

Business Proofreading Checklist (Formal Documents)



Getting Set Up	
Save the Original , then create a Clean/Track Changes copy of the document (depending on your preferred workflow)	<input type="radio"/>
Review your client's style guide and/or brief ; confirm the extent of edits required	<input type="radio"/>
Consistency: Create separate document to track recurring details, including names of people, places, and organizations and uses of any nonstandard or industry-specific terms	<input type="radio"/>
Without editing the document, read a sample passage to become familiar with client's voice and writing style	<input type="radio"/>
Set the proofing language	<input type="radio"/>
Check for double spaces (use the Find function)	<input type="radio"/>

Things To Look Out For	
Consistency:	
Formal tone (e.g., formal documents should be objective and usually with no contractions)	<input type="radio"/>
Organizational pronouns (i.e., whether the client uses singular/plural pronouns to refer to their business)	<input type="radio"/>
Consistent and appropriate point of view (e.g., third person)	<input type="radio"/>
The title and any headings (for capitalization, length, and parallel structure where necessary)	<input type="radio"/>
Use of acronyms and abbreviations	<input type="radio"/>
Note (don't change) seemingly excessive wordiness or repetition that detracts from the flow	<input type="radio"/>
Note (don't change) seemingly overly complex language that detracts from the clarity	<input type="radio"/>
Standard errors:	
Use of quotation marks	<input type="radio"/>
Comma usage (e.g., comma splices, use of serial/Oxford commas)	<input type="radio"/>
Use of hyphens, en dashes, and em dashes according to style guide and/or dialect	<input type="radio"/>
All other punctuation use (e.g., colons, semicolons, apostrophes, ellipses, parentheses)	<input type="radio"/>
Capitalization of common vs. proper nouns (e.g., job titles, brand names)	<input type="radio"/>
Use of <i>which</i> and <i>that</i>	<input type="radio"/>
Use of passive vs. active voice	<input type="radio"/>
Sentence fragments and misplaced modifiers	<input type="radio"/>
Verb agreement and parallelism	<input type="radio"/>
How numbers are written (i.e., as numerals or words)	<input type="radio"/>
Biased or inappropriate language	<input type="radio"/>
Dialect-specific spelling, grammar, and punctuation issues	<input type="radio"/>
Typos and spelling mistakes, especially ones that will not appear as errors (e.g., from/form)	<input type="radio"/>

References And Citations And/Or Appendices Or Resources	
Consistent and correct formatting of citations according to the client's style guide/referencing system	<input type="radio"/>
Consistency, formatting, and presence of all elements for each source in the reference list according to the client's style guide/referencing system	<input type="radio"/>
Citations in the text have a corresponding entry in the reference list and vice versa (unless working with a bibliography)	<input type="radio"/>
Presentation of reference list/bibliography according to style guide/referencing system (e.g., adding hanging indents, ordering entries alphabetically)	<input type="radio"/>
Dates and spellings of author names in each citation match their corresponding reference	<input type="radio"/>
Any additional materials (e.g., appendices or memos) are present, correctly titled, and align with mentions in the main text	<input type="radio"/>

Things To Check Back On	
Review noted excessive wordiness or repetition (check : is it done with purpose?), and change, comment, or leave as needed	<input type="radio"/>
Review noted overly complex language (check : does it seem intentional?), and change, comment, or leave as needed	<input type="radio"/>
URLs and embedded hyperlinks (e.g., for formatting and suitable anchor text)	<input type="radio"/>
Introduction and formatting of quotes (including block quotes)	<input type="radio"/>
The placement and details of any visual elements (e.g., captions, alt text, source credits)	<input type="radio"/>

Review Your Comments. Comments Should Be...	
Used on changes or issues that require the client's attention or action only	<input type="radio"/>
Written in full, grammatically correct sentences , with no errors	<input type="radio"/>
Written using the same dialect as the rest of the document, including spelling and punctuation	<input type="radio"/>
Clear, direct, and helpful	<input type="radio"/>

Final Checks	
Review the client's brief or style guide to ensure all requirements are met	<input type="radio"/>
Check again for double spaces (use the Find function)	<input type="radio"/>
Review your edits (especially larger ones that may alter the meaning of the original text)	<input type="radio"/>
Use a spellchecker to pick up any missed or introduced errors	<input type="radio"/>
Create the second version of the document (Track Changes or Clean), and ensure appropriate file name stems are used for all copies	<input type="radio"/>
If necessary, provide any general comments or feedback that you think would be helpful to your client	<input type="radio"/>