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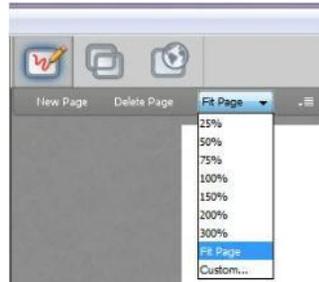

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Section 508 Refresh

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Presenters
U.S. Access Board

Bruce Bailey   **Timothy Creagan**

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Presentation Outline

- Final Rule Structure and Organization
- Key Changes and Issues from Proposed Rule
- Key Changes and Issues from Original 508
- Overview of 508 Standards
  - Including Some Differences in 255 Guidelines
- Resources
- Questions and Answers

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Timeline: ICT Refresh and Related W3C Activities

Access Board	W3C
February 3, 1998 – Original Telecommunications Act Accessibility Guidelines	
	May 5, 1999 – Final version of WCAG 1.0
December 21, 2000 – Original Section 508 Standards	January 25, 2001 – First public Working Draft of WCAG 2.0
July 6, 2006 – Members named to Advisory Committee (TEITAC)	
April 3, 2008 – TEITAC presents final report	
	December 11, 2008 – Final version of WCAG 2.0
March 22, 2010 – Draft proposed rule (ANPRM) to update the Section 508 standards and Telecommunications Act guidelines	
December 8, 2011 – Revised draft proposed rule (2nd ANPRM)	May 18, 2012 – WCAG2ICT Task Force convened to report on how to apply WCAG 2.0 to non-Web ICT
	October 26, 2012 – WCAG 2.0 becomes ISO/IEC International Standard ISO/IEC 40500:2012
February 27, 2015 – Proposed rule (NPRM) published in Federal Register	September 5, 2013 – Guidance on Applying WCAG 2.0 to Non-Web Information and Communications Technologies
January 18, 2017 – Final rule published in FR	

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Terminology Updated

Information and Communication Technology (ICT)
   instead of Electronic and Information Technology (EIT)

Function-based approach instead of product categories
- Examples:
   ICT with Two-Way Voice Communication
      instead of "Telecommunications products"
   ICT with Closed Functionality
      Instead of "Self-contained, closed products"

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Many Changes in 17 Years – 2000 to 2017…

- Extensive use of voluntary consensus standards incorporated by reference (IBR)

- Scoping sections impact the application of the technical sections

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Final Rule Structure and Organization

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Final Rule Structure and Organization

Draws on our rulemaking experience:
- ADA and ABA Accessibility Guidelines and Standards
- Formatting is similar to industry standards

Structure and organization is the same as proposed in the 2015 NPRM

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Sections Titles Use Whole Numbers

Each section will have one or more subsections
- Subsections use a number with a decimal point, and also have titles
- Subsections may themselves have subsections (with two or more decimal points)

Example:
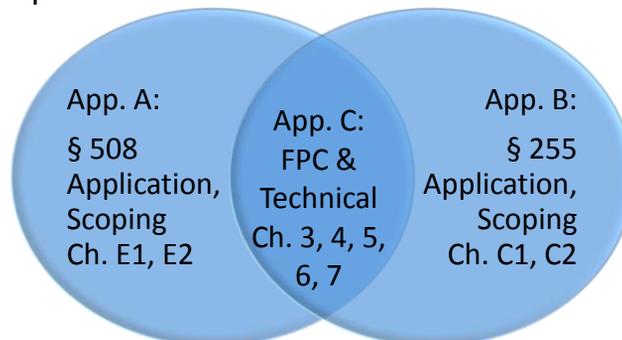412 ICT with Two-Way Voice Communication
   412.1 General
   412.2 Volume Gain
      412.2.1 Volume Gain for Wireline Telephones

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Final Rule Structure and Organization

- The final rule is comprised of both the Revised 508 Standards *and* the Revised 255 Guidelines
- In the CFR, they will both appear as Appendices to 36 CFR part 1194

App. A:

§ 508 Application, Scoping Ch. E1, E2

App. C: FPC & Technical Ch. 3, 4, 5, 6, 7

App. B:

§ 255 Application, Scoping Ch. C1, C2

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Information and Communication Technology Standards and Guidelines: 36 CFR Part 1194

Appendix A
    508 Chapter 1: Application and Administration
    508 Chapter 2: Scoping

Appendix B
    255 Chapter 1: Application and Administration
    255 Chapter 2: Scoping

Appendix C
    Chapter 3: Functional Performance Criteria
    Chapter 4: Hardware
    Chapter 5: Software
    Chapter 6: Support Documentation and Services
    Chapter 7: Referenced Standards

Appendix D
    EIT Accessibility Standards as Originally Published on December 21, 2000

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Key Changes and Issues from Proposed Rule

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Key Changes and Issues from Proposed Rule

Final Rule as compared to 2015 Proposed Rule (NPRM)

- New "Safe Harbor" provision for Legacy ICT (Revised 508 Standards only)
- Real Time Text (RTT)
- Functional Performance Criteria (FPC)

New "Safe Harbor" Provision in the revised 508 Standards (E202.2)

Any component or portion of <u>existing ICT</u> that complies with an earlier standard issued pursuant to Section 508 of the Rehabilitation Act of 1973 (as amended), and that has not been <u>altered</u> on or after January 18, 2018, shall not be required to be modified to conform to the Revised 508 Standards.

- "Existing ICT" and "Alteration" are defined in E103.4

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Real-Time Text (RTT)

Reserved (412.5 is the place holder)
  Deference to ongoing FCC rulemaking on RTT

FCC Report and Order, released Dec. 16, 2016
  Petition for Rulemaking to Update the Commission's Rules for Access to Support the Transition from TTY to Real-Time Text Technology, and Petition for Waiver of Rules Requiring Support of TTY Technology

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FCC RTT Report and Order Addresses:

• Transition from TTY technology to RTT technology that permits simultaneous voice and text on the same call using the same device
• Interoperability achieved by adhering to RFC 4103 as a safe harbor standard
• Backwards compatibility with TTYs (supported for a specified period)
• Support for RTT transmissions to 911 call centers and telecommunications relay centers

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Requirements for TTY and RTT are in Transition

The Access Board continues to monitor these proceedings and will update the 508 Standards and 255 Guidelines as appropriate in a future rulemaking

There are no TTY requirements in the Revised 508 Standards for the time being
- TTY compatibility is still required under current 255 requirements as enforced by the FCC

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Functional Performance Criteria (FPC) Changes:

FPC added to address cognitive accessibility (302.9)
- New to Revised 508 Standards
- Already in original 255 Guidelines
- Harmonizes with EN 301 549 (European Union standard)

FPC for Limited Hearing (302.5) and Limited Vision (302.2) modified
- Responsive to NPRM comments
- More closely harmonize with EN 301 549 standard

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Role of the FPC Clarified

Use of FPC is consistent with past and current practices:

- FPC are applicable when the technical requirements in Chapters 4 and 5 do not address the functions of the ICT
- FPC are used when ICT does not conform to technical requirements

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When ICT Does Not Conform to Technical Requirements

FPC are the basis for equivalent facilitation
  - FPC are used to determine whether substantially equivalent or greater accessibility is provided

When ICT features do not conform to technical requirements, test those features against the FPC

When ICT features conform to the technical requirements in Chapters 4 and 5, the FPC are not applicable

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Key Changes and Issues
from Original 508

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Key Changes and Issues from Original 508

Final Rule as compared to 2000 Original 508 Rule

- Broad Application of WCAG 2.0
  - Delineation of Covered Electronic Content

- ICT with Closed Functionality

- What about Mobile?

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Broad Application of WCAG 2.0

WCAG 2.0 Level A and AA Success Criteria and
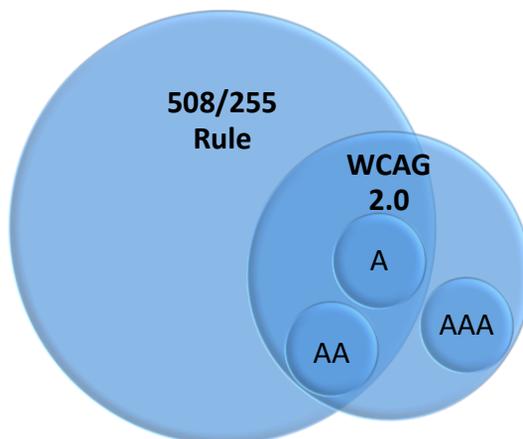Conformance Requirements applied to:
- Web content
- Covered non-Web documents
- Software user interfaces

Similar Approach is Used Elsewhere
- Consistent with proposals in second ANPRM and NPRM

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WCAG 2.0 Incorporation By Reference (IBR)

508/255 Rule

WCAG 2.0

A

AA

AAA

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WCAG 2.0 Incorporation By Reference

Citations to WCAG 2.0:
   508 Chapter 2
      E205.4 Accessibility Standard (under E205 Electronic Content)
      E207.2 WCAG Conformance (under E207 Software)
   Chapter 5: Software
      504 Authoring Tools
   Chapter 6: Support Documentation and Services
      602.3 Electronic Support Documentation

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WCAG 2.0 IBR for Electronic Content

E205.4 Accessibility Standard
   Electronic content shall conform to Level A and Level AA Success Criteria and Conformance Requirements in WCAG 2.0 (incorporated by reference, see 702.10.1)

E205.4 continues…

- Exception for non-Web documents from the four Success Criteria that are for "sets of Web pages"
- E205.4.1 details the word substitution necessary to clearly apply WCAG 2.0 for non-Web documents

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WCAG 2.0 IBR for Software

E207.2 WCAG Conformance

> User interface components, as well as the content of platforms and applications, shall conform to Level A and Level AA Success Criteria and Conformance Requirements in WCAG 2.0 (incorporated by reference, see 702.10.1)

Exception, word substitution, and rewrite of WCAG Conformance Requirement 3

Same approach as with E205.4

- But for software instead of documents
- Mechanics of word substitution more complex
- Exception for software that is assistive technology

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WCAG 2.0 IBR Under 255 Guidelines

Electronic Content

C203.1 is nearly identical to E205.4

> Electronic content <u>that is integral to the use of telecommunications or customer premises equipment</u> shall conform to Level A and Level AA Success Criteria and…

Software

> C205.2 is identical to E207.2

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Delineation of Covered Electronic Content (Revised 508 Standards only)

E205.2 Public Facing

> Electronic content that is public facing shall conform…

E205.3 Agency Official Communication

> Content that is not public facing
>
> Agency official communication in nine categories

Exception for NARA records

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E205.3 Agency Official Communication

A. An emergency notification
B. An initial or final decision adjudicating an administrative claim or proceeding
C. An internal or external program or policy announcement
D. A notice of benefits, program eligibility, employment opportunity, or personnel action
E. A formal acknowledgement of receipt
F. A survey questionnaire
G. A template or form
H. Educational or training materials
I. Intranet content designed as a Web page

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ICT with Closed Functionality

402 Closed Functionality
- Five subsections, some extensive
- Explicit requirement for speech output

402.2 Speech-Output Enabled
> ICT with a display screen shall be speech-output enabled for full and independent use by individuals with vision impairments
> - Six exceptions
> - Five subsections

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What about Mobile?

No separate chapter or section for mobile
> Mobile technology was taken into account throughout the rulemaking process

Mobile phones are covered under hardware
> See Chapter 4: Hardware

Mobile apps are covered under software
> See Chapters 2 citations to WCAG 2.0 for software (E207.2 and C205.2)
> See Chapter 5: Software

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Do phones have to be speech-output enabled?

Scoping requirements different under 508 Standards and 255 Guidelines

> Under 508, all of 402 Closed Functionality applies, including 402.2 Speech-Output Enabled

Under 255, there are exceptions

> See C204 Hardware, where 402 is listed as an exception

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402 Closed Functionality (Section 508)

Closed functionality applies to ICT such as phones and kiosks

- Several provisions in Chapter 4 have exceptions for personalized ICT

- Example: 402.2.5 Braille Instructions
  EXCEPTION: Devices for personal use shall not be required to conform to 402.2.5.

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Section 255 Guidelines Scoping Exceptions

ICT covered by Section 255 is generally required to comply with technical requirements (Chapters 4 thru 7)

Under 255 only, there are hardware exceptions for:
- Closed Functionality (402)
- Tactile orientation of tickets and fare cards (407.7)
- Reach range, height, and depth (407.8)
- Display screen visible from seated height (408)
- User Controls for Captions and Audio Descriptions (415)

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Overview of 508 Standards

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Overview of 508 Standards

Chapter 1: Application and Administration

Chapter 2: Scoping

Chapter 3: Functional Performance Criteria

Chapter 4: Hardware

Chapter 5: Software

Chapter 6: Support Documentation and Services

Chapter 7: Referenced Standards

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Section 508 Requirements, Chapters 1 & 2

Chapter 1: Application and Administration	Chapter 2: Scoping Requirements
E101 General	E201 Application
E102 Referenced Standards	E202 General Exceptions
E103 Definitions	E203 Access to Functionality
	E204 Functional Performance Criteria
	E205 Content
	E206 Hardware
	E207 Software
	E208 Support Documentation and Services

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Chapter 3: Functional Performance Criteria

301 General

302 Functional Performance Criteria

   302.1 Without Vision

   302.2 With Limited Vision

   302.3 Without Perception of Color

   302.4 Without Hearing

   302.5 With Limited Hearing

   302.6 Without Speech

   302.7 With Limited Manipulation

   302.8 With Limited Reach and Strength

   302.9 With Limited Language, Cognitive, and Learning Abilities

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Chapter 4: Hardware

401 General

402 Closed Functionality

403 Biometrics

404 Preservation of Information Provided for Accessibility

405 Privacy

406 Standard Connections

407 Operable Parts

408 Display Screens

409 Status Indicators

410 Color Coding

411 Audible Signals

412 ICT with Two-Way Communication

413 Closed Caption Processing Technologies

414 Audio Description Processing Technologies

415 User Controls for Captions and Audio Descriptions

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Chapter 5: Software

501 General
502 Interoperability with Assistive Technology
503 Applications
504 Authoring Tools

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Chapters 6 and 7

Chapter 6: Support Documentation and Services
    601 General
    602 Support Documentation
    603 Support Services

Chapter 7: Referenced Standards
    701 General
    702 Incorporation by Reference

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Comparison of Appendices A (508) and B (255): Chapters 1

Both Chapters 1 have the same three provision titles

- General
- Referenced Standards
- Definitions
  Some definitions only appear in one or the other

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Comparison of Appendices A (508) and B (255): Chapters 2

Same:
- E201 Application corresponds to C201 Application

Different:
- 508 Chapter 2 has section for "General Exceptions" (E202) and "Access to Functionality" (E203)
- 255 Chapter 2 does not have these sections

Same:
- E204 through E208 corresponds to C202 through C206

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Resources

Resources (1 of 3)

- www.Access-Board.gov – Section 508 Standards and Section 255 Guidelines, technical assistance;
  - ICT Final rule (2017)
  - Webinars – Section 508 Best Practices
  - More guidance material under development

- http://w3.org/tr/wcag – WCAG 2.0 materials:
  - WCAG 2.0 Guidelines and Success Criteria
  - Understanding WCAG 2.0 (Technical Assistance (TA))
  - Techniques for WCAG 2.0 (TA)
  - Customizable and interactive Quick Reference (TA)

Resources (2 of 3)

Section 508 "Best Practices" Webinar series (2013-2017)

- Sponsored by the U.S. Access Board and CIO Council (CIOC).

  Six times per year
  - Archived webinars: http://www.adaconferences.org/CIOC/Archives/

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Resources (3 of 3)

- www.Section508.gov – GSA website with 508 technical assistance: FAQs, Best Practices on how to make Word documents accessible; Excel spreadsheets; PDFs

- http://www.ada.gov/pcatoolkit/chap5toolkit.htm ADA Toolkit for State and Local governments

- www.CIO.gov – CIOC Accessibility Committee Best Practices, Education & Vendor subcommittees for Section 508

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Questions?

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