

PDF Remediation Services - Event Transcript

Opening

Lori Litz

Hi everyone! Welcome to today's Accessibility.com event "PDF Remediation Services." If we haven't met before, my name is Lori. I'm the Director of Conferences here at Accessibility.com. Today's event is sponsored by Splash Box Marketing and Braille Works. If you haven't been out to the Expo Hall yet to say hello to them, please head on out there and do so.

Learn a lot about PDF remediation directly from companies that provide that service. Also here to teach you today more about PDF remediation, what it is and why you need it, is the Senior Product Director of Accessibility at Adobe, Rob Haverty. We are so honored to have him here with us today. Today's event is recorded and will be available later this evening for you to catch on demand in case you have to take off early or in case you couldn't make it here to see the event now. You will receive an email from me this evening with instructions on how to access that. You can always head out to our website, Accessibility.com, head to Events and scroll down to Past Events where you will see a listing of our past events. Click on that and down during in the agenda section is a link to watch the on demand recording.

We appreciate your time. Thank you for being here today. And without further ado, I'm going to hand it off to our president, Mark Shapiro, along with Rob Haverty.

Presentation

Mark Shapiro

We have with us today Rob Haverty. Rob was at Microsoft for 18 years, where he was the Director of Accessibility. For the past eight years he's been with Adobe as the Senior Product Manager for Adobe's Document Cloud Accessibility. Rob, we're honored to have you with us today.

Rob Haverty

Thank you very much. I am excited to be here.

Mark Shapiro

So to start with, what does it mean to have a remediated PDF?

Rob Haverty

So when you think about remediating a PDF, it's really about reviewing it and then fixing it to ensure that it is fully accessible and usable by individuals who use assistive technologies such as a screen reader.

Mark Shapiro

And how would you go about remediating a PDF?

Rob Haverty

There are a number of tools and processes available that you can use for remediation. But really the heart of PDF accessibility is this thing that's called the tag tree or the structure tree. And the purpose of that is to expose the structure and the content of the PDF to assistive technologies like screen readers. And so each individual tag does that. [Computer ding.]

Mark Shapiro

Adobe has all this built in to their... one of their versions of their PDF writers. Why can't somebody just use that? Why would they need to go to an outside company to fix up their PDF?

Rob Haverty

Quite frankly, remediating a PDF takes a specific skill set. It's not hard to learn, but it is time consuming to learn and it is time consuming to do. And so you may decide from a pure resource allocation standpoint it's going to be more efficient and potentially cheaper for you to use an outside outside remediation service.

Mark Shapiro

Are PDFs required to be accessible?

Rob Haverty

The simple answer to that is yes. There's a more complex answer in that it depends on how it's being exposed, who's using it. But at the end of the day, the idea is, is to give everyone an equitable experience. And if you don't have your PDF accessible, that means that somebody's not going to be able to read that document.

Mark Shapiro

How do I go about proving that a PDF is accessible?

Rob Haverty

[Chuckles.] Yeah, that's the \$64 million question. Really, the only real proof is finishing up remediation and then actually reading through the document using a screen reader. There are accessibility checkers available, but regardless of the format of your content, whether it's a Word document, a Google doc, a PDF or a HTML... Automated accessibility checkers are only going to get you 20 to 30% there. And so what I typically do is I'll use the accessibility checker. Then I will manually check that tag tree to make sure that everything is correct. And then I will actually read through the document using a screen reader.

Mark Shapiro

So the companies that do this type of work, that do the manual remediation, what's what type of a company are they? Are these individuals or this these companies like IBM?

Rob Haverty

They run the gamut. There are some very large corporations that have taken up doing PDF remediation, and then there are other companies that specialize only in doing PDF remediation.

Mark Shapiro

Those companies, how do they typically work with clients?

Rob Haverty

In general, and we're not a remediation company, so, you know, I speaking more from my experience. But in general, you know, you will contact them. They will want to know what types of documents you have, how many documents you have, and what level of accessibility you are actually looking for when they are remediated.

Mark Shapiro

What are the different levels as it relates to PDF for accessibility?

Rob Haverty

So if you get to, you know, what I would call a perfect PDF [air quotes], it's going to meet the web content accessibility guidelines and you're going to have to decide are you at 2.0 or 2.1 or now a 2.2 company and then PDF UA which is PDF Universal Access, and that's sort of a subset of the larger PDF standard.

If you meet both WCAG, the Web Content Accessibility Guidelines, and the PDF UA, then you are as good as you can get.

Mark Shapiro

In terms of budgeting... A lot of companies might have thousands of documents. The documents could have hundreds of pages. How would you get your hands around how to budget for something like that?

Rob Haverty

So there's a couple of things I would look at. Number one is if you have a large number of documents, there are APIs available today that allow you to batch process and get a PDF up to a certain level of accessibility. This is likely going to be cheaper and faster than sending it to an outside remediation service. But if you want a document to be fully accessible and meet this... meet the standards, then you're going to need to either manually remediate yourself or send it out to a remediation service.

It can run on average I would say if I were budgeting, I would say plan on \$5 a page. That may be high in some cases. It may be low in some cases. But that's probably a good average that we think of.

Mark Shapiro

What do you see as the distinguishing characteristics of a good company versus a bad company as it relates to PDF remediation services?

Rob Haverty

Not to throw anybody under the bus... But when I look at it, I'm going to look at does the company focus specific only on PDF remediation? How long have they been there? And typically if you go out to their website, you're also going to see references from customers and take a look at what kind of customers are actually using that company.

Mark Shapiro

Okay. Now we're going to do a deep dive with Jenny Woldt. She's the CEO of Splash Box Marketing. Jenny, I want to thank you for allowing us to do a deep dive with you on your company.

Jenny Woldt

Absolutely. Thank you.

Mark Shapiro

Tell us a little bit about your company.

Jenny Woldt

Sure. Splash Box Marketing started in 2006 as a creative design firm. In 2012, due to requests from a client, we took on and learned about accessibility and how to remediate documents. And then it kind of became our passion. And now it's actually the largest part of our business.

Mark Shapiro

Wow. So what do you offer in terms of PDF remediation services?

Jenny Woldt

So we do all languages. And we take on a lot of health care documents as well as government documents. And we're we're specialist in tables, I think, because everyone's always sending us documents that normally they would remediate in-house and they just can't because of complex tables. So we really excel at those. And we're pretty much willing to take on anything that anybody sends our way. So.

Mark Shapiro

All right. What what's a typical use case for your customers?

Jenny Woldt

So for most of our non-government customers, the use is all of the mandated materials for health plans. So your evidence of coverage, your EOCs, ANOCs, summary of benefits, those types of documents. And then for the U.S. government, we work a lot with the National Parks Bureau of Land Management. So we're remediating all of the different materials that you would want to know about the national parks. All the brochures and those types of items. Junior Ranger books, things like that.

Mark Shapiro

What sort of a budget should people be considering when they're thinking about remediating their PDFs?

Jenny Woldt

Well, for us, we do a flat rate. So regardless of difficulty or language, we do a flat rate per page, which makes it easy for our clients to budget based on the size of their documents. So generally, someone coming in off the street will, you know, quote a \$5 a page, and that makes it easy for them to figure out what this is going to cost them.

The only time that there is more is when it's a flattened image document. And we need to run OCR software because, as you know, that's very time consuming going back in and making sure all the characters got picked up. And in those cases, it's generally like \$6 a page to fix those.

Mark Shapiro

What's a reasonable amount of advance notice that you'd like to get from the customers?

Jenny Woldt

For us, it depends on how many documents you're sending to us. We'll generally give you a turnaround time, kind of based on our current workflow. When we think we can get that done. But we'll always tell people if you have a hard date that you need to meet, just let us know that. And in the case of like a thousand page document, we can split it up between several remediators.

The benefit of us doing all of the work in-house ourselves is we can move around and and take documents and make them so we can work as a team on them.

Mark Shapiro

Okay. What do you see that sets you apart from your competitors or even independent contractors?

Jenny Woldt

We... like I said, we do everything in house. We're not farming anything out. We are in three time zones, so we're pretty much available from, you know, seven in the morning till seven at night. So we are able to respond to people pretty quickly. All of our remediators go through a six

month intensive training with us before they're let loose to really remediate documents on their own without, you know, constant supervision.

And we also QC every document before goes out. A second set of eyes looks at every single one before it's sent back to the client. We try and capture what we call personal choices that are not necessarily things that make the document more compliant, but are personal choices for that client. And we try and capture those upfront, but occasionally they'll forget or think something's normal and maybe it's not something we usually do, but we will go back in and make those changes for them.

Mark Shapiro

That's fantastic. Thank you, Jenny. Appreciate the the deep dive.

Jenny Woldt

Yeah, absolutely.

Mark Shapiro

We're here with Glen Schubert, the Executive VP for Braille Works. Glen, thanks for allowing us to do a deeper dive on Braille Works and helping us understand PDF remediation.

Glen Schubert

Certainly. Happy to be here. Thanks for the opportunity.

Mark Shapiro

Sure. Just as we're getting started, can you tell us about Braille Works?

Glen Schubert

Yeah, Braille Works was founded back in 1984 and started primarily as a Braille company, creating menus for the largest chain restaurants in North America. And it's grown from the two founders, Lou and Joyce Fioritto, to now about 210 employees. We have four company owned buildings on campus, disaster recovery site. Operational, by the way, with people there. And we handle not only Braille now, but we do large print, we do audio, and in particular, we have a team that does nothing but accessible PDFs.

The team is actually here based in Florida. They're on campus, so we don't do anything with outsourced tools. We do everything on our servers, by our employees, and that team does nothing but document remediation and typically PDF document remediation to the WCAG standard currently 2.2, PDF UA, and HHS.

Mark Shapiro

What's a typical use case for a company that's using your services?

Glen Schubert

You know, I'd say it's a company that's looking to bring their accessibility to the next level. They may have worked on their website. They may have gotten some of that content accessible and, you know, made it available to people with visual impairments or people who use assistive technology. But their PDF documents, their marketing documents, their forms, the informational documents that they have for people are not built to be handled by a screen reader, software or accessibility tools.

So we take those libraries of documents and we make them fully compliant to whatever standard applies in that particular company.

Mark Shapiro

What would you say sets you apart from your competitors or independent contractors?

Glen Schubert

That's a great question. We run into what we call aggregators. You know, we have a blog out there about the Wild West of 508, and we have companies that we deal with all the time that don't actually remediate. They have beautiful websites. They take your documents, they put, they port them to an overseas resource. They hand them back and they here are your documents.

And yes, here's a compliance certificate. What makes us different is we do everything here in-house by people who are very well trained. We have a long term training process for each of our team members. They are a level one in the beginning. They can go all the way up to subject matter expert. But each one is trained not only on the tagging process but on the manual steps required to certify a document as being WCAG compliant.

So things like clicking on the link, is it a live link and does it go to relevant content? A lot of times you'll see companies that will say, we think it's a live link. Or, hey, here are our links. But they don't actually check it. They don't make sure it's there. They don't go through and check color contrast from beginning to end in the document. We do. And we offer suggestions on correcting that sometimes as simply making it a black text on the background.

Other times, the companies want to work with us to develop a color palette that works for their branding and also meets the compliance standards. So the big difference with Braille Works is we actually do all of the manual steps required. We take great care in making sure these documents are accessible. We test them all in a JAWS screen reader or other similar technology, and we make sure when we deliver that document back, that certificate of compliance is a real certificate and we embed in that certificate all the tests that were run so they can click on the link and see that right from the certificate.

Mark Shapiro

That sounds great. Glen, thank you so much for letting us do a deep dive. And quite an impressive company you have here.

Glen Schubert

Thank you very much. We appreciate that. We work pretty hard here to tell get people what they need.

Mark Shapiro

We got a bunch of questions from the audience. We're not going to jump to those. First question, what type of guarantees regarding document compliance should we expect? Glen, why don't you let me take this one?

Glen Schubert

Yeah, that's a great question. You know, when we talk about certificates of compliance, almost anybody you talk to will tell you they're going to supply you with a certificate of compliance. The question is, what's in that certificate? We take that extra step of embedding the test results in that certificate. So when you bring it up for a particular document, you can click on that link and see all of the tests and how it passed and what we did. And then check with the company to make sure they do all of the manual steps.

That's where we see a lot of fall out there.

Mark Shapiro

Rob?

Rob Haverty

Sure. So I think there's a couple of things. Number one is a report. You know, generally when you have remediated a PDF, you can run a checker and you can get a report out that will tell you, does it meet a specific standard. The other thing I look for is a guarantee.

There are some companies who will, you know, if guarantee that if you are sued, for example, and it turns out that the document is not fully accessible, they will actually cover the cost of that. So those are the two things I would look for.

Mark Shapiro

Okay. A next question. Is there an accuracy rating below 100% that is acceptable for a remediated PDF? Rob, why don't you take this one?

Rob Haverty

I'll be happy to. I love this question. I would say a soft yes. It really depends upon the use case for the PDF. So let me give you a couple of examples. If I'm working in a disability office at a university and I have a student who comes in and says, I have this paper that the professor just sent out and I have to read it by tomorrow and I can't read it with my screen reader.

I very likely would use an automated tagging service to get it up to a usable and readable quality so that the, you know, the student can proceed. They don't need a perfect document. In another

another case, you know, when I when I'm working specifically with large companies, not all of their documents are equal. You may have a document that every customer has to read.

That one should probably be 100%. Or you may have a document that people are required to fill out a form that they're required to fill out before proceeding. That one should be 100%. But then you may have a bunch of other stuff out there that you know quite in reality, not everybody reads, that doesn't get to 100%. You know, I would certainly check with your own legal department, but it's kind of like it's going to pass an automated checker, probably.

You're okay with that not being 100%. Obviously, we want everybody to be 100%. But the reality is, if I've got 100,000 documents, I'm not going to get to 100% of them all.

Mark Shapiro
Jenny?

Jenny Woldt

There is not an acceptable rating below 100% for us to send a document back to the client that says this is fully remediated. We see a lot of shortcuts taken. But at the end of the day, if it's not completely accessible to the hardest sighted individual on the other end, then it's not worth anything.

Mark Shapiro
Glen?

Glen Schubert

Yeah, you know, we have pretty high standards here, so we set the bar at this. We are delivering a fully compliant document. We do have clients who ask for accessibility over compliance. And by that I mean they, they may not necessarily want us to change the color contrast in the PDF for branding reasons, but they want someone using assistive technology to be able to read and understand all of the content.

In those situations, we do not issue a certificate of compliance, but it's specifically at a customer's request. We do deliver a certificate of accessibility, meaning that all of the content is readable using assistive technology.

Mark Shapiro

Is it better to provide the original file such as an illustrator file or the rendered pdf? Jenny?

Jenny Woldt

Normally we we like to get the rendered PDF. Just that way we don't run into issues with text shifting or there being nuances when we create the PDF. But in cases where the document perhaps had some issues as a PDF, in those cases we will ask for the original native files and create the PDF ourselves, have the person look over it to verify it all looks good to them, and then we'll remediate that one.

Mark Shapiro
Glen?

Glen Schubert

Sure. The answer to that is kind of a two part answer. Typically we want just the PDF. One of the things that people may not understand is that the way a PDF renders on your system could be different from the way it renders on our system. We may not have the font family that you're using. We may not have the same parameters set up to save that file.

The reason I said it's a two part answer is primarily we want the PDF for remediation, but in some cases the fonts may not be embedded in the PDF or there may be components that don't come over well - alt text and things in the images. And in some cases we can pull that from the source file. So initially PDF and then we'll request the source file as needed.

Mark Shapiro
Rob?

Rob Haverty

Absolutely, and I will, I will take issue with that or because I would provide both. It is always it can sometimes be easier to actually go back and fix that original source document and then reconvert it to a PDF using the appropriate conversion tool that will give you a tagged PDF. It's also useful... I was actually doing a document earlier this week and by being able to go back to the source document, I was able to better understand the intent of the author and then get the document the PDF tagged more appropriately.

Mark Shapiro

All right. Next question. If you create a document in Word or Google Docs and it passes the accessibility checker, 100% passes, and save it as a PDF, would that PDF be 100% accessible? Glen, why don't... why don't you take this one?

Glen Schubert

Yeah, that's great. Typically, no. You find that the process of saving as a PDF can affect the tag tree structure. So what you have as a an accessible Word document or accessible PowerPoint or source document. Once it saved to PDF, you do have to do some touch up on that. May not be a lot, but in some cases it can be pretty dramatic.

Mark Shapiro
Rob?

Rob Haverty

Absolutely. The simple answer is no. You know, as I mentioned previously, there's no automated checker that's going to give you a 100% assurance that your PDF is accessible or any content format, whether it be Word or Google Docs or wherever you're bringing it from.

It will do a good job if you do the right work, but you know, not to pick on anybody. But let's take Word, for example. If I create a very complex table that has nested headers, Word does not allow me to actually indicate that. And so when I convert it to a PDF, those nested headers are not going to be tagged correctly and I'm going to have to fix that.

Mark Shapiro

Why can't someone just use an automatic accessibility checker and such as Adobe to get a document 100% accessible?

Mark Shapiro

Jenny?

Jenny Woldt

Great. So the accessibility checker is great, but there are items that require human intervention for your metadata, your making sure the alternate text is correct, making sure all the OCR was processed properly. Tag trees are correct. Reading order is also correct. And these are things that require somebody to actually physically go through and check these things.

Mark Shapiro

Next question Do PDF remediation service companies provide training to help create better source documents?

Mark Shapiro

Rob?

Rob Haverty

I will be happy to take that. Some do, some don't. But there is a host of training available out there. You know, if you go out to the web and search on PDF accessibility training, you're going to get a lot of results. I would suggest that people look for the most current training available because the... PDF remediation is rapidly advancing and we're improving the tools to do that.

And you really don't want to get trained with a course that's ten years old that's not going to take advantage of the new advances.

Mark Shapiro

Thank you, everyone, for joining us today. Thank you, Rob from Adobe, Jenny from Splash Box, and Glen from Braille Works.

Closing

Lori Litz

I want to echo Mark's sentiment in thanking Jenny, Glen and Rob for being here with us today. The day is not yet over. If you head on back to the lobby or if you're already in the lobby, you

can head on over to Braille Works is putting on a breakout session called the Wild West of PDF Remediation.

And if you've ever tried to remediate a PDF, you know exactly what they're referring to. We also invite you to head on out to the Expo Hall and visit with Splash Box Marketing and Braille Works to learn more about PDF remediation services. Our next event is April 9th and that will be PDF Remediation Software. And yes, there is a difference.

We invite you back in April to that event to learn more about the differences between services and software as it relates to PDF remediation. As I mentioned earlier, today's event is recorded and will be available again this evening. I will email you out instructions on how to access it. Thank you all so much for being here. Head on over to the Wild West of PDF Remediation and have a great rest of your day.