

FORMAT REQUIREMENTS (UPDATED APRIL 2009)

Although manuscripts are accepted for review in any acceptable format, we highly recommend that manuscripts submitted to the *Journal of Finance Case Research* be formatted according to the following guidelines. Manuscripts adhering to these guidelines are likely to achieve more favorable review, since they already are in the format that will be required before final acceptance.

For insight into the editorial philosophy of the JFCR, read "What is Finance Case Research?" from a prior (2002?) JFCR issue: <http://www.jfcr.org/editorial.pdf>

(For *conference proceedings*, manuscripts need to be formatted according to each individual conference's requirements)

Manuscript submission is electronic ONLY, via email. Send manuscripts to

editor@jfcr.org

STEP1: TURN OFF ALL AUTOFORMATTING IN MS WORD

Do this by clicking the Office2007 button, selecting word options, selecting proofing, selecting autocorrect options. A five-tab window will appear. On every tab, *unlick* all boxes and apply your changes. If you created your document with autoformat on, however, your previous autoformatting will remain. *Unformatting* already formatted copy is a great challenge in MS word. We have found it easier to save a formatted document as plain text, then open it with MS word with the autoformatting turned off. Prior versions of MS word work differently (of course). If you would like assistance with this, we have copy editors who charge an hourly rate of \$15.

GUIDELINES:

1. File Names: Save your files as the lead author's last name:

For the case:	smith.doc
For the teaching notes:	smithTN.doc
For any other files associated with the case:	smithA.doc, smithB.doc, etc.

2. Page Limitation: For the *Journal*, there is no page limitation. For conference proceedings, please adhere to each individual conference's requirements.

3. Word Processor: Use Microsoft Word. Save documents in Word 97-2003 (.doc)

4. Type Face: Use Times New Roman regular font in 12 point. For emphasis, use italics. Boldface can also be used sparingly for emphasis. Do not use underlines.

5. Margins: Use one-inch margins all around.

6. Spacing: Single space the text. Double space before and after headings, and between citations in the references. **DO NOT double spacebar between sentences, or double space between paragraphs.**

7. Indentation: Indent all paragraphs 1/2 inch. DO NOT double space between paragraphs.

8. Justification: All regular text should be justified with straight margins (not ragged on right).

9. Commands: We strongly recommend that autoformatting functions be turned off or disabled. These cause problems from version to version of MS Word, and problems in translation from WP to MS Word. If we have difficulty in translation of manuscripts, it is the author's responsibility to provide documents without formatting. Do not use footnote and endnote functions. Rather, use superscript text to cite (like this¹), and *type* notes at the end of the case. Use APA style for references within the text (Jones, 2001). *DO NOT* use headers or footers, or page numbers.

10. Title of Manuscript: All caps, bold, 18 point, centered, two lines from the top of the page. Dark Blue.

example:

THIS IS MY PAPER'S TITLE

11. Authors: *On review versions*, type asterisks in place of the authors' names and affiliations. *For final versions*, type author names followed by comma and affiliation, in upper and lower case two spaces below the title, in 12 point bold, centered, Dark Blue:

**John Doe, USA University
Jane Dough, Corporation, Inc.**

12. Headings: Bold and Center major headings in 12 point, all caps. *One* level of subheadings is allowable. If you use subheadings, they should be left justified, upper and lower case, bold. No color on headings and subheadings:

THE BOARD MEETING

Initial Arguments

12. Body: Create an unlabeled (no heading) introductory paragraph with a brief description that introduces the case and gains the reader's interest. The introductory paragraph should be in italics. Double space afterward and begin the case, in normal font.

Use a heading, if desired, between the introductory paragraph and the first paragraph of the case.

13. Formulae: JFCR gives substantial latitude to authors for the creation of formulae appropriate for their cases. We ask that formulae be rendered with a professional look. If it is possible for us to read formula renderings from Microsoft Equation or a similar equation editor, then formulae can be inserted as needed into the text. Other arrangements can be made, if authors have the need, including typesetting services or scanning and pasting (for a fee) that we can arrange. Equations should be tabbed 1/2 inch and numbered at the right margin in sequence of appearance. The equation should be in black and the equation number should be in bold green:

$$\beta_j = \frac{COV_{j,m}}{\sigma_m^2} \qquad \text{Equation 1}$$

14. Illustrations, tables: These may be labeled figure, table, or exhibit, whichever is appropriate. Number each category independently. Financial statements and summaries should always be labeled as *exhibits*. Drawings and graphs, photos, pictures, etc. should be labeled as *figures*, and tabular data may be labeled *table* or *exhibit*. Color may be used in illustrations, drawings, photos, or graphs if it looks professional and adds to content or presentation. Flashy or ill- advised use of color is discouraged. In tables, limit color usage to dark blue on left column label cells, and green on first row label cells. Remember that these cases may be printed by the user in grayscale, and that this may obscure the color highlights. Label cells may be boldfaced, if desired. Hide Gridlines. The label should be in bold red. Single space between the label and the beginning of the object or table. *Do not* re-label the exhibit *within* the object or table:

Exhibit 1. Delang Corporation Return Distribution.

	Probability	Return
Boom Economy	.23	24%
Moderate Economy	.54	16%
Recession	.33	4%

The look of tables should be consistent throughout your case. Simpler, cleaner tables are highly preferable to complicated ones. Vertical format tables are highly preferable to those the reader would have to view by holding a page horizontal. Do NOT place more information on a table than can be clearly read. Tiny font sizes are ineffective for communication and aesthetically undesirable.

15. Graphs: Create graphs as simply and practically as possible. Although color may be used to differentiate multiple items, we also recommend the use of dotted lines or symbolic indicators, since these cases may be printed by the user in grayscale. To see if this is a problem, just print the file in grayscale and see if the differentiation of multiple items is obvious. If not, use some manner of grayscale differentiation.

16. References and citations: References should be prepared and cited using APA (American Psychological Association) guidelines. Three exceptions: 1) use italics instead of underlines. 2) Capitalize major words in titles. 3) Avoid references or citations involving online URL's that are not permanent.

Use the bold centered heading "REFERENCES". Double space between citations and hanging indent by one-half inch. Use dark blue color, even on the heading:

REFERENCES

Grove, Hugh, Tom Cook, and Jon Goodwin (2001). Hermes Corporation: Joint Venture Financing Case. *Journal of Finance Case Research* 2(1), 1-20.

For detailed reference and citations, see the APA excerpts at the end of this guide.

17. Hyperlinks: Embed full location address for links. *Make sure they are permanent:*

See <http://www.jfcr.org/format.pdf> for more information.

18. Teaching Notes: All submissions should include a teaching note, prepared in a separate file. Begin the teaching note with "TEACHING NOTES" in red, and a repeat of the title and authors. See item 11 for review versus final versions.

TEACHING NOTES

THIS IS MY PAPER'S TITLE

John Doe, USA University
Jane Dough, Corporation, Inc.

Continue the teaching note with a case description and a case synopsis. The description is designed to inform the potential user about standard technical aspects of the case, while the synopsis should be written to capture the potential user's interest. Use italic blue font:

CASE DESCRIPTION

The primary subject matter for this case concerns (describe the subject). Secondary issues examined include (list as many as the case contains). The case has a difficulty level appropriate for (describe the target level: freshman, sophomore, junior senior, 1st year MBA, MS or 2nd year MBA, doctoral, etc. Use more appropriate categories if these are inadequate). The case is designed to be taught in (indicate how many) class hours and should require (indicate how many) hours of outside preparation by students.

CASE SYNOPSIS

(In this section, present a brief overview, max 300 words. Be creative. This section sells your case- it convinces the professor to use it.)

After these required sections, present teaching approaches, suggested questions, successful strategies you have used, when in a particular course to use the case, special teaching features, ancillary links or materials (**make sure links are permanent**). Instructor notes are an important part of the review.

Prepare the teaching notes keeping in mind that you may be communicating to professors without substantial teaching experience, without direct familiarity with what you are familiar with, without access to information you may access easily, and without academic or practical background experience that you may have acquired in your career. The teaching notes should minimize prep time for potential users.

Epilogues are usually of interest to students. They have a natural curiosity as to whether the characters in the case did what they came up with, or if other approaches were used, and what the outcome(s) were. Feel free to present an epilogue for the case.

Detailed Reference and Citation Exerpts from APA:

In-Text Citations: The Basics

Reference citations in text are covered on pages 207-214 of the Publication Manual. What follows are some general guidelines for referring to the works of others in your essay.

Note: APA style requires authors to use the past tense or present perfect tense when using signal phrases to describe earlier research. E.g., Jones (1998) **found** or Jones (1998) **has found**...

APA Citation Basics

When using APA format, follow the author-date method of in-text citation. This means that the author's last name and the year of publication for the source should appear in the text, E.g., (Jones, 1998), and a complete reference should appear in the reference list at the end of the paper.

If you are referring to an idea from another work but **NOT** directly quoting the material, or making reference to an entire book, article or other work, you only have to make reference to the author and year of publication in your in-text reference.

In-Text Citation Capitalization, Quotes, and Italics/Underlining

- Always capitalize proper nouns, including author names and initials: D. Jones.
- If you refer to the title of a source within your paper, capitalize all words that are four letters long or greater within the title of a source: *Permanence and Change*. Exceptions apply to short words that are verbs, nouns, pronouns, adjectives, and adverbs: *Writing New Media, There Is Nothing Left to Lose*.

(**Note:** in your References list, only the first word of a title will be capitalized: Writing new media.)

- When capitalizing titles, capitalize both words in a hyphenated compound word: *Natural-Born Cyborgs*.
- Capitalize the first word after a dash or colon: "Defining Film Rhetoric: The Case of Hitchcock's *Vertigo*."
- Italicize or underline the titles of longer works such as books, edited collections, movies, television series, documentaries, or albums: *The Closing of the American Mind*; *The Wizard of Oz*; *Friends*.
- Put quotation marks around the titles of shorter works such as journal articles, articles from edited collections, television series episodes, and song titles: "Multimedia Narration: Constructing Possible Worlds"; "The One Where Chandler Can't Cry."

Short Quotations

If you are directly quoting from a work, you will need to include the author, year of publication, and the page number for the reference (preceded by "p."). Introduce the quotation with a signal phrase that includes the author's last name followed by the date of publication in parentheses.

According to Jones (1998), "Students often had difficulty using APA style, especially when it was their first time" (p. 199). Jones (1998) found "students often had difficulty using APA style" (p. 199); what implications does this have for teachers? If the author is not named in a signal phrase, place the author's last name, the year of publication, and the page number in parentheses after the quotation. She stated, "Students often had difficulty using APA style," (Jones, 1998, p. 199), but she did not offer an explanation as to why.

Long Quotations

Place direct quotations longer than 40 words in a free-standing block of typewritten lines, and omit quotation marks. Start the quotation on a new line, indented five spaces from the left margin. Type the entire quotation on the new margin, and indent the first line of any subsequent paragraph within the quotation five spaces from the new margin. Maintain double-spacing throughout. The parenthetical citation should come after the closing punctuation mark.

Jones's (1998) study found the following:

Students often had difficulty using APA style, especially when it was their first time citing sources. This difficulty could be attributed to the fact that many students failed to purchase a style manual or to ask their teacher for help. (p. 199)

Summary or Paraphrase

If you are paraphrasing an idea from another work, you only have to make reference to the author and year of publication in your in-text reference, but APA guidelines encourage you to also provide the page number (although it is not required.)

According to Jones (1998), APA style is a difficult citation format for first-time learners.
APA style is a difficult citation format for first-time learners (Jones, 1998, p. 199).

In-Text Citations: Author/Authors

APA style has a series of important rules on using author names as part of the author-date system. There are additional rules for citing indirect sources, electronic sources, and sources without page numbers.

Citing an Author or Authors

A Work by Two Authors: Name both authors in the signal phrase or in the parentheses each time you cite the work. Use the word "and" between the authors' names within the text and use the ampersand in the parentheses.

Research by Wegener and Petty (1994) supports...

(Wegener & Petty, 1994)

A Work by Three to Five Authors: List all the authors in the signal phrase or in parentheses the first time you cite the source.

(Kernis, Cornell, Sun, Berry, & Harlow, 1993)

In subsequent citations, only use the first author's last name followed by "et al." in the signal phrase or in parentheses.

(Kernis et al., 1993)

In *et al.*, *et* should not be followed by a period.

Six or More Authors: Use the first author's name followed by et al. in the signal phrase or in parentheses.

Harris et al. (2001) argued...

(Harris et al., 2001)

Unknown Author: If the work does not have an author, cite the source by its title in the signal phrase or use the first word or two in the parentheses. Titles of books and reports are italicized or underlined; titles of articles and chapters are in quotation marks.

A similar study was done of students learning to format research papers ("Using APA," 2001).

Note: In the rare case the "Anonymous" is used for the author, treat it as the author's name (Anonymous, 2001). In the reference list, use the name Anonymous as the author.

Organization as an Author: If the author is an organization or a government agency, mention the organization in the signal phrase or in the parenthetical citation the first time you cite the source.

According to the American Psychological Association (2000),...

If the organization has a well-known abbreviation, include the abbreviation in brackets the first time the source is cited and then use only the abbreviation in later citations.

First citation: (Mothers Against Drunk Driving [MADD], 2000)

Second citation: (MADD, 2000)

Two or More Works in the Same Parentheses: When your parenthetical citation includes two or more works, order them the same way they appear in the reference list, separated by a semi-colon.

(Berndt, 2002; Harlow, 1983)

Authors With the Same Last Name: To prevent confusion, use first initials with the last names.

(E. Johnson, 2001; L. Johnson, 1998)

Two or More Works by the Same Author in the Same Year: If you have two sources by the same author in the same year, use lower-case letters (a, b, c) with the year to order the entries in the reference list. Use the lower-case letters with the year in the in-text citation.

Research by Berndt (1981a) illustrated that...

Introductions, Prefaces, Forewords, and Afterwards: When citing an Introduction, Preface, Foreword, or Afterward in-text, cite the appropriate author and year as usual.

(Funk & Kolln, 1992)

Personal Communication: For interviews, letters, e-mails, and other person-to-person communication, cite the communicators name, the fact that it was personal communication, and the date of the communication. Do not include personal communication in the reference list.

(E. Robbins, personal communication, January 4, 2001).

A. P. Smith also claimed that many of her students had difficulties with APA style (personal communication, November 3, 2002).

Citing Indirect Sources

If you use a source that was cited in another source, name the original source in your signal phrase. List the secondary source in your reference list and include the secondary source in the parentheses.

Johnson argued that...(as cited in Smith, 2003, p. 102).

Note:When citing material in parentheses, set off the citation with a comma, as above.

Electronic Sources

If possible, cite an electronic document the same as any other document by using the author-date style.

Kenneth (2000) explained...

Unknown Author and Unknown Date: If no author or date is given, use the title in your signal phrase or the first word or two of the title in the parentheses and use the abbreviation "n.d." (for "no date").

Another study of students and research decisions discovered that students succeeded with tutoring ("Tutoring and APA," n.d.).

Sources Without Page Numbers

When an electronic source lacks page numbers, you should try to include information that will help readers find the passage being cited. When an electronic document has numbered paragraphs, use the ¶ symbol, or the abbreviation "para." followed by the paragraph number (Hall, 2001, ¶ 5) or (Hall, 2001, para. 5). If the paragraphs are not numbered and the document includes headings, provide the appropriate heading and specify the paragraph under that heading. Note that in some electronic sources, like Web pages, people can use the Find function in their browser to locate any passages you cite.

According to Smith (1997), ... (Mind over Matter section, para. 6).

Note: Never use the page numbers of Web pages you print out; different computers print Web pages with different pagination.

Reference List: Basic Rules

Your reference list should appear at the end of your paper. It provides the information necessary for a reader to locate and retrieve any source you cite in the body of the paper. Each source you cite in the paper must appear in your reference list; likewise, each entry in the reference list must be cited in your text.

Your references should begin on a new page separate from the text of the essay; label this page References (with no quotation marks, underlining, etc.), centered at the top of the page. It should be double-spaced just like the rest of your essay.

Basic Rules

- All lines after the first line of each entry in your reference list should be indented one-half inch from the left margin. This is called hanging indentation.
- Authors' names are inverted (last name first); give the last name and initials for all authors of a particular work unless the work has more than six authors. If the work has more than six authors, list the first six authors and then use et al. after the sixth author's name to indicate the rest of the authors.
- Reference list entries should be alphabetized by the last name of the first author of each work.
- If you have more than one article by the same author, single-author references or multiple-author references with the exact same authors in the exact same order are listed in order by the year of publication, starting with the earliest.
- When referring to any work that is NOT a journal, such as a book, article, or Web page, capitalize only the first letter of the first word of a title and subtitle, the first word after a colon or a dash in the title, and proper nouns. Do not capitalize the first letter of the second word in a hyphenated compound word.
- Capitalize all major words in journal titles.
- Italicize titles of longer works such as books and journals.
- Do not italicize, underline, or put quotes around the titles of shorter works such as journal articles or essays in edited collections.

Reference List: Author/Authors

The following rules for handling works by a single author or multiple authors apply to all APA-style references in your reference list, regardless of the type of work (book, article, electronic resource, etc.)

Single Author

Last name first, followed by author initials.

Berndt, T. J. (2002). Friendship quality and social development. *Current Directions in Psychological Science*, 11, 7-10.

Two Authors

List by their last names and initials. Use the ampersand instead of "and."

Wegener, D. T., & Petty, R. E. (1994). Mood management across affective states: The hedonic contingency hypothesis. *Journal of Personality & Social Psychology*, 66, 1034-1048.

Three to Six Authors

List by last names and initials; commas separate author names, while the last author name is preceded again by ampersand.

Kernis, M. H., Cornell, D. P., Sun, C. R., Berry, A., & Harlow, T. (1993). There's more to self-esteem than whether it is high or low: The importance of stability of self-esteem. *Journal of Personality and Social Psychology*, 65, 1190-1204.

More Than Six Authors

If there are more than six authors, list the first six as above and then "et al.," which stands for "and others." Remember not to place a period after "et" in "et al."

Harris, M., Karper, E., Stacks, G., Hoffman, D., DeNiro, R., Cruz, P., et al. (2001). Writing labs and the Hollywood connection. *Journal of Film and Writing*, 44(3), 213-245.

Organization as Author

American Psychological Association. (2003).

Unknown Author

Merriam-Webster's collegiate dictionary (10th ed.).(1993). Springfield, MA: Merriam-Webster.

NOTE: When your essay includes parenthetical citations of sources with no author named, use a shortened version of the source's title instead of an author's name. Use quotation marks and italics as appropriate. For example, parenthetical citations of the two sources above would appear as follows: (*Merriam-Webster's*, 1993) and ("New Drug," 1993).

Two or More Works by the Same Author

Use the author's name for all entries and list the entries by the year (earliest comes first).

Berndt, T.J. (1981).

Berndt, T.J. (1999).

When an author appears both as a sole author and, in another citation, as the first author of a group, list the one-author entries first.

Berndt, T. J. (1999). Friends' influence on students' adjustment to school. *Educational Psychologist*, 34, 15-28.

Berndt, T. J., & Keefe, K. (1995). Friends' influence on adolescents' adjustment to school. *Child Development*, 66, 1312-1329.

References that have the same first author and different second and/or third authors are arranged alphabetically by the last name of the second author, or the last name of the third if the first and second authors are the same.

Wegener, D. T., Kerr, N. L., Fleming, M. A., & Petty, R. E. (2000). Flexible corrections of juror judgments: Implications for jury instructions. *Psychology, Public Policy, & Law*, 6, 629-654.

Wegener, D. T., Petty, R. E., & Klein, D. J. (1994). Effects of mood on high elaboration attitude change: The mediating role of likelihood judgments. *European Journal of Social Psychology*, 24, 25-43.

Two or More Works by the Same Author in the Same Year

If you are using more than one reference by the same author (or the same group of authors listed in the same order) published in the same year, organize them in the reference list alphabetically by the title of the article or chapter. Then assign letter suffixes to the year. Refer to these sources in your essay as they appear in your reference list, e.g.: "Berndt (1981a) makes similar claims..."

Berndt, T. J. (1981a). Age changes and changes over time in prosocial intentions and behavior between friends. *Developmental Psychology*, 17, 408-416.

Berndt, T. J. (1981b). Effects of friendship on prosocial intentions and behavior. *Child Development*, 52, 636-643.

Introductions, Prefaces, Forewords, and Afterwards

Cite the publishing information about a book as usual, but cite Introduction, Preface, Foreword, or Afterword (whatever title is applicable) as the chapter of the book.

Funk, R. & Kolln, M. (1998). Introduction. In E.W. Ludlow (Ed.), *Understanding English Grammar* (pp. 1-2). Needham, MA: Allyn and Bacon.

Reference List: Articles in Periodicals

Basic Form

APA style dictates that authors are named last name followed by initials; publication year goes between parentheses, followed by a period. The title of the article is in sentence-case, meaning only the first word and proper nouns in the title are capitalized. The periodical title is run in title case, and is followed by the volume number which, with the title, is also italicized or underlined.

Author, A. A., Author, B. B., & Author, C. C. (Year). Title of article. *Title of Periodical*, volume number(issue number), pages.

Article in Journal Paginated by Volume

Journals that are paginated by volume begin with page one in issue one, and continue numbering issue two where issue one ended, etc.

Harlow, H. F. (1983). Fundamentals for preparing psychology journal articles. *Journal of Comparative and Physiological Psychology*, 55, 893-896.

Article in Journal Paginated by Issue

Journals paginated by issue begin with page one every issue; therefore, the issue number gets indicated in parentheses after the volume. The parentheses and issue number are not italicized or underlined.

Scruton, R. (1996). The eclipse of listening. *The New Criterion*, 15(30), 5-13.

Article in a Magazine

Henry, W. A., III. (1990, April 9). Making the grade in today's schools. *Time*, 135, 28-31.

Article in a Newspaper

Unlike other periodicals, p. or pp. precedes page numbers for a newspaper reference in APA style. Single pages take p., e.g., p. B2; multiple pages take pp., e.g., pp. B2, B4 or pp. C1, C3-C4.

Schultz, S. (2005, December 28). Calls made to strengthen state energy policies. *The Country Today*, pp. 1A, 2A.

Note: Because of issues with html coding, the listings below using brackets contain spaces that are not to be used with your listings. Use a space as normal before the brackets, but do not include a space following the bracket.

Letter to the Editor

Moller, G. (2002, August). Ripples versus rumbles [Letter to the editor]. *Scientific American*, 287(2), 12.

Review

Baumeister, R. F. (1993). Exposing the self-knowledge myth [Review of the book *The self-knower: A hero under control*]. *Contemporary Psychology*, 38, 466-467.

Reference List: Books

Basic Format for Books

Author, A. A. (Year of publication). *Title of work: Capital letter also for subtitle*. Location: Publisher.

Note: For "Location," you should always list the city, but you should also include the state if the city is unfamiliar or if the city could be confused with one in another state.

Calfee, R. C., & Valencia, R. R. (1991). *APA guide to preparing manuscripts for journal publication*. Washington, DC: American Psychological Association.

Edited Book, No Author

Duncan, G. J., & Brooks-Gunn, J. (Eds.). (1997). *Consequences of growing up poor*. New York: Russell Sage Foundation.

Edited Book with an Author or Authors

Plath, S. (2000). *The unabridged journals* (K.V. Kukil, Ed.). New York: Anchor.

A Translation

Laplace, P. S. (1951). *A philosophical essay on probabilities*. (F. W. Truscott & F. L. Emory, Trans.). New York: Dover. (Original work published 1814).

Note: When you cite a republished work, like the one above, work in your text, it should appear with both dates: Laplace (1814/1951).

Edition Other Than the First

Helfer, M. E., Keme, R. S., & Drugman, R. D. (1997). *The battered child* (5th ed.). Chicago: University of Chicago Press.

Article or Chapter in an Edited Book

Author, A. A., & Author, B. B. (Year of publication). Title of chapter. In A. Editor & B. Editor (Eds.), *Title of book* (pages of chapter). Location: Publisher.

Note: When you list the pages of the chapter or essay in parentheses after the book title, use "pp." before the numbers: (pp. 1-21). This abbreviation, however, does not appear before the page numbers in periodical references, except for newspapers.

O'Neil, J. M., & Egan, J. (1992). Men's and women's gender role journeys: Metaphor for healing, transition, and transformation. In B. R. Wainrib (Ed.), *Gender issues across the life cycle* (pp. 107-123). New York: Springer.

Multivolume Work

Wiener, P. (Ed.). (1973). *Dictionary of the history of ideas* (Vols. 1-4). New York: Scribner's.

Reference List: Other Print Sources

An Entry in An Encyclopedia

Bergmann, P. G. (1993). Relativity. In *The new encyclopedia britannica* (Vol. 26, pp. 501-508). Chicago: Encyclopedia Britannica.

Work Discussed in a Secondary Source

List the source the work was discussed in:

Coltheart, M., Curtis, B., Atkins, P., & Haller, M. (1993). Models of reading aloud: Dual-route and parallel-distributed-processing approaches. *Psychological Review*, 100, 589-608.

NOTE: Give the secondary source in the references list; in the text, name the original work, and give a citation for the secondary source. For example, if Seidenberg and McClelland's work is cited in Coltheart et al. and you did not read the original work, list the Coltheart et al. reference in the References. In the text, use the following citation:

In Seidenberg and McClelland's study (as cited in Coltheart, Curtis, Atkins, & Haller, 1993), ...

Dissertation Abstract

Yoshida, Y. (2001). Essays in urban transportation (Doctoral dissertation, Boston College, 2001). *Dissertation Abstracts International*, 62, 7741A.

Government Document

National Institute of Mental Health. (1990). *Clinical training in serious mental illness* (DHHS Publication No. ADM 90-1679). Washington, DC: U.S. Government Printing Office.

Report From a Private Organization

American Psychiatric Association. (2000). *Practice guidelines for the treatment of patients with eating disorders* (2nd ed.). Washington, D.C.: Author.

Conference Proceedings

Schnase, J.L., & Cunniss, E.L. (Eds.). (1995). Proceedings from CSCL '95: *The First International Conference on Computer Support for Collaborative Learning*. Mahwah, NJ: Erlbaum.

Reference List: Electronic Sources

Article From an Online Periodical

Note: In 2007, the APA released several additions/modifications for documentation of electronic sources in the APA Style Guide to Electronic References. These changes are reflected in the entries below. **Please note** that there are no spaces used with brackets in APA.

Online articles follow the same guidelines for printed articles. Include all information the online host makes available, including an issue number in parentheses. Provide a retrieval date only if the information is likely to be updated or changed at a later date (as in the case of blogs and wikis). Since many online periodicals appear in their "final" form, a retrieval date is not necessary.

Author, A. A., & Author, B. B. (Date of publication). Title of article. *Title of Online Periodical*, volume number(issue number if available). Retrieved month day, year, (if necessary) from <http://www.someaddress.com/full/url/>

Bernstein, M. (2002). 10 tips on writing the living Web. *A List Apart: For People Who Make Websites*, 149. Retrieved May 2, 2006, from <http://www.alistapart.com/articles/writeliving>

Online Scholarly Journal Article

Since online materials can potentially change URL's, APA recommends providing a Digital Object Identifier (DOI), when it is available, as opposed to the URL. DOI's are an attempt to provide stable, long-lasting links for online articles. They are unique to their documents and consist of a long alphanumeric code. Many-but not all-publishers will provide an article's DOI on the first page of the document.

Note that some online bibliographies provide an article's DOI but may "hide" the code under a button which may read "Article" or may be an abbreviation of a vendors name like "CrossRef" or "PubMed." This button will usually lead the user to the full article which will include the DOI. Find DOI's from print publications or ones that go to dead links with CrossRef.org's "DOI Resolver," which is displayed in a central location on their home page.

Article From an Online Periodical with DOI Assigned

Author, A. A., & Author, B. B. (Date of publication). Title of article. *Title of Journal*, volume number.

doi:0000000/000000000000

Brownlie, D. Toward effective poster presentations: An annotated bibliography. *European Journal of Marketing*, 41(11/12), 1245-1283. doi:10.1108/03090560710821161

Article From an Online Periodical with no DOI Assigned

Online scholarly journal articles without a DOI require a URL but do not require a retrieval date. Provide a retrieval date only if the information is likely to be updated or changed at a later date (as in the case of blogs and wikis). Since most journal articles appear in their "final" form, a retrieval date is not needed.

Author, A. A., & Author, B. B. (Date of publication). Title of article. *Title of Journal*, volume number. Retrieved month day, year, from <http://www.someaddress.com/full/url/>

Kenneth, I. A. (2000). A Buddhist response to the nature of human rights. *Journal of Buddhist Ethics*, 8. Retrieved February 20, 2001, from <http://www.cac.psu.edu/jbe/twocont.html>

If the article appears as a printed version as well, the URL is not required. Use "Electronic version" in brackets after the article's title.

Whitmeyer, J.M. (2000). Power through appointment [Electronic version]. *Social Science Research*, 29, 535-555.

Article From a Database

When referencing material obtained from an online database (such as a database in the library), provide appropriate print citation information (formatted just like a "normal" print citation would be for that type of work). Then add information that gives the date of retrieval and the proper name of the database. This will allow people to retrieve the print version if they do not have access to the database from which you retrieved the article. You can also include the item number or accession number in parentheses at the end, but the APA manual says that this is not required. (For more about citing articles retrieved from electronic databases, see page 278 of the Publication Manual.)

Smyth, A. M., Parker, A. L., & Pease, D. L. (2002). A study of enjoyment of peas. *Journal of Abnormal Eating*, 8(3). Retrieved February 20, 2003, from PsycARTICLES database.

Abstract

If you only cite an abstract but the full text of the article is also available, cite the online abstract as other online citations, adding "[Abstract]" after the article or source name. If only the abstract is available, write "Abstract retrieved from" and provide the database name or URL.

Paterson, P. (2008). How well do young offenders with Asperger Syndrome cope in custody?: Two prison case studies [Abstract]. *British Journal of Learning Disabilities*, 36(1), 54-58. Retrieved from EBSCO Host database.

Bossong, G. Ergativity in Basque. *Linguistics*, 22(3), 341-392. Abstract retrieved from Linguistics Abstracts Online.

Newspaper Article

Author, A. A. (Year, Month Day). Title of article. *Title of Newspaper*. Retrieved <http://www.someaddress.com/full/url/>

Parker-Pope, T. (2008, May 6). Psychiatry handbook linked to drug industry. *The New York Times*. Retrieved from <http://www.nytimes.com>

Electronic Books

Electronic books may include books found on personal websites, databases, or even in audio form. Use the following format if the book you are using is only provided in a digital format or is difficult to find in print. If the work is not directly available online or must be purchased, use "Available from," rather than "Retrieved from," and point readers to where they can find it.

De Huff, E.W. *Taytay's tales: Traditional Pueblo Indian tales*. Retrieved from

<http://digital.library.upenn.edu/women/dehuff/taytay/taytay.html>

Davis, J. *Familiar birdsongs of the Northwest*. Available from <http://www.powells.com/cgi-bin/biblio?inkey=1-9780931686108-0>

Chapter/Section of a Web document or Online Book Chapter

Author, A. A., & Author, B. B. (Date of publication). Title of article. In Title of book or larger document (chapter or section number). Retrieved month day, year, from <http://www.someaddress.com/full/url/>.

Engelshcall, R. S. (1997). Module mod_rewrite: URL Rewriting Engine. In *Apache HTTP Server Version 1.3 Documentation* (Apache modules.) Retrieved March 10, 2006, from http://httpd.apache.org/docs/1.3/mod/mod_rewrite.html

Peckinpaugh, J. (2003). Change in the Nineties. In J.S. Bough and G.B. DuBois (Eds.), *A century of growth in America*. Retrieved from GoldStar database.

NOTE: Use a chapter or section identifier and provide a URL that links directly to the chapter section, not the home page of the Web site.

Online Book Reviews

Cite the information as you normally would for the work you are quoting. (The first example below is from a newspaper article; the second is from a scholarly journal.) In brackets, write "Review of the book" and give the title of the reviewed work. Provide the web address after the words "Retrieved from," if the review is freely available to anyone. If the review comes from a subscription service or database, write "Available from" and provide the information where the review can be purchased.

Zacharek, S. (2008, April 27). Natural women [Review of the book *Girls like us*]. *The New York Times*. Retrieved from <http://www.nytimes.com/2008/04/27/books/review/Zacharek-t.html?pagewanted=2>

Castle, G. (2007). New millennial Joyce [Review of the books *Twenty-first Joyce*, *Joyce's critics: Transitions in reading and culture*, and *Joyce's messianism: Dante, negative existence, and the messianic self*]. *Modern Fiction Studies*, 50(1), 163-173. Available from Project MUSE Web site: http://muse.jhu.edu/journals/modern_fiction_studies/toc/mfs52.1.html

Dissertation/Thesis from a Database

Biswas, S. (2008). *Dopamine D3 receptor: A neuroprotective treatment target in Parkinson's disease*. Retrieved from ProQuest Digital Dissertations. (AAT 3295214)

Online Encyclopedias and Dictionaries

Often encyclopedias and dictionaries do not provide bylines (authors' names). When no byline is present, move the entry name to the front of the citation. Provide publication dates if present or specify (n.d.) if no date is present in the entry. Because updates and modifications are not normally specified, provide the retrieval date in the citation. When listing the URL, give only the home or index root as opposed to the URL for the entry.

Feminism. (n.d.) In *Encyclopædia Britannica online*. Retrieved March 16, 2008, from <http://www.britannica.com>

Online Bibliographies and Annotated Bibliographies

Jürgens, R. (2005). *HIV/AIDS and HCV in Prisons: A Select Annotated Bibliography*. Retrieved from http://www.hc-sc.gc.ca/ahc-asc/alt_formats/hpb-dgps/pdf/intactiv/hiv-vih-aids-sida-prison-carceral_e.pdf

Data Sets

Point readers to raw data by providing a Web address (use "Retrieved from") or a general place that houses data sets on the site (use "Available from").

United States Department of Housing and Urban Development. *Indiana income limits* [Data file]. Retrieved from
http://www.huduser.org/Datasets/IL/IL08/in_fy2008.pdf

Graphic Data (e.g. Interactive Maps and Other Graphic Representations of Data)

Give the name of the researching organization followed by the date. In brackets, provide a brief explanation of what type of data is there and in what form it appears. Finally, provide the project name and retrieval information.

Solar Radiation and Climate Experiment. (2007). [Graph illustration the SORCE Spectral Plot May 8, 2008]. *Solar Spectral Data Access from the SIM, SOLSTICE, and XPS Instruments*. Retrieved from http://lasp.colorado.edu/cgi-bin/ion-p?page=input_data_for_spectra.ion

Qualitative Data and Online Interviews

If an interview is not retrievable in audio or print form, cite the interview only in the text (not in the reference list) and provide the month, day, and year in the text. If an audio file or transcript is available online, use the following model, specifying the medium in brackets (e.g. [Interview transcript, Interview audio file]):

Butler, C. (Interviewer) & Stevenson, R. (Interviewee). (1999). *Oral History 2* [Interview transcript]. Retrieved from
Johnson Space Center Oral Histories Project Web site: http://www1.jsc.nasa.gov/history/oral_histories/oral_histories.htm

Online Lecture Notes and Presentation Slides

When citing online lecture notes, be sure to provide the file format in brackets after the lecture title (e.g. PowerPoint slides, Word document).

Hallam, A. *Duality in consumer theory* [PDF document]. Retrieved from Lecture Notes Online Web site:
<http://www.econ.iastate.edu/classes/econ501/Hallam/index.html>

Roberts, K. F. (1998). *Federal regulations of chemicals in the environment* [PowerPoint slides]. Retrieved from
<http://siri.uvm.edu/ppt/40henv/index.html>

Nonperiodical Web Document, Web Page, or Report

List as much of the following information as possible (you sometimes have to hunt around to find the information; don't be lazy. If there is a page like <http://www.somesite.com/somepage.htm>, and [somepage.htm](http://www.somesite.com/somepage.htm) doesn't have the information you're looking for, move up the URL to <http://www.somesite.com/>):

Author, A. A., & Author, B. B. (Date of publication). *Title of document*. Retrieved month day, year (only if the text may potentially change over time), from <http://Web address>

NOTE: When an Internet document is more than one Web page, provide a URL that links to the home page or entry page for the document. Also, if there isn't a date available for the document use (n.d.) for no date.

Computer Software/Downloaded Software

Do not cite standard office software (e.g. Word, Excel) or programming languages. Provide references only for specialized software.

Ludwig, T. (2002). *PsychInquiry* [computer software]. New York: Worth.

Software that is downloaded from a Web site should provide the software's version and year when available.

Hayes, B., Tesar, B., & Zuraw, K. (2003). OTSoft: Optimality Theory Software (Version 2.1) [Software]. Available from <http://www.linguistics.ucla.edu/people/hayes/otsoft/>

E-mail

E-mails are not included in the list of references, though you parenthetically cite them in your main text: (E. Robbins, personal communication, January 4, 2001).

Online Forum or Discussion Board Posting

Include the title of the message, and the URL of the newsgroup or discussion board. Please note that titles for items in online communities (e.g. blogs, newsgroups, forums) are not italicized. If the author's name is not available, provide the screen name. Place identifiers like post or message numbers, if available, in brackets. If available, provide the URL where the message is archived (e.g. "Message posted to..., archived at...").

Frook, B. D. (1999, July 23). New inventions in the cyberworld of toylandia [Msg 25]. Message posted to <http://groups.earthlink.com/forum/messages/00025.html>

Blog (Weblog) and Video Blog Post

Include the title of the message and the URL. Please note that titles for items in online communities (e.g. blogs, newsgroups, forums) are not italicized. If the author's name is not available, provide the screen name.

Dean, J. (2008, May 7). When the self emerges: Is that me in the mirror? Message posted to <http://www.spring.org.uk/the1sttransport>. (2004, September 26). Psychology Video Blog #3 [Video File]. Video posted to <http://www.youtube.com/watch?v=lqM90eQi5-M>

Wikis

Please note that the *APA Style Guide to Electronic References* warns writers that wikis (like Wikipedia, for example) are collaborative projects which cannot guarantee the verifiability or expertise of their entries.

OLPC Peru/Arahuay. (n.d.). Retrieved May 1, 2008, from the OLPC Wiki: http://wiki.laptop.org/go/OLPC_Peru/Arahuay

Audio Podcast

For all podcasts, provide as much information as possible; not all of the following information will be available. Possible addition identifiers may include Producer, Director, etc.

Bell, T. & Phillips, T. 2008, May 6). A solar flare. *Science @ NASA Podcast*. Podcast retrieved from <http://science.nasa.gov/podcast.htm>

Video Podcasts

For all podcasts, provide as much information as possible; not all of the following information will be available. Possible addition identifiers may include Producer, Director, etc.

Scott, D. (Producer). (2007, January 5). The community college classroom [Episode 7]. *Adventures in Education*. Podcast retrieved from <http://www.adveeducation.com>

For more help with citing electronic sources, please use these links:

Reference List: Other Non-Print Sources

Interviews, Email, and Other Personal Communication

No personal communication is included in your reference list; instead, parenthetically cite the communicators name, the fact that it was personal communication, and the date of the communication in your main text only.

(E. Robbins, personal communication, January 4, 2001).

A. P. Smith also claimed that many of her students had difficulties with APA style (personal communication, November 3, 2002).

Motion Picture

Basic reference list format:

Producer, P. P. (Producer), & Director, D.D. (Director). (Date of publication). *Title of motion picture* [Motion picture].

Country of origin: Studio or distributor.

Note: If a movie or video tape is not available in wide distribution, add the following to your citation after the country of origin: (Available from Distributor name, full address and zip code).

A Motion Picture or Video Tape with International or National Availability

Smith, J.D. (Producer), & Smithee, A.F. (Director). (2001). *Really big disaster movie* [Motion picture]. United States:

Paramount Pictures.

A Motion Picture or Video Tape with Limited Availability

Harris, M. (Producer), & Turley, M. J. (Director). (2002). *Writing labs: A history* [Motion picture]. (Available from Purdue

University Pictures, 500 Oval Drive, West Lafayette, IN 47907)

Television Broadcast or Series Episode

Producer, P. P. (Producer). (Date of broadcast or copyright). Title of broadcast [*Television broadcast or Television*

series]. City of origin: Studio or distributor.

Single Episode of a Television Series

Writer, W. W. (Writer), & Director, D.D. (Director). (Date of publication). Title of episode [Television series episode].

In P. Producer (Producer), *Series title*. City of origin: Studio or distributor.

Wendy, S. W. (Writer), & Martian, I.R. (Director). (1986). The rising angel and the falling ape [Television series

episode]. In D. Dude (Producer), *Creatures and monsters*. Los Angeles: Belarus Studios.

Television Broadcast

Important, I. M. (Producer). (1990, November 1). *The nightly news hour* [Television broadcast]. New York: Central

Broadcasting Service.

A Television Series

Bellisario, D.L. (Producer). (1992). *Exciting action show* [Television series]. Hollywood: American Broadcasting Company.

Music Recording

Songwriter, W. W. (Date of copyright). Title of song [Recorded by artist if different from song writer]. On *Title of album* [Medium of recording]. Location: Label. (Recording date if different from copyright date).

Taupin, B. (1975). Someone saved my life tonight [Recorded by Elton John]. On *Captain fantastic and the brown dirt cowboy* [CD]. London: Big Pig Music Limited.

For more about citing audiovisual media, see pages 266-269 of the Publication Manual.