APA Editing Checklist
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This checklist indicates requirements to conform to the American Psychological Association's (APA) sixth edition Publication Manual guidelines. There is a helpful Checklist for Manuscript Submission on pages 241 through 243 of the manual, which serves a somewhat different purpose. In the lists below, the page numbers indicate where to find more detailed information about specific guidelines that relate to typical mistakes. Also, for editing clients I insert a filled-in box to indicate more prevalent issues. 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. In some instances, instructions are included for formatting MS Word documents. Versions of this program differ, so yours may slightly vary from the described path. 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 two spaces after end-of-sentence punctuation, but one space in references section (p. 88).
- ☐ Pagination of document should continue into the appendix(es).
- ☐ References section should be double-spaced (p. 180), though some requests are for single-space within and double-space between.
- ☐ Footnotes should only be used to amplify the text and convey one idea (pp. 37-38).
- ☐ Flush left justification style, ragged right (p. 229). (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, one inch (2.54 cm) for all margins is standard. Page numbers and appendixes must be within margin requirements (p. 229).

Preliminary Pages Format

☐ Title should be about 10 to 12 words and contain no abbreviations (p. 23).

☐ Abstract word allowance ranges from 150 to 250 words for journal submissions (p. 27). 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 of the same level. 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 must be paginated with lower case roman numerals.

Heading Format

☐ The examples in the sixth edition show strict double-spacing throughout (pp. 41-59); however, according to the *fifth* edition (p. 326) of the APA publication manual, as well as some school guidelines, it is acceptable to triple or quadruple space before major headings (level 1 and 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 (pp. 62-63).

☐ Avoid having only one subsection within a section, just as you would in an outline (p. 62).

☐ Do not begin a section with the subheading Introduction (p. 27). APA manual discourages using the word *Introduction* as a heading after a chapter heading (APA 6th ed. p. 27, see also p. 63 sec. 3.03).

☐ The first page of the first chapter should not repeat a dissertation title.

Paragraph Format

☐ Paragraph length must be more than one sentence (p. 68).

☐ Blocked quotes (40 words or more) are indented on left edge only (p. 92) and double-spaced (p. 171). According to the CMS, if a block quotation itself contains quoted material, double quotation marks enclose that material. (In a non-blocked quotation, these would be set as single quotation marks within the regular double quotation marks.)

☐ Footnotes should be indicated by numbers that are correctly located (p. 38).

☐ 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. The institution may prefer that such quotes conform to block quotation style.

List Format

☐ Correct seriating format for lists: (a), (b), (c) for a complex series of items *within* a sentence (p. 64) semicolons are used to separate items only when commas are used within the listed items; numbers and hanging indent for numbered lists, for full sentences and full clauses (pp. 63-); use hanging indent even for numbered long paragraphs (p. 64).

☐ Bullets are acceptable (p. 64).

☐ Semicolons are used to separate items in a list when commas appear *within* items of the list (p. 64).

☐ Acceptable list format for a definitions section typically includes (a) bullets with a colon after the term defined, (b) level 4 headings (but if any level 4 headings are in table of contents, all should be, in which case another list format looks better), (c) table format, or (d) a list in the appendix in an alternate style.

Punctuation and Emphasis

☐ Punctuation marks:

em dash	—	p. 97 (to set off an interrupting idea within a sentence)
dash (hyphen)	-	p. 97 (see also http://writingcenter.waldenu.edu/341.htm) Following Chicago Manual of Style guidelines, hyphens are mostly avoided, except where an otherwise unclear interpretation may result.
parentheses	( )	p. 93
brackets	[ ]	p. 94
slash	/	p. 95 (do not use when a phrase can be clear without it)
semicolon	;	p. 62
colon	:	p. 90
comma	,	pp. 88-89
quote marks	" "	p. 92 (do not use to hedge; instead use language such as *so-called*…) p. 91 (to introduce a word or phrase as an ironic comment, slang, or invented or coined expression; use quotes first time and not thereafter)

☐ Commas must separate each item in a series, even before the conjunction *and* (p. 88).

☐ 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" (p. 173). Ellipsis points should be spaced (with blank spaces between the points. Three periods for middle of sentence ellipsis or a fourth period are used to indicate that one or more sentences were skipped (pp. 172-173).

☐ Combine back-to-back parentheses using a semicolon to separate items (p. 178).

☐ Italics should not be used for emphasis (p. 106), except to indicate where the meaning might otherwise be lost. For titles of works, see pages 176 through 177. For other uses, see pages 104 through 106.

☐ Use italics for introduction of a key or technical term, for the first use only, or whenever prefaced by "the word…" or "the term…" (p. 105).

☐ 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. See APA manual pages 104 through 106.

☐ Block quote (pp. 92, 171).

Capitalization

☐ Do not capitalize the second word of hyphenated compound (p. 101).

☐ Chapter titles are treated as proper nouns (i.e., Chapter 2), as are sections within the document referencing itself (p. 102).

☐ Capitalize all letters of four words or more in a heading (p. 101). Exception: Subheadings of levels 3, 4, and 5 (paragraph headings) only have first letter capitalized (p. 102, first bullet point).

☐ Do not capitalize names of laws, theories, models, or hypotheses (p. 103, sec. 4.16).

☐ Do not use title capitalization for statistical tests (p. 122).

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

☐ 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.* (p. 88).

☐ Use capitals for 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*.

☐ *Black* and *White* as racial designations are capitalized (p. 75).

☐ "Words such as *test* or *scale* are not capitalized if they refer to subscales of tests" (p. 103).

☐ Do not capitalize names of DSM disorders. See https://www.google.com/webhp?sourceid=chrome-instant&ion=1&espv=2&ie=UTF-8#q=apa%20capitalize%20dsm%20disorders

☐ Do not capitalize "important words." Proper nouns are capitalized, meaning a specific legal identity, 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), and trade names (p. 102).

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 (p. 108).

☐ Explain abbreviations and acronyms on first occurrence (p. 106), but not thereafter unless you want to remind the reader by including the abbreviation with 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" (p. 88).

☐ *t* test (p. 116, sec. 4.44); 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 (pp. 111-112).

☐ Plurals for years should not use an apostrophe before *s,* such as "in the 1990s" (see 5th ed., p. 130).

☐ Use % symbol only when preceded by a numeral (pp. 111-112, sec. 4.31).

☐ Use *N* to designate numbers in a total sample and *n* to designate number in a portion of the total sample (p. 120).

☐ For math signs, insert special characters (e.g., minus sign not dash; p. 124).

☐ Capitalize nouns that precede a number, such as *Level 5* (p. 103, sec. 4.17), with the exception of common parts of books or tables followed by numerals or letters.

☐ Numerals and symbols in equations should have spaces between them (p. 118).

☐ Letters used as statistical symbols for algebraic variables are italicized (*p, r, SD, t* test, *F* distribution; pp. 119-122).

☐ Statistical terms used in the narrative should be written out, but use symbols in tables and figures (p. 117, sec. 4.45).

☐ For numbers less than 1, add a 0 before the decimal point, for example $SD = 0.33$ (p. 117), 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 (p. 111).

☐ Provide metric equivalents for all non metric units (p. 115).

Grammar

- ☐ Use personal pronouns (e.g., "I found," or "we found" if joint authors) when referring to your own results in a study (p. 69).
- ☐ 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 (p. 69).

Tables

- ☐ Italicize table titles. Table titles should be single spaced if they extend over one line of text (see examples on p. 132).
- ☐ Each table must be labeled with the correct consecutive table number (p. 127).
- ☐ Tables must be referred to in the text (p. 130, sec. 5.10).
- ☐ For table title, capitalize major words and all words that are four letters or more (p. 133).
- ☐ Capitalize only the first word of columns and row headings (p. 136), except capitalize (a) factors in a numerical factor analysis and (b) proper nouns.
- ☐ Every column must have a heading (p. 150).
- ☐ Rows may be single-spaced or double-spaced (p. 141).
- ☐ 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 (i.e., without splitting the table in two parts if it can fit on one page). The APA manual guidelines are generally intended for journal submissions, which ask for the tables at the end because journal staff would decide where to position the tables.
- ☐ 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 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 (p. 137).
- ☐ Obtain copyright permission for reproducing or adapting a table (p. 231), 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. See example (p. 144).
- ☐ For table notes that refer to symbols within the table, do not use the word *Note* prior to explanation. See example (p. 143).
- ☐ 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 (p. 130), 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 (p. 151).
- ☐ Each figure must be labeled with the correct consecutive figure number (p. 167).

☐ Figures must be referred to in the text (p. 167).
☐ 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 (see example on p. 152).
☐ Figure captions have only first word and proper nouns capitalized (p. 152).
☐ Use of photos (p. 165).
☐ Figure copyright issues (p. 173). 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 (p. 175), 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 (pp. 174-175).
☐ "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" (p. 176)
☐ Spelling and dates in citations must match the references section (p. 174).
☐ 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 (p. 175).
☐ 3rd and subsequent authors are abbreviated with et al. after the first citation (no punctuation immediately following author's name). Include 3 to 5 authors in the first citation (and the first author with et al. thereafter); with 6 or more authors, use only the first author with et al. even in the first citation (p. 175).
☐ For articles with no author, use the article name (with a shortened version of title for the in-text citation) not the journal name (p. 200, sec. 9).
☐ 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.

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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, as was explained in the 5th edition manual. It does, however, allow the use of gender-specific pronouns. A full name is used when a person is discussed but not cited, and the full name is needed for identification.

☐ 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 (p. 178).

Direct Quotes

☐ You must cite your sources whenever "paraphrasing, quoting an author directly, or describing an idea that influenced your work" (p. 170).

☐ For direct quotes, you must use quote marks and include a page number, or for online sources without pages, include a paragraph number (p. 170). 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 (p. 172). For example: (Discussion section, para. 4) or ("Abbreviated Heading," para. 6)

☐ 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" (p. 171, sec. 6.04).

☐ Direct quotes of 40 words or more must be in block format (p. 171).

☐ The whole blocked quote must be indented five spaces (1/2 inch) and must end with a period *before* the citation in parentheses (pp. 92, 171).

☐ A blocked quote often has a colon preceding it (see example on p. 171), 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 (p. 178, sec. 6.17).

☐ The abbreviation for *no date*, used for online sources, (n.d.) has no space between (p. 203, sec. 20).

☐ Within a paragraph, when the name of the author is part of the narrative, you need not include the year in subsequent nonparenthetical references to a study as long as the study cannot be confused with other studies cited in the article" (p. 174). The APA manual states on page 175 in the second indented example: "Omit year from subsequent citations after first non-parenthetical citation within a paragraph. Include the year in subsequent citations if first citation within a paragraph is parenthetical." In other words, only after you've used the format *Author (date)* within a paragraph may you thereafter use only the author name without the date, in that same paragraph, unless the date is needed to avoid confusing the citation with another author of the same name used in your paper. For citations with the author name within parentheses, the date should always be included.

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). Electronic files in portable document format (PDF) usually have stable page numbers, so you can use the page number in the parenthetical citation (pp. 171-172).

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 instructions in the APA publication manual (p. 231).

☐ 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 should be used only with permission (pp. 173, 233-236).

References (within the references section)

Format
- [ ] General formats (p. 174): online (pp. 187-192, 203-204), book or chapter in a book (p. 202), periodicals (p. 198), abbreviations used in references section (p. 180), publication date (p. 180)
- [ ] Double space references (p. 180), though some university-specific guidelines allow double-space between and single-space within references.
- [ ] Identifiable meta-analyses are preceded by an asterisk (p. 183).

Authors
- [ ] Include up to seven authors. For eight or more author names, include first six names followed by a comma and three ellipses, then the last author's name (p. 184).
- [ ] List references in alphabetical order (p. 181).
- [ ] 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 (p. 183).
- [ ] Full official names of organizations should be used in the references section, not abbreviations (p. 183).
- [ ] For online reference manuals or databases such as dictionaries or encyclopedias, see APA 6th edition page 205 item 30.

Dates
- [ ] The oldest date is listed first if two or more articles have the exact same author name(s) (p. 182).
- [ ] 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 (pp. 180, 185, 203, sec. 20).
- [ ] For APA 6th edition, the retrieval date for online sources is not used in the references section (p. 192).

Titles
- [ ] Only periodicals have title capitalization (p. 198).
- [ ] Periodical articles or chapters in books must show first and last page numbers (pp. 198, 202).

Publishers (paper and online sources)
- [ ] Publisher name: Omit *Inc. Publishers.* or *Co.* as add-ons (p. 187), but retain the words *Books* and *Press*.
- [ ] Publisher state locations: State abbreviations are included in the author location, even for major publishing cities (p. 187; this is a change from the 5th edition publication manual).
- [ ] Database name: For online journal references, the database name is only included for material of limited circulation (p. 202, sec. 17). 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 not listed as a URL, but should simply begin with *doi:* with no space between the colon and the number (p. 192, para. 4). 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 might be 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 (p. 39).
- [ ] Each appendix letter must match its letter in the table of contents and the text (p. 39).
- [ ] 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