Making an Accessible Fillable PDF Form

Microsoft Word and a PDF Editor

To create an accessible fillable PDF form, you can start with an accessible Microsoft Word document and then use a PDF editor to add the form fields.

Start with an accessible Word document

Start by creating a Word document that has the information you want people to fill out.

Provide helpful instructions

Instructions may be helpful to include at the beginning of the form to let people know what the form is for and how the information will be used. If there is context or special information that people need to understand to fill out the form properly, include that as well.

Use clear field labels

Each question or field should have a clear label that tells the user what information is needed. Make sure to note if information needs to be in a specific format.

> **Good:** Applicant's full name
>
> Less helpful: Name
>
> **Good:** Date (d/m/yyyy)
>
> Less helpful: Date

Indicate required fields

If a field is required, indicate that next to the field label. You can do this by adding (required) in parentheses. You can also indicate it with an asterisk, making sure to indicate in the form instructions what the asterisk is for.

Do not use color as the only way to indicate that a field is required.

For each field, consider what type of response you want

If someone needs to...	Use...
Enter information	Text field
Choose one option	Radio buttons
Choose one or more options	Checkboxes
Select options from a list	Dropdown select list
Enter a longer response	Multi-line text field

Leave blanks where you want fillable fields to go

Don't add form fields in Word. Leave enough space to add the form fields later using the PDF editor.

- If you want to add radio buttons or check boxes in front of their accompanying text, leave space on the left side of the text.
- If you want to add a multi-line text field, allow enough vertical space between the field labels.

Convert Word to PDF

Note: Information in this handout has details specific to the Foxit PDF Editor. Adobe Acrobat Pro has similar features and options, but they may be accessed differently or in different menus.

Once the Word document is set up:

1. Save the Word document
2. Save it as a PDF
3. Open the PDF in the PDF editor
4. Review the PDF before adding form fields

Review the PDF before adding form fields to check the following:

- The content looks visually correct
- All the elements have the correct tags
- The document structure is good

Add form fields

In Foxit

1. In the top menu, make sure you are on the Forms tab.
2. The toolbar ribbon has options for adding different types of form fields. Select the form field you want to add.
3. Draw a box in the form where you want the field to be placed. Tip - For radio buttons and checkboxes, create one button/checkbox then copy and paste it. This will make the sizes of the buttons/checkboxes the same.
4. Edit the properties for each field.
    - When you add the field, you can click on the **All Properties** link.
    - If you want to access properties after the field has been added, double click the field.
5. In the Properties
    - **Give the field a name.** This doesn't appear anywhere but will make it easier to distinguish later when tagging the field for accessibility. For a radio button grouping, someone should only be able to select one item. To ensure this, the radio buttons need to be recognized as a group. This is done by making sure the field name is the exact same for all the radio buttons in the group.

- **Enter a Tooltip value.** Provide a useful description of to tell someone what needs to be entered or selected. The tooltip can provide an accessible name or instructions when assistive technology encounters the field.
  - **Text field example:** Enter first and last name
  - **Dropdown list example:** Select the training you want to attend
  - **Radio button example** (note: the tooltip should be the same for each tooltip in the group): Select whether you have attended a training before
  - **Checkbox example** (note: you would modify the tooltip for each checkbox in a group): Select if you have a dairy restriction
- **Set radio button values** – Set the distinct value for each radio button in a group. To do this, click the **Options tab** in the Properties box. In the Export Value, enter the same text that is next to the radio button on the form. For example, if the text next to a radio button is "Yes," then the Export Value for that button should be "Yes"
- **Add dropdown list values** – Go to the **Options tab** in properties to add the list of selections that a user can choose from in a dropdown list.

Required fields

On the **General tab** in the Properties, you have an option to mark a field as "Required." If you make a field required, make sure you also indicate visibly on the form that the field is required.

Other properties options

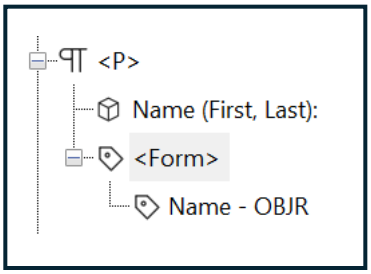
Depending on the type of field, there are other configuration options in the Properties. Adjust them based on how you want the field to look or how you want the user to enter information.

Add tags to make the form accessible

Adding form fields doesn't automatically make the PDF accessible. The PDF also needs an underlying structure (tags) that allows assistive technology such as screen readers to understand the document.

For a form, each field must have a Form and OBJR tag.

- **<Form>** - identifies the form field in the PDF's tag structure
- **OBJR** - connects the tag structure to the actual interactive form field object



Add <Form> tags

Each visible field label should have a paragraph (**<P>**) tag associated with it in the Tags panel. Do the following for each one starting with the first form field and working your way down the form.

1. In the Tags panel, right-click the <P> tag that has the field label
2. Choose "New Tag"
3. In the pop up, choose Form from the Type list
4. Make sure an empty <Form> field is added as a child under the <P> tag

Add OBJR tags

After you add the <Form> tag, you need to add an OBJR tag for the field as a child under it.

1. Click the <Form> tag so it is selected in the Tags panel
2. In the dropdown at the top of the Tags panel, choose Find
3. In the Find Element pop-up box, select Unmarked Annotations
4. Click the Find Next button to find the first form field that hasn't been tagged
5. Ensure the field that is associated with the <Form> tag you have selected is what is listed next to Type, then click the Tag Element button to add an OBJR tag as a child tag under the <Form> tag
6. Keep the Find Element box open
7. Click the next <Form> tag in the Tags list and repeat steps 5 and 6 until all <Form> tags have an OBJR tag underneath them

Check the tab order and that fields work

Someone should be able to complete the form using a keyboard without having to use a mouse.

Save the PDF and test the tab order by using the hand selector located in the top toolbar in Foxit. You can also open the PDF file in a free PDF reader such as Adobe Reader.

Use only your keyboard (no mouse) to move through the form and check that:

- Every field can be reached and you can enter information for each one
- Fields are encountered in a logical order that generally follows the visual order of the form
- The user doesn't get trapped or sent unexpectedly around the page

Keyboard controls for testing:

- Tab key – moves you from one field to the next
- Shift + Tab key – moves you to the previous field
- Up and down keys – moves you through the list of options in a dropdown or a radio button grouping
- Enter key – allows you to select checkboxes or items in a dropdown list or radio button grouping

Run an accessibility check

Use the accessibility checking tools available in your PDF editor. Review the results and fix any identified issues.

Remember: An accessibility checker can identify many potential problems, but it cannot determine whether everything is meaningful or usable. You still need to manually review the form.

Final Review and Testing Checklist

Before publishing the form, review it from the perspective of the person who will be filling it out. Make sure the finished form is understandable, navigable, and usable with assistive technology.

Content and instructions

- Labels clearly identify what information someone must enter
- Instructions are clear and understandable
- Required information is clearly identified
- Content follows a logical order

Form fields

- Every field has the correct field type
- Every field has a meaningful name
- Every field has an appropriate tooltip
- Required fields are identified appropriately
- Radio buttons are grouped correctly
- There are no unnecessary or missing fields

PDF structure

- Reading order is logical
- Form fields are represented appropriately in the tag structure
- Accessibility checker results have been reviewed and identified issues have been corrected

Keyboard testing

- Every field can be reached using the keyboard
- Tab order follows a logical sequence
- Radio buttons, checkboxes, and dropdown list selections can be made using the keyboard
- The entire form can be completed without a mouse

Assistive technology testing

- Field names and instructions are understandable when read aloud
- The form field types are being communicated
- Required fields are communicated appropriately
- The form can be navigated in a logical order