

CHECKLIST OF EDITORIAL PREFERENCES

Client: _____ Project: _____ Date _____

(Default listed first)

1. MECHANICS

Abbreviations and acronyms

- Common Latin abbreviations may be used in parenthetical expressions and in notes.
- Replace all common Latin abbreviations (etc., i.e., e.g.) with English equivalents.

- Delete periods in acronyms and abbreviations for organizations except U.S. and U.N.
- Delete periods in acronyms and abbreviations for organizations including US and UN.
- Use periods in acronyms and abbreviations for organizations.
- Follow the author's preference.

- Use full capitals for all acronyms: HMO, NAFTA, NAACP.
- Use an initial capital for an acronym five letters or longer that is pronounced as a word (Nafta, Erisa, Basic); use full capitals for all other acronyms.

- On first mention of a term, introduce its acronym in parentheses: Health maintenance organizations (HMOs) are preparing...
- When the acronym is better known than the spelled-out version, introduce the spelled-out version in parentheses on first mention: Under ERISA (Employee Retirement Income Security Act of 1974) employers cannot...
- Spell out in parentheses only those acronyms likely to be unfamiliar to readers.
- Do not introduce acronyms or their spelled-out versions in parentheses; if readers cannot deduce the meaning of the acronym from the context, spell out the term on each mention.

- Do not abbreviate state names in running text.
- Use two-letter postal abbreviations (CA, NY, NJ) in bibliography, notes, and tables.
- Use traditional abbreviations (Calif., N.Y., N.J.) in bibliography, notes, and tables.
- Use two-letter postal abbreviations only in addresses.

- Use small caps for A.M., P.M., A.D., and B.C.
- Use small caps, no periods, for AM, PM, AD, and BC.
- Use regular caps for A.M., P.M., and., and B.C.
- Lower case a.m. and p.m.; uppercase A.D. and B.C.

Capitalization of titles, subtitles, and heads

- Capitalize prepositions of four or more letters; prepositions that are the first or last word of the item; and prepositions that are an inseparable part of the verb (e.g., *Growing Up Absurd*).
- Capitalize prepositions of five or more letters; prepositions that are the first or last word of the item; and prepositions that are an inseparable part of the verb.
- Capitalize only prepositions that are the first or last word of the item or that are an inseparable part of the verb.

Contractions

- Follow the author's preference in using contractions..
- Spell out all contractions except for the expressions "do's and don'ts" and "aren't I?"

Words used as words:

- Put in italics.
- Put in quote marks.

Foreign terms, names, quotes

- Use English-style plurals, not the Latin- or Greek-influenced forms: curriculum(s) (*not* curricula), syllabus(es) (*not* syllabi), memorandum(s) (*not* memoranda).
- For French and Spanish words, delete accent marks on capital letters.
- For French and Spanish words, keep or add accent marks on capital letters.
- For the transliteration of foreign names, use _____ as a reference book.
- Mark quotations in foreign languages for special typographic treatment.
- Do not italicize a quotation in a foreign language; place in quotations marks.

Hyphenation

- Follow Chicago [style manual/ dictionary] for hyphenation.
- Hyphenate compounds in which the last letter of a prefix ending in a vowel is the same as first letter of the root: intra-arterial, re-elect, anti-intellectual, micro-organism.
- Hyphenate compounds in which the last letter of a prefix ending in a vowel is the same as first letter of the root *except* if the vowel is an *e*: intra-arterial, anti-intellectual, micro-organism, *but* reelect.
- Hyphenate when a closed compound would produce a misleading diphthong or syllable: pre-image, co-op, co-worker.

Numbers and numerals

- For dates, follow the author's preference.
- For dates, use January 1, 1990.
- For dates, use 1 January 1990.

- For decades use 1990s.
- For decades, use 1990's.

- Treat *mid* as a prefix: in the mid-twentieth century; in the mid-'60s.
- Treat *mid* as an adjective: in the mid twentieth century; in the mid '60s.

- For plurals of numerals, add s: F-111s, AK-47s.
- For plurals of numerals, add 's: F-1111's, AK-47's.

- Spell out numbers under 10.
- Always use numerals with units of measurement: 3 inches, 6 miles.
- Spell out numbers under _____.
- Follow the author's preference.

- Follow the author's preference in using measurements.
- Use American measurements only (inches, feet, miles, ounces).
- Use SI (metric) measurements only (meters, liters, grams).
- Use American measurements and the SI equivalent in parentheses: 100 yards (91.4 m).
- Use SI measurements and the American equivalent in parentheses: 100 kilometers (62 mi).

- Use a comma in four-digit numbers (except dates, addresses, serial numbers, page numbers).
- Use a comma only for five-digit and larger numbers (including dates and page numbers).
- Follow the author's preference.

- For large sums of money, use numerals and a dollar sign: \$55 million.
- Spell out large sums of money: fifty-five million dollars.
- Follow the author's preference.

- Spell out *percent* in running text; OK to use % in parenthetical comments.
- Always spell out *percent*.
- Follow the author's preference.

- For page ranges, use all digits: pp. 102-105; pp. 215-217.
- For page ranges, use two digits after the en dash: pp. 102-05. pp. 215-17.
- For page ranges, show only the digits that change: pp.102-5, pp. 215-7.
- For page ranges, follow the elision system described in *Chicago*.

- Mark N as an uppercase roman letter.
- Italicize *N* (= the size of the data base, e.g., numbers of subjects in an experiment).
- Mark N for roman small caps.

Possessives

- For proper names ending in *-s*, add 's for the possessive: Jones's.
- For proper names ending in *-s*, add only an apostrophe for the possessive: Jones'.
- Follow the author's preference.

Punctuation

- Use the serial comma before *and* in a series of three or more
- Do not use the serial comma.
- Follow the author's preference.

Spelling

- For words with variant spellings, always use the first entry in the dictionary that is named at the beginning of this checklist.
- Change British spellings such as *theatre*, *colour*, *organize* to preferred American spellings.
- For words that have variant spellings, follow the author's preference.

Other Mechanical Preferences

2. FORMATTING

Cross-references

- In cross-references use upper case *chapter*: see Chapter 1.
- Lower case *chapter*: see chapter 1.
- Upper case *chapter* and spell out the number: Chapter One.
- Eliminate cross-references to pages or change them to cross-references to chapters.
- Instruct the typesetter to set page cross-refs as 00 or 000.
- Instruct the typesetter to set page cross-refs as solid quads.

Extracts

- Run-in prose quotes of fewer than ____ words or ____ lines.
- Run-in poetry quotes of fewer than ____ lines.
- Set as extracts quotes longer than ____ words or ____ lines.

Heads

- Do not open a chapter with a 1-level head.
- OK to have chapter begin with a 1-level head.

- OK to stack a 2-level head directly under a 1-level head.
- Do not stack a 2-level head directly under a 1-level head.

- For each level of head used in a chapter or section, there must be at least two instances in that chapter or section. A chapter may not have only one 1-level head; a section may not have only one 2-level or 3-level head.

Vertical Lists

- Use numbered lists only when there is need for numbering the items.
- When all items in a list consist of a single word, lower case the items (except for proper nouns and proper adjectives). In all other cases, capitalize the first word of each item.
- Capitalize the first word in all lists unless the list completes a sentence begun in an introductory element.
- When all items in a list consist of a single word, omit end punctuation.
- When one or more items in a list forms a complete sentence, use periods at the end of all items.
- When a list completes a sentence begun in an introductory element, separate items with commas or semicolons and begin each item with lower-case letter.
- Do not use bulleted lists.

3. DOCUMENTATION

Bibliography

- Alphabetize names beginning with *Mc* as though spelled *Mac*: MacDonald, McKillan, McStuart, MacWilson, Mayfield.
- Alphabetize names with *Mc* as *Mc*: MacDonald, MacWilson, Mayfield McKillan, McStuart.

- List the first three and then “et al.”
- If a work has many authors, list the first three and then “and others.”
- List all authors.
- Follow the author’s preference.

- If there is more than one entry by a given author, list the entries in alphabetic order, disregarding any initial *the*, *a*, or *an*.
- List the entries in chronological order.
- Follow the author’s preference; query any inconsistencies.

- Use two-letter postal abbreviations (CA, NY, MI, IL) for state names in bibliography.
- Use traditional abbreviations (Calif., N.Y., Mich., Ill.) for state names in bibliography.

- Follow the author’s preference, as long as it is consistent.
- Follow the bibliographical format in _____.

- To indicate second and third editions: 2d ed., 3d ed.
- To indicate second and third editions: 2nd ed., 3rd ed.

- To indicate page numbers in a book: p. 1, pp. 1-3.
- Use *p.* and *pp.* only if there might be some confusion that the numbers are page numbers
- Follow the author’s preference.

In-text citations

- For joint authors, use &: Smith & Wilson.
- For joint authors, use “and”: smith and Wilson.
- Follow the author’s preference.

- If there are many authors, list the first two, followed by “et al.”
- If there are many authors, list the first two, followed by “and others.”
- Follow the author’s preference.

- Arrange multiple in-text citations alphabetically: see Doe, 1978; Jones, 1990, Smith, 1977.
- Ask author to arrange multiple citations in order of importance or value to the reader.
- Follow the author’s preference.

Footnotes or endnotes

- To indicate page numbers in a book: See p.1, pp. 1-3.
- Use *p.* and *pp.* only if there might be some confusion.
- Follow the author's preference.

- Use the two-letter postal abbreviations (CA, WA OR, NY) in notes.
- Use traditional abbreviations for state names (Calif., Wash., Ore., N.Y.) in notes.

Other Formatting and Documentation Preferences