EDS Milestone Formatting, Academic Writing, and Copy-Editing Checklist

The following is a high-level checklist to help you self-assess your work prior to submission.
This checklist does not repeat everything found on our website, but it includes the most common things.
Ensure that you follow the Work Submission and Review process at each step, as outlined on our website.

Other Resources

Formatting	Submission Instructions	Rubrics	Thesis Office Resources

Sources

	Annotated Bibliography	Maintain an annotated bibliography throughout, including the methodology chapter
	Source Selection	Avoid cherry-picking sources to satisfy your agenda or assumptions.
	Grouping sources by Theme	Do not pre-select theories and themes; instead allow the literature to reveal what these should be.
	Primary Sources	Prioritize primary sources unless there is a specific reason to cite the second sources; instead, read the secondary source to make it become the primary source.
	Sufficient number of sources	While we provide a minimum, don't stop there. If you are struggling to find sources, reach out to the Education librarian.
	Study Context	Elaborate on the context of the studies being cited. What, why, who, how? What were they examining? What was their purpose? Who were the participants and how many? How did they collect their data?
	Evidence that led to the claim	What was the evidence/data that led to the claims being made? What are some metrics or specific data points?
	Everything is cited	Avoid your readers needing to ask *"Who said this?"*
	Avoid overuse of sources	Diversify your sources, especially within a given paragraph
	Citing authors within the body of your work	Always check the latest version of APA, but it isn't necessary to spell out their full name (unless there are duplicate last names) nor is it necessary to state where they work or the name of the journal from which the source coms

Words

	Evidence-based verbs	Refer to the Academic Phrasebook and our website for suggestions as well as words to avoid
	Connect Sources	Use relevant connecting works to link multiple sources together; Do not jump from one source to the next.
	Word Diversity	Avoid overuse of particular words, especially within the same paragraph
	Parameter is "Literature Reviewed"	When referring to the literature or existing research, always include the parameter of "the literature reviewed", this conveys that you are not generalizing beyond what you have read or have cited.
	Avoid Acronyms	Avoid stand-alone acronyms unless you've received a waiver to use a particular one When using an acronym, you still need to spell it out each time.
	Ensure Appropriate Work Focus Terminology	Refer to the milestone at hand (i.e. General Field) and not "my study" or "my dissertation" until it becomes relevant to do so (later in the sequence) and avoid your tentative research question or focus of the work being on a specific "side" of your topic, potentially indicating a closed mindset.
	Literature Review Terminology	This work is a literature review and not "a paper". During the early stages, it is not your dissertation. And while things will evolve, Chapter 2 will always be a literature review.
	Use Third Person or Passive Voice	Do not use first person; You can use third person or passive voice to avoid using first person
	Eliminate unnecessary words	Avoid unnecessary words such as "in a study by…". Instead, you can simply say Source (year) examined….
	Tables and Figures Naming Convention	Recommendation is to use chapter-based numbers (i.e. Figure 2.1, Figure 2.2, etc.) for ease of maintenance, but the key is to be consistent

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Sentences

	Include Objective Topical Sentences	Include objective section and paragraph topical sentences to help your readers know the focus of a given section or paragraph. By focusing on what was examined (rather than what was found) you leave yourself open to all sides of the topic. Objectives means to avoid uncited claims. If you need to generalize as a part of your topical sentence, it must be followed by several specific examples. Avoid the generalization of findings as much as possible, as this may indicate that you have cherry-picked your sources to present a finding that you agree with.
	Write in the Voice of the Literature	Avoid your voice being too prominent in the Literature Review; make sure it is always clear who is speaking - the literature or the student. Example: Source (year) claims…
	Minimize Generalizations	If you must generalize, ensure proper evidence or justification follows and always use the parameter of "the literature reviewed"
	Limit Use of Direct Quotes	Direct quotes from sources are okay, but reserve them for things that truly can't be said any other way. Also avoid long lists copied and pasted.
	Avoid your own judgment, assessment, opinion, or assumptions	Rely on what the literature has revealed. It is not necessary for you to comment on what the literature or has said or make a judgment of the literature.

Paragraphs

	Start with a topical sentence	Start with topical sentences to help inform your reader of the purpose of the paragraph *See above*
	Diversity of Sources	Avoid paragraphs dedicated to a single source
	Synthesize the findings from your sources	Aim to be concise; avoid this feeling like an annotated bibliography
	Establish relationships between multiple sources	Include connecting words to demonstrate the relevant relationship between sources; do not jump from source to source.
	Voice of the Literature	Focuses on what the literature reveals, not what you want to say

Tables and Figures

	Numbering Schema	Chapter-based numbering is recommended. (Figure 2.1 would be the first figure in chapter 2) This is useful as your manuscript evolves and you add and remove tables and figures. Do not use a combination of numbers and letters (Figure 2.1 = YES; Figure 2.1 a = NO)
	Consecutive Numbering	Ensure the numbering sequence is accurate; no skipped or duplicated numbers.
	Check Table and Figure number references in the main body that they match the captioned #	When referring to a table or figure, it is easy to forget to update that reference if/when you happen to renumber the table or figure. Or sometimes you might say Figure XX during the draft process and then forget to go back and fill them all in.
	Consistency	Be consistent in your numbering schema and styling, including the placement of the labels and captions.
	Formatting	Ensure table and figure captions are distinct from the body of your text (i.e. use a different font size, alignment, and/or italics, etc.) Thesis Office Resource: Figures & Tables
	Placement on a Page	Tables and figures shouldn't run across two pages unless they are too tall to fit on a single page. If it needs to span multiple pages, say for example, Figure 4.1 (continued) for the second page. Table and Figure headers and/or captions should not be separated from the item itself Use CTRL Enter on your keyboard to move to the start of a new page.

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Table of Contents and Headers

	Headings and Subheadings	Choose styles that differentiate header levels from one another and also from the main text. Use consistent styling for a given header level. Capitalize your Chapter Headers (CHAPTER 1: INTRODUCTION); Appendices as well. Use descriptive, yet brief header/subheader titles.
	Use the Word "Styles" feature to create headers, etc.	By using the Style feature, you ensure consistent formatting for each level of header and the main body of your text, including Tables and Figures (and their captions). Word even has a feature to auto-update all entries using a particular style
	Table of Contents should match exactly the main body headers	Select how many levels of headings you want to include in the Table of Contents and ensure that the titles are exactly the same; this includes capitalization and the Appendix Ideally, use the Word feature to auto-create your Table of Contents and do a final update (right click and choose to "update table") prior to submission to ensure that the page numbers match
	Headers should not be orphaned from content	Do not end a page with a stray header; move it to the top of the next page. It is okay to have a blank space at the bottom of a page in order to accommodate this.
	Appendix Headers should be on a single or continuous line and all capitals	Example: APPENDIX A: THEN THE TITLE (and then your table of contents should match that)

Page Numbers

	Title page should not have a page number	In MS Word you can use the feature to say suppress page number on First Page
	Pre-Manuscript Pages should be lowercase roman numerals	
	Chapter 1 starts regular numbering	Chapter 1 should be the start of page 1 all the way to the end of your manuscript. Appendices should also be numbered (regular numbers)
	Use Section Breaks to ensure page numbers are correct	Pages that come before your chapter 1 should be numbered with lowercase roman numerals (i, ii, iii, iv, v, etc.) You can number parts of your manuscript differently by using Section breaks and then choose a different number format for those pages
	Every page must have a page number except the title page	If you have something to insert that is technically another document (typically in the Appendix), you'll need to either paste in an image of that document or you'll need to use creative numbering to insert the separate document (with correct page numbers) and then combine the PDFs. Your IRB waiver or response is a good example of this scenario.

Milestone Titles

	CGScholar Title	*Work Type* and a *brief, yet descriptive title* (i.e. General Field: Multiliteracies) Avoid using the "subtitle" feature, as we can't see that unless we are in preview/view in browser mode.
	Word Document Title	*Author's Name, Work Type, brief, yet descriptive title*, and *current revision date* (i.e. John Smith_General Field_Multiliteracies_20221019) When adding the Word document to your Scholar project, either repeat the filename as the caption or leave the caption blank (which would show the filename by default). The goal is that we need to easily see the full filename without opening it to see the last revision date.

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Chapters and Sections to Include

	Chapter and Section Placeholders	Include placeholders for future main sections that will be relevant as you progress through the sequence (see below).
	CGScholar Structure Tool	Sections and subsections should exist in Scholar to keep your work organized and to help your readers. Make sure to use the indent option.
	CGScholar Section Word Document	Separate section in Scholar to attach the Word version of your manuscript. Attach the most current Word version each time you resubmit the milestone.
	Note to Reviewers	Placed prior to the official start of your manuscript. Provides some background for your readers; this can be in your voice. Will be removed when you arrive at your final dissertation.
	Change Notes	Placed prior to the official start of your manuscript. Provides a descriptive summary of what has changed since your last revision. Do not delete change notes as you progress – keep a running list of **dated** change notes. Will be removed when you arrive at your final dissertation deposit. Change notes can be housed in a separate document during the final dissertation review/revision process.

Overall Manuscript

	Proofread	Ensure that you and at least one other person have proofread your work. Check for overall writing quality, word choices, grammar, and overall flow. Procure a copy editor, if necessary.
	Length	Word count alone is not used to evaluate your submissions, but check the length and thoroughness of your work. (The Main body of the work is where the word count matters). Be thorough enough to represent the field, theory, or methodology. Demonstrate that you have conducted a deep investigation of your selected field.
	Focus	Ensure that the purpose of the current work is clear and is maintained throughout the work.
	APA Style	Follow the latest APA style guide, especially for common items such as: - Narrative Citations vs. Parenthetical Citations (variation for authors, years, etc.) - Article and Book Titles capitalization - Italicize Journal Titles & Volumes *(remember: Scholar doesn't retain formatting)*
	Change Notes	See above, but it is important to include these to assist with the review process.

Final Deposit Process Reminders

	Use Word to draft your manuscript	If you rely on Google docs or don't have easy access to MS Word, you may experience challenges as you prepare to submit your manuscript and may find it difficult to quickly and easily make edits after the College and Thesis Office reviews or new issues may arise.
	Correct Submission Format	1. A Word document can be sent to your advisor and committee for final approval 2. A PDF must be sent to the College contact for final approval 1. A PDF must be uploaded to the Thesis deposit website for final approval and deposit
	Correct Approval Order	2. Your faculty advisor sends an email to the College contact (either Jena or Linda), copying your committee 3. College contact reviews and reports their approval to the Graduate College 3. Graduate College approves for final deposit
	Leave ample time for the final review cycles	We can not control how long the College of Thesis Office needs to review your final dissertation. Ensure that you submit it to the College at least 3 weeks before the deposit deadline. And then submit it to the Thesis Office at least a week before the deadline. All approvals must be complete by the deposit deadline – that is not a submission deadline.

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Manuscript Organization (See Thesis Office Resource: Main Text)

	Title Page	The title will change as your study and manuscript evolve.
		Ensure proper capitalization, spacing, and margins. Center section that houses the name of the degree should follow the layout and words exactly
		Committee names should be correctly formatted. (Don't say Dr. Mary Kalantzis, but instead Professor Mary Kalantzis); Put "Chair" after your committee chair (assigned faculty advisor). External committee members should have their university name after it.
		Thesis Office Resource: Title Page
	Title Page – Name of Degree	Submitted in partial fulfillment of the requirements for the degree of Doctor of Education in Education Policy, Organization and Leadership with a concentration in Learning Design and Leadership in the Graduate College of the University of Illinois Urbana-Champaign, 2024
	Table of Contents	The names should be identical, including capitalization.
		Page numbers must be accurate; use the automated Table of Contents builder to assist you.
		Each Appendix should have its own line in the TOC (and those titles should match exactly)
		Entries should not be underlined.
		Thesis Office Resource: Table of Contents
	Optional Pages	Thesis Office Resources: Copyright Page and Acknowledgements
	Abstract	Should briefly, yet clearly and objectively introduce the focus of the work. This will change as your study and manuscript evolve. Thesis Office Resource: Abstract
		One to two paragraphs; 300 Words or less
	Chapter 1: Introduction	This is a placeholder until you are working on your preliminary exam
		Two to three pages maximum
		This can be in your voice, but still aim to use third person and write objectively
		Eventually, this serves as a brief, yet descriptive overview of your study proposal (prelim) or actual study and findings (dissertation)
		Do not excessively repeat what you have elsewhere in your manuscript

	Chapter 2: Literature Review	This temporarily houses your General Field and Special Field LRs; label each accordingly:
		    Part 1: General Field: [Insert the name of your general field]
		    Part 2: Special Field: [Insert the name of your special field]

		By your preliminary exam, this becomes a streamlined single literature review (no mention of general or special fields)
	Chapter 3: Theory and Methodology	This is a placeholder until you are working on your methodology and preliminary exam.
		Refer to the website for specific details, but at a high-level, you should have:
		Brief introduction, Theoretical Foundation, Research Questions and Logic Model, Methodology Selection, Implementation Plan, IRB Materials and Data Collection Instruments in the Appendix
	Chapter 4: Results and Findings	This is a placeholder until you have conducted your study and you are ready to write up your results. *Refer to the website for specific requirements, but at a high-level, you should have Brief recap of your study, Actual implementation details, Participants, results/findings grouped*
	Chapter 5: Implications and Conclusions	This is a placeholder until you have conducted your study and you are ready to write up your implications, recommendations, and conclusions. *Refer to the website for specific requirements, but at a high-level, this should include Brief recap of findings, implications, recommendations, study limitations, suggestions for additional research, and conclusions.*
	References	Maintain a running list of references as your manuscript evolves (the involves both adding and removing sources, when relevant).
		Ensure proper APA style. See also Thesis Office Resource: References
	Appendix	Includes IRB materials, recruiting emails, consent letters, data collection instruments, etc.
		Use letters with a title to separate each appendix item (i.e APPENDIX A: RECRUITMENT LETTER)
		Titles should be in all capital letters and the titles should be centered; TOC should match exactly
		Every Appendix page must have a page number