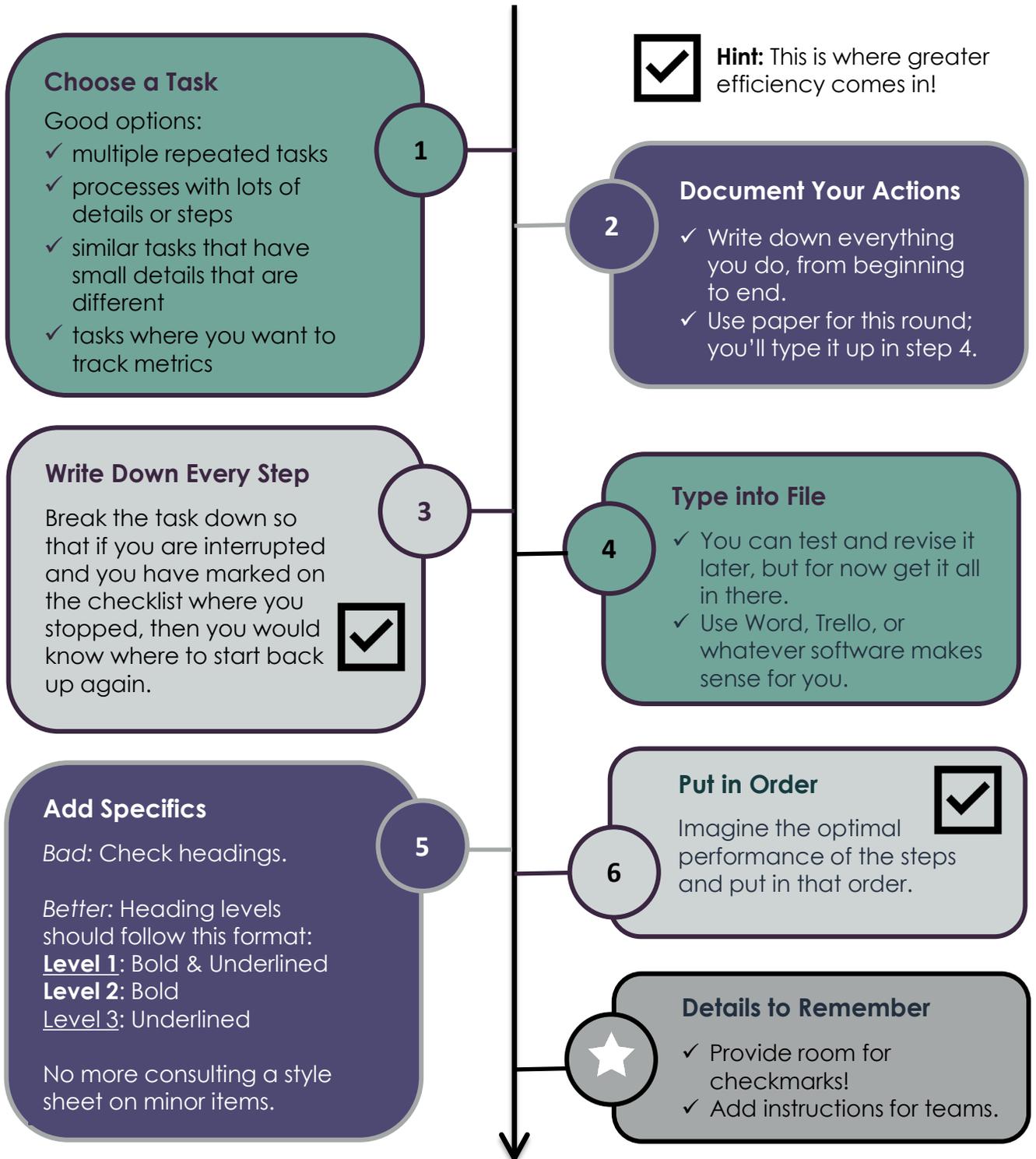




How to Create a Comprehensive Checklist

Creating and using a comprehensive checklist for a particular task can really help you be more efficient and consistent.

But a checklist is no good unless you use it! Being able to check off items you have completed lets you know where you left off when you have been interrupted or you go off on a tangent.



Add Mechanics

- ✓ Steps for getting into systems
- ✓ Process-related items
- ✓ Spell Check

7

If processes change, or you hop between different systems, this is especially helpful.

Test, Revise, Test

Once you have a draft, test it out. Make notes of what didn't work and make those changes to the next version. Then do it all over again until it works really well.



9

How do you Know You Have Good Checklists?

- ✓ When you find an error your editing checklist told you to look for
- ✓ When you almost forgot to do something but the checklist reminded you
- ✓ When you can confidently give an estimate because you have metrics in your checklists



Add Tracking Items

- ✓ Start and stop times
- ✓ Length of project
- ✓ Level of difficulty
- ✓ Product or topic

8

Keeping used checklists allows you to more easily remember what was going on with a particular task if asked about it later. And if you didn't have time to check everything on the checklist, you have documentation of what you did and didn't do.



Hint: This is where greater efficiency comes in!

How do you Know You Have Good Checklists?

- ✓ When you have peace of mind when working on something
- ✓ When you start a new type of project and you feel lost without a checklist
- ✓ When you are confident you have completed a project because you have checked everything off on your checklist



Resources:

- ✓ Gawande, Atul. *The Checklist Manifesto: How to Get Things Right*. New York: Henry Holt & Company, 2010.
- ✓ Rizzo, Paula. *Listful Thinking: Using Lists to be More Productive, Highly Successful and Less Stressed*. New York: Start Midnight, LLC. 2014.

Contact:

Kelly Schrank
Kelly@headbookworm.com
<http://headbookworm.com>

AIIP Virtual Workshop

To be More Efficient and Consistent, Build
a Better Checklist
June 2, 2020, 12- 2pm ET

bookworm
editing services

Manuscript Checklist

Client: _____	Project # _____	Additional Contact: _____
Manuscript (long title): _____		
Manuscript (short title): _____		
Journal (name): _____		Journal (abbreviation): _____
Date Due: _____ Pages: _____		
Time: _____	Time: _____	Time: _____
START STOP SPENT	START STOP SPENT	START STOP SPENT
Time: _____	Time: _____	Time: _____
START STOP SPENT	START STOP SPENT	START STOP SPENT
Run PerfectIt		
Clean up author section		
<ul style="list-style-type: none"> • Ensure consistent names, titles, and locations 		
Edit abstract		
Make sure it has the following sections:		
<ul style="list-style-type: none"> • Background • Methodology • Results • Conclusion 		
Count number of words and compare to journal requirements:		
Journal Req: _____		Abstract: _____
Edit keywords		
Edit main text		
Make sure it has the following sections:		
<ul style="list-style-type: none"> • Introduction • Methodology • Results and Discussion • Conclusion 		
Count number of words and compare to journal requirements:		
Journal Req: _____		Main text: _____
Edit references		
<ul style="list-style-type: none"> • Look up each reference and correct • Edit according to journal's author instructions and <i>AMA Manual of Style</i> 		
Edit supplementary materials		
Edit conflict of interest statement		
Edit Acknowledgements		
Check/Fix Abbreviations and Acronyms		
<ul style="list-style-type: none"> • Ensure that the composite words of abbreviations and acronyms are spelled out on first use in body text, followed by the abbreviation and/or acronym in parentheses. <i>Headings should have full version in most cases.</i> 		
<ul style="list-style-type: none"> • Use abbreviations and acronyms only if the term is used ≥ 3 times in the document. Note: If using <i>Find</i> and <i>Replace</i> to help locate abbreviations and acronyms, look for both the spelled-out versions and the abbreviations. • Make sure that abbreviations and acronyms are used consistently within the SR. 		

Manuscript Checklist

Notes from Journal's Author Instructions	
FINAL TOUCHES	
	Run Spell Check
	Turn off Track Changes
	Change View to 100% <ul style="list-style-type: none">• Look over one more time in All Markup• Look over one more time in No Markup
	Save Document
	Email back to author in email subject line that matches naming convention

Editor Checklist Dossier

Owner: _____	Product: _____	Section: _____
Date Received: _____	Date Due: _____	# of Pages: _____
Date Completed: _____		
Time: _____	Time: _____	Time: _____
START STOP SPENT	START STOP SPENT	START STOP SPENT
Time: _____	Time: _____	Time: _____
START STOP SPENT	START STOP SPENT	START STOP SPENT
Run PerfectIt		
FORMATTING		
Check Margins: 1" on top, bottom, left, and right		
Check Header and Footer: Right side of Header: X Section or References or Abbreviations Left side of Footer: Product Name Dossier Right side of Footer: Page X of X		
Check for Keep with Next near headings and tables		
Check that spacing between paragraphs is consistent: spaces (¶) or consistent spacing before and after (3pt/6 pt).		
Check Bulleted and Numbered Lists Make sure bullets and numbers begin at the left margin and that the tab is only .25 for each level.		
Check Size of Font		
<ul style="list-style-type: none"> • Body Text: 11 pt Calibri • Headings: 11 pt Calibri 		
Check Justification		
<ul style="list-style-type: none"> • Check that body text, bullets, and references are left justified. 		
Check Spacing		
<ul style="list-style-type: none"> • Do a Find for period followed by 2 spaces; replace with period followed by 1 space. • Do a Find for 2 spaces; replace with 1 space. 		
Check Headings and Sections of Document: Look for consistency in heading levels, order of sections, and use of bullets.		
3.0 CLINICAL EVIDENCE		
3.1 SUMMARIES OF KEY CLINICAL STUDIES		
3.1.1 Clinical Development Summary of DRUG		
<i>Pharmacokinetics and Pharmacodynamics</i>		
Heading Level 4: Roman, Initial Caps		
ABBREVIATIONS		
Check Abbreviations and Acronyms		
<ul style="list-style-type: none"> • Ensure that there are no periods in abbreviations (<i>Examples: ie, US</i>) (<i>Exception: vs.</i>). • Ensure abbreviations and acronyms are used consistently within the dossier • Use abbreviations and acronyms only if the term is used ≥3 times in the document. • Headings should have full version in most cases. • Spell out abbreviations on first mention. 		

Editor Checklist Dossier

TABLES/FIGURES
<p>Tables/Figures</p> <ul style="list-style-type: none"> Count tables and figures; tables and figures should be numbered consecutively with bold capital numerals. <i>Example: Table 2-1. Dosage Form, Strengths, Package Sizes, and NDCs (Author Date).</i> Provide links from table and figure references to the tables and figures. Table and Figure titles: 11 pt Calibri; text within table: 10 pt Calibri; Footnotes: 9 pt Calibri. Order: Abbreviations, Footnotes, Notes; paragraph break between each section. Ensure footnotes are indicated with superscript lowercase letters in alphabetical order (a-z). Ensure abbreviations are in this format: AE, adverse event;
<p>Tables</p> <ul style="list-style-type: none"> Make sure units of measure in tables are specified in column headings or sub-headings, but not duplicated in cells. Make sure text in header row and any shaded rows is bold and initial cap; however, text/data within the columns should be sentence case and not bold. If a table is very long and has to break between 2 pages, ensure that header rows are repeated.
STYLE
<p>Check Capitalization in Headings and Sub-Headings</p> <p>Capitalize:</p> <ul style="list-style-type: none"> Nouns, pronouns, verbs, adjectives, and adverbs, the first word after a colon, the first and last words Prepositions of \geq four letters (With, From, Into, Onto) <p>Do NOT Capitalize:</p> <ul style="list-style-type: none"> Articles and coordinating conjunctions (and, or, but) Prepositions of \leq three letters (eg, in, on, for)
<p>Check Numbers</p> <ul style="list-style-type: none"> Search for numbers 1-10 to make sure numbers are used instead of words. Numbers that begin a sentence should always be spelled out. Common phrases: Phase 1, stage 2
<p>Check Symbols and Signs</p> <ul style="list-style-type: none"> Ensure the appropriate use and format of symbols and signs within parentheses and in tables/figures. Ensure that symbols and signs are spelled out in text, except for lab values (<i>Examples: CK >10x ULN; HbA1c \geq6.5%; BMI \geq25 kg/m².</i>)
<p>Check Units of Measure</p> <ul style="list-style-type: none"> Ensure the appropriate format of units of measure.
REFERENCES
<p>References in Text:</p> <p>Citations should be at the end of the sentence in Author-Date format. <i>Example: Text (Name 2011).</i></p>
<p>References List:</p> <p>If done in Endote; copy list to end of document and edit copied text with tracked changes.</p>
FINAL TOUCHES
<p>Run PerfectIt</p>
<p>Run Spell Check</p>
<p>Change View to 100% and Look it Over One More Time</p>
<p>Clean up formatting tracked changes; leave only content edits.</p>
<p>Save Document</p>

Editor Checklist Activation of Slide Decks

Owner: _____ Title: _____			
Date Received: _____ Due Date: _____ # of Slides: _____ Asset # _____			
Date: _____ Time: _____			
START STOP SPENT			
Reviewing Assets			
Make sure you are an editor for the asset in Vault.			
CHECK OUT DOCUMENT FROM VAULT Save to your Documents folder			
Click iSpring , then Publish , then Publish again.			
Press View in Browser , then choose IE or Chrome.			
Close the Preview window of iSpring.			
With both assets open, check them against each other, noting discrepancies below.			
Check Cover Sheet Is the cover sheet hidden? Does logo link go to hidden cover sheet?			Fixed
Check Cover Sheet Is the cover sheet hidden? Does logo link go to hidden cover sheet?			Fixed?
In the first pass, look at the slides for inconsistencies:			
<ul style="list-style-type: none"> • Superscript characters • Symbols • Graphics and line drawings • Lines (particularly those that end in arrowheads) 		<ul style="list-style-type: none"> • Text boxes (text can sometimes run over the borders) • Text before/after formatted text (italic/ bold/ colored text) 	
Slide(s)	Notes of things that need to be fixed or flagged:	Fixed	Fixed?
In a separate pass, look in the Notes pages for the following items:			
<ul style="list-style-type: none"> • Missing symbols (particularly \geq and \leq) or little squares where symbols should be • Long URLs (they can run off the edge of the viewable area on the iPad) 			
Slide	Notes of things that need to be fixed or flagged:	Fixed	Fixed?
In a separate pass, check that links to other slides in the deck go to the proper location.			
Slides	Notes of things that need to be fixed or flagged:	Fixed	Fixed?
If there are no errors, undo Checkout and go to Final Steps .			
Fixing Errors			
If there are errors, proceed with the following steps:			
After fixing errors and saving the file, click iSpring , then Publish , then Publish again.			
In Preview window of iSpring, check that items are fixed.			
If errors are fixed, save document.			

Editor Checklist Activation of Slide Decks

Check Document Back in to Vault		
Final Steps		
Check Cover Sheet		
Check that 2 questions are answered as follows:		
MSL Leave Behind – No Leave Behind FMV – box empty	MSL Leave Behind – Yes Leave Behind FMV - box should be filled in	
If something is amiss above, email asset owner and ask how to correct it. If neither Yes or No is checked, email asset owner and ask how it should be. Then correct cover sheet as needed.		
Check Cover Sheet Against General Properties		
Match?	Cover Sheet	General Properties
	Asset title	Name
	Approval Date (MM/2016)	Expiration Date (MM/DD/2017)
	Use Type (Reactive)	Intended Use (Reactive)
	Note: Only check Distribution for decks with “-Slides” at the end of the title.	
	Distribution	
	No	Approved for Distribution-Reactive MI - No
	Yes	
	Reactive via MI	Approved for Distribution-Reactive MI -Yes
	Reactive via MA SciP	
	Proactive	
	Approved for Use By (Any MA SciP)	Personnel Approved To Use (Any MA SciP)
	Audience (Any HCP)	Audience (Any HCP)
	One-time Use (No)	One-time Use? (No)
	Restricted Use (No)	Restricted Use? (No)
	Special Instructions and/or Disclaimers	Special Instructions
	New Asset / Renewal / Renewal with Change	Author Comments (make sure there are comments that specify whether it was a new asset or renewal)
If anything is off, email asset owner and ask how to correct it. Make corrections, then continue with process.		
Complete the Task		
<ul style="list-style-type: none"> • Click Complete. <li style="padding-left: 20px;">○ Click Approved • Click Complete. 		