

# DOCUMENTATION GUIDE: APA

## What:

The APA (American Psychological Association) style is used for research reports in the social and health sciences (whereas in most other areas the MLA style is required). If you are in doubt about what style to use, consult your teacher, or, if writing a report for the workplace, ask your colleagues.

## Why:

If you keep in mind the reasons for documenting reports (honesty, reliability, utility), you will realize **the primary function of documentation is to enable your readers to find, consult, and evaluate your sources for themselves if they wish to do so**, and the most important thing about your documentation is that it should make this possible. This is the reason for standardization.

Before attempting to put these instructions into practice, you should understand what plagiarism is and how to avoid it. See the **Student Survival Guide: avoiding plagiarism**.

## How:

**The standard format is given in simplified form here:** it covers most situations. In the interest of teaching you the principles rather than the endless details, and in order to make your college experience with documentation as painless as possible, we are simplifying very complex requirements. When your source doesn't fit this model, or when you need to use APA outside the College, we suggest you consult <http://www.essayessentials3e.nelson.com>,  
<http://www.pearsoned.ca/rogers>  
<http://www.englishresources.nelson.com>

The APA style is designed to ensure consistent formatting for the submission of articles to journals, and acknowledges that **“reasonable exceptions to APA style ... often make sense and are encouraged if communication is better served”** (*Publication Manual*, pp. 334 335). You should therefore ask what exceptions your teacher or employer accepts.

## As you are researching:

**Make the process easier on yourself:** You should record the publishing information for each source you consult *as soon as* you consult it. You don't want to waste time searching for the

information later, when you put the report together, as this will more than double your work. We also recommend you print Web pages and e-mails, and photocopy printed sources for later reference, noting the publishing details at the top. Documenting each source as you obtain it means you don't have a rush at the end when you put your report together, and enables you to become acquainted with the APA system a little at a time.

## Writing the report:

### Readers expect information in two places:

1. **at the end of the report**, in a list called **References**, in which you must give complete publishing details of every source so that the reader will be able to find the source.
2. **within the report** to identify the source of ideas or information you have borrowed or words you have quoted (actual quotations also need quotation marks). Here, brief citations in parentheses supply just enough information to allow the reader to consult your list at the end, recognize to which item you are referring, and assess whether your sources are up-to-date.

### 1. At the end of the report: References

- Double space the **References** list (as you do the rest of the paper).
- Use a hanging indent (first line starts at margin, subsequent lines indented 5 spaces - your word-processor can do this for you) for each entry, so that the first word is quickly visible to the reader.
- List the works alphabetically in a single list by author. If no author is given, list the work by (in order of preference) editor/s followed by **(Ed.)** or **(Eds.)** or title.
- Place last name first, followed by initials (not full names) as in **Smith, H.J.**
- More than one author? After the name of the first author, add the others, also reversed. **Smith, J., & Brown, G.** More than six? Give the first author and add **and others**.
- Capitalize only the first word of each title of articles, books and Web pages.
- Where dates include months and days, place the year first: **(1999, March 4)**.
- Place titles of whole published sources (books, newspapers, journals, encyclopaedias, anthologies, etc.) in italics. Do not use italics *or* quotation marks for titles of parts of sources (articles, essays, chapters, etc.).
- Supply additional information where required, such as **[Videotape]. [Audiotape]. [Interview]. [CD]. [Lecture]. [Radio Broadcast]. [Television Broadcast].** etc. after the title.
- Use p. and pp. before page numbers (for example **pp. 45-78**)
- If you obtained words or information from a source which originated in another source (a secondary source citation), give the name of the original author (or title if no author is given), and the original date, followed by all the publication details for *your* source.

## Models:

We suggest that you use common sense to adapt as closely as possible to one of the five models described below, following the order and punctuation as shown in each model.

1. Whole printed source
2. Part of a whole printed source
3. Material originally from a printed source but obtained by you from the Internet
4. Material originating on the Internet
5. Email or letter

### **Model 1: Whole printed source** (usually a book)

- The principle is to give all the information necessary to find the source in a library.

**Author's last name, initials. (Date). *Title in italics*. Place of publication: Publisher.**

For example:

**Cricket, J. (2001). *Amphibian models in the study of communal relations*. New Savannah:  
Swamptown Press.**

**Model 2: Part** (article, chapter, essay, etc.) **of a whole printed source** (newspaper, journal, anthology, book, encyclopaedia).

- The principle is to give the information about the part as well as about the whole source.

**Author's last name, initials. (Date). Title of part. *Title of whole in italics* volume if a journal, page numbers of part with section if appropriate.**

For example:

Arkell,P. (2000, March 17). Spring peeper numbers on the rise. *The Globe and Mail*, pp. C31-32.

Flye,Q. (2003). Eating disorders in tadpoles. In P.Granger (Ed.), *The Parents' Handbook* (pp. 49-54). Toronto: Green Press.

### **Model 3: Material originally from a printed source but obtained by you from the Web**

- The principle is to give the original printed source information.
- Then add the information connected with the Web page including the date you accessed the page and the complete address.
- Don't split Internet addresses at the end of a line.

**Author's last name, initials. (Date of original publication). Title of part. [number of paragraphs].**

*Title of whole in italics* [Form, for example On-line]. Page numbers in original if available.

**Retrieved date from Internet address.**

For example:

Newmarsh, E. (2000, July 31). Teen hierarchies in frog communities. [7 paragraphs]. *The Globe and Mail* [On-line]. pp. C31-32. Retrieved August 6, 2003 from <http://www.globeandmail.com/science/frogs.htm>.

### **Model 4: Material originating on the Web**

- The principle is to give, as far as you can deduce from the page, the same information as you would for a printed source and then add the information connected with the Web including the date you accessed the page and the complete address.
- Don't split Internet addresses at the end of a line.
- A complication is that material on Web pages may print out on several sheets of paper but traditional page numbers are often not provided. To make it easier on your reader, give paragraph or section numbers where available. Do not give the page number of your printout as this varies from one situation to another. If no individual author is given, you may also have to decide whether it is appropriate to place an organization's name in the position usually reserved for the author, or place a page title first and place the organization's name where the publisher's usually goes.
- If a page has a title, give it. If it's an untitled home page use the words **Home page** (no quotation marks or italics).

**Author or sponsoring organization. (Date when page last updated or “No date” if date unavailable). Title of page. Sponsoring Organization if not already mentioned. Retrieved from date and Internet address.**

For example:

**Mole, K. (1999, 7 March). Pets as caregivers. Veterinary Association of Ontario. Retrieved January 3, 2003 from <http://www.vetassoc.ca/patients/pets.htm>.**

**Salamander identification. (2002, May 16). North American Amphibian Society. Retrieved May 16, 2002 from <http://www.naas.com/salmanders.htm>**

**Model 5: Email, on-line posting or letter** (keep a paper copy)

- The principle is that personal correspondence should not be listed in your **References** because it cannot be universally accessed.
- Be sure, however, that you do include a parenthetical reference within the text of your report.

### **Documentation within the report** (this is the easy part!)

Here you give the minimum amount of information that will allow the reader to go straight to the item in your list of **References**: the last name of the author (or editor or short title if no author is known), the date of publication, plus page number/s if available, separating the items by commas. Note: in APA Journals, page numbers are given only for quotations, but in most school and workplace situations, page numbers are also required for the sources of ideas, summaries and paraphrases.

- Therefore, immediately following an idea, summary, paraphrase or quotation you have used, put the author’s or editor’s last name and the relevant page/s in parentheses: **(Smith, 1999, pp. 104-5)**.
- More than one author with the same last name in your list of **References**? Include the initials: **(A.T. Jackson, 1999, p. 5)**.
- If the work is divided into volumes, show this with volume number, colon and page numbers, for example **1: pp. 34-6**.
- You need not repeat the author’s name if it’s obvious from your report: **Smith finds no evidence that toads are friendlier than frogs (1999, pp. 104-5)**.
- If the work has no named author or editor, use the title or an easily recognizable short form of it which must correspond to the first few words on the entry in the list of **References**.
- Remember book titles are placed in italics (***Teens and Adults*, 2000, p. 54**) and all words

longer than four letters in titles are capitalized when referred to in your text, though not in the list of **References (Friendliness Quotient, 1998, p. 45).**

- If your source has no page number, as often happens in the case of Web pages, just give the author (or title if no author) and date with no page number: **(Andrews, 1999)** or **(Toads in History, 2000).**
- If you are referring to material you found in a source that originated in another source, give the author (or short title) of the original source, followed by “quoted in” or (if the exact words weren’t given) “cited in” and the source *you* used with dates of both **(Mole, 1997, quoted in Smith, 1999, p. 90).**
- If you quote up to forty words from your source, put the words in quotation marks and give the source using one of the formats above, for example, **“Toads have a wonderful sense of humour” (Smith, p. 87).** If the quotation is more than forty words long, use a block quotation. Start a new line, indent the quotation five spaces from the margin (using the indent command, not the tab key, to do this), continue to use double spacing as in the rest of your report, finish with a period and then use the parentheses as you do for your other references. **(Doe, 1999, p. 23)** Do not use quotation marks with a block quotation.

#### **Telling the reader you have adjusted a quotation:**

- If you wish to omit words within a quoted sentence, use three periods to show where words were omitted: **According to Don, he was “lying face down ... flat on the ground” for six hours (Jackson, 2000, p. 31).** At the end of a sentence add an extra period: **According to Don, he was “lying face down....” (Jackson, 2000, p. 31).**
- If you wish to show you have changed a word (perhaps to explain who was meant by a word like “She” in a quotation), put the new words in [square brackets]: **“[Marie] gave the toad a kiss”(Canby, 1998, p. 32).**

### **Formatting your report**

- Your teacher or place of work may have different requirements from those set for journal publication, so it would be wise to check.
- Ask about requirements for holding pages together. These may vary from paper clips or staples through various forms of binders to spiral bindings.
- All pages, including the title page, are numbered and have a running header consisting of a short form of your report title, followed by 5 spaces and then the page number. Set your word processor up to place this automatically at the top right, half an inch from the top of the paper.
- Apart from the header, you should set 1" margins all round. Some teachers prefer 1½". If you have been asked to bind your report down the left side (as, for example, with a spiral binding) you should leave 1½" at the left to accommodate this.
- Double space all text and **References.**
- Title page: ask your recipient how the title page should look as tastes vary. The APA suggests that all information should be double spaced and be centred both horizontally and vertically. Include, in this order, title (with all significant words capitalized), and your name.

In school, add at least your course and section and your teacher's name. At work, find out what is normal practice.

- The APA instructions for headings for published articles are very complicated. Use common sense and consistency. Normally no numbering is used with headings.
- For format of quotations, parenthetical references in the text, and individual entries in References, see the appropriate sections above.
- For the list of references at the end of your report, start a new page and type **References**, centred, and continue to double space.

This document was last revised August 26, 2003.