

# Editing Checklist

Checklist · 77 items · 12 sections

The editor's working checklist for any manuscript you did not write. Walks the four edit levels (developmental, line, copy, proof), Chicago and AP mechanics, style sheet discipline, query etiquette, sensitivity review, and final hand-off. Built for paid editors, not self-editing authors.

Open the editable, AI-powered version online:

<https://genechecklist.com/checklist/editing-checklist>

## ESTABLISH THE BRIEF

- Confirm the edit level in writing: developmental, substantive, line, copy, or proof  
**HIGH**  
*Levels overlap in practice but the contract sets scope and price. Do not silently upgrade a copy edit to a line edit*
- Confirm the style guide: Chicago Manual of Style, AP, MLA, APA, or in-house  
**HIGH**  
*CMOS for books and long-form; AP for journalism and marketing; APA for social sciences*
- Confirm word count target, tone, reading level, and any cuts the author has agreed to  
**HIGH**
- Confirm deadline, number of review rounds, and turnaround per round  
**HIGH**
- Confirm audience and venue: web, print, academic journal, trade book, marketing collateral  
**HIGH**
- Confirm the workflow: tracked changes, queries-only, silent fixes for typos, or a hybrid  
**HIGH**  
*Per Saller in The Subversive Copy Editor: agree the rules of engagement before you open the file*
- Request any existing style sheet, prior books in the series, or comparable titles

## FIRST READ

- Read the full manuscript once without making changes  
**HIGH**  
*Einsohn calls this the diagnostic pass. Resist the urge to fix*
- Note structural issues: thesis, organization, missing sections, redundant sections, weak openings  
**HIGH**
- Identify the author's voice, rhythm, and stylistic tics worth preserving  
**HIGH**

- Flag passages that need fact-checking, permissions, or source verification

HIGH

## DEVELOPMENTAL EDIT

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- Test whether the thesis or central claim is clear, consistent, and supported throughout
- Check that structure serves the thesis: every chapter or section earns its place
- Confirm sections appear in the optimal order; propose reordering with a brief rationale
- Check that transitions between sections are logical and signposted
- Test whether the introduction sets up scope, stakes, and promise within the first page
- Confirm the conclusion delivers on the promise and gives the reader somewhere to go
- Identify gaps in evidence, argument, or counterargument; query the author with specifics
- Flag redundant, off-topic, or anecdotal sections that dilute the argument

HIGH

HIGH

## SUBSTANTIVE EDIT

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- Check paragraph-level cohesion: one idea per paragraph, clear topic sentence, clean exit
- Confirm topic sentences carry the paragraph; rewrite buried leads
- Break paragraphs that run over 150 words in web copy or feel airless on the page
- Check sentence-length variation: short for punch, long for nuance, no monotony
- Test pacing: slow sections need cutting, fast sections may need a beat
- Confirm examples and evidence land where the argument needs them, not where they were easy to find

HIGH

HIGH

## LINE EDIT

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- Cut for wordiness: aim for 10 to 15 percent reduction on a typical first draft
- Prefer active voice unless passive serves emphasis or genre convention

HIGH

*Garner's Modern English Usage: economy of expression is the editor's first duty*

HIGH

- Replace nominalizations with the underlying verb: utilization to use, implementation to implement
- Cut adverbs that do not earn their place; let strong verbs carry the weight
- Vary sentence openers; flag three or more consecutive sentences starting the same way
- Eliminate filler: basically, literally, very, really, just, that, in order to, the fact that

HIGH

HIGH

- Replace clichés and corporate jargon with concrete language
  - Tighten dialogue tags: default to said; flag muttered, exclaimed, opined, ejaculated
- Norris in Between You and Me defends said as invisible, which is its job*

## COPY EDIT

- Run spell-check and reconcile US versus UK spelling against the style sheet
- Apply punctuation rules per style: serial comma per CMOS, no serial comma per AP, semicolons, colons
- Distinguish em dashes, en dashes, and hyphens; use en dashes for ranges and hyphens for compound modifiers
- Check hyphenation of compound modifiers before nouns: well-known author, but the author is well known
- Apply capitalization rules: headline case or sentence case per house style; proper nouns; titles of works
- Apply number style: CMOS spells out zero through one hundred; AP spells out zero through nine
- Standardize quotation marks: curly throughout, not straight; US convention places commas and periods inside
- Apply italics for titles of books, films, journals, ships; roman in quotes for articles, chapters, episodes
- Define abbreviations and acronyms on first use: National Institutes of Health (NIH), then NIH thereafter

HIGH

HIGH

HIGH

*CMOS 6.78 covers en dash for ranges; CMOS 7.81 covers hyphenation of compounds*

HIGH

HIGH

HIGH

HIGH

HIGH

HIGH

## FACT-CHECK AND REFERENCE

- Verify names, dates, places, titles, and statistics against authoritative sources  
HIGH
- Test every URL; flag dead links and link rot  
HIGH
- Confirm in-text citations match the reference list; flag orphan citations and uncited references  
HIGH
- Trace statistics to a primary source; flag any number you cannot verify  
HIGH
- Verify quotations word-for-word against the original; mark ellipses and brackets per CMOS 13  
HIGH
- Spot-check historical dates, geographic facts, and biographical details

## STYLE CONSISTENCY

- Create or update a project style sheet on day one; log every decision as you make it  
HIGH  
*Einsohn: the style sheet is the editor's single most valuable working document*
- Record capitalization patterns: titles of officers, ranks, era names, brand styling  
HIGH
- Record number style decisions: ages, percentages, currency, measurement, decades  
HIGH
- Record date format: July 4, 2026 versus 4 July 2026 versus 2026-07-04  
HIGH
- Standardize list formatting: bullet style, serial punctuation, capitalization of items, terminal periods
- Standardize heading capitalization and hierarchy through every level  
HIGH

## SENSITIVITY AND INCLUSIVITY

- Use gender-neutral language where the referent is unspecified; singular they is accepted by CMOS and AP  
HIGH
- Replace ableist terms and dated medical language; consult Conscious Style Guide or APA bias-free guidelines  
HIGH
- Follow identity-first or person-first language per the community's stated preference  
HIGH

- Check cultural names, holidays, foods, and rituals for accuracy and respectful spelling
- Flag stereotypes, tokenism, and unexamined assumptions; query the author rather than rewrite

HIGH

## QUERY ETIQUETTE

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- Use a Q: prefix or comment marker for every author query; never bury queries in tracked changes
- Explain the reasoning behind each query in one sentence; cite the style rule when relevant
- Distinguish must-change items (style, grammar, fact) from suggestions (preference, taste)
- Preserve the author's voice: Saller's rule is to be the carpenter, not the architect
- Batch related queries at chapter or section breaks rather than peppering every page

HIGH

HIGH

HIGH

HIGH

## PROOFREAD

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- Run spell-check, then re-read word by word; spell-check misses correctly spelled wrong words
- Read the final draft aloud or use text-to-speech to surface rhythm and missing words
- Read one section backwards sentence by sentence to catch typos the eye glides over
- Check pagination, page numbers, folios, and running heads for accuracy and consistency
- Confirm captions match the images they sit beside; verify figure and table numbers
- Verify footnote and endnote numbers match between text and notes; no skipped numbers
- Cross-check the table of contents against actual headings, page numbers, and chapter titles
- Click every internal cross-reference, anchor link, and see also pointer
- Check widows, orphans, bad breaks, and stacked hyphens in the final laid-out proof

HIGH

HIGH

HIGH

HIGH

HIGH

HIGH

HIGH

HIGH

## FINAL HAND-OFF

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- Accept or reject all tracked changes after the author has signed off on the final round

HIGH

- Save the completed style sheet alongside the project files and send a copy to the author or publisher  
HIGH
- List any unresolved queries, deferred decisions, or fact-check items the author still owes  
HIGH
- Deliver clean and tracked versions, plus a one-page editor's note summarizing scope and major changes