APA Editing Checklist
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This checklist indicates requirements to conform to the American Psychological Association's (APA) seventh edition Publication Manual guidelines. The APA manual defers to the Chicago Manual of Style where rules are not specified. Keep in mind that journals, class paper assignments, and dissertation committees may deviate from APA guidelines in some of their requirements, and those deviations should be adhered to if clearly defined. For a pre-formatted APA dissertation template, see APAeditor.com under Resources.

Notable changes from 6th edition to 7th: https://www.scribbr.com/apa-style/apa-seventh-edition-changes/

Table of Contents

Page Format

☐ No single line of a paragraph remains on top or bottom of page. Highlight entire document with cntrl-A keys simultaneously, then set paragraph settings to widow orphan control: on menu bar *format > paragraph > line and page breaks > widow/orphan control*.

☐ Use one space after end-of-sentence punctuation.

☐ Pagination of document should continue into the appendix(es).

☐ References section should be double-spaced, though some schools or publications request single-space within and double-space between.

☐ Footnotes should only be used to amplify the text and convey one idea.

☐ Flush left justification style, ragged right. (on menu bar *format > paragraph > alignment > left*)

☐ Margins: Most dissertations, if published as a paper book, require a 1.5-inch (3.81 cm) left margin for binding. Otherwise, 1 inch (2.54 cm) for all margins is standard. Page numbers and appendixes must be within margin requirements. Many are now published online and use 1 inch on all sides.

Preliminary Pages Format

☐ Title should be about 10 to 12 words and contain no abbreviations.

☐ Abstract word allowance ranges from 150 to 250 words for journal submissions. Abstract must typically be 350 words or fewer for dissertations.

☐ Consistent levels of heading must be included in a table of contents. Level 4 and 5 headings typically are omitted from the table of contents.

☐ A table of contents should use leader tabs for exactness, rather than manually inserted dot lines.

☐ For headings in the table of contents that are longer than one line, indent the second line three spaces, but not five spaces or it will appear to be a separate heading. Typically, an auto-update table of contents will adjust this automatically.

☐ Dissertation preliminary pages: Match format of with examples available through your institution. Typically title and copyright pages must be counted but not numbered. Remaining preliminary pages are often paginated with lower case roman numerals.

Heading Format

☐ The examples in the APA publication manual show strict double-spacing throughout; however, some school guidelines allow triple or quadruple space before major headings (level 2) to improve readability. This can be automatically set as a format option for heading style when creating an automatically updatable table of contents.

☐ Headings and subheadings must be formatted correctly in bold. Levels must match the table of contents levels.

☐ Avoid having only one subsection within a section, just as you would in an outline.

☐ Do not begin a section with the subheading *Introduction.*

Paragraph Format

☐ Paragraph length must be more than one sentence.

☐ Blocked quotes (40 words or more) are indented on left edge only and double-spaced. According to the Chicago Manual of Style (to which APA defers in matters it does not describe), if a block quotation itself contains quoted material, double quotation marks enclose that inside material. (In a non-blocked quotation, these inside would be set as single quotation marks within the regular double quotation marks.)

☐ Footnotes should be indicated by numbers that are correctly located.

☐ Some students choose to begin a chapter with a free-standing quote. If the advisor approves this, the institution is likely to accept it as long as the quote has a proper citation that is referenced in the references section. Your institution may prefer that such quotes conform to block quotation style.

List Format

☐ Commas must separate each item in a series, even before the conjunction *and*.

☐ Correct seriating format for lists as follows: (a) for a series of items *within* a sentence, semicolons are used to separate items only if commas are used within the listed items; (b) letters in parentheses are used for lists that have shorter content; and (c) numbers with hanging indent are used for numbered lists that are full sentences and full clauses or paragraphs.

☐ A definitions section often uses bullets with a colon after the term defined.

Punctuation and Emphasis

☐ Punctuation marks:

em dash	—	Use to set off an interrupting idea within a sentence.
dash (hyphen)	-	See http://writingcenter.waldenu.edu/341.htm Following Chicago Manual of Style guidelines, hyphens are mostly avoided, except where an otherwise unclear interpretation may result.
brackets	[ ]	Use when as parentheses within parentheses.
slash	/	Do not use when a phrase can be clear without it.
quote marks	" "	Do not use to hedge; instead use language such as *so-called*… Use to introduce a word or phrase as an ironic comment, slang, or invented or coined expression; use quotes first time and not thereafter.

☐ No ellipsis (. . .) is needed for the beginning or end of a quote, unless it is important to understand that the sentence continues. The APA manual states, "Do not use ellipsis points at the beginning or end of any quotation unless, to prevent misinterpretation, you need to emphasize that the quotation begins or ends in midsentence." Use three periods for middle of sentence ellipsis. A fourth period is used to indicate that one or more sentences were skipped.

☐ Combine back-to-back parentheses using a semicolon to separate items.

☐ In general italics should not be used for emphasis, except to indicate where the meaning might otherwise be lost. For titles, italicize periodicals but not articles within them, books but not chapters within them, and a series but not individual segments.

☐ Use italics for introduction of a key or technical term, for the first use only, or whenever prefaced by "the word…" or "the term…"

☐ Use italics for anchors of a scale, such as a Likert scale (i.e., *never, rarely, sometimes, most of the time,* or *always*) rather than quotation marks.

☐ Use block quote format for quotes 40 words or more.

Capitalization

See https://apastyle.apa.org/style-grammar-guidelines/capitalization/

☐ Do not capitalize the second word of hyphenated compound.

☐ Do not capitalize names of laws, theories, models, or hypotheses.

☐ Do not use title capitalization for statistical tests or procedures.

☐ Do not capitalize "important words." Proper nouns are capitalized, meaning a specific legal identity or a specific title for a specific position at a specific company along with the person's name (i.e., "Dean Margit is unlike other deans").

☐ In general, do not capitalize the names of diseases, disorders, therapies, treatments, theories, concepts, hypotheses, principles, models, and statistical.

☐ Words such as *test* or *scale* are not capitalized if they refer to subscales of tests.

☐ Job titles are not capitalized unless they immediately precede a name (i.e., President Mary Baker)

☐ *Black* and *White* as racial designations are capitalized, and also Aboriginal, Asian, European American. See https://apastyle.apa.org/style-grammar-guidelines/bias-free-language/racial-ethnic-minorities

☐ Chapter titles are treated as proper nouns (i.e., Chapter 2), as are sections within the document referencing itself, but not when referencing chapters of other documents.

☐ Capitalize all words that have four letters or more in a heading. Exception: Subheadings of levels 4 and 5 (paragraph headings) only have the first letter capitalized.

☐ When referring to the United States Congress or President, *Congress* or *President* is capitalized even without the word being preceded by the words *United States* or *U.S.*

☐ Use capitals for a complete proper name, a trademarked product name, or legal trade name, but not a description of a category (see Chicago Manual of Style, to which APA defers in unmentioned matters). In general, shortened terms that are not the full formal title are not capitalized, such as *institute* or *director*.

Abbreviations

☐ *e.g.* means *for example*, whereas *i.e.* means *in other words*, *that is,* or *such as*. The abbreviations should have commas after them. If not within parentheses, use non-Latin equivalents, except use *et al.* inside and outside parentheses.

☐ Explain abbreviations and acronyms on first occurrence, but not thereafter, unless you want to remind the reader on occasion, such as the first use in each chapter.

☐ If an abbreviation is commonly used as a word, it does not use periods, such as within degree titles and organization titles (i.e., PhD and APA). See www.docstyles.com/apacrib.htm

☐ When used as an adjective, abbreviate U.S. (i.e., the U.S. population), but when used as a noun, spell it out, such as "persons in the United States."

☐ *t* test; note that the *t* is italicized.

Numbers

☐ Express numbers in digit form that (a) are 10 and larger, (b) refer to units of time or measurement, (c) refer to statistics or mathematical functions, (d) refer to subjects of experiments (not subjects of other types of studies) or scores, (e) note place in a numbered series, or (f) denote age.

☐ Plurals for years should not use an apostrophe before *s,* such as "in the 1990s".

☐ Designations of time (years, minutes, etc.) should be in numeral form.

☐ Use % symbol only when preceded by a numeral.

☐ Use *N* to designate numbers in a total sample and *n* to designate number in a portion of the total sample.

☐ For math signs, insert special characters (e.g., minus sign not dash).

☐ Capitalize nouns that precede a number, such as *Level 5*, with the exception of common parts of books or tables followed by numerals or letters.

☐ Capitalize "Grades 4 and 12" but not "fourth grade, nor 12th grade"

☐ Numerals and symbols in equations should have spaces between them.

☐ Letters used as statistical symbols for algebraic variables are italicized (*p, r, SD, t* test, *F* distribution).

☐ Statistical terms used in the narrative should be written out, but use symbols in tables and figures.

☐ For numbers less than 1, add a 0 before the decimal point, for example *SD* = 0.33, but not for *p* (probability), Chronbach's alpha, or *d* (effect size) that are expected to be less than 1.

Units of Measurement

☐ Abbreviate units of physical measurement when appearing with a numeric value.

☐ Provide metric equivalents for all non metric units.

Grammar

☐ Use personal pronouns (e.g., "I found," or "we found" if joint authors) when referring to your own results in a study.

☐ Use the first person I rather than referring to self as "the researcher," which might be confused as referring to someone other than yourself as the author and researcher.

Tables

☐ Bold the word *Table* and its number, which should be a space above the title and not italicized. Italicize table titles. Table titles should be single spaced if they extend over one line of text.

☐ Each table must be labeled with the correct consecutive table number.

☐ Tables must be referred to in the text.

☐ For table title, capitalize major words and all words that are four letters or more.

☐ Capitalize only the first word of columns and row headings, except capitalize (a) factors in a numerical factor analysis and (b) proper nouns.

☐ Every column must have a heading.

☐ Rows may be single-spaced or double-spaced.

☐ Typically for publications such as theses and dissertations, the table should be as close after the first mention of it as the page format allows. The APA manual guidelines are generally intended for journal submissions, which ask for the tables at the end because publishers decide where to position them.

☐ Whenever possible, keep a table on one page for readability.

☐ For tables continued onto the next page, some advisors request that you use (a) a line for a lower border and place under the line a note such as *table continues* at the bottom and (b) a repeat of column headings on the next page; however, these requirements add a substantial chore when repositioning the table. Even with such requirements, table notes should not be repeated but should appear at end of last page of table.

☐ It is generally acceptable to triple or quadruple space before and after tables and figures.

☐ Use a dash in an empty cell only if data were not obtained or not reported—which can be explained in a table note—or if data are not applicable.

☐ Obtain copyright permission for reproducing or adapting a table, but see section below on citations for citation of table sources that utilize data from other sources, placed in substantially different format.

☐ If referring to probability notes in a table, use asterisks, not superscript letters.

☐ For table notes that refer to symbols within the table, do not use the word *Note* prior to explanation.

☐ A table note should generally be continuous, meaning in sentence format not in list format. For example: *Note*. Ratings ranged from 1 = *strongly disagree* to 6 = *strongly agree*.

☐ Refer to tables only by number, not by referring to "the table below" or "the table above."

☐ In dissertations, typically the table number, table title, and page number are included in a list of tables following the table of contents and in the same format as the table of contents.

☐ The original use of only horizontal lines was based on the fact that it was what the typewriter was equipped to produce. Most schools now allow vertical lines in tables also. This editor encourages advisors to allow students to use formatting that clarifies the content.

Figures

☐ Graphs, charts, maps, drawings, and photographs are all referred to as figures.

☐ Bold the word *Figure* and its number, which should be a space above the caption and not italicized.

☐ Each figure must be labeled with the correct consecutive figure number.

☐ Figures must be referred to in the text.

☐ Only the word *Figure* is italicized in the figure caption. A period follows the caption, and at the beginning of the caption, the word *Figure* is on the same line as the caption.

☐ Figure captions have only first word and proper nouns capitalized.

☐ Figure copyright issues. See section below on citations for citation of figure sources.

☐ For dissertations, typically large blank spaces should not precede or follow a figure if at all possible, but do not split figures across two pages.

☐ In dissertations, typically the figure number, figure caption, and page number are included in a list of figures following the list of tables, and in the same format.

Citations (within the text)

☐ Quick guide for citation styles: http://bcs.bedfordstmartins.com/resdoc5e/res5e_ch09_s1-0001.html

☐ With multiple citations in same set of parentheses, list citations in alphabetical order of first author's name separated by semi-colons, but maintain the order of names *within* an author group in the same order as listed in that source.

☐ For multiple citations of the same author or author group within the same paragraph, only the first use of the citation should include the year if the author names are used outside parentheses (i.e., as part of the narrative). However, repeat the year always when the names appear within parentheses. Also, repeat the year for the second citation of the author names used outside parentheses.

☐ If a reference list includes publications by two or more primary authors with the same surname, include the first author's initials in all text citations, even if the year of publication differs. For example (J. R. Stuart & Frey, 2016; M. Stuart, 2019).

☐ Spelling and dates in citations must match the references section.

☐ If the organization has a familiar abbreviation, you may include it in brackets the first time you cite the source and use the abbreviation alone in later citations. For example, the first citation would be this: (Centers for Disease Control and Prevention [CDC], 2009) and later citations would be this: (CDC, 2009).

Author Names

☐ For citations that include multiple author names, spell out the word *and* when outside parentheses but use the ampersand *&* if the citation is inside parentheses.

☐ 3rd and subsequent authors are abbreviated with et al., with no punctuation immediately following author's name.

☐ For articles with no author and no company name, use the article name (with a shortened version of title for the in-text citation) not the journal name.

☐ In general, use the last name of cited authors but not first names, even in non-parenthetical citations.[1] An appropriate use of full names—consistent with the intent of the APA manual but allowing for correct identification of authors who are cited as a secondary citation—would be to only use full names in landmark research directly on point with your topic. If the source is in the literature review then use the APA style of including only the surname.

☐ When using a secondary citation (i.e., one author referring to another) it is assumed the earlier-published work is not in the references section and also should not have a year associated with it in the citation.

Direct Quotes

☐ You must cite your sources whenever paraphrasing, quoting an author directly, or describing an idea that influenced your work.

☐ For direct quotes, you must use quote marks and include a page number, or for online sources without pages, include a paragraph number. If no paragraph number is visible, cite the section heading (in part if it is too long) and the number of that paragraph with numbering restarted within the section. For example: (Discussion section, para. 4) or ("Abbreviated Heading," para. 6)

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[1] Because the documentation of gender bias has been irrefutable in psychological research, APA style prefers to use last names only. It does, however, allow the use of gender-specific pronouns. A full name is used when a person is discussed but not cited, and when the full name is needed for identification.

- [ ] It is not necessary but is allowable to include a page number when paraphrasing. When paraphrasing or referring to an idea contained in another work, you are encouraged to provide a page or paragraph number, especially when it would help an interested reader locate the relevant passage in a long or complex text.
- [ ] Direct quotes of 40 words or more must be in block format.
- [ ] The whole blocked quote must be indented five spaces (1/2 inch) and must end with a period *before* the citation in parentheses.
- [ ] A blocked quote often has a colon preceding it, though there are exceptions depending on the grammatical structure of the preceding sentence.

Dates

- [ ] The date for a publication not read in the original is not included with the author of a secondary source citation.
- [ ] The abbreviation for *no date*, used for online sources, (n.d.) has no space between.
- [ ] Within a paragraph, you need not include the year in the second and subsequent nonparenthetical references to the same study, when the name of the author is part of the narrative rather than in parentheses, as long as the study cannot be confused with other studies cited in the article. For citations with the author name within parentheses, the date should always be included.

Documents Without Page Numbers

- [ ] Use a paragraph number for citing online sources if paragraphs are numbered or are few enough to easily count. Otherwise, include a section heading also, such as in this example: ("No Page Numbers," para. 1) or (Discussion section, para. 5).

Permissions

- [ ] If you use data from another source to create your *own* table or figure, copyright permission is usually not necessary, but you must cite the information source in the standard manner of citation and make clear that data segments, not a pre-published table or figure, were used. If you duplicate all or part of a table, figure, or graphic from another source, you must obtain copyright permission from the source's copyright holder and format the permission note according to the APA publication manual.
- [ ] Authors generally have permission to quote (and appropriately cite) previously published text under 400 words as a block or under 800 words interspersed; however, a copyright holder's specific definition of fair use overrides this general rule. Tests of any length, in part or whole, should be reprinted only with permission.

References (within the references section)

Format

- [ ] Double space references, though some university-specific guidelines allow double-space between and single-space within references.
- [ ] Identifiable meta-analyses are preceded by an asterisk.

Authors

- [ ] Include all author names.
- [ ] List references in alphabetical order.
- [ ] If the author is an organization that is part of a larger organization, use only the organization referred to in the source. If both organizations are referred to in the source, the larger organization is listed first in the reference and also is used alone in the text citation as the author. The sub-organization should be listed in the references after the larger organization name, separated by a comma.
- [ ] Full official names of organizations should be used in the references section, not abbreviations.

☐ For online reference manuals or databases such as dictionaries or encyclopedias, use the defined word in place of the author name. Word. (n.d.). In *Online dictionary* (11th ed.). Retrieved from http://www.xxxxx/word

Dates

☐ The oldest date is listed first if two or more articles have the exact same author name(s).

☐ To distinguish between citations (and references) that have the same author and date combination but are different sources, for the first mentioned in the text, use the date followed by the letter *a*. For the next citation that has the same author and date combination but indicates a different source, use the letter b after the date, and so forth. The references then are ordered by their appearance in the text.

☐ The abbreviation for no date (n.d.) has no space between.

☐ For APA 7th edition, the retrieval date for online sources is not used in the references section unless it is a wiki whose content changes.

Titles

☐ Only periodicals have title capitalization.

☐ Periodical articles or chapters in books must show first and last page numbers.

Publishers (paper and online sources)

☐ Publisher name: Omit *Inc. Publishers.* or *Co.* as add-ons, but retain the words *Books* and *Press*.

☐ Publisher locations are no longer included in the author location.

☐ Database name: For online journal references, the database name is only included for material of limited circulation. Do not include names of databases, such as, "Retrieved from EBSCOhost database," because this database accesses the same sources as most other large databases. A doi number is preferred, and if that is unavailable, the url for the journal's home page.

☐ A DOI number is now listed as a URL. A good resource: https://search.crossref.org/references

☐ You can turn off the function that automatically creates links when a URL is placed in your references. However, for publishing online, it is useful to the reader to leave these. If your paper-reader insists they be removed, right click the URL > choose *hyperlink > edit hyperlink* > click *remove link*.

Appendixes

☐ Appendixes must be labeled with capital letters (A, B, C, etc.) in the order in which they are mentioned in the text and must be placed in the same order.

☐ Each appendix letter must match its letter in the table of contents and the text.

☐ Appendixes must typically conform to the same margin specifications as the rest of the document. If needed, shrink pre-printed forms by photocopying. Maintain page numbers on all appendix pages.

☐ For permission letters, you may typically omit personal contact information of yourself and others.

For another useful summary of rules, see http://psych.ucalgary.ca/thpsyc/APA_Style_Sheet.pdf