

Quick Checklist for Report Writers and Preparers

This checklist is to ensure reports are written and prepared according to NYSERDA's standards.

Front Matter

- Include title page (authors, affiliations, dates, report ID)
- Add Record of Revisions (if required)
- Include Abstract
- Include Keywords
- Include Acknowledgments (if desired)
- Include Preferred Citation
- Compile a complete Acronyms and Abbreviations list

Body Matter (Main Text)

- Include Summary or Executive Summary
- Apply template formatting using Styles, maintain heading hierarchy (H1, H2, H3, etc.)
- Spell out all abbreviations and acronyms on first use, use abbreviations and acronyms consistently
- Tables, Figures, and Images
 - ✓ Reference each table, figure, and image in the text
 - ✓ Create tables in Word or Excel; avoid merged cells and multiple header rows
 - ✓ Number all tables and figures sequentially (avoid multiple images in one figure, labeling a, b, c, etc.)
 - ✓ Shorten long titles by moving explanatory text to captions
 - ✓ Ensure figures and images are hi-res (300 dpi+)
 - ✓ Include source credits, if needed (author-date)
- Number equations, examples, and case studies consistently
- Cite all sources consistently using author-date (Chicago) style
- Verify units, data, and statistics for accuracy, internal consistency, and correct citation
- Use footnotes or endnotes only for brief explanations (include author-date only if necessary)

Consistency & Technical Terms

- Use consistent word choices (avoid multiple terms for the same concept)
- Standardize style (hyphenation, capitalization, abbreviations, units)
- Avoid jargon and gendered language
- Verify all cross-references (e.g., "See Section 4.2")
- Use global search/replace to check consistency
- Check grammar and punctuation throughout for clarity and professionalism
- Ensure paragraph structure supports readability (clear sentences, logical flow, avoid overly long sentences)
- Review for plain language and readability
- Confirm consistent use of tense, voice, and number style

Back Matter

- Include only cited works in References; place all other materials in Secondary References
- Alphabetize the reference list by author; for multiple works by the same author, list them from earliest to latest
- Verify URLs and DOIs; add access dates
- Label appendices clearly (Appendix A, B, ...) and update cross-references
- Treat previously published material as added pages in the pdf
- Consult the sample report if unsure about the formatting of references

Final Pre-Submission Steps

- Run Microsoft Editor for spelling and grammar. Use "Document stats" to review/reduce passive sentences
- Run Accessibility Checker (Click "Review," "Check Accessibility")
- Ensure color contrast meets accessibility standards
- Use noncolor cues in figures that rely on color (labels, patterns)
- Remove comments, tracked changes, and placeholder text