

APA Style Basics: Sixth Edition

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Please Note:

For ease of use, the Table of Contents, List of Tables, and List of Figures entries are hyperlinks so that you can click on them and go directly to the section that you need.

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About this Handout

The *Publication Manual of the American Psychological Association* (APA) defines style rules for writing in the behavioral and social sciences. This handout was created to help OPWL students apply the basics of the APA style to their citations and references for class assignments. Using APA style for citations and references is required in most assignments throughout the OPWL program. The *Publication Manual* has further guidelines for formatting pages, writing clearly and concisely, and the presentation of research data; these may be useful if you choose the Thesis option for your culminating activity. Adherence to the broader APA formatting style is not required for most OPWL assignments. Although it is always good practice to use headings, 12 point font and 1 inch margins. If your instructor has specific formatting requirements, these will be described in your assignment or a template will be provided.

Citations and references are very important in graduate work. You can use them to:

- demonstrate that you are aware of what others are thinking and saying about the topic
- provide support for your arguments by identifying who else agrees with your ideas
- show where others might disagree with your position and respond to their concerns
- give credit to the originator(s) of an idea or model and help you to avoid plagiarism
- enable your reader to locate the information that you are citing
- communicate important information about the sources that you are relying on in making your arguments. For example, peer-reviewed sources are generally considered more authoritative

Citations and references also identify what you actually read. So, if someone else misinterpreted someone's work and you are relying on that person's interpretation, it is clear that you are relying on their interpretation and are not responsible for the mistake.

We use APA Style formatting for citations and references in OPWL assignments because it is the predominant style in the journals which we most frequently read and publish in.

When to Cite a Source

Quoting, Paraphrasing and Summarizing

Quotations, paraphrases, and summaries of what you have read or heard are very useful tools in writing. For example, you can use them to

- add credibility to what you are saying by showing that there is support within the field for your position
- illustrate the differences in opinion about a topic
- highlight a particular viewpoint with which you want to agree or disagree
- show what a particular author or thinker had to say about an issue
- distance yourself from a particular position by presenting a different voice or writing style

Regardless of your purpose, whenever you quote, paraphrase, or summarize something that you read or heard elsewhere (even your own previously published work) you need to include a citation

to avoid plagiarism. Yes, you can plagiarize yourself, if you use work that you previously published (or submitted for grading)! Generally speaking, though, you will want to choose sources that are considered expert in their field for your papers assignments.

For descriptions and examples of a quote, a paraphrase, and a summary as well as when to use each one, see Table 1.

Table 1. Description of the Differences between a Quote, a Paraphrase, and a Summary

	Quote	Paraphrase	Summary
Definition	When you quote, you include the exact wording that you read or heard somewhere else into your work.	When you paraphrase, you change the wording and perhaps condense what you read or heard somewhere else before including it in your work.	When you summarize, you put the idea that you read or heard somewhere else into your own words and condense it down to its essence before including it in your own work.
When to Use	<ul style="list-style-type: none"> • to draw attention to what a particular author said and how they said it as an illustration of their use of language • to present someone’s position before commenting on it or providing a critique • to present a particularly well phrased statement whose meaning might be changed or lost completely if you summarized or paraphrased it 	<ul style="list-style-type: none"> • to communicate the idea rather than the specific language used to express it • to avoid disrupting the flow of the paper by introducing another voice 	<ul style="list-style-type: none"> • to communicate the idea more succinctly • to avoid disrupting the flow of the paper by introducing another voice
Example	“Reproduce word for word material directly quoted from another author’s work or from your own previously published work, material replicated from a test item, and verbatim instructions to participants” (APA, 2010, p. 170). <i>Note:</i> location information is required for all quotations.	Copying the exact wording from a publication, document or statement whether your own or someone else’s is called quoting (APA, 2010, p. 170). <i>Note:</i> a paraphrase may contain some of the same words as the original, but not many!	Quoting is incorporating exactly what you read or heard elsewhere into your work (APA, 2010, p. 170). <i>Note:</i> the page number is included here and in the example of the paraphrase because the APA 6 th recommends including location information when paraphrasing or summarizing.

Figures and Tables

In the APA Style any tables or figures that are copied or adapted from someone else’s work (or your own previously published work) must be clearly identified as reprinted or adapted from the original source and the original source must be provided in text. Permissions from the original publisher must also be obtained and this must be noted in the text using the words “with permission”. See example in Figure 1.

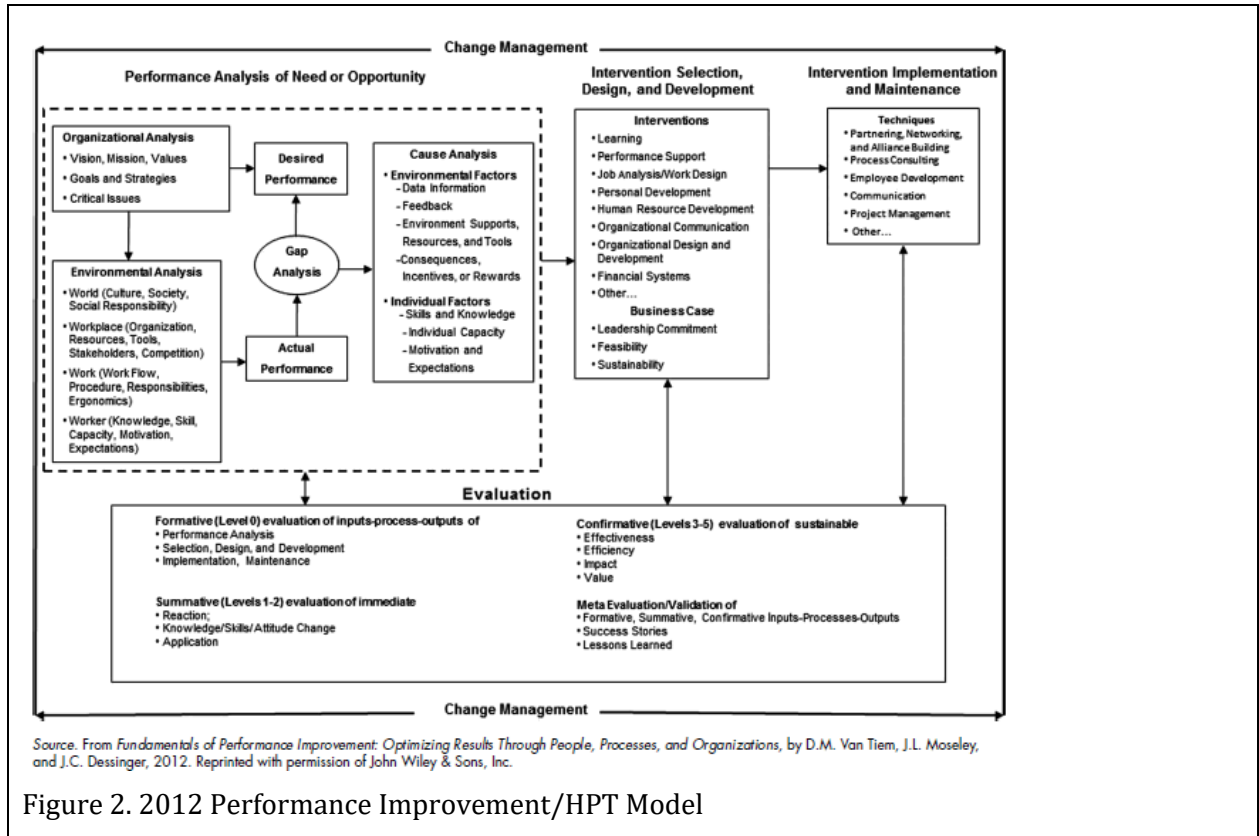


Figure 2. 2012 Performance Improvement/HPT Model

Figure 1. Example of Figure Copied from Another Source with Source and Permissions Noted.

In your assignments for this program, we do not expect that you will request permission from the author/publisher to include a figure or table in your assignment, nor do we require you to use the special formatting, but we do expect you to cite your source(s) using the author-date method when you copy or adapt a table or figure from another source. See example of a Table copied from an original in Figure 2 and of a table adapted from an original source in Figure 3.

Note: You should refer to the label of the table or figure in your text (e.g., “As shown in Table 1”). However, you should not refer to where the table or figure is located (e.g., “As shown in Table 2, below”). Simply referring to the label of the table or figure is sufficient and the location of a particular table or figure may change.

Table 2. Example of a Congruent Lesson Structure

Instructional Objectives	Instructional Activities	Assessment Methods
Without using reference materials, students will be able to list the six factors of Thomas Gilbert's behavior engineering model (BEM) in the correct order.	<ul style="list-style-type: none"> Show Gilbert's BEM in a table. Explain the sequence Gilbert said should be followed. Provide an example of the use of the six factors in the correct order to diagnose a problem. 	Show the BEM table without the labels of the six factors. Ask students to write down the labels in the correct cells and then to number them in the proper order.

(Chyung, 2008, Table 1, p. 17)

Figure 2. Table Copied from the Original.

Table 2. Create a Congruent Lesson Plan

Instructional Objectives	Instructional Activities	Assessment Methods
Enter your instructional objective in this column adding rows as needed. For example, Without using reference materials (condition), students (audience) will be able to list the six factors of Thomas Gilbert's behavior engineering model (BEM) (Behavior) in the correct order (criteria).	Then list 2-3 instructional activities that will help your learners to achieve each one. For example, <ul style="list-style-type: none"> Show Gilbert's BEM in a table. Explain the sequence Gilbert said should be followed. Provide an example of the use of the six factors in the correct order to diagnose a problem. 	Finally, describe how you will assess whether or not they have achieved each objective. For example, Show the BEM table without the labels of the six factors. Ask students to write down the labels in the correct cells and then to number them in the proper order.

(adapted from Chyung, 2008, Table 1, p. 17)

Figure 3. Table Adapted from the Original.

The same is true for Figures although both the caption and the citation are below as shown in Figure 4 and Figure 5.

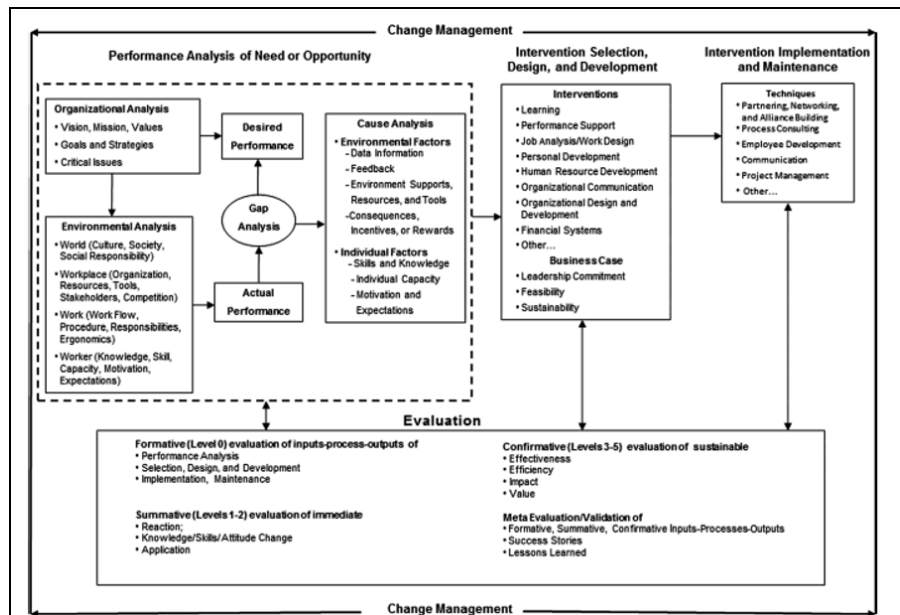


Figure 1. ISPI HPT/Performance Improvement Model (Van Tiem, Moseley, & Dessinger, 2012, Figure 2-1, p. 43).

Figure 4. Figure Copied from the Original.

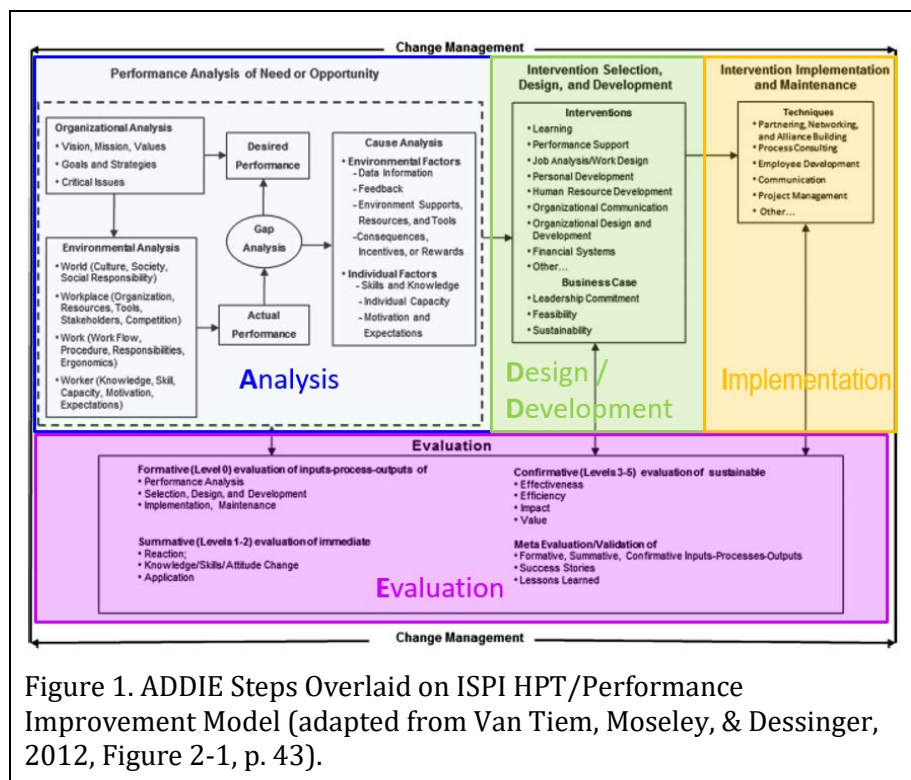


Figure 1. ADDIE Steps Overlaid on ISPI HPT/Performance Improvement Model (adapted from Van Tiem, Moseley, & Dessinger, 2012, Figure 2-1, p. 43).

Figure 5. Figure Adapted from the Original.

Note: Some instructors use “based on” rather than “adapted from”. Both are acceptable. But you may want to check with your instructor to see if they have a preference.

Citing Your Sources the APA Way

Author-Date Citation Method

The APA style uses the author-date citation method. That means that the author(s) surname(s) is always directly followed by the publication date exactly as it is shown in the references, while the page number (or other location information such as para. for paragraph, chapter, or figure) may be separate. Table 2 shows examples of this.

Author first name(s) are only used in citations when there is a need to distinguish between two authors with the same surname in the references.

Table 2. Citation Examples – Paraphrases and Short Quotes

Citation Type	Example
Paraphrase Author in flow of text	Porter (2015) offered encouragement suggesting that while the APA style may seem tricky at first, once you practice a little you can get the hang of it (para. 6).
Paraphrase Author in parentheses	Instructional technology is both focused on the ends, i.e., achieving preset goals, and systematic in its approach, using methods derived from physical or social science (Chyung, 2008, pp. 3-4).
Quotation Authors in flow of text	Villachica, Stepich, and Rist (2011) note that “without sponsorship, it becomes difficult, if not impossible, to demonstrate the overall impact of a training program to the sponsor who funded it-let alone the rest of the organization” (pp. 9-10).
Quotation Author in Parentheses	“ <i>Systematic</i> applications refer to purposely planned, methodical, step-by-step approaches” (Chyung, 2008, p. 9).

Note: when the author(s)’ name is in the flow of the text it emphasizes that this author saying what you are citing, while when the author’s name is in parentheses it emphasizes the idea that you are citing rather than the author who said it.

To make it easier to read and save space, when there are three or more authors or recognizable acronyms for groups, the APA style sometimes uses a short form, such as acronyms, “et al.” or an ampersand (&), as illustrated in Table 3.

Table 3. Variations in Author-Date Citation Depending on the Number or Type of Author(s)

Number of Authors	1 st Citation– Author(s) in the flow of the Text	Subsequent Citations–Author(s) in the flow of the Text	1 st Citation– Author(s) in Parentheses	Subsequent Citations–Author(s) in Parentheses
1 author	Huglin (2010)	Huglin (2010)	(Huglin, 2010)	(Huglin, 2010)

Number of Authors	1 st Citation– Author(s) in the flow of the Text	Subsequent Citations–Author(s) in the flow of the Text	1 st Citation– Author(s) in Parentheses	Subsequent Citations–Author(s) in Parentheses
2 authors	Giacumo and Conley (2015)	Giacumo and Conley (2015)	(Giacumo & Conley, 2015)	(Giacumo & Conley, 2015)
3 authors	Chyung, Winiiecki, and Downing, (2010)	Chyung, et al. (2010)	(Chyung, Winiiecki, & Downing, 2010)	(Chyung, et al., 2010)
4 authors	Kennedy, Chyung, Winiiecki, and Brinkerhoff (2014)	Kennedy, et al. (2014)	(Kennedy, Chyung, Winiiecki, & Brinkerhoff, 2014)	(Kennedy, et al., 2014)
5 authors	Marker, Villachica, Stepich, Allen, and Stanton (2014)	Marker et al. (2014)	(Marker, Villachica, Stepich, Allen, & Stanton, 2014)	(Marker et al., 2014)
6 (or more) authors	Beriwal et al. (2013)	Beriwal et al. (2013)	Beriwal et al. (2013)	Beriwal et al. (2013)
1 group (easily recognizable acronym) as author	International Society for Performance Improvement (ISPI, 2014)	ISPI (2014)	(International Society for Performance Improvement [ISPI], 2014)	(ISPI, 2014)
1 group (no abbreviation) as author	Boise State University (2015)	Boise State University (2015)	(Boise State University, 2015)	(Boise State University, 2015)

Location Information - Page Numbers or Equivalent

The APA style requires location information, typically page numbers, for all quotations regardless of their length. It also recommends including location information for all paraphrases and summaries since this makes it easier for your reader, and for you, to locate the specific information you are referring to, particularly in lengthy or complex documents.

If there is no page number, as is often the case with online documents, paragraph numbers can be used. This can be unwieldy in a long document so, if neither page numbers nor paragraph numbers are visible, and there are headings, it is better to include the heading (either in full or shortened) followed by the number of the paragraph following that heading. To cite a specific part of a source you can also use chapter, figure, or table followed by the number. Note that unlike page or paragraph, the words chapter, figure, and table are capitalized in citations. See examples in Table 4.

Table 4. Examples of Location Information for Citations

Location Information	Format	Examples
Page Number(s)	p. xx or pp. xx-xx	(p. 12) or (pp. 12-15)
Paragraph	para. x	para. 7
Heading + Paragraph	Heading words, para. x	Plagiarism, para. 1
Short Heading + Paragraph	“Shortened heading,” para. x	Original Heading – Works with no identified author or with an anonymous author. “Works with no identified author,” para. 2
Chapter	Chapter x	Chapter 6
Figure	Figure x	Figure 12
Table	Table x	Table 2

Note: spacing is important! Be sure to include a space after the location type and the number. For example p. 12 not p.12!

Citing Personal Communications

Personal communications are things like conversations, emails, letters, and so forth that would not be readily accessible to someone reading your work. Nonetheless, they should be cited. The format for these citations is a little different, it includes the author(s) initials as well as the surname, the words personal communications, and the full date. See examples in Figure 6. Examples of Citations of Personal Communications.

L. Urban (personal communication, July 31, 2016) noted that good metacognitive skills are essential for graduate students’ success.

Active reading is an important metacognitive skill (L. Urban, personal communication, July 31, 2016).

Figure 6. Examples of Citations of Personal Communications.

Note: Personal communications are not included in your reference list. However, in your OPWL assignments we treat Blackboard posts as retrievable so be sure to check out how to format them for your assignments in the *OPWL Blackboard Posts and Attachments* section of this handout.

Citing an Indirect or Secondary Source

You must always cite the source that you read. This is the material that you are relying on to make your argument. When you are submitting a manuscript for publication, this usually means that you need to track down the original source of the material so that you can cite it directly, unless it is not available. But for most of your assignments in OPWL your instructor will not require you to do this. Instead, they will accept a citation of a secondary source.

When you cite a source (the original author or primary source) whose work you read about in another author's work (the indirect or secondary source) you need to include both authors. For example, you are reading Chyung's book and in it she uses an excellent analogy from Rothwell for the concept of "systemic" that you want to include in your assignment. You would acknowledge Rothwell as the original author and then use the words "as cited in" before the author and publication date of the source that you read, Chyung, 2008. Figure 7 shows how you might cite this in your assignment.

If you want to emphasize that Rothwell said this, you would use the format:
Rothwell (1995) likens systemic approaches to touching a spider's web (as cited in Chyung, 2008, p. 11).

If you want to emphasize the analogy and credit Rothwell, you would use the format:
Systemic approaches are like touching a spider's web (Rothwell, 1995, as cited in Chyung, 2008, p. 11).

Figure 7. Examples of Citations of a Secondary Source.

Note: the source that you read is the one that you should include in your references.

Special formatting for Quotations

The APA style uses two different formats for quotations depending on their length:

- quotations of less than 40 words; and
- quotations of more than 40 words.

Both must copy the original *exactly* with a few notable exceptions:

- The first letter of the first word in a quotation may be changed to uppercase or lowercase to suit the construction of your sentence.
- The punctuation mark at the end of the sentence may be changed to better fit the flow of your sentence.
- Double quotation marks in the original should be changed to single quotation marks when the quotation is enclosed in quotation marks in your paper.
- Material may be omitted within a sentence if three spaced ellipsis points (...) are inserted or between two sentences if four spaced ellipsis points (...) are inserted.
- Additions may be made within square brackets [] to help clarify for your reader.
- Italics may be added to emphasize a word or words within the quotation if they are followed immediately by [emphasis added].

Format for Quotations of Less than 40 Words

Quotations of less than 40 words must be enclosed within double quotation marks and the period moves to the end of the sentence, following the parentheses surrounding the page number or equivalent. Note: if the closing punctuation is something other than a period (for example, an exclamation point or question mark), that mark stays put and a period is added after the parentheses. See Figure 8 for examples of quotations of less than 40 words.

According to Rummler, “human performance ‘problems’ are multi-causal” (Dixon, 1988, p. 301).
Dixon (1988) notes Rummler tells us “a finite number of variables affect performance” (p. 301).
What about the burning platform? Dormant (2011) notes “over half the workers died!” (p. 3).
Honebein (2015) warned “A conjunction in a survey item is a danger sign” (para. 1).

Figure 8. Examples of Quotations Less than 40 Words.

Format for Quotations of More than 40 Words (Block Style)

Quotations of more than 40 words must be formatted in the block style i.e. the left side of the quoted material must be indented ½ inch and the closing punctuation should remain where it is in the original. The page number or equivalent follows in parentheses without punctuation after it.

As illustrated in Figure 9, punctuation following the introductory (lead-in) sentence before the quotation. When the introductory statement

- is a full sentence, a colon follows before the quotation
- ends in a verb, a comma follows before the quotation
- is neither a full sentence nor a verb, no punctuation follows before the quotation.

Rossett (1999) offers a clear distinction between performance analysis and training needs assessment:

Performance analysis provides preliminary study of the situation in order to determine if and when a more detailed training needs assessment is warranted.

Training needs assessment is study to design and develop instructional and informational programs and materials, after the performance analysis has determined that training or informational materials are indeed appropriate. (p. 23)

Rossett (1999) says,

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Training needs assessment is study to design and develop instructional and informational programs and materials, after the performance analysis has determined that training or informational materials are indeed appropriate. (p. 23)

In the words of Rossett (1999)

Performance analysis provides preliminary study of the situation in order to determine if and when a more detailed training needs assessment is warranted.

Training needs assessment is study to design and develop instructional and informational programs and materials, after the performance analysis has determined that training or informational materials are indeed appropriate. (p. 23)

Figure 9. Examples of Lead-ins for Quotations of More than 40 Words.

Use quotations judiciously in your work. Generally speaking, unless you are trying to emphasize what a particular author said, it is better to paraphrase or summarize the information in your own words. This both helps the flow of your writing and demonstrates a higher level mastery of the concept.

Creating Your Reference List

As you cite, you will want to record your sources for your reference list. This section includes some basic rules to keep in mind when you format your reference list, followed by examples of references for different types of publications.

Basic rules

- Start your Reference List at the top of a new page.
Tip: to ensure that it is at the top of a new page insert a page break before your reference list rather than a series of returns.
- Center the heading “References” in title case, without quotation marks, bolding, underlining, or italics.
- Use a hanging indent for each entry. This means that the second and subsequent lines of the reference are indented ½ inch from the margin as shown in Figure 10.

Chyung, S. Y., Winiiecki, D., & Downing, J. (2010). Training and performance improvement professionals’ perspectives on ethical challenges during evaluation practice. *Performance Improvement Quarterly*, 23(1), 7 – 29.
<https://doi.org/10.1002/piq.20073>

Figure 10. Example of a Hanging Indent.

- List each of the sources that you cited in the body of your paper, except for personal communications, in alphabetical order by the author(s)’ last name and initial(s) as shown on the publication that you are referencing. Be sure to include a space between the author(s)’s initials as shown in Figure 11.
- If there is more than one author, be sure to keep the authors in the same order as they appear on the original publication because in many fields the order reflects the level of contribution to the paper. See Figure 11 for an example of two works by the same authors listed in a different order.

Dessinger, J. C., Moseley, J. L., & Van Tiem, D. M. (2012). Performance improvement/HPT model: Guiding the process. *Performance Improvement*, 51(3), 10-17.
<https://doi.org/10.1002/pfi.20251>

Van Tiem, D. M., Moseley, J. L., & Dessinger, J. C. (2012). *Fundamentals of performance technology: A guide to improving people, process, and performance* (3rd ed.). Silver Spring, MD: International Society for Performance Improvement.

Figure 11. Example of Formatting for Author Names – Surname and Initials.

- If you have more than one entry by the same author(s), listed in the same order, list the entries by publication date from oldest to newest as shown in Figure 12.

Rummler, G. A., & Brache, A. P. (1992). *Improving performance: How to manage the white space on the organization chart*. San Francisco, CA: Jossey-Bass.

Rummler, G. A., & Brache, A. P. (2013). *Improving performance: How to manage the white space on the organization chart* (3rd ed.). San Francisco, CA: Jossey-Bass.

Figure 12. Example of More than One Entry by the Same Authors.

- If you have more than one entry by the same author (or authors listed in the same order) with the same publication date, order the entries alphabetically by the first major word in the title (i.e. ignore a, an, the etc.) unless they are part of a series in which case order them from first to last in the series (e.g., Part 1:...Part 2:...). Once they are in the correct order, insert lower case letters (a, b, c...) within the parentheses directly following the publication date to distinguish between them as shown in Figure 13.

Keller, J. M. (1987a). Development and use of the ARCS model of instructional design. *Journal of Instructional Development*, 10(3), 2-10.

Keller, J. M. (1987b). The systematic process of motivational design. *Performance & Instruction*, 26(9/10), 1-8. <https://doi.org/10.1002/pfi.4160260902>

Figure 13. Example of More than One Entry by the Same Author in the Same Year (not a series).

Note: You must include these lower case letters in your citations so that your reader can distinguish between the sources. For example, Keller (1987a) said... or (Keller, 1987b).

- If the author is a corporation or organization, then the name is presented in full as shown in Figure 14.

International Society for Performance Improvement. (2013, February). Certified performance technologist: CPT standards. Retrieved from <http://www.ispi.org/pl/cpt/CPT-Performance-Standards.pdf>

Figure 14. Example of an Entry with a Corporation as the Author.

- If there is no author, the title moves to the author position and the entry is alphabetized by the first significant word of the title. See example in Figure 15.

Cahoon, B. (1996, Autumn). Group learning and technology. *New Directions for Adult and Continuing Education*, 1996(71), 61-69.

Learning in groups. (1994). *Journal of Cooperative Learning*, 9, 27-42.

Race, P. (2000). *500 tips on group learning*. London, England: Routledge.

Figure 15. Example of an Entry without an Author.

- If the author is listed as “Anonymous” treat “Anonymous” as the author’s name.
- Include the publication date as specified for the type of publication as shown in Table 5 and in the *Examples of References of Different Types* section. For unpublished works or

informally published works use the date the work was created. If no date is available use (n.d.) for no date.

Table 5. Publication Date Formats for Different Types of Sources

Journals, Books, Reports, Dissertations, Movies	Publication year enclosed in parentheses e.g., (2007)
Magazines, Newsletters, Newspapers, Webpages, Corporate documents, Podcasts, YouTube Videos, Blog posts,	Enclose the publication year followed by comma and month and date, or month, or season as provided in parentheses e.g., (2010, May 17), (2011, July), (2013, March/April) or (2015, Fall)
Unpublished Papers and Posters presented at Meetings, Conferences, or Symposia	Year followed by comma and month of the meeting enclosed in parentheses e.g., (2009, January)
OPWL course posts	Publication year enclosed in parentheses e.g. (2016, Fall)

- Use title case (i.e. capitalizing all major words in the title) for titles of periodicals only. For everything else (titles of articles, books, webpages, and so forth), use sentence case, i.e., capitalize the first letter of the first word in the title and subtitle, proper nouns, and acronyms in the title. See examples of the difference between capitalization of titles in periodicals and books in Table 6.

Table 6. Differences in Capitalization of Titles of Periodicals and Books

Periodical	<p>von Bertalanffy, L. (1972). The history and status of general systems theory. <i>Academy of Management Journal</i>, 15(4), 407-426. https://doi.org/10.2307/255139</p> <p>Note: The title of the article uses sentence case, so only the first letter of the title is capitalized, and the title of the journal uses title case so all major words are capitalized. Proper nouns, acronyms and the first letter of the subtitle would also be capitalized in the article title.</p>
Book	<p>von Bertalanffy, L. (1969). <i>General system theory: Foundations, development, applications</i> (Revised ed.). New York, NY: George Braziller.</p> <p>Note: The title of the book uses sentence case, so only the first letter of the title and the first letter of the subtitle (word following the colon) are capitalized. Proper nouns and acronyms would also be capitalized in the book title.</p>

- Include the journal title in full.
- Maintain the punctuation and capitalization that is used by the journal in its title. For example, ReCALL not RECALL, and Educational Technology Research & Development not Educational Technology Research and Development.
- Italicize titles of 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.
- Do not underline URLs or DOIs. **Note:** if you have automatic formatting for URLs turned on in your word processor this may mean that you need to turn it off or manually reformat the URL so that it is not underlined or in a different color.
- Use single spaces after punctuation.
- Format your reference entries as specified for the particular type of source or one that is the most similar to your source that you can find.

Examples of References for Different Types of Sources

This handout includes most of the common formats for sources that you will use in your course assignments. Of course, neither it nor the official *APA Publication Manual*, itself, contains exhaustive examples of every possible format, because there are just too many possible combinations and permutations. Sometimes you will need to adjust elements depending on what is or is not available to you. For example, sometimes elements are missing such as author or publication date. The APA Publication Manual recommends that when you cannot find an example of your specific source, you find the one that is most similar and use that format.

If you cannot locate what you need in this guide, you may want to consult the APA Style website: <http://www.apastyle.org/>, APA Blog <http://blog.apastyle.org/apastyle/> or the APA section of the Purdue University Online Writing Lab (OWL) website: <https://owl.english.purdue.edu/owl/resource/560/01/> to check for additional examples. When in doubt, remember to consult your instructor. Just as the editor has final say about what is acceptable in a publication, your instructor is the final arbiter in your class.

Articles in Periodicals

Basic Format

The basic format for an article in a periodical is shown in Figure 16. Specific examples of the most commonly used types of articles in periodicals follow.

Author, A. A., Author, B. B., & Author, C. C. (Publication Date). Title of article. *Title of Periodical*, volume number(issue number), pages. <https://doi.org/xx.xxx/yyyy>

Figure 16. Basic Reference Formatting for an Article in a Periodical.

- The author(s) surname, followed by initials. Use commas between authors and an ampersand before the last name in a list of authors.
- The publication date is within parentheses, followed by a period.
- The title of the article is in sentence case, meaning only the first word in the title and subtitle, acronyms, and proper nouns in the title are capitalized.
- The periodical title is in title case, meaning that all major words are capitalized (words like the, a, and, or etc. are not). The title is followed by a comma and the volume number which, with the title, is also italicized.

- The issue number (if available) is enclosed in parentheses immediately following the volume number but is not italicized i.e., there is no space between the volume number and the initial parenthesis.
- The page numbers follow the issue number and are not preceded by p. or pp as they are in citations and the reference entries for sections of a book.
- If the article has a DOI, it follows after the page numbers. If there is no DOI and you are accessing the periodical online, the URL (preferably the permalink) follows the page number.
- The entry ends in a period unless there is a DOI or URL.

Journals

Article with a DOI (Print or Online)

Salisbury, D. F. (1990). General systems theory and instructional systems design. *Performance & Instruction, 29*(2), 1-10. <https://doi.org/10.1002/pfi.4160290202>

Most citation generators do not automatically pick up the DOI. You can locate the DOI printed on the article or by using <http://www.crossref.org/guestquery/>

Note: There is no period following the DOI.

The formatting of DOIs has evolved since the printing of the 6th edition of the APA Publication manual which specified using doi: before the DOI number. The current preference of the APA is for <https://doi.org/> before the DOI number. You may also see <http://dx.doi.org/> before the DOI number. Any of these are acceptable, but your instructor may have a preference so it is wise to ask.

Article without a DOI – Print

Atkinson, R. C., & Shiffrin, R. M. (1979). The control of short-term memory. *Journal of Educational Psychology, 26*(2), 80-89.

Article without a DOI – Online

Kernohan, L. (2008). Access opportunities and issues for students with disabilities at one Ontario college. *College Quarterly, 11*(2), 1-19. Retrieved from <http://collegequarterly.ca/>

Note: There is no period following the URL.

Magazines

Print

Wick, C., Pollock, R., & Jefferson, A. (2009, July). The new finish line for learning. *T + D, 63*(7), 64-69.

Online

Szczesny, J. R. (2009, August 4). *Automakers give rave reviews for ‘cash for clunkers.’* Retrieved from <http://www.time.com/time/business/article/0,8599,1914531,00.html>

Newspapers

Print

Marklein, M. B. (1997, February 7). Student finds SAT math mistake. *The Idaho Statesman*, p. A1.

Online

Ross, E. (2016, January 20). Eight smart ways to use social media in universities. *The Guardian*. Retrieved from <https://www.theguardian.com/higher-education-network/2016/jan/20/eight-smart-ways-to-use-social-media-in-universities>

Books

Basic Format

The basic formatting for a book published in the United States (U.S.) is shown in Figure 17. Specific examples of the most common book-related references follow.

Author, A. A., Author, B. B., & Author, C. C. (Publication Date). *Title of book: Subtitle of book*.
Publication City, Publication State: Publisher Name.

Figure 17. Basic Reference Formatting for a Book Published in the U.S.

- The author(s) surname, followed by initials. Use commas between authors and an ampersand before the last name in a list of authors.
- If there is an editor rather than an author, the editor information takes the place of the author information and is followed by (Ed.) for one editor or (Eds.) for two or more editors.
- The publication date follows the final period after the author or editor information and is enclosed within parentheses and followed by a period.
- The title of the book is italicized and in sentence case, meaning only the first word in the title and subtitle, acronyms, and proper nouns in the title are capitalized and the entire title is in italics.
- For print books, include the publisher information:
 - The city of the publisher followed by a comma and the abbreviated name of US states and territories, or if the work is published outside the US, spell out the city and country of the publisher.
 - If the publisher is a university and the name of the state or province is included in the name of the publisher, do not repeat it in the publisher location.
 - Use a colon after the publisher location and follow it with the publisher's name omitting words like *Publishers, Co.,* and *Inc.*
- For digital books, if the book has a DOI, it follows the title. If there is no DOI the URL follows the title.
- The entry ends in a period unless there is a DOI or URL, or parentheses.

Entire Book

Print – Not Edited Published in the U.S.

Pratt, D. D. (1998). *Five perspectives on teaching in adult and higher education*. Malabar, FL: Krieger Publishing Company.

Print – Not Edited Published outside the U.S.

Race, P. (2000). *500 tips on group learning*. London, England: Routledge.

Print – Edited

Biech, E. (Ed.). (2008). *ASTD handbook for workplace learning professionals*. Alexandria, VA: ASTD Press.

Note: The editor replaces the author information.

Online with a DOI

Cleland, J. K. (2003). *Business writing for results*. <https://doi.org/10.1036/0071426221>

Note: The DOI replaces the publication information.

Online without a DOI

Jonassen, D. H., Tessmer, M., & Hannum, W. H. (1999). *Task analysis methods for instructional design* [NetLibrary version]. Retrieved from http://boisestate.worldcat.org/oclc/44957467&referer=brief_results

Note: The information in brackets is the eReader program since this may affect pagination. If you are not certain of the eReader program, you may use [eBook] as the generic form, since the URL will direct the reader to the version that you used.

Book Sections – Chapters or Entries in a Reference Work

Print – Not Edited

Wenger, E., McDermott, R., & Snyder, W. M. (2002). Chapter one: Communities of practice and their value to organizations. In *Cultivating communities of practice* (pp. 1-21). Boston, MA: Harvard Business School Press.

Note: The name of the book is preceded by “In” and “pp.” is used in front of the page numbers.

Print – Edited

Clark, R. C. (2006). Evidence-based practice and professionalization of human performance technology. In J. A. Pershing (Ed.), *Handbook of human performance technology: Principles, practices, potential* (3rd ed., pp. 873-898). San Francisco, CA: Pfeiffer.

Note: The name of the editor(s) follows the title of the chapter or section, and is preceded by “In”. It is not inverted like the name of the author of the chapter or section. Also, the edition number is enclosed in the same brackets as the pages for the chapter which are preceded by pp.

Entry in a Reference Work

Print – Edited Reference Work

VandenBos, G. R. (Ed.) (2007). *APA dictionary of psychology*. Washington, DC: American Psychological Association.

Online – Entry in an Edited Reference Work, Edition other than the first

Graham, G. (2000). Behaviorism. In E. N. Zalta (Ed.), *The Stanford encyclopedia of philosophy* (Fall 2016 ed.) Retrieved from <http://plato.stanford.edu/entries/behaviorism/>

Online – Entry in a Reference Work without an Author or Editor

Gestalt. (n.d.). In *Merriam-Webster's online dictionary*. Retrieved from <http://www.merriamwebster.com/dictionary/>.

OPWL Blackboard Posts and Attachments

In the APA style sources that are not retrievable by others, e.g. personal communications, are cited but not included in your references. Your Blackboard posts and attachments would not be retrievable if you were submitting your work for publication, but they are retrievable by your classmates and instructors so for your OPWL assignments we ask that you include them and format them as described in this section.

Note: Unless otherwise noted, you can use your instructor as the author of the instructional materials on your course site.

Discussion Post

Urban, L. (2017, Spring). *Time management* [Discussion post]. Retrieved from OPWL 536 4201 Blackboard course site.

Note: 4201 refers to the section number for the course. This will vary depending on the number of sections for the course. Typically, the first section of a course is 4201 and subsequent sections are numbered sequentially i.e., 4202, 4203 and so forth. Your section number can be found in the course syllabus or on your course registration.

Lecturette Content Item (i.e., one that is embedded in Blackboard)

Porter, C. (2017, Fall). *Systems thinking* [Lecture notes]. Retrieved from OPWL 536 4202 Blackboard course site.

PDF Attachment

Urban, L. (2017, Spring). *Laying the foundation* [PDF document]. Retrieved from OPWL 536 4201 Blackboard course site.

PowerPoint Attachment

Porter, C. (2017, Fall). *Using endnote for citations and references* [PowerPoint slides]. Retrieved from OPWL 588 4202 Blackboard course site.

Assignment Submitted in Class

Caldwell, C. (2017, Spring). *Model organizer* [MSWord document]. Submitted for OPWL 536 4203, Boise State University.

Note: You should include the full publication date in your citation. For example, Caldwell (2017, Spring).

Other

Blog Post

Wallace, G. (2009, July 22). ADDIE is still takin' heat – but is it ADDIE's fault? [Web log message]. Retrieved from http://pursuingperformanceblog.blogspot.com/2009_07_01_archive.html

Video

Brant, S. (2008, December). *Dr. Russell Ackoff on systems thinking - Pt 1* [Video]. Retrieved from <https://www.youtube.com/watch?v=IJxWoZJAD8k> (00:04:36).

Podcast

Miller, S. (Interviewer). (2013, December, 12). SEI podcast series: From process to performance-based improvement [Audio Podcast]. Retrieved from <http://www.sei.cmu.edu/podcasts/>

Note: The role of the person filling the “Author” position is described in parentheses before the date. It can be a producer, writer or a speaker. The type of podcast is identified in square brackets following the title. It can be audio or video. Also the retrieval page is the homepage URL rather than the specific URL because it is more likely to be correct in the long term.

ERIC Documents (Print -Microfiche and Online)

Print or Microfiche

Jones, J. C. (2000). *Webquests as a way to teach social studies* (Report No. ABCD-EE-00-5). Marion, IN: Indiana Wesleyan Center for Educational Excellence. (ED111111)

Online

Gottfredson, L. S. (1980). *How valid are occupational reinforcer pattern scores?* (Report No. SOS-R-292). Baltimore, MD: Johns Hopkins University, Center for Social Organization of Schools. Retrieved from ERIC Database. (ED182465)

Note: There is no period after the final parentheses.

Conference Proceedings

Published

Giacumo, L., Steeby, A., & Savvides, P. (2010). Making instructional design accessible in recessionary times: Lessons learned from partnership-based design and development. In M. Simonson (Ed.), *33rd Annual proceedings of the association for educational communications and technology*, Vol. 2. (pp. 108-113). Bloomington: IN: Association for Educational Communications and Technology.

Note: Vol. precedes the volume number for published conference proceedings, but not periodicals.

Unpublished

Keller, J. (2000, February). *How to integrate learner motivation planning into lesson planning: The ARCS model approach*. Paper presented at VII Semanario, Santiago, Cuba.

Dissertation/Thesis

Published

Rau, J. L. (2011). *Comprehensive performance-process improvement: A grounded theory study of human performance improvement within process-focused improvement events* (Doctoral dissertation). Retrieved from <http://libproxy.boisestate.edu/login?url=http://search.proquest.com.libproxy.boisestate.edu/docview/906777477?accountid=9649> (Order No. 3481435.)

Note: Use (Master's thesis) or (Doctoral dissertation) as appropriate followed by retrieval information. End with the Accession or Order number in parentheses.

Unpublished

Porter C. (1990). *Review of labor arbitration cases in British Columbia from 1979 to 1989*. (Unpublished master's thesis). University of British Columbia, BC, Canada.

Note: The publication date replaced by the creation date. Use (Unpublished master's thesis) or (Unpublished doctoral dissertation) as appropriate followed by the name of the institution and location.

Web Page

Be careful in using web pages as sources for your assignments. Peer-reviewed materials are definitely a preferred source because they have been vetted by respected thinkers in the field. They also tend to be journals so are more current than books which have a longer lead time. However, there are websites that are accurate and appropriate.

Because information on webpages is often moved, restructured or deleted, unlike online periodicals or books, it is important to include the date on which you retrieved the information from the webpage and the URL of the organization's home page rather than the direct URL.

Clark, D. (2015, September 15). *ADDIE timeline*. Retrieved August 12, 2016 from <http://nwlink.com/~donclark/index.html>

Note: The publication date is the copyright or last updated date or n.d. for no date if none is available. The retrieval date is also included before the URL of the organization's homepage (not the page that you actually retrieved the work from).

Sample Reference List

On the next page is a list of references formatted in the APA style. The comments on the right describe what type(s) each is an example of. Note that these references are double spaced within and between as specified by the APA Style. However using single spaced references to save space is generally accepted within our department. See example in Figure 18. If you are unsure what your instructor wants, be sure to ask.

References
Chyung, S. Y. (2008). <i>Foundations of instructional and performance technology</i> [eBook]. Retrieved from http://ebookcentral.proquest.com.libproxy.boisestate.edu/lib/boisestate/detail.action?docID=435534
Clark, D. R. (2010, June 7). <i>Constructivism and instructional design</i> . Retrieved September, 23, 2016 from http://nwlink.com/~donclark/index.html
Huglin, L. (2010). HPT roots and branches: Analyzing over 45 years of the field's own citations. Part 3: Author citations. <i>Performance Improvement Quarterly</i> , 23(3), 5-13. https://doi.org/10.1002/piq.20086
Kennedy, P., Chyung, S. Y., Winiiecki, D., & Brinkerhoff, D. (2014, March). Training professionals' usage and understanding of Kirkpatrick's level 3 and level 4 evaluations. <i>International Journal of Training & Development</i> , 18(1), 1-21. https://doi.org/10.1111/ijtd.12023
Stolovitch, H. D., Keeps, E. J. (Eds). (1992). <i>Handbook of human performance technology: A comprehensive guide for analyzing and solving performance problems in organizations</i> . San Francisco, CA: Jossey-Bass.

Figure 18. Example of a Single-Spaced Reference List with Five Entries.

Note: There are no additional blank lines between entries or between the heading and the entries in a single-spaced reference list.

References

- American Psychological Association (APA). (2010). *Publication manual of the American Psychological Association* (6th ed.). Washington, DC: Author.
- Anonymous. (2012). *Song of Roland*. [eBook]. Retrieved from <http://ebookcentral.proquest.com.libproxy.boisestate.edu/lib/boisestate/reader.action?docID=1889762&ppg=2>
- Beriwal, M., Clegg, S., Collopy, F., McDaniel, R. Jr., Morgan, G., Sutcliffe, K., Kaufman, . . . Selwyn, N. (2013). Organizational science. *Educational Technology*, 53(5), 42–52.
- Brethower, D. M. (2006). Chapter 5: Systemic issues. In J. A. Pershing (Ed.) *Handbook of human performance technology: Principles, practices and potential* (3rd ed., pp. 111-137). San Francisco, CA: Pfeiffer.
- Chyung, S. Y., Conley, Q., Gibson, E., & McWatters, G. (2015, October 12). What do novice e-learning developers think about rapid e-learning development programs? *Learning Solutions Magazine*. Retrieved from <http://www.learningsolutionsmag.com/articles/1890/developing-scenarios-with-red-programs-troubleshooting-for-computer-lab-staff>
- Dormant, D. (2011). *The chocolate model of change*. Lexington, KY: lulu.com.
- Giacumo, L., Steeby, A., & Savvides, P. (2010). Making instructional design accessible in recessionary times: Lessons learned from partnership-based design and development. In M. Simonson (Ed.), *33rd Annual proceedings of the association for educational communications and technology*, Vol. 2. (pp. 108-113). Bloomington: IN: Association for

Print Book. Organization as author. Edition other than the first. Published by the Organization. Closing period.

Online Book. Author is Anonymous. No period at the end.

Print Article by eight or more authors including one with the title Jr. No DOI. Note: pp. is not used before the page numbers.

Chapter in an edited book. Edition other than the first. Print version. Edition and page numbers for the chapter are combined in a single set of parentheses.

Article in an online magazine. No period after URL

Print Book.

Published Conference Proceedings. Note: pp. used before page numbers for a section of a book.

Educational Communications and Technology.

Gibson, E. (2014, Spring). *Getting there* [Discussion post]. Retrieved from OPWL 536 4202/4203 Blackboard course site.

Gottfredson, L. S. (1980). *How valid are occupational reinforcer pattern scores?* (Report No. SOS-R-292). Baltimore, MD: Johns Hopkins University, Center for Social Organization of Schools. Retrieved from ERIC Database. (ED182465)

IBM (n.d.). *Corporate responsibility*. Retrieved August 8, 2016 from <http://www.ibm.com/ibm/responsibility/>

Lohr, L., Miller, K., & Winiecki, D. (2006). Narrative strategies to enhance interactivity online. In C. Sunal, E. Wilson & V. Wright (Eds.), *Research on enhancing interactivity of online learning* (pp. 101-125). Greenwich, CT: Info Age Publishing.

Marker, A., Villachica, S., Stepich, D., Allen, D., & Stanton, L. (2014). An updated framework for human performance improvement in the workplace: The spiral HPI framework. *Performance Improvement*, 53(1), 9–22. <https://doi.org/10.1002/pfi21389>

Porter C. (1990). *Review of labor arbitration cases in British Columbia from 1979 to 1989*. (Unpublished master's thesis). University of British Columbia, BC Canada.

Princeton, C. L. (2017, Spring^a). *Rummler and Brache's performance matrix* [PDF document]. Retrieved from OPWL 536 4202 Blackboard course site.

Princeton, C. L. (2017, Spring^b). *Week 7: Wrap up* [PowerPoint slides]. Retrieved from OPWL 536 4202 Blackboard course site.

OPWL Blackboard discussion post. Note: the semester follows the year in parentheses and the section number follow the course number.

Report retrieved from the ERIC Database.

Web page. Corporation as Author. No Date. Note that the retrieval date is provided because the information is subject to change without notice
Chapter in an edited book. First edition. Print version. Note: pp. is used before the page numbers of the chapter.

Article in a peer-reviewed journal with a DOI assigned. Note: pp. is not used before page numbers in a periodical

Unpublished Master's Thesis. Creation date replaces the publication date.

PDF Lecturette and PowerPoint Slides posted on the OPWL course site. Sources by the same author and same publication date are alphabetized by title and lowercase letters are added to distinguish between them.

Rau, J. L. (2011). *Comprehensive performance-process improvement: A grounded theory study of human performance improvement within process-focused improvement events* (Doctoral dissertation).

Retrieved from

[http://libproxy.boisestate.edu/login?url=http://search.](http://libproxy.boisestate.edu/login?url=http://search.proquest.com.libproxy.boisestate.edu/docview/906777477?accountid=9649)

[proquest.com.libproxy.boisestate.edu/docview/906777477?accountid=9649](http://libproxy.boisestate.edu/docview/906777477?accountid=9649) (Order No. 3481435.)

Stout, D. (2009, August 4). U.S. Agency plans meeting on distracted driving.

The New York Times. Retrieved from

http://www.nytimes.com/2009/08/05/us/politics/05drive.html?_r=1&hp

Villachica, S. W. (2011, September). *Problem solving in the workplace*. Paper presented at Boise State's PSYC 343 Cognitive Psychology course.

Boise, ID.

Wallace, G. (2009, July 22). *ADDIE is still takin' heat – but is it ADDIE's fault?*

[Web log message]. Retrieved from

http://pursuingperformanceblog.blogspot.com/2009_07_01_archive.html

Wick, C., Pollock, R., & Jefferson, A. (2009, July). *The new finish line for learning*. *T + D*, 63(7), 64-69.

Wile, K. (2014, August). *Peter Senge introduction to systems thinking* [Video].

Retrieved from

<https://www.youtube.com/watch?v=eXdzKBWDraM>

Published Doctoral Dissertation available through a dissertation database.

Online Newspaper Article. Note publication date includes month and day as well as year.

Unpublished Paper presented in a class.

Blog Post

Print Based Magazine Article.

Online Video

APA Citation and Referencing Formatting Checklists

Here is a checklist that you can use when you proofread your citations and references to ensure that you have done them correctly. If you find that you are making errors that are not included in this list, add them so that you can be sure to check for those things as well.

Citations Checklist

	1. All paraphrases, summaries, and quotations are cited.
	2. All citations use the author(s)' surname (no initials or first names unless there are two authors with the same surname) and keep it with the publication date.
	3. All citations in parentheses use ampersand (&) and all citations that are in the flow of the text use "and" between author names.
	4. All quotations of less than 40 words are enclosed in quotation marks, include the page number(s) in parentheses, and have the period following the parentheses.
	5. All quotations of more than 40 words are formatted in the block style with the left side indented, no quotation marks, the page number(s) in parentheses, and the period (or other closing punctuation) before the parentheses enclosing the page number(s).
	6. All page numbers are preceded by p. for a single page or pp. for multiple pages and there is a space between p. or pp. and the page number(s). For example, (pp. 12-15).
	7. All sources with more than one author have the authors' names in the correct order and are formatted correctly depending on whether it is the first citation from that source or a subsequent one.
	8. Wherever more than one source is cited in parentheses, the sources are listed in alphabetical order and separated by semicolons.
	9. All cited works are listed in the References except for personal communications.
	10. All citations from secondary sources include the original author's surname and the words "as cited in" before the author(s)' surname and publication date of the source that you read.
	11. All sources with the same author(s), in the same order, and the same publication date include the lowercase letter from the references following the publication date to distinguish between them.
	12.
	13.
	14.

References Checklist

	1. The References section begins at the top of a new page with the title References centered without bolding or italics.
	2. All items listed in the References are cited in the body of the paper (and no works that are not cited are listed except personal communications).
	3. All reference entries are formatted with a hanging indent.
	4. All sources list the authors in the same order as they are listed on the publication.
	5. There is a space between all authors' initials.
	6. All sources are listed in alphabetical order by author(s)' surname and initials. Where there are more than one source with the same author(s)', in the same order, they are listed by publication date - earliest first unless they are part of a series in which case they are listed in the series order.
	7. All works by the same author(s) in the same year have lowercase letters following the publication date. For example, Cox, D. L. (2001a), Cox, D. L. (2001b) and so forth.
	8. All entries use only one space following punctuation.
	9. All titles of articles, chapters, books, reports are in sentence case (only the first word of the title, the subtitle, proper nouns and acronyms are capitalized). Only titles of books and reports are italicized e.g. <i>First principles of instruction: Identifying and designing, effective, efficient, and engaging instruction.</i>
	10. All titles of periodicals (journals, magazines, newsletters or newspapers) are italicized and in title case i.e. all major words begin with a capital e.g. <i>Performance Improvement.</i>
	11. All volume numbers are italicized and there is no space between the volume number and the parentheses surrounding the issue number (which is not italicized).
	12. All entries except those that end in parentheses, a URL or a DOI end in a period.
	13. All references are as complete as possible and formatted correctly for the type of source e.g., journal, book, course posting, etc.
	14.
	15.
	16.
	17.
	18.