Keys to Effective Editing

Checklist—File Flow

	For each document type (i.e., annual report, Biological Opinion, Species Status Report, white paper, etc.)	
	<u>Action</u>	<u>Notes / Examples / Suggestions</u>
	Data Tracking	
	Establish procedures for citations.	
	Establish procedures for formatting and crediting photos and other visuals.	
	Determine whether a data tracking system will be employed or files will be tracked manually.	i.e., USFWS--Data Tracking System; USGS--Information Product Data System; manual / online--One Drive, SharePoint, MS Teams; manual--email sharing
	Ensure all parties have access to the chosen system.	
	Ensure the system is secure.	
	Ensure the system has version control guidelines.	For manual systems, create a protocol describing how to share and edit files online, providing naming conventions, etc.
	Roles and Responsibilities	
	Clearly outline the review process so each party understands what is expected of them.	i.e., distinguish between substantive edit, copyedit, and proofread; restrict polishing to final stages of document production; establish procedures for resolving conflicts between reviewers
	Set deadlines for all stages.	i.e., drafting (with milestones as necessary), review, revision, and publication

	Assign a person to manage the file flow process.	Responsibilities include • preserve intact the drafts received from authors and reviewers on various dates • maintain a list of abbreviations • keep a working copy of the document that integrates any changes received from the author • collect review plans from the reviewers • integrate the reviewers' edits and comments into the working copy • maintain a response record from the author
	Assign a person to manage 508 compliance.	