All fields of study use a particular style for scholarly writing and publication. A style is simply a set of rules that a given field follows to prepare manuscripts and express ideas. Following these rules provides a body of literature that is consistent in form, and is accepted by and familiar to a broad readership of that field. The field of Instructional and Performance Technology uses the style rules of the American Psychological Association (APA). The APA published a new 6th edition in the fall of 2009 (copyright in 2010), primarily to reflect the changes due to the increase of documents that are available electronically (see page 21 in this document for a partial list of changes in the 6th edition as compared to the 5th edition).

Basic Format

APA style requires a page header and page number at the top right-hand corner of each page of your document. The first page of your manuscript is the title page, which is numbered page 1. The title page consists of three parts: the running head, the title, and the byline. The running head is an abbreviated title specified by the author that would be used if the article was published. It should be typed flush left at the top of the title page in all caps, and should not exceed 50 characters. Your instructor may not require a running head—check with your instructor for details.

In the upper half of the title page, the title should be typed, centered, in title case (i.e., all significant words in the title should be capitalized). If the title exceeds one line, the lines should be double-spaced. The name of the author appears one double-spaced line below the title. Institutional affiliation, where appropriate, should be centered below the author’s name on the next double-spaced line. Nothing on the title page should be bold or underlined. See Figure 1 for an example of a title page.

If you are writing a formal research paper, you will need to include an abstract. The second page, numbered page 2, should contain only the abstract. The word “Abstract” should be centered at the top of the page, and should not be in bold type. The abstract should be in block form (i.e., no indentation) and its word limit is typically from 150 to 250 words. The abstract should be double-spaced. If you are uncertain if your assignment requires an abstract, ask your instructor.

If you have included an abstract page, the text of the article begins on the third page and should be numbered as page 3 (obviously, if you have not included an abstract, the article begins on page 2 instead). Type the title of the paper centered at the top of the page, double-space, and then type the text. NOTE: Do not use the word “Introduction” at the beginning of your paper; the APA manual (2010) states that because “the first part of a manuscript is assumed to be the introduction” (p. 63) it need not be labeled. The entire text of the rest of the paper, including block quotes and the references page, should be double-spaced.
Figure 1. Example of an APA Style Title Page

The Effect of Embedded Questions on Student Achievement
and Attitudes in Computer-Based Training

Jill A. Student
Boise State University
Levels of Headings in APA Style

Headings within the text of your paper function as an outline to enable the reader to understand the structure of your paper. The number of headings used depends entirely on the number of headings that you as the author find necessary to clarify your content. The easiest way to determine what type of heading to use is to look first at an outline of your paper.

For all levels of headings, note that although the title is not written in boldface, the topic headings are required to be bolded. Also, as stated previously, the word “Introduction” should not be used as a topic heading since it is assumed that the beginning of the paper is the introduction.

One Heading Level

A single level of heading would be used if your document can be outlined like this:

I. Topic One
II. Topic Two
III. Topic Three

The first level of heading should be centered, boldface, uppercase and lowercase heading (also referred to as title case; see the APA 6th edition manual, p. 62). For a single heading level, your text would look like this:

Title

Introductory text text text text text text text text text text text text text text text text text

Topic One

Text text text text text text text text text text text text text text text text text text text text text text text text text text

Topic Two

Text text text text text text text text text text text text text text text text text text text text text text text text text text

Topic Three

Text text text text text text text text text text text text text text text text text text text text text text text text text text
Two Heading Levels

The first heading level is formatted as described above; the second heading level should be flush left, boldface, uppercase and lower case heading (see the APA 6th edition manual, p. 62). Two levels of heading would be used if your document can be outlined like this:

I. Topic One
   A) Subtopic One A
   B) Subtopic One B
II. Topic Two
   A) Subtopic Two A
   B) Subtopic Two B

The resulting text would look like this (note that the subtopic headings in the second level are no longer italicized):

Title

Introductory text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text.

   Topic One

   Subtopic One A

   Text text text text text text text text text text text text text text text text text text text text text text text.

   Subtopic One B

   Text text text text text text text text text text text text text text text text text text text text text text text.

   Topic Two

   Subtopic Two A

   Text text text text text text text text text text text text text text text text text text text text text text text.

   Subtopic Two B

   Text text text text text text text text text text text text text text text text text text text text text text text.
Three Heading Levels

The first and second heading levels are described above; the third heading level should be an indented, boldface, lowercase paragraph ending with a period. Three levels of headings would be used if your document can be outlined like this:

I. Topic One
   A) Subtopic One A
      1) Subtopic One A First
      2) Subtopic One A Second
   B) Subtopic One B
      1) Subtopic One B First
      2) Subtopic One B Second
II. Topic Two
   A) Subtopic Two A
      1) Subtopic Two A First
      2) Subtopic Two A Second
   B) Subtopic Two B
      1) Subtopic Two B First
      2) Subtopic Two B Second

The resulting text would look like this:

Title

Introductory text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text.

Topic One

Subtopic One A

Text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text.

Subtopic one a first. Text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text.

Subtopic one a second. Text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text.

Subtopic One B

Text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text text.
Subtopic one b first. Text text text text text text text text text text text text text text text text text text text text text text text text text text.

Subtopic one b second. Text text text text text text text text text text text text text text text text text text text text text text text text text text.

Topic Two

Subtopic Two A

Subtopic two a first. Text text text text text text text text text text text text text text text text text text text text text text text text text text.

Subtopic two a second. Text text text text text text text text text text text text text text text text text text text text text text text text text text.

Subtopic Two B

Subtopic two b first. Text text text text text text text text text text text text text text text text text text text text text text text text text text.

Subtopic two b second. Text text text text text text text text text text text text text text text text text text text text text text text text text text.

Four or More Heading Levels

Three heading levels should be sufficient for the majority of papers written. If you find that you need more than three levels of heading, consult the APA Publication Manual, 6th Edition, pg. 62.
APA Style In-text Citations

Any works that are mentioned in the body of your paper must be cited. This identifies the source for the reader and also enables the source to be located in the reference section of your paper. Never plagiarize! Plagiarism is not acceptable. There are two ways of citing the work of other authors: 1) by paraphrasing, and 2) by quoting directly. NOTE: Although the following examples are single-spaced to save room, they should be double-spaced in the final APA document.

How to Paraphrase Statements

When you write statements that are not yours but somebody else’s, paraphrase the statements and give credit to the author.

Citation of a primary source. A primary source simply means that you’ve actually read the source of information. For example, you’ve read Watkins and Kaufman’s article and you want to cite their statement. The example below shows how to cite their statement:

YES ➔ Watkins and Kaufman (1996) argue that training needs assessment is an oxymoron because the solution has been already decided before needs assessment is conducted.

NO ➔ Training needs assessment is an oxymoron because the solution has already decided needs assessment is conducted.

If a work is referred to indirectly, cite the last name of the author and the year, separated by a comma, in parentheses. If more than one work by different authors is included in the same parentheses, list in alphabetical order by the main author’s last name; separate with semicolons. Examples:

YES ➔ A recent study of cognitive style (Patterson, 1997) examined the effect of...

YES ➔ These data are consistent with other studies concerning this topic (Greenfield, 1990; Patterson, 1997; Smith & Jones, 1992).

Citation of a secondary source. A secondary source means that you did not read the source of information, but you found somebody else citing the source of information and you are borrowing what has been cited by that person:

YES ➔ McClelland (as cited in Rush, 1996) characterizes people who have a high need for achievement...

NO ➔ McClelland (1996) characterizes people who have high need for achievement...

In this case, you didn’t read McClelland’s article, but you read Rush’s article in which he cited McClelland’s statement. In your references section, you must put the reference to Rush’s article (not McClelland’s article).
The following information is based on mistakes that previous IPT students frequently have made:

- Include the author’s last name. Write the year of publication in parentheses. Then paraphrase the statement. If you are listing multiple authors in the body of your paper, use ‘and’ instead of ‘&.’ For example:
  
  **YES →** According to Watkins and Kaufman (1996), training needs assessment is...
  
  **NO →** According to Watkins & Kaufman (1996), training needs assessment is...

- Use the author’s last name. Do not include the first name or the initial. For example:

  **YES →** According to Watkins and Kaufman (1996), training needs assessment is...
  
  **NO →** According to Watkins, R. and Kaufman, R. (1996), training needs assessment is...

  The only exception to this is if the list includes two authors with the same last name, but different first names. In this case, you would include the first initial to distinguish between the two authors.

- If there are 3-5 authors, list all authors the first time you cite them; in subsequent citations, list only the first author’s last name followed by ‘et al.’:

  **YES →** (the first time) McKnight, Dillon, and Richardson (1992) describe that...
  
  **YES →** (in subsequent citations) McKnight et al. (1992) describe that...

  Don’t forget to put a period after ‘et al.’, even if it appears in the middle of a sentence:

  **YES →** McKnight et al. (1992) describe that...
  
  **NO →** McKnight et al (1992) describe that...

- If there are 6 or more authors, write the first author’s last name followed by ‘et al.’ for the first and subsequent citations.

- Make sure to use the word ‘and’ to list multiple authors if they appear as part of the narrative, but use an ‘&’ in citation parentheses:

  **YES →** Dick and Carey (2005) explain that...
  
  **NO →** Dick & Carey (2005) explain that...
  
  **YES →** An instructional systems model starts with a (training) needs assessment phase (Dick & Carey, 2005).
  
  **NO →** An instructional systems model starts with a (training) needs assessment phase (Dick and Carey, 2005).

- All of the cited sources must be included in your references section. See the last section of this document for an example of how to do this.
How to Quote Statements

Instead of paraphrasing, you can quote an author’s original statement. **NOTE:** Although the following examples are single-spaced to save room, they should be double-spaced in the final APA document.

**Quotes less than 40 words.** If the statement you want to quote is less than 40 words, cite as follows:

**YES →** Rossett (1995) states that needs assessment is conducted “when the instructional technologist is trying to respond to a request for assistance” (p. 184).

**YES →** Interviews and observations are frequently used needs assessment tools. Especially, observations are “a very useful tool for finding out what is really happening at work” (Rossett, 1995, p. 191).

REMEMBER – Put a period at the end of the sentence (after the parenthesis, not inside the parenthesis), as noted above. Use ‘p.’ to indicate a single page number and use ‘pp.’ to indicate multiple page numbers:

**YES →** Programmed instruction, initially developed by Sydney Pressey and popularized by B. F. Skinner, “presents new instructional content to learners in a controlled sequence” (Chyung, 2008, pp. 24-25).

When you cite a specific part of a source, you need to include the number of the page, figure, chapter, etc. in the citation. Although the word page is abbreviated as *p.*, the words **figure, chapter, table and equation** are not abbreviated for in-text citations. Examples:

**YES →** This group is led by Richard Clark, who believes that “media are mere vehicles that deliver instruction but do not influence student achievement any more than the truck that delivers our groceries causes changes in our nutrition” (Clark, 1983, p. 445).

**YES →** Distinct differences are seen between data gathered for male and female subjects in the first study (Beech & Moen, 1994, Figure 2).

**YES →** To facilitate the shift from teacher-centered to student-centered learning, written materials that accompany distance courses should include concept maps and advance organizers, as demonstrated by the Kawakami method (Kawakami, 1996, Chapter 5).

Quotations within quotes less than 40 words are enclosed within single quotation marks, as follows:

According to Mitchell and Jolley (2004), “Sometimes participants will give you the answer they think you want to hear. Their behavior may be similar to yours when, after a meal, the server asks you, ‘Was everything okay?’ and you say ‘Yes, everything was okay’” (p. 47).

**DIRECT QUOTES MUST ALWAYS INCLUDE A PAGE NUMBER** unless you are quoting electronic sources that do not provide page numbers.
If the source is electronic and page numbers are not available, use the paragraph number rather than a page number (e.g., para. rather than p.). For example:

**YES** → Smith and Jones (2003) found that “college students who complete a study skills course in their freshman year tend to graduate with a higher grade point average than those who don’t” (para. 3).

If paragraph numbers are not visible, use a short version of the heading and the number of the paragraph in which the quote is located. For example:

**YES** → “Learning from dictionaries, like any method that tries to teach abstract concepts independently of authentic situations, overlooks the way understanding is developed through continued, situated use” (Brown, Collins, & Duguid, 1989, "Situated Knowledge and Learning," para. 6).

**Quotes with 40 words or more.** If the statement you want to quote is 40 or more words, use a block quote format, as follows:

Rossett (1995) points out the importance of examining records and outcomes:

> The examination of extant data is a wonderful needs assessment tool because it is inexpensive. This tool takes the instructional technologist across the organization in search of the natural outcomes of effective and ineffective performance. It involves asking colleagues for the data that automatically flow from their work. The only challenge is to convince colleagues that they ought to release that information to you. (p. 192)

REMEMBER: In contrast to direct quotations that are less than 40 words, a period is placed *before* the parenthesis:

**NO** → Rossett (1995) points out the importance of examining records and outcomes:

> The examination of extant data is a wonderful needs assessment tool because it is inexpensive. This tool takes the instructional technologist across the organization in search of the natural outcomes of effective and ineffective performance. It involves asking colleagues for the data that automatically flow from their work. The only challenge is to convince colleagues that they ought to release that information to you (p. 192).

- Do not use quotation marks to enclose block quotations. If there are quotations *within* the block quotation, however, use *double* quotes to enclose them.

- A block quotation should be started on a new line; the entire block should be indented to where a new paragraph would start (usually five spaces or half an inch). The right margin of the block remains the same as the rest of the text.
APA Style References

After you have completed your paper, create a list of references that contains the sources that you have cited in the body of your paper at the end of your document. It is a very detail-oriented task. You must be very careful about details such as whether to use ‘and’ or ‘&’, whether to insert a period or a comma, whether to capitalize the first letter of a word or not, whether to insert ‘pp.’ or nothing in front of the page numbers, etc.

The first line of each citation should be a “hanging indent” (i.e., the first line of the citation should be flush with the margin, while the remaining lines should be indented five spaces). Citations are double-spaced both in and between citations. To determine how to format hanging indents on your word processor, refer to its Help section (look under “Indentation” in Microsoft Word).

Here are some general rules to follow when writing your references page.

1. Start the reference section on a new page.

2. The word “References” should be centered at the top of the page, but should not be bold, underlined or in all capital letters.

3. List citations alphabetically by the author’s last name. If you have more than one citation for the same author, order them from oldest to most recent.

4. If you have more than one citation from the same author for the same year, arrange them alphabetically by title (excluding A or The). The exception to this is if the articles are in a series, in which case they are differentiated by using a lower case letter immediately after the year, within the parenthesis. For example:


5. When listing the author names in a citation, the author’s first name should not be used. Only the initials of the first name (and the middle name, if included) should be used:

   YES ➔ Butler, K. A. (1995)...
   NO ➔ Butler, Kathleen. (1995)...

   Also, there should be a space between the initials:

   YES ➔ Butler, K. A. (1995)...
   NO ➔ Butler, K.A. (1995)...

6. In the case of multiple authors, the last name should be listed first for all of them:

   YES ➔ Smith, J. C., & Jones, C. J.
   NO ➔ Smith, J. C., & C. J. Jones
7. For more than two authors, the "&" should only be used at the end of the list, and not between all authors:

**YES** → Smith, J. C., Jones, C. J., & Johnson, A. B.
**NO** → Smith, J. C., & Jones, C. J., & Johnson, A. B.

8. The word "and" should not be used in the list of author names—just "&." Note that this is the opposite of how multiple author names are listed using in-text citations.

**NO** → Smith, J. C., Jones, C. J., and Johnson, A. B.

9. Only the first letter of the first word of the title should be capitalized. The rest of the words should be in lower case. An exception to this is the first word after a colon—the first letter of that word should be capitalized, too.

**YES** → The human brain: An owner’s manual
**NO** → The human brain: an owner’s manual

Also, proper nouns should always be capitalized:

**YES** → A guidebook to Idaho’s wildflowers
**NO** → A guidebook to idaho’s wildflowers

Use only one space after a period or a colon, not two.

**Examples of APA Style References**

Since the publication of the 5th edition of the APA Publication Manual in 2001, electronic publication of materials that are commonly referenced has grown considerably. A given journal article, for example, can be found in multiple versions, both electronically and in print ("fixed-media"). The APA 6th edition manual recommends “that you include the same elements, in the same order, as you would for a reference to a fixed-media source and add as much electronic retrieval information as needed for others to locate the sources you cited” (p. 187).

The URL (Uniform Resource Locator) used to be the primary method for retrieving electronic documents and information. However, due to the temporary nature of the URL, publishers have devised a system to assign a permanent number to electronic materials to ensure more reliable retrieval; this number is called the DOI, or Digital Object Identifier. A unique and permanent DOI is assigned to an article or book by a particular publisher when that article or book is published. CrossRef.org, a registration agency, provides a search system that will quickly find an online article based upon its DOI. Thus, DOI numbers (when available) are now included in a paper’s references list to assist with the ease of retrieval of a cited source. However, when DOI numbers are not available, the URL of where the document was found is used instead. Note that a retrieval date is not longer used.

Following are examples of various types of references, separated into five categories: Periodicals, Books, Reports, Online Communications, and Other.

**NOTE:** Although the citations below are single-spaced to save room in this document, they should be double-spaced in the final references page.
PERIODICALS

Journals

- Article with a DOI

  Note: the DOI was found in the footer of the first page of the article:

- Article without a DOI
  - Print

    Note: The name and volume of the journal should be italicized, and there should be a comma between the journal name and volume number. Note that the issue number is NOT italicized (the (2) in the example), and that there is not a space between the volume number and the issue number. Also note that only the first word of the title is capitalized; all other words begin with lower case letters (unless it’s the first word after a colon or a proper noun).

  - Online

    Note: Do not include a period at the end of a URL.

Magazine Articles

- Print

- Online

  Note that for magazines, the date should include the year and month for monthly publications, and the year, month, and day for weekly or daily publications. If volume and issue numbers are not available, list the page range directly after the name of the magazine.
Newspapers

- **Print**

- **Online**

For newspapers, the date should include the year, month, and day for daily or weekly publications.

- **BOOKS**
  - **Entire Book**
    - **Print**
      - **Non-edited**
      - **Edited**
    - **Online**
      - **URL**
      - **DOI**

  - **Book Sections**
    - **Print**
      - **Non-edited**
      - **Edited**
Note that the title of the book is italicized, but the title of the chapter is not. This is also one of the few cases in which pp. is used rather than p.

▪ Online

▪ URL: Entry in an online reference work

Note that n.d. stands for “no date”; i.e., the date in which the reference was published is not available.

❖ REPORTS
  ➢ Corporate Author

▪ Online

❖ ERIC Documents

▪ Print (microfiche) and Online

❖ ONLINE COMMUNICATIONS
  ➢ IPT Database

  ➢ E-mail List

  ➢ Blog Post

  ➢ Video Blog Post
OTHER

Dissertation/Thesis

Documents without an Author

If there is no author, the title moves to the author position, and the citation is alphabetized by the first significant word of the title.


Occasionally, the author of the article will be listed as “Anonymous.” If this is the case, treat Anonymous as the author’s name, and alphabetize it as such on the references page.
References


### APA STYLE CHECKLIST

#### Basic Format
<table>
<thead>
<tr>
<th></th>
<th>1. Each page of the document has a running head at the top left-hand corner and a page number at the top right-hand corner, with the title page numbered as page 1.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2. Entire document, including block quotations and references page, is double-spaced.</td>
</tr>
<tr>
<td></td>
<td>3. Heading levels are consistent throughout the document, and are formatted as specified in this document or as per Table 3.1 on p. 62 of the 6th edition APA manual.</td>
</tr>
<tr>
<td></td>
<td>4. All paragraphs are indented five spaces.</td>
</tr>
</tbody>
</table>

#### Title Page
<table>
<thead>
<tr>
<th></th>
<th>1. Title page includes a running head (if required by instructor).</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2. Title is centered in title case in the upper half of the page, and isn’t bold or underlined.</td>
</tr>
<tr>
<td></td>
<td>3. If the title exceeds one line, the lines are double-spaced.</td>
</tr>
<tr>
<td></td>
<td>4. Author name is centered one double-spaced line below the title, and it isn’t bold or underlined.</td>
</tr>
<tr>
<td></td>
<td>5. Institutional affiliation is centered and is one double-spaced line below the author’s name, and isn’t bold or underlined.</td>
</tr>
</tbody>
</table>

#### Citations
<table>
<thead>
<tr>
<th></th>
<th>1. All sources that are cited in the paper are included in the references section.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2. All in-text citations are formatted correctly.</td>
</tr>
<tr>
<td></td>
<td>3. All quotations are formatted correctly.</td>
</tr>
<tr>
<td></td>
<td>4. All direct quotations include a page number.</td>
</tr>
<tr>
<td></td>
<td>5. All quotations less than 40 words are within quotation marks.</td>
</tr>
<tr>
<td></td>
<td>6. All quotations greater than 40 words are formatted as block quotes.</td>
</tr>
<tr>
<td></td>
<td>7. When several authors are listed within one set of parentheses, they are listed in alphabetical order and separated by semicolons.</td>
</tr>
<tr>
<td></td>
<td>8. Multi-author papers are cited correctly.</td>
</tr>
</tbody>
</table>

#### References
<table>
<thead>
<tr>
<th></th>
<th>1. All sources that are included in the references section are also cited in the paper.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2. The references section starts on a separate page.</td>
</tr>
<tr>
<td></td>
<td>3. The references are listed in alphabetical order by the first author’s last name.</td>
</tr>
<tr>
<td></td>
<td>4. References are formatted with a hanging indent.</td>
</tr>
<tr>
<td></td>
<td>5. References are double-spaced both within and between.</td>
</tr>
</tbody>
</table>
Summary of Primary Changes between APA 5th and 6th Editions

<table>
<thead>
<tr>
<th>BODY OF THE DOCUMENT</th>
<th>APA 6th EDITION</th>
<th>APA 5th EDITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title positioned in the upper half of the title page</td>
<td>Title positioned halfway down the title page</td>
<td></td>
</tr>
<tr>
<td>Two spaces after the period at the end of a sentence</td>
<td>One space after the period at the end of a sentence</td>
<td></td>
</tr>
<tr>
<td>All section headings should be in boldface</td>
<td>Section headings not in boldface</td>
<td></td>
</tr>
<tr>
<td>The format for heading levels has changed (see p. 62 in the APA 6th edition manual)</td>
<td>Different formatting for heading levels than in the 6th edition</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>IN-TEXT CITATIONS</th>
<th>APA 6th EDITION</th>
<th>APA 5th EDITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>The words Figure, Chapter, Table and Equation are spelled out in in-text citations</td>
<td>Words such as Figure and Chapter are abbreviated in in-text citations</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>REFERENCES SECTION</th>
<th>APA 6th EDITION</th>
<th>APA 5th EDITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include a doi (digital object identifier) for an electronic source when available. Do not include a retrieval date; no space between doi and the doi number.</td>
<td>Include a retrieval date and a URL (Uniform Resource Locator) for an electronic source</td>
<td></td>
</tr>
</tbody>
</table>