

Document Review Checklist

When you edit a document, remember “broad-to-specific” and “outside-to-inside”. In other words, review the page layout, headers and footers, graphics, tables, headings and obvious content first. Then, work your way to the specific content, and edit for clarity and readability. When all the content is accurate and effective, edit for grammar and punctuation last.

Use the following checklist to edit documents.

| Document Name: | | |
|---------------------|--|----------|
| OK (Y/N) | Item | Comments |
| Front Matter | | |
| | Title page: correct title, subtitle and date. | |
| | Legal notice is current and trademarks listed. | |
| | Table of contents formatted properly with correct headings and page numbers. | |
| | | |
| Back Matter | | |
| | Documents in excess of ten pages include an index. | |
| | Documents with a variety of technical terms and/or acronyms include a glossary. | |
| | | |
| Page Layout | | |
| | Headers, footers and page numbers are correct and consistent. | |
| | Page, line and section breaks are used effectively. | |
| | Right/left pagination is correct: chapters start on an odd-numbered page. | |
| | Document is free of windows and orphans (one line standing alone at the top/bottom of the page, one bullet at the top of a page, headings not kept with following text). | |
| | Includes adequate white space for readability. | |
| | | |

| Document Name: | | |
|----------------------|---|----------|
| OK (Y/N) | Item | Comments |
| Tables | | |
| | Tables are consistently formatted (spacing, horizontal/vertical alignment, character fonts/sizes/styles). | |
| | Table headers repeat across pages. | |
| | Displayed where necessary for better understanding. | |
| | | |
| Graphics | | |
| | Graphics are current. | |
| | Graphics clearly illustrated the text. | |
| | Graphics are legible. | |
| | | |
| Formatting | | |
| | Document observes current M&A style guide and template. | |
| | Formatting is consistent throughout document. | |
| | Product names are capitalized, spelled and used correctly. | |
| | Vertical spacing between paragraphs is consistent. | |
| | Document does not contain unnecessary blank lines. | |
| | | |
| Readability | | |
| | Sentences are clear, direct and concise. | |
| | Repetition and transitional phrases are effectively used. | |
| | Information is chunked and logically ordered. | |
| | Headings, lists, captions and sentences have parallel structure and punctuation. | |
| | | |
| Writing Style | | |
| | Information is appropriately presented for the intended audience. | |
| | New concepts and terms are explained as | |

| Document Name: | | |
|-------------------------|---|----------|
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| | presented. | |
| | Concepts flow logically. | |
| | Similar topics are presented in the same manner. | |
| | Headings clearly denote parts of the document. | |
| | Information is logically organized and clearly identified. | |
| | Active voice is used throughout the document. | |
| | Steps are in the imperative mood. For example, "Click Next to continue", or "Enter "ABC" in the Company field". | |
| | Voice, tone and reading level are appropriate for the intended reader. | |
| | Terms are used consistently and correctly. | |
| | Acronyms and abbreviations are defined at first use. | |
| | Document does not contain gender-specific references. | |
| | | |
| Grammar and Punctuation | | |
| | Sentences are complete. | |
| | Subjects and verbs agree. | |
| | Pronouns and antecedents agree. | |
| | Verb tense is consistent. | |
| | Short sentences are employed for readability. | |
| | The Spelling and Grammar check tool has been used. | |
| | Punctuation, capitalization and spelling are correct. | |
| | Headings and captions follow departmental standards. | |
| | Capitalization is consistent and follows departmental standards. | |
| | Numbers zero through ten are spelled out. | |
| | All lists (numbered and bulleted) contain an introductory phrase/sentence. | |
| | Bullets are used consistently. | |