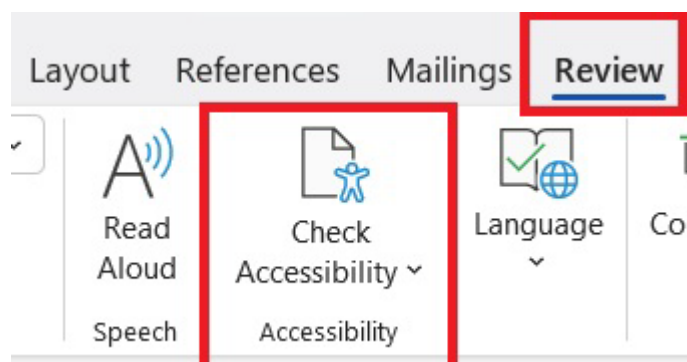
These may **not** include the full MS Word Accessibility Checker or may produce incomplete results.

For Mac users

- Ensure you are using **Microsoft Word for Mac (Microsoft 365)** and that it is **fully updated**
- The Accessibility Checker is available on Mac, but:
 - Some checks may appear in a different order
 - Certain prompts or fix suggestions may be phrased differently than on Windows
- These differences are minor and **do not affect compliance** as long as all errors and relevant warnings are addressed.

How to run the Accessibility Checker

1. Open your document in **Microsoft Word (Microsoft 365)**
2. Go to the **Review** tab
3. Select **Accessibility Checker**



The Accessibility Checker:

- Identifies structural and accessibility issues
- Explains **what the issue is** and **how to fix it**

What to do with the results

- **Errors** → must be corrected
- **Warnings** ⚠ → must be reviewed carefully and addressed when applicable

✅ Many accessibility fixes are **fastest and most reliable when completed in MS Word**, rather than later in the PDF.

STEP 4 — LaTeX / Overleaf USERS (IF APPLICABLE)

If you are using LaTeX or Overleaf, additional steps are required to generate tagged, accessible PDFs. Accessibility support for LaTeX has improved, but workflows vary and change frequently. Consult the LaTeX and Overleaf resources listed at the end of this guide **before proceeding**.

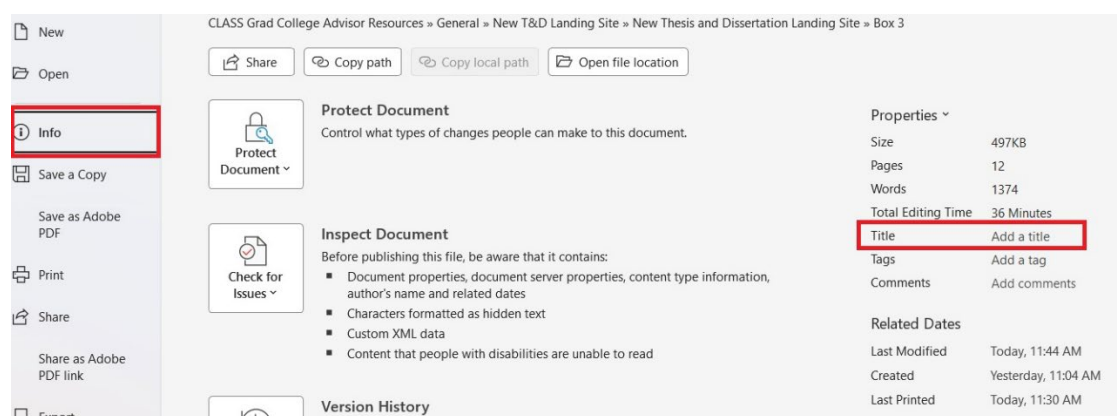
STEP 5 — CONVERT YOUR DOCUMENT TO PDF

Once **all accessibility work in the source Word document is complete**, convert your file to PDF using the **correct method** below. This step is essential for preserving tags, structure, and document metadata.

1. Confirm your document title (required)

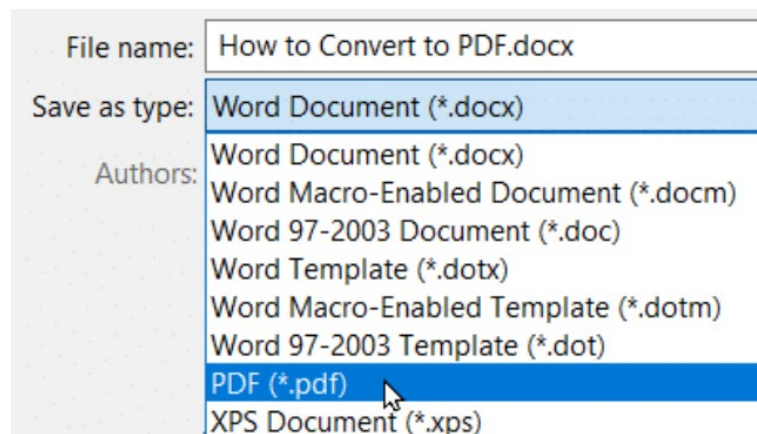
Before converting:

- Make sure your MS Word file has a **Document Title** set
(*File → Info → Properties*)
- Screen readers use this title, and it prevents the **“Missing Document Title”** error in Adobe.



2. Convert using Save As

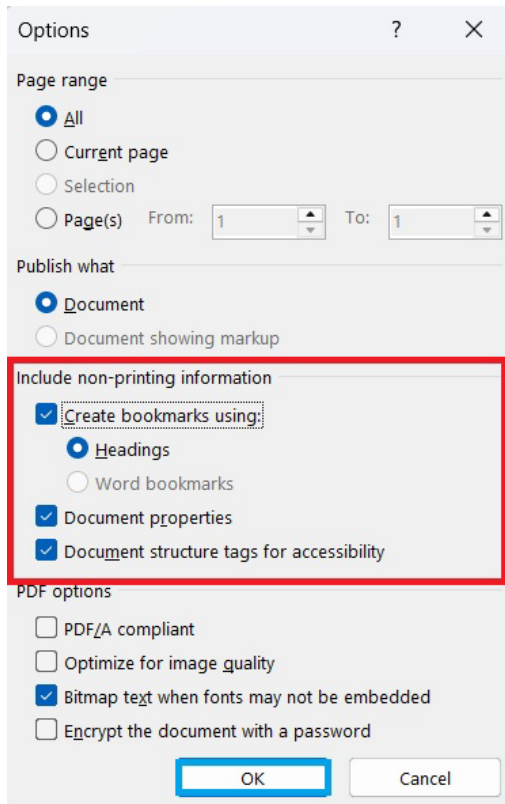
- Go to **File → Save As** (or **Save a Copy**)
- Choose where to save your file
- Set **Save as type** to **PDF (*.pdf)**



3. Set required PDF options

In the **Save As** window:

- Enter a **Title** (this is what screen readers will read aloud)
- Check **Open file after publishing**
- Click **Options...**



Under **Include non-printing information**, check **all** of the following:

-  **Create bookmarks using: Headings**
Bookmarks allow users to navigate the document easily
-  **Document properties**
Carries over the document title and author
-  **Document structure tags for accessibility**
Required for screen readers and accessibility compliance

Click **OK**, then **Save**.

Your document is now converted to an **accessible, tagged PDF**.

Do **NOT** use these methods

The following “save as” options will not produce an accessible PDF and must be avoided:

- Print to PDF
- Save as Adobe PDF
- Third-party PDF converters

 These methods strip tags and routinely cause avoidable **accessibility failures**.

LaTeX users

Your workflow may differ, but the final version of record must still be an accessible, tagged PDF.

STEP 6 — OPEN THE PDF IN ADOBE ACROBAT PRO

Open your PDF in **Adobe Acrobat Pro** (not the free Reader).

If you do not already have access, Acrobat Pro is available at:

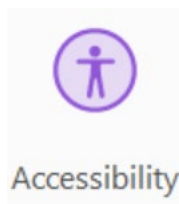
- UH IT (AccessUH) — for eligible employees (TAs/RAs)
- UH Library Digital Commons
- Writing Center (CBB 226 – limited workstations)
- Graduate School Office (Bates Law Suite)

 These locations provide **full Acrobat Pro**, not Reader.

STEP 7 — RUN THE ADOBE ACCESSIBILITY CHECKER

In Adobe Acrobat Pro:

1. Go to **All Tools → Prepare for Accessibility**
2. Select **Accessibility Checker**



Checker Settings Matter

Before running the check, you will be guided through **four separate settings screens**.

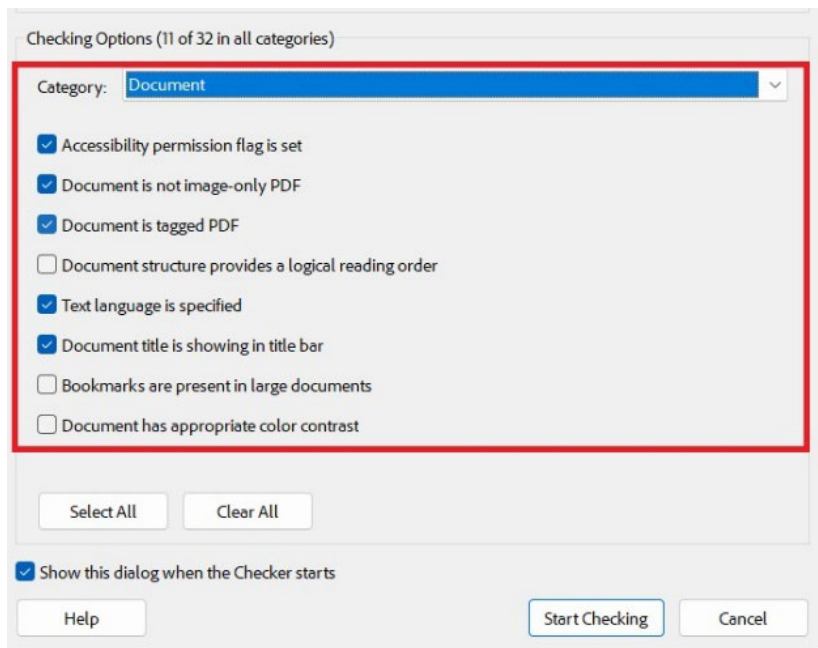
- ✓ Match the screenshots exactly.

You must select **exactly these 11 required options**, and no others.

Scroll through each screen carefully to see all categories.

- ✗ Do not select different or additional options.

- ✗ Incorrect settings produce misleading or incomplete results.



Checking Options (11 of 32 in all categories)

Category: **Page content**

- ☒ All page content is tagged
- ☐ All annotations are tagged
- ☐ Tab order is consistent with structure order
- ☐ Reliable character encoding is provided
- ☐ All multimedia objects are tagged
- ☐ Page will not cause screen flicker
- ☐ No inaccessible scripts
- ☐ Navigation links are not repetitive
- ☐ Page does not require timed responses

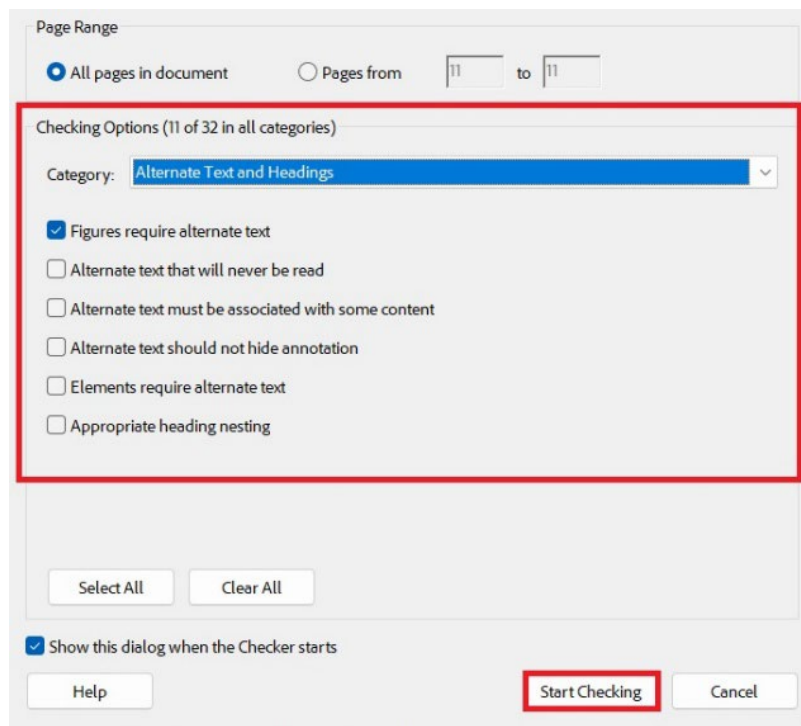
Select All Clear All

Checking Options (11 of 32 in all categories)

Category: **Forms, Tables and Lists**

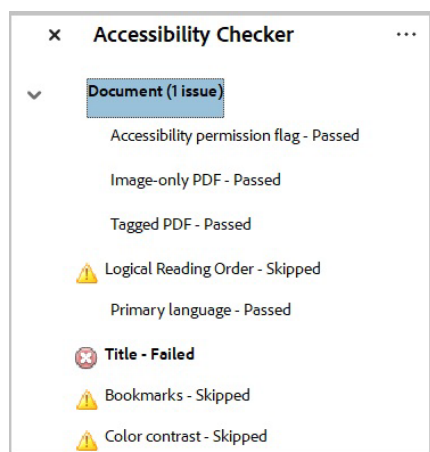
- ☒ All form fields are tagged
- ☒ All form fields have description
- ☐ TR must be a child of Table, THead, TBody, or TFoot
- ☐ TH and TD must be children of TR
- ☒ Tables must have headers
- ☐ Tables must contain the same number of columns in each row and rows in each column
- ☒ Tables must have a summary
- ☐ LI must be a child of L
- ☐ Lbl and LBody must be children of LI

Select All Clear All



✓ Once all required options are selected, run the checker by clicking **Start Checking**.

⚠ **Note:** One common issue is the document **title**, which you can then enter manually by using the “fix button” in case you have not done this in MS Word (see above).



Understanding the Results

The Accessibility Checker generates a report listing items by category.



- **Failed checks → must be corrected**

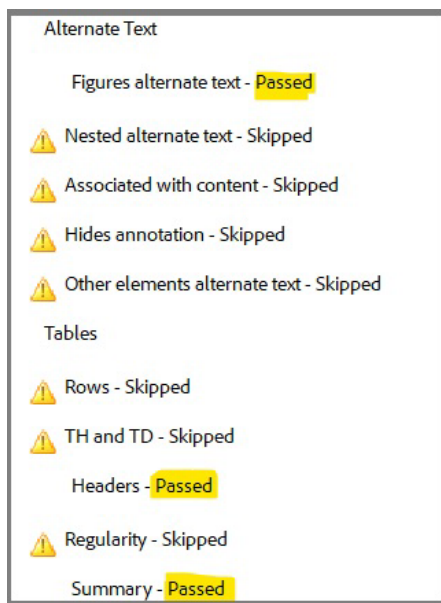
These indicate items that must be corrected **for the Accessibility Checker to clear successfully.**

⚠ Warnings:

Warnings → expected and informational

Warnings reflect how the checker applied the **required options**:

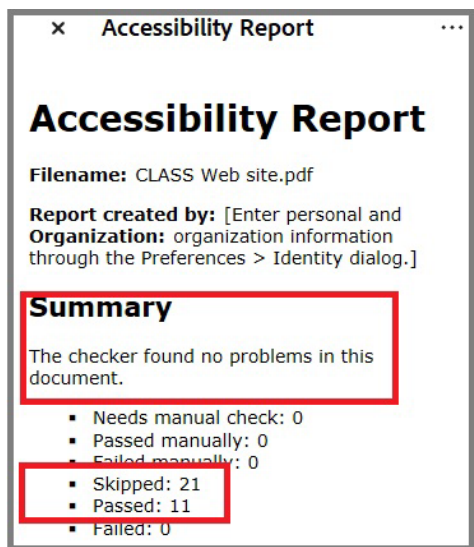
- Some items are **intentionally skipped** (as specified in the checker settings)
- Other items are **evaluated and passed**
- The presence of warnings ⚠ **does not indicate an error**



Running the checker with correct settings ensures that:

- real issues are detected,
- expected flags appear correctly as per the settings (skipped vs. passed)
- and your final Accessibility Report is **accurate**.

A passing accessibility report will look like this:



TABLES ONLY — READ CAREFULLY

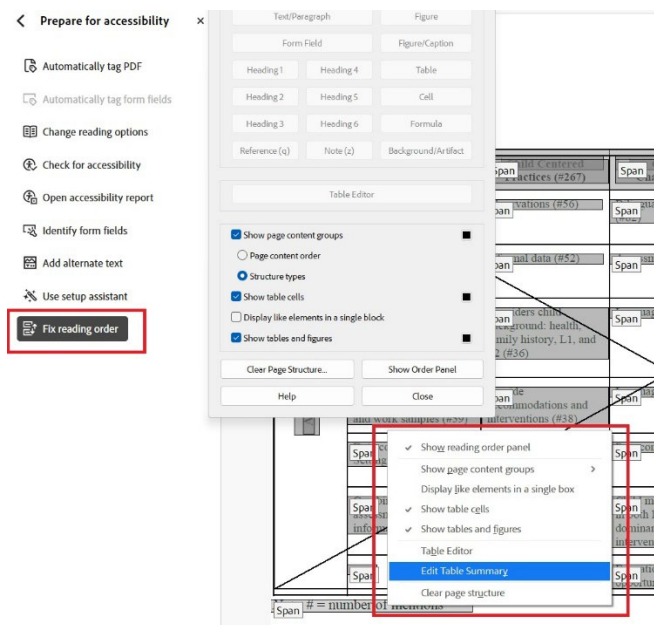
If your document contains tables, **additional required steps apply**.

Table summaries written in Word do **not reliably transfer** during PDF conversion.

As a result, tables will be flagged **until summaries are correctly transferred in Adobe Acrobat**.

- ✓ This is expected
- ✓ This does not indicate an error
- ✓ No new writing is required

What to do in Acrobat



For each table:

1. Select the table
2. Open **Fix Reading Order**
3. Right-click → **Edit Table Summary**
4. Copy and paste the summary you already wrote in MS Word

Repeat for:

- each table, and
- each instance of tables spanning multiple pages (the same summary text may be reused).

✦ This is the **most common reason** documents are returned for revision.

Tables – special problems section:

Tables — Special Problems (Read Carefully)

 Avoid **merged and split cells** as they cause accessibility and PDF-tagging problems.

Tables require extra attention in PDF. The issues below are **common and expected** during PDF conversion and can be resolved using the steps provided.

Tables that span multiple pages

When a table continues across more than one page, the PDF conversion process may split it into **separate table structures**, one per page. If this happens, **each table segment must be reviewed and tagged correctly**.

If a table is split across pages:

- Re-select the table **on each page** using **Prepare for Accessibility → Reading Order**
- Confirm that table headers are correctly tagged as **TH (table header cells)** on each page
- If a table summary/description is required for context, apply the **same (or equivalent)** summary to each table segment

 This is expected behavior for multi-page tables.

Tables repeatedly flagged for “Missing Table Summary”

If a table continues to be flagged after initial correction, follow these steps **in order**:

Re-label the table

- Use **Reading Order** to select the entire table
- Label it again as **Table**
- Right-click the table → **Edit Table Summary**
- Re-enter (or paste) the summary text

If this does not resolve the issue, try the following two solutions:

- a) Re-run the Accessibility Checker:

Three-dots icon next to the Accessibility Checker → Check Again

- b) Check for duplicate table tags:

Right-click on Element 1 → Show in Tags

Confirm that there are **not two overlapping table structures** for the same table

 These are some of the most common revision points, and students regularly clear them successfully using these steps.

STEP 8 — RE-RUN THE ACCESSIBILITY CHECKER

After making required fixes:

- Select **Check Again**
- Review the report summary

 To proceed, the report must **run cleanly** (no failed checks)

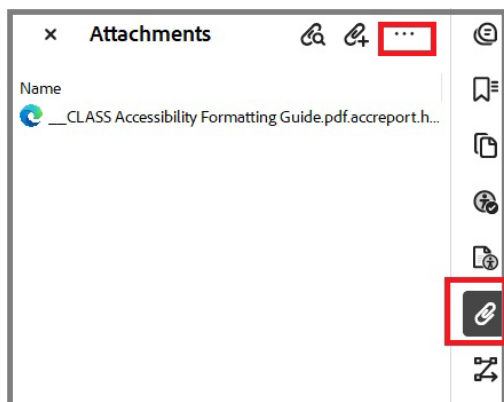
 Do not submit reports containing failed checks.

If issues remain:

- Some fixes can be made directly in the PDF
- Others should be corrected in the source document, then reconverted

STEP 9 — SAVE THE ACCESSIBILITY REPORT

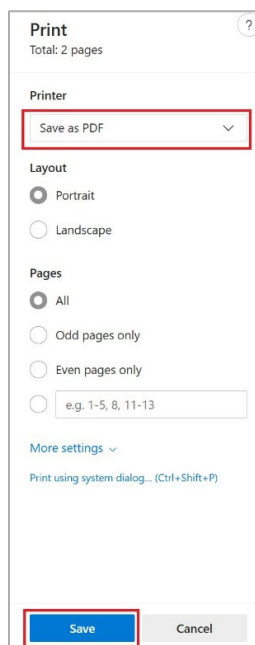
In the Accessibility Report panel:



1. Select the **three-dots menu**
2. Choose **Attach report to document**
3. Click the **paperclip icon**

If the paperclip is missing, you need to right-click in the empty space on the right or top toolbar and re-enable the navigation panels.

4. Open the attached .html report
5. **Print (Ctrl+P) → Save as PDF**
6. Specify location and file name: **Accessibility_LAST NAME**



⚠ Submit the Accessibility Report as a **PDF**, not as an HTML file, screenshot, or web link.

STEP 10 — SUBMIT MATERIALS TO CLASS

⚠ All **three** documents are required for CLASS review.

✦ Email the following PDFs to CLASSGrad@central.uh.edu and **CC your committee chair:**

- ✓ Final thesis/dissertation PDF
- ✓ Accessibility Report PDF (runs cleanly)
- ✓ Fully signed approval form

Use your **CougarNet email account** to avoid delivery issues.

⊘ Missing documents are the most common cause of submission delays.

✦ Remember to CC your committee chair.

STEP 11 — AFTER CLASS APPROVAL

After receiving CLASS approval, upload your files to the UH Library's ETD submission system (**Vireo** / TDL):

⚠ **Two PDF files** are required in Vireo:

- Final approved PDF of your manuscript (Manuscript PDF)
- Accessibility Report in PDF format, generated by Adobe Acrobat Pro (Administrative Files)

✦ The Vireo submission is the final required step before **graduation certification** can be processed. Both required files must be uploaded by the **Vireo deadline** for your graduation semester.

CLASS staff will notify you if further revisions are required or if you may proceed.

REQUIRED REFERENCES & COMMON SOLUTIONS

Do not skip this section if you encounter difficulties.

Microsoft Word

[MS Word official advice](#)

[Northeastern University](#)

[Helpful cheat sheet](#)

There are also many YouTube tutorials on this topic.

Tip: You may customize the appearance of Heading styles. Structure matters; appearance does not.

LaTeX / Overleaf

Using LaTeX for Your Thesis or Dissertation

LaTeX can produce high-quality documents, especially for technical and quantitative work. However, **creating an accessible PDF from LaTeX is significantly more complex than using MS Word**, and the workflow is still evolving.

Faculty members in the UH College of Natural Sciences and Mathematics have also developed LaTeX resources to help with this. They can be found on this [website](#).

What you should know

Accessibility is required

Your final PDF must meet federal accessibility standards (PDF/UA tagging, alt text, readable structure).

LaTeX accessibility is not automatic

Standard LaTeX PDFs are **not accessible by default** and require additional setup and manual work.

Current tools are still developing

New features (e.g., LaTeX tagging, PDF/UA-2 support) have improved the process, but:

- results vary depending on your setup
- not all packages are compatible
- full compliance is not guaranteed [\[latex3.github.io\]](https://github.com/latex3/latex3), [\[docs.overleaf.com\]](https://docs.overleaf.com)

What this means for you

If you choose to use LaTeX, you will need to:

- Use an **up-to-date system** (TeX Live 2025 or newer)
- Compile with **LuaLaTeX**
- Enable **PDF tagging** (e.g., `\DocumentMetadata{tagging=on}`)
- Add **alt text** for all images and figures
- Ensure proper **document structure** (headings, tables, captions)
- **Check and fix accessibility issues in Adobe Acrobat**

Even with these steps, additional **manual corrections may be required**.

Important limitation

At this time, there is **no single, fully reliable LaTeX workflow** that guarantees a compliant accessible PDF.

Some documents may require significant post-processing.

Recommendation

If you are unfamiliar with LaTeX accessibility workflows, or if you are working under a deadline, we strongly recommend using **MS Word**, which provides a more reliable and supported path to an accessible PDF.

Responsibility

Students using LaTeX are responsible for ensuring that their final PDF meets accessibility requirements. The Graduate School reviews the final PDF, not the source file.

Resources

- The Latex Tagging Project: <https://latex3.github.io/tagging-project/documentation/>
- Overleaf Docs: <https://docs.overleaf.com/writing-and-editing/creating-accessible-pdfs>
- NC State: <https://grad.ncsu.edu/students/etd/digital-accessibility-requirements/guidelines-for-digitally-accessible-files/>
scroll to the bottom for a list of university links
- Ohio State: <https://ets.osu.edu/digital-accessibility/latex-accessibility-guide>

Final Reminder

Accessibility review is a **procedural, software-based process**.

Students who follow steps in order, slow down, and use this guide carefully are far more likely to pass on first submission and avoid last-minute stress.

? Questions? After reviewing the materials and documents available on the CLASS Thesis and Dissertation website, please contact CLASSgrad@central.uh.edu if you need additional assistance. We are happy to help.