

The author's checklist

Patricia Huston, MD, MPH; Carolyn Joyce Brown, BJ, DPA;
H. Kate Schissler

Resources

Ressources

Une traduction française suit cet article.

Dr. Huston is Associate Editor-in-Chief and Ms. Brown and Ms. Schissler are Associate Editors of *CMAJ*.

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It seems that the two key documents for writing scientific articles in medical journals — the “Instructions for authors” (see page 98 of this issue) and the “Uniform requirements for manuscripts submitted to biomedical journals” — are anathema to many new authors. A medical editor once noted that he was tempted to write somewhere in the middle of the instructions to authors of his journal that authors would receive a cheque for \$35 if they submitted a manuscript that followed all of the instructions. He did not expect to lose a lot of money (Roy Pitkin, editor, *American Journal of Obstetrics and Gynecology*: personal communication, Los Angeles, 1996). It seems that these clear and succinct instructions, extolled by medical editors, are unreadable to the uninitiated. Now, help is at hand.

One of the problems that authors may encounter is that they are so involved in the design and outcome of their study that factors such as word count, font, spacing, table placement and items to be noted in the cover letter seem unimportant. Yet, authors need to realize that there are certain formatting as well as ethical and legal requirements that need to be met to translate a research project they have sweated over into a pristine publication they can be proud of.

To help authors heed the requirements of manuscript submissions, we have updated a previous checklist² and synthesized the information offered in our instructions for authors and in the uniform requirements. We believe it may be easier for some people to check off one item after another than to get bogged down in the fine print of text instructions.

One of the new features of this checklist is that it separates formatting instructions, which (if one is so lucky) can be passed on to support staff to follow, from substantive instructions that must be considered by the author(s).

It is well worth the while for authors to review this checklist *before* they start to write — it will save enormous amounts of time and perhaps a tree or two as well. What naïve and enthusiastic authors may not realize is that when we receive a manuscript that does not conform to our requirements (for example, an 8000-word manuscript), we promptly return it. Although we appreciate all the work that has gone into it, it is a “nonstarter.” We note our word limit in a return letter to the authors and invite them to revise their work accordingly before peer review (in the above example, this would mean cutting the manuscript by approximately 75%). Although it is patently (or painfully) obvious in retrospect, it is much faster to do something correctly the first time than to do it incorrectly and have to fix it. This may explain why these instructions become more readable over time.

This checklist should be regarded as a companion piece to our instructions for authors and the uniform requirements. The instructions for authors can lead authors to more detailed articles that identify the criteria for evaluation of different types of manuscripts (from case reports to randomized controlled trials), and the uniform requirements demonstrate in detail the fine art of reference citation (be it of technical reports or chapters in a book) and provide a clear definition of what constitutes a duplicate publication.

This checklist is the means to an end for authors: preventing unnecessary work and long delays. It also liberates editors from elucidating the obvious and gives them more time to work with authors on content. Thus, the checklist can increase the happiness and productivity of authors and editors alike.

Many thanks to Ann Bolster, Associate Director, New Media, CMA, who prepared an earlier draft of the checklist.

- 152:1459-65. [A revised version of the uniform requirements will be published in the Jan. 15, 1997, issue of *CMAJ*.]
 2. Squires BP. The author's checklist. *Can Med Assoc J* 1990;142:20-1.

References

1. International Committee of Medical Journal Editors. Uniform requirements for manuscripts submitted to biomedical journals. *Can Med Assoc J* 1995;

Reprint requests to: Dr. Patricia Huston, CMAJ, PO Box 8650, Ottawa ON K1G 0G8; fax 613 523-0937; pubs@cma.ca

AUTHOR'S CHECKLIST

This list is in two parts: the first part deals with formatting requirements and can be delegated to support or word-processing staff; the second part contains substantive instructions and should be reviewed by the author(s). If you have any questions about these requirements, please call the manuscript coordinator, Lorna Lang, at 613 731-8610, ext. 2130.

PART ONE

Manuscript preparation

- ___ Use 12-point Courier type and double space.
- ___ Left justify; do not use right or full justification.
- ___ Number all pages.
- ___ Arrange the the manuscript in the following order: title page, abstract and key words, text, acknowledgements, references, figure legends and tables.
- ___ Supply the manuscript, tables and figures (if possible) on a diskette. Indicate the software used.
- ___ Submit five copies of the manuscript (for blind peer review, omit identifying information from three of the copies).
- ___ Headings: Capitalize only the first letter of the first word and any proper nouns or words or abbreviations normally capitalized; use the same character size as in the rest of the manuscript; bold main headings and italicize subheadings; do not indent or centre.
- ___ Enclose reference numbers between angle brackets, place after punctuation, and use a hyphen to link 3 or more consecutive numbers (i.e., medicine and surgery.<4,5,7,13-20>).
- ___ Do NOT use footnotes except on title page and tables.

- ___ Do NOT use footnote or endnote features of the word-processing software (e.g., WordPerfect or Microsoft Word) to prepare references. Referencing software may be used as long as the final reference numbers and list do not appear as codes in the electronic file.

Title page

- ___ Allocate a separate page for the title page.
- ___ Give the name of each author, including given name, degree(s), and institutional and departmental affiliations.
- ___ Supply the name, address, phone and fax numbers and e-mail address of the corresponding author.
- ___ Give a word count.

Tables (see also Part Two)

- ___ Number tables sequentially; do not use letters.
- ___ Cite each table in the text.
- ___ Place each table on a separate page.
- ___ If a table is too long to fit on one page, continue it on another page, repeating the headings. Do not create tables wider than 6½ inches.
- ___ Horizontal or vertical lines may be used in the title or the footnotes, but not in the body of the table.

PART TWO

Randomized controlled trials

- For articles reporting RCTs, complete the CONSORT checklist (see *Can Med Assoc J* 1996;155:1277-9) and include it with the manuscript.

Manuscript

Maximum length of text (excluding abstract, references, tables and figures):

- Systematic reviews, clinical practice guidelines, consensus statements and qualitative studies: 3000 words (15 pages)
- Original research articles: 2500 words (13 pages)
- Program descriptions, editorials and platform articles: 1500 words (8 pages)
- Case reports: 800 words (4 pages)

Abstract and key words

- Provide a structured abstract for original research articles, systematic reviews, clinical practice guidelines, consensus statements, qualitative studies and program descriptions.
- Provide a 150-word summary for editorials, platform articles and case reports.
- Provide 4 to 10 key words (preferably MeSH terms).

Covering letter

- Ensure that all authors listed qualify for authorship. In the letter, state that each has made a substantial contribution to the article (i.e., conception and design or analysis and interpretation, writing or revising for important intellectual content) and will approve the final version to be published.
- Have the letter signed by all the authors.
- State that the manuscript has not been previously published and is not being considered by another journal.
- Disclose sources of funding and authors' financial interest in the subject matter or relationship with any company with such financial interest.
- Indicate any address change or unavailability during the next several months.

Text

- Never use the names or initials of patients.
- Indicate that studies involving human experimentation were approved by an ethics review board.
- Describe all statistical procedures, provide

references, and identify the version, manufacturer, city, and province or state of all statistical software used.

- When applicable, provide confidence intervals, *p* values or both.
- Use standard deviation (cited within parentheses), not standard error of the mean, for sample data.
- Use SI units for all measurements (except pressure, which is in mm Hg).
- Provide generic names for all drugs.
- If brand names of drugs or devices are relevant, give the full corporate name of the manufacturer and its location in brackets after the brand name.
- Minimize the use of abbreviations. If an abbreviation is used, ensure that it is written in full on first mention, with the exception of measurements and CMA, CMAJ, DNA, RNA, AIDS and HIV.
- Write out the name of bacteria in full on first mention and always italicize.
- Personal communications: cite in the text and include the person's full name and affiliation, city, and the year of the communication (see **Assurances**).
- Unpublished work: cite in the text as "unpublished observations" and include the source's full name and affiliation, city, and the year of the observations (see **Assurances**).
- Identify people mentioned in the acknowledgement section by their full name, degrees (e.g., MD or PhD) and affiliations.

References

- List references in the style given in the "Uniform requirements for manuscripts submitted to biomedical journals" (*Can Med Assoc J* 1995;152:1459-65).
- Cite all references, in order, in the text.
- Number references cited in tables in sequence with those in the text according to where the table is first mentioned in the text.
- In-press references: If an article has been accepted for publication but is not yet published, cite it in the reference list and add "In press" (see **Assurances**).
- For references to books, provide the first and last page numbers of the chapter or the information cited, unless the reference is to the entire book.

Tables (see also Part One)

- Label rows and columns clearly and state units of measurement.
- Include counts, with percentages in brackets.

- ___ Ensure that all participants are accounted for in the tables, even if this means including a "No response," "Unknown" or "Not measured" column.
- ___ Ensure that numbers in the table match those in the text.
- ___ Define all abbreviations in footnotes to the table.
- ___ Use the following symbols, in this sequence, for footnotes: *, †, ‡, §, ||, ¶, **, ††, etc.

Assurances

- ___ Report all sources of support, including the names and numbers of grants, in the acknowledgements.
- ___ Forward a letter signed by the person named as a

source giving permission to use their name for (1) a personal communication, (2) unpublished work or (3) an acknowledgement.

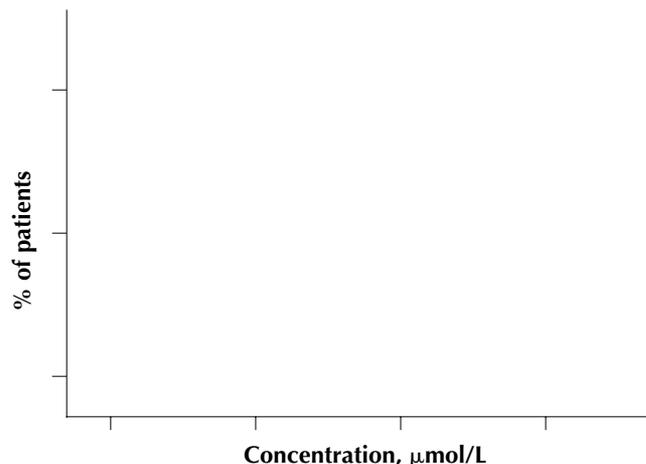
- ___ To verify that an in-press article has been accepted, *CMAJ* requires a copy of correspondence proving that the article has been accepted; obtain this from the author of the in-press reference.
- ___ In photos of people, either ensure that the subject is not identifiable (the photo is of a body part only) or obtain written permission from the subject or from his or her family (in the case of an incompetent or deceased subject).
- ___ For tables and figures reproduced from published articles, obtain written permission from the copyright holder and note any modification.

Figures (if applicable)

- ___ Place each figure on a separate page.
- ___ Number figures sequentially; do not use letters.
- ___ Cite each figure in the text.

Charts and graphs

- ___ Submit a complete data set in the form of a table or a spreadsheet computer file.
- ___ Show only x and y axes; there should be no boundary of the graph on the right-hand side or top (see example).
- ___ If you wish to include a key on a graph, ensure that it appears within the area bounded by the axes.
- ___ Do not use gridlines within a graph (see example).
- ___ Begin each axis at zero, and clearly break it with a double slash if the scale is interrupted.
- ___ Ensure that axis-scale tick marks point out (see example).
- ___ Label each axis with the name of the variable and provide the unit of measurement, abbreviated and preceded by a comma; centre the axis label. Place the label for the y axis so that it runs parallel to the axis (rotate type counter-clockwise 90°) (See example).
- ___ Use a single, sans serif font within a set of figures.
- ___ Submit sharp, professionally prepared, glossy black-and-white prints or original laser printouts no larger than 203 × 254 mm (8 × 10 in.). Photocopies are not acceptable.



Photographs

- ___ Submit five sets of photographs or radiographs for review, editorial and printing purposes.

- ___ Ensure that photographs can survive changes in size and reproduction.
- ___ Ensure that symbols, arrows and type contrast with the background.
- ___ Provide an unlabelled scale bar on photomicrographs to allow recalculation of the scale after figure sizing. State the scale in the figure legend or on the photo.
- ___ Label the back of each figure with its number and orientation and the first author's last name.

Figure legends

- ___ Include legends that are fully descriptive, so that figures are comprehensible without reference to the text.
- ___ Explain all abbreviations and symbols in the legends.
- ___ For photomicrographs, identify the method of staining and provide the scale for an unlabelled bar on the photo.
- ___ Place legends at the end of the text, after the references; do not place legends on the figures.