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Guide to Learning the Basics of APA Style for Manuscript Preparation

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### Abstract

This guide provides basic instructions for writing papers in the publication style of the American Psychological Association (APA) version 5.0. It discusses and illustrates the use of the following elements of APA style: (a) typing instructions, (b) citation format, (c) references list, and (d) writing style. This guide is not intended to replace the more comprehensive *Publication Manual of the American Psychological Association* (APA, 2001) but rather is intended to serve as a quick and authoritative reference for students learning to use APA style.

## A Guide to Learning the Basics of APA Style

Imagine the first day of class. You are excited about the content of the course, but the instructor's syllabus notes (in boldface type) that you must write a term paper in “APA style.” What should you do? Should you (a) drop the course immediately, (b) change majors, (c) ask your friends to teach you APA style, (d) memorize the 412-page *Publication Manual of the American Psychological Association* (American Psychological Association [APA], 2001), or (e) read and refer to this guide? Any of the options may solve your problem, but we recommend option (e).

Your friends may want to help you learn APA style, but the odds are unlikely that others will understand all the details of the style. Use of the lengthy publication manual (APA, 2001) can overcome that problem. However, the manual does not target students as its audience; rather, it serves as a resource for professionals who want to publish technical or scholarly reports. Consequently, students often find the manual complex and difficult to use (Hummel & Birchak, 1989). We designed this guide with you in mind. By reading only a few pages, you can learn the basic elements of APA style and then apply those elements to writing the APA-style paper. In this guide, we will discuss and illustrate the use of the following elements of APA style: (a) typing instructions, (b) citations, (c) references, and (d) writing style.

### Typing Instructions

Type your paper carefully, making sure to check for spelling and typographical errors. Use a word processor and save your work on a personal floppy disk so that you can revise the paper at any time. Be sure to save your work frequently (approximately every 15 min).

In addition, follow these specific guidelines:

1. Use margins of at least 1.0 in. top, bottom, and sides, with font size set at 12-point. Choose a simple, easily read font style such as Times or Times New Roman. Use a printer cartridge that produces dark, clean print.
2. Only the left margin should be justified (i.e., aligned to the left). Do not justify the right margin.

3. Indent each paragraph using the tab functions except for the abstract, which is a solid paragraph.
4. Double-space all lines of the paper, including headers, references, and information in the tables.
5. Do not underline words or use single (‘) or double (“) quotation marks to provide emphasis.
6. Prepare a title page, centering all information except the running head, which should be flush with the left margin. Include the paper’s running head, title (limited to 12-15 words), your name, and your affiliation (Creighton University). The running head consists of a few words (no more than 50 characters including letters, punctuation, and spaces) that identify the content of your paper. Use the following format: Running head: DESCRIPTOR. See the title page of this guide for an example.
7. Type the paper’s short title (page header) in the top, right-hand corner of each page using the “header” of your word processing software package. The short title identifies each manuscript page; it includes only the first two or three words of the full title. The page number follows the short title by 3-5 spaces on the same line. For example, see the short title and page number at the top of this page (e.g., “Guide to Learning 4”). Note that you should count page numbers beginning with the title page as page 1, the abstract as page 2, and so forth.
8. Include an abstract of your paper on page 2. The abstract is a one-paragraph, comprehensive summary of the contents of your paper. Do not indent the abstract (e.g., see page 2 of this guide). Abstracts should not exceed 120 words. Center the word, Abstract, at the top of the page and provide a summary.
9. Begin the text of your paper on page 3. Center the title of the paper at the top of the page. Begin the first, indented paragraph on the next line.
10. Use a heading when introducing each new topic or section of the paper. The introduction is an exception because its position in the paper identifies it. Each heading should be as brief as possible. APA-style manuscripts use up to five levels of headings. Table 1 provides

descriptions and examples of each level of heading. In selecting headings for use in your paper, follow these rules of thumb:

- For short papers (e.g., brief reaction papers), use one level of heading (Level 1).
- For longer papers (e.g., term papers), use two levels (Levels 1 and 3).
- For longer, more complex theoretical papers and for single-experiment studies, use three levels (Levels 1, 3, and 4).
- Multi-experiment studies often require four levels of headings (Levels 1, 2, 3, and 4).
- Only rarely does a student need to use all five levels of headings.

If you carefully follow these typing instructions, your papers should have a professional appearance.

### Citations

Generally, limit your sources to published books and journal articles and to papers presented at conventions. Unless your instructor specifically directs you otherwise, avoid using non-copyrighted materials and articles published in newspapers (e.g., *The Omaha World Herald* and *The Wall Street Journal*) and magazines (e.g., *Time* and *Psychology Today*). If your instructor wants you to use such sources, you will need to refer to the APA publication manual (pp. 207-214) for appropriate style instructions.

Throughout the body of your paper, make reference to your sources whenever you quote directly or paraphrase an author's ideas. Each time you quote or paraphrase a source, cite the author(s), using only the surname(s) and the year of the publication (e.g., Myers, 2000; O'Neil & Egan, 1992). Include the appropriate page number(s) for direct quotes (e.g., Myers, 2000, p. 74). Never change the order of names as they appear on the cited publication. Use the following rules of thumb:

- If the source has one author, cite his or her name each time you refer to it.
- If the source has two authors, cite both names each time you refer to it.
- If the source has three, four, or five authors, cite all of them in the first time. In subsequent references, cite the first author's surname followed by the expression "et al."

- If the source has six or more authors, cite only the first author's surname followed by the expression "et al." in the text. In the Reference List, provide initials and surnames of the first six authors followed by "et al." if there are more than six.

### Direct Quotes

If your paper includes direct quotes from one source that collectively totals more than 500 words or more, you must obtain written permission from the copyright owner you are quoting. If you do not want to go to that much trouble, limit the number of words you quote from one source to less than the limit.

Embed complete quotes of fewer than 40 words within the paper's text. Begin and end each quote with double quotation marks ("") and include author surname(s), year of publication, and page(s) where the quote appears. If the quote is contained on one page only, use the notation "p." followed by the page number. If the quote extends to more than one page, use the notation "pp." followed by the page numbers. The citation information may appear either in parentheses at the end of the quote or embedded in the text before the quote begins. Table 2 provides examples of proper style for both parenthetical and embedded citations.

Present quotes of 40 or more words as an indented block. Indent the entire block using the tab function. Do not further indent the first line and do not use quotation marks (""). At the end of the quote, include a parenthetical reference citing the author(s), year of publication, and page(s) where the quote appears.

Most instructors prefer that you use and quote from only primary sources. If you must use a secondary source, when you quote from it use a parenthetical reference citing the primary source's author(s) and include the words "as cited in" and the secondary author(s), year, and page(s) where the quote from the primary source appears in the secondary source. Refer to Table 2 for an example.

### Paraphrased Material

When you paraphrase ideas, hypotheses, theories, methods, results, and/or conclusions from another source, you must make references to the author(s) of that material. Always include

author surname(s) in the order in which they appear on the source, as well as the year of publication. Table 2 provides some examples of how to cite paraphrased material.

### The Reference List

The Reference List is not a bibliography. According to Hummel and Birchak (1989), “Bibliographies refer the interested reader to additional sources for further reading that were not cited in the manuscript through paraphrasing or direct quotation” (p. 15). When using APA style, you list references, not bibliographies. Therefore, if you read a source but do not cite it in your paper, you do not list the source in the Reference List. Sources cited and references listed must match exactly. Follow these rules of thumb in preparing the Reference List:

1. Begin the list of references on a new page, and center the word, References, at the top of the page.
2. List every primary source that you have both personally read and cited in the paper. Do not include any source(s) not cited in the paper. When referring to a primary source reported in a secondary source, cite only the secondary source. For example, if you refer to Jones’ experiment, which you have not personally read in the original but which was reported by Smith, include only Smith in the Reference List.
3. List each reference alphabetically according to the surname of the first author. Do not rearrange the order of the authors’ surnames for a particular reference listing.
4. Entries begin flush left, and the second and subsequent lines are indented using the tab function.
5. For each reference, list the first author’s surname followed by a comma, and the author’s first and middle initials each followed by a period and space. For multiple-author references, include a comma after each author’s name and initials. Before the last author’s name use an ampersand (&) instead of the word “and.”
6. Immediately after the authors’ names, present the date of publication in parentheses followed by a period. For book, chapter, and article references, include only the year of publication. For presentations and documents, include the year followed by a comma and the month. For

news articles, include the year followed by a comma and the month and date. For examples, see pages 222-281 of the publication manual (APA, 2001).

7. List the title of the source next, using the following guidelines:
  - a. For a book reference, capitalize the first letter of (a) the first word, (b) any proper nouns, and (c) the first letter of a word following a colon. Do not capitalize other words in the title of a book. Italicize the book title and the period following the title. If the book is a second or subsequent edition, include in parentheses after the title (and before the period) the number of the edition (e.g., 2nd ed.). Do not use italics for edition information. Include publication information next. List the city where the source was published. If the city is not well known, follow the name of the city by a comma and the postal code abbreviation for the state (see publication manual p. 217 for details). End the location information with a colon followed by the name of the publishing company.

Author, A. A. (2001). *Title of book* (2nd ed.). Location: Publisher.

- b. To list the title of a presentation, use the same rules that apply to listing book titles. Include a short sentence naming the group to whom the paper was presented and the city and state (abbreviated) where the meeting was held. Do not italicize the descriptive sentence.

Author, A. A., & Author, B. B. (2001, Month). *Title of presentation*. Poster session presented at the annual meeting of the Organization, City, STATE.

- c. For the title of a book chapter, use the capitalization rules that apply to a book, but do not use italics for the chapter title. End the title with a period. Then type the word “In” and list the initials and surname of the author(s) of the book in which the chapter appears. Use the capitalization and italics rules for book titles. Following the book title but before



the period, include in parentheses the abbreviation “pp.” and the beginning and ending page numbers of the chapter separated by a hyphen.

Author, A. A., & Author, B. B. (2001). Title of chapter. In A. Editor, B. Editor, & C. Editor (Eds.), *Title of book* (pp. xxx-xxx). Location: Publisher.

- d. For the title of a journal article, use the capitalization rules that apply to a book, but do not use italics for the article title. Type the name of the journal in which the article appears. Capitalize the first letter of each word of the journal title except for prepositions (e.g., of, and, etc.). Put a comma after the journal title, followed by the journal’s volume number, another comma, and the beginning and ending page numbers of the article separated by a hyphen. Do not use the notation “p.” or “pp.” Use italics for the journal’s title through the comma including the volume number. Cite the journal’s issue number only if each issue begins on page 1.

Author, A. A., Author, B. B., & Author, C. C. (2001). Title of article. *Title of Periodical*, xx, xxx-xxx.

8. Use the following rules for spacing following punctuation:

Insert one space after all punctuation (including at the end of a sentence) except after internal periods in abbreviations (e.g., a.m., i.e., U.S.).

9. Table 3 provides examples of different kinds of references; book, chapter, edited book, journal article, legal case, on-line information, presentation, movies, and television (Table 3). If you are not sure how to list a reference, refer to pages 222-268 in the publication manual (APA, 2001). For clarification about on-line sources in particular, refer to pages 231, 268-281 in the publication manual (APA). Do not cite year if the reference appears more than once in a paragraph.

## A Few Suggestions About Writing Style

1. Organize the paper logically. In the introduction explain what you are going to say, say it in the body of the paper, and briefly restate what you have said in the summary and conclusions. Sternberg (1992) noted, “In this way, you provide an advance organization for the reader, explicate the main content, and emphasize to readers what you want them to remember” (p. 13). Begin with an introduction that describes the purpose of your paper and states the position you are taking. Then provide evidence to support your position as well as arguments against any opposing position(s). Summarize the main points of your paper and offer general conclusions, including ideas for future research on the topic.
2. Write sentences that are complete, readable, clear, and concise. Incorrect grammar and carelessly constructed sentences distract the reader, introduce ambiguity, and generally obstruct communication. Refer to an English grammar book if you need help. Pages 31-60 of the publication manual (APA, 2001) also provide helpful hints about writing style.
3. Ensure that sentence constructions are parallel (see page 44). Use either singular or plural forms for nouns and verbs, but not both. Do not alternate among verb tenses.
4. Write in the active rather than passive voice. Use of passive voice may be appropriate in the Method section of empirical studies because the emphasis is on the object rather than the actor. Table 4 provides examples of active and passive voice.
5. Know when it is appropriate to use each of the following words. Note that page numbers in parentheses refer to the publication manual (APA, 2001).
  - while versus although (p. 56)
  - since versus because (p. 57)
  - which versus that (p. 55)
  - men and women versus males and females (p. 66)
6. Use nonsexist language. To avoid sexist language you may either use plural nouns and pronouns or use the expression “he or she” or vice versa.

7. Know when to use numbers and when to spell out the names of numbers. Use figures to express all numbers 10 and above, all numbers below 10 that are grouped for comparison, numbers that immediately precede a unit of measurement, numbers that represent statistical or mathematical functions, numbers that represent time, dates, ages, sample, subsample, or population size, numbers that denote a specific place in a numbered series, and all numbers in the abstract of a paper (see pages 122-130 of the publication manual, APA, 2001).
8. Define and explain important terms and professional jargon. Ensure readers know that you know what you are writing about.
9. Offer facts, figures, and concrete examples to illustrate the points you want to make. Sternberg (1992) emphasized, “Readers are busy: Don’t expect them to generate the examples. It’s your responsibility” (p. 13).
10. Proofread and correct errors in your paper before you give it to your professor. On this point, one editor noted:

I find that the single most annoying flaw in a submitted article is a slew of typographical errors. Why? Because they’re the easiest thing for the author to correct. It’s neither the editors’ nor the reviewers’ jobs to do your proofreading for you. Always proofread. It’s the one thing you can most easily do to improve the impression you make (Sternberg, 1992, p. 13).

For additional help in writing a good paper, we recommend Rosnow and Rosnow’s (2001) *Writing papers in psychology* and Szuchman’s (1999) *Writing with style: APA style made easy*. Effective writing improves with practice and instructive resources.

References

- American Psychological Association. (2001). *Publication manual of the American Psychological Association* (5th ed.). Washington, DC: Author.
- Hummel, J. H., & Birchak, B. C. (1989, September). A short course on APA style for psychology students. *APS Observer*, 14-16.
- Rosnow, R. A., & Rosnow, M. (2001). *Writing papers in psychology* (5th ed.). Belmont, CA: Wadsworth.
- Sternberg, R. J. (1992, September). How to win acceptances by psychology journals: 21 tips for better writing. *APS Observer*, 12-13, 18.
- Szuchman, L. T. (1999). *Writing with style: APA style made easy*. Pacific Grove, CA: Brooks/Cole.

Table 1

*Levels and Types of Headings for APA-style Manuscripts*

Example	Level
Centered Uppercase and Lowercase Heading	1
<i>Centered Italicized, Uppercase and Lowercase Heading</i>	2
<i>Flush Left, Italicized, Uppercase and Lowercase Heading</i>	3
<i>Indented, italicized, lowercase paragraph heading ending with a period.</i>	4
CENTERED UPPERCASE HEADING	5

Table 2

*Illustrations of Embedded and Parenthetical Citations*

Type of Quotation	Embedded Citation	Parenthetical Citation
Direct Quote	Smith and Jones (2000) reported that “xxxx” (p.12).	“Xxxx xxx” (Smith & Jones, 2000, p. 12).
Paraphrase	Smith and Jones (2000) found that yyyy.	One study revealed that yyyy (Smith & Jones, 2000).
Paraphrase (Legal Citation)	Lessard v. Schmidt (2001) noted that yyyy.	In a famous case (Lessard v. Schmidt, 2001), precedent determined that yyyy.
Quote from a Secondary Source	Brown (as cited in Smith & Jones, 1999) reported that “xxxxx” (p. 157).	One recent research study concluded that “xxxxx” (Brown, as cited in Smith & Jones, 1999, p. 157).

Table 3

*Illustrations of Citations in the Reference List*

Type of Reference	Examples
Periodicals	<p data-bbox="500 558 1414 804">Badura, A. S., Millard, M., Peluso, E. A., &amp; Ortman, N. (2000). Effects of peer education training on peer educators: Leadership, self-esteem, health knowledge, and health behaviors. <i>Journal of College Student Development</i>, 41, 471-478.</p> <p data-bbox="500 842 1414 1020">Cherney, I. D., &amp; Ryalls, B. O. (1999). Gender-linked differences in the incidental memory of children and adults. <i>Journal of Experimental Child Psychology</i>, 72, 305-328.</p> <p data-bbox="500 1058 1414 1236">Finken, L. L., &amp; Cooney, R. R. (2000). Academic job search secrets: Applying for positions. <i>Society for Research in Adolescence Newsletter</i>.</p> <p data-bbox="500 1274 1414 1453">Leak, G. K., &amp; Parsons, C. J. (2001). The susceptibility of three attachment style measures to socially desirable responding. <i>Social Behavior and Personality: An International Journal</i>, 29, 21-30.</p> <p data-bbox="500 1491 1414 1661">Stone, N. J. (2000). Exploring the relationship between calibration and self-regulated learning. <i>Educational Psychology Review</i>, 12, 437-475.</p>
Book	<p data-bbox="500 1703 1414 1803">Perry, N. W., &amp; Wrightsman, L. S. (1991). <i>The child witness: Legal issues and dilemmas</i>. Newbury Park, CA: Sage.</p>

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Type of Reference	Examples
Edited book	Ware, M. E., & Johnson, D. E. (Eds.). (2000). <i>Handbook of demonstrations and activities in the teaching of psychology</i> (2nd ed., Vols. I-III). Mahwah, NJ: Lawrence Erlbaum Associates, Inc.
Chapter in an edited book	Douglas, K. J., Huss, M. T., Murdoch, L. L., Washington, D. O., & Koch, W. J. (2000). Posttraumatic stress disorder stemming from motor vehicle accidents: Legal issues (pp. 271-289). In E. Blanchard & E. Brickling (Eds.) <i>Road accidents and the mind</i> . New York: Pergamon.  Morrison, F. J., & Cooney, R. R. (2000). Parenting and academic achievement. Multiple paths to early literacy. In J. G. Borkowski, S. Landesman, & M. Bristol-Power (Eds.), <i>Parenting and the child's world: Influences on academic, intellectual and social-emotional development</i> . Mahwah, NJ: Erlbaum Associates.
Unpublished paper presented at a meeting	Ware, M. E. (2000, August). <i>Getting into graduate school: Importance of research involvement</i> . Presented at the meeting of the American Psychological Association, Washington, DC.



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Type of Reference	Examples
Poster session	<p>Budesheim, T. L., Badura, A. S., Kaura, C., Firbas, E., Koga, R., Miller, K., &amp; Parikh, V. (2001, June). <i>Genetic discrimination and social relationships</i>. Poster session presented at the 13th annual convention of the American Psychological Society, Toronto, Ontario, Canada.</p> <p>Cherney, I. D., &amp; Ryalls, B. O. (2000, June). <i>Incidental memory for spatial location in 3- and 5-year-old children</i>. Poster presented at the American Psychological Society, Miami Beach, FL.</p>
Motion picture	Scorsese, M. (Producer), & Lonergan, K. (Director). (2000). <i>You can count on me</i> [Motion picture]. United States: Paramount Pictures
Television program	Crystal, L. (Executive Producer). (1993, October 11). <i>The MacNeil/Lehrer news hours</i> [Television broadcast]. New York and Washington, DC: Public Broadcasting Service.
Online periodical (Article in an Internet-only journal)	Frederickson, B. L. (2000, March 7). Cultivating positive emotions to optimize health and well-being. <i>Prevention &amp; Treatment</i> , 3, Article 0001a. Retrieved November 20, 2000, from <a href="http://journals.apa.org/prevention/volume3/pre0030001a.html">http://journals.apa.org/prevention/volume3/pre0030001a.html</a>
Online document (Stand-alone document)	United Network for Organ Sharing. (2000b). <i>UNOS home</i> . Retrieved April 24, 2000 from <a href="http://www.unos.org">http://www.unos.org</a>

- Legal case                      Lessard v. Schmidt, 349 F. Supp. 1078 (E.D. Wis. 1972).
- DSM-IV-TR                      American Psychiatric Association. (2000). *Diagnostic and statistical manual of mental disorders* (4<sup>th</sup> ed., text revision). Washington, DC: Author.

Table 4

*Illustrations of Active and Passive Voice*

Passive (poor)	Active (better)
“There is agreement that ...”	“Authorities agree that ...”
“Health promotion has been researched in the workplace.”	“Investigators have researched health promotion in the workplace.”
“A continuum between extreme introversion and extreme extroversion has been postulated.”	“Scholars have postulated a continuum between extreme introversion and extreme extroversion.”

Author Notes

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