

PDF Remediation Workflow Checklist

In Acrobat – before using Commonlook PDF:

- ✓ Run OCR if the document is scanned.
- ✓ Add Form fields and/or Links as needed.
- ✓ Add Java Script if needed.
- ✓ Embed fonts if needed (PDF/UA)
- ✓ Add Tags to the document if needed – Check for corruption in the physical view!
- ✓ “Save as” so that you are not working on the original document!

Optional but helpful:

- ✓ Print the Table of Contents and mark Heading Levels.
- ✓ Look over the document and see if there are tables that contain empty cells – if there are, remember to not do a “full” cleanup when cleaning empty tags!
- ✓ Are there images that convey relevant information? If not (or if not many) then, in CommonLook, it may be advantageous to artifact all images (lines on tables, for example).

In CommonLook PDF:

- ✓ In the ribbon on the **Settings** tab:
 - Reset Panels Location if needed.
 - Choose selection settings as appropriate (Exact, Tagged/Untagged, etc.).
- ✓ Open the Tag tree.
- ✓ Artifact images as needed (refer to the “Optional” section).
- ✓ Remediate the document: (remember to save periodically!)
 - Verify reading order,
 - Check that the correct tag is being used,
 - Look for color issues
 - Fix tables, Forms, Links, artifact headers/footers, etc. as needed.
 - Set the Tabbing Order to follow Document Structure
- ✓ Add the Document Tag.
- ✓ Add Bookmarks.
- ✓ Clean up empty tags.
- ✓ Complete Metadata (this may be done in the next step as part of the HHS, WCAG, or PDF U/A verification).
 - Check the checkbox (in Metadata) for 508, WCAG 2.0AA, PDF/UA and/or HHS as applicable
- ✓ Run Verification(s) – Structural and Accessibility as needed.
- ✓ Generate and save the report.
- ✓ Save your work!