**Checklist for Authors: Formatting Manuscripts for**

**the American Fern Journal (updated October 2020)**

**Page charges of ca. $60-$110 USD per printed page will be charged to the authors of each accepted manuscript after publication.**

**If at least one author is a member of the American Fern Society, page charges will be considered optional except for mandatory charges for color figures (see Page 7 below).**

**Non-members must agree to pay page charges before a manuscript will be considered for review.**

**AFS membership information may be found online at** [**https://www.amerfernsoc.org/take-action/**](https://www.amerfernsoc.org/take-action/)**.**

**Click the checkbox (****) before each item to confirm that your manuscript conforms to the formatting described by that item.**

***Please submit the completed checklist along with your manuscript.***

**Necessary Components of Regular Manuscripts (see specific instructions for Taxonomic Treatments and Shorter Notes below):**

Manuscripts must be submitted in formats readable by Microsoft Word.

Assemble manuscript in this order: (1) Title page, (2) Abstract page, with key words, (3) Text, (4) Acknowledgments, (5) Literature Cited, (6) Tables, (7) Appendices, if any, (8) Figure legends. **Each figure must be submitted as a separate file, not embedded in the manuscript file.**

**Title page**: include title and author’s name (or authors’ names) and full address(es) including country, and email. For multi-authored manuscripts, indicate the corresponding author, and include his or her email address. Format titles in bold letters, with **all but connecting words capitalized** and the title centered on the page. Format author names in Large and small caps and centered. Associated with each author’s name, list and center addresses, both physical and e-mail. If a species name is included in the title or the abstract, the binomial must be provided but not the authority name.

**Informative, one-paragraph abstract** (fewer than 250 words) that begins with the word Abstract (in small caps) followed by period and em dash (*i.e.,* Abstract.⎯). Structure abstract content to summarize (1) rationale for work, (2) methods applied, (3) results obtained, and (4) conclusions reached. If species names are mentioned in the abstract, do not include the authority.

**Key words** (up to 5), followed by a period and an em dash (*i.e.*, Key Words.⎯). Do not include words present in the article title.

**Text,** including headers and keys if appropriate. The sections should be titled with Large and Small Capitals (*e.g*., Materials and Methods, Results, Discussion) and centered on page above the start of the text. Do **not** use the title Introduction.

**Acknowledgments** (if desired). It may be appropriate to thank editors and anonymous reviewers for their contributions to the manuscript.

**Literature Cited**—see below for formatting instructions.

Place **Tables** after Literature Cited, and numbered in the order they first appear in the text, Table 1, Table 2, etc. in small caps. Tables must be constructed using the table feature in a word processor, not using an external program such as Excel. Each table must be accompanied by a short descriptive caption.

Place **figure captions** after Tables. Group captions as a series of paragraphs. Label figures consecutively in the order they first appear in the text, Fig. 1, Fig. 2, etc. in small caps. In text, use ‘Figure’ only at beginning of sentence, otherwise use ‘Fig.’ or ‘Figs.’ Do not use small caps in the text of the manuscript.

For shorter notes and reviews, see checklist at end of this document.

**Manuscript Formatting:**

Double-space manuscripts throughout.

Set margins (upper, lower, left, right) at 1 inch (2.54 cm), and set Headers and Footers at 0.5 inches (1.27 cm) from top and bottom of page, respectively.

Use 12 point for all text; Cambria or Times New Roman preferred.

In the upper right corner of each page, in small caps, place the first author's surname with an abbreviated running title and page number (*e.g.*, Diamond *et al*.: Aquaporins in *Cheilanthes lanosa* 1).

Left-justify all text except section headers—**do not submit center-justified or right-justified text**.

Do not use footnotes.

Do not break words at end of lines.

Format second level headings in *Italics* followed by a period and an em dash with no spaces (*e.g.*, *Taxon sampling*.—A total of 92 accessions…). Third level headings are Large and Small Capitals followed by an em-dash (—), with normal indentation.

Use S.I. (metric) units for all measures (*e.g.*, distance, elevation, weight) unless quoted or cited from another source (*e.g.*, specimen citations). Imperial units may be presented but only if S.I. unit equivalents are also shown.

Use periods (not commas) to designate decimal points in text, tables, and figures.

To indicate a range, use an en dash (*e.g.*, 18–22 cm), *not* a hyphen (-).

Use hyphens (-) for words (*e.g.*, linear-lanceolate) or names (*e.g.*, Jian-Xing Wang). Do not hyphenate words at the end of lines in the manuscript.

For within-text citations, Latin words such as *e.g., sensu lato,* or *et al*. must be italicized.

Italicize all scientific (Latin) names at the generic and lower levels. Do not italicize plant family names or families, subfamilies, tribes, etc. This rule applies to all occurrences of such names—in the main text, the literature cited, figures and figure caption, appendices, etc.

If a sentence begins with a genus name, spell it out, do not abbreviate it.

Authority data (authors) must be given the first time a taxon (at the rank of species or below) is mentioned, or alternately in a table where all relevant names are listed (*e.g.*, table of voucher specimens). Use authors of plant names as posted on The International Plant Names Index (<http://www.ipni.org/>).

Italicize names of DNA loci (*e.g.*, *rbcL*, *ndhF*, *rpL16, trnL-trnF*). This rule applies to all occurrences of such names—in the main text, literature cited, figures and figure captions, tables, appendices, etc.

All references cited within the text, appendices, or captions must be included in the Literature Cited (and vice-versa).

For within-text citations, references with one, two, or three authors must list all authors (*e.g.,* Smith, 2020; Smith and Jones, 2020; or Smith, Jones, and Anderson, 2020). With **more than three authors**, list the first author, followed by “*et al*.”.

In the Literature Cited section, the reference must list the names of all authors (up to 12 authors, then insert *et al.*).

For multiple parenthetical citations, list references alphabetically by surname of primary author and separate each author citation by a semi-colon (Anderson *et al*., 2010; Billings, 1998, 2001; Carlisle and Diamond, 1962).

Use Index Herbariorum (Regnum Vegetabile 120:1-693. 1990; or http://sweetgum.nybg.org/ih/) for designations/acronyms of herbaria.

**Data [Skip parts of this section if not applicable to your manuscript.]**

Voucher specimens must be cited in a table or an appendix to document sources of morphological and molecular data. Vouchers are herbarium specimens, not living plant accession numbers from botanical gardens or DNA tube numbers, etc.

All molecular sequences used as data must be deposited in one of the international nucleotide sequence databases, preferably GenBank. Post-review final manuscript will not be accepted until sequence database accession numbers are included. Newly reported sequences **must** be documented by an herbarium specimen. Previously published sequences may cite the voucher or a literature citation with voucher information.

All data sets for phylogenetic analyses must be submitted to TreeBASE (<http://www.treeBASE.org>). A TreeBASE accession number (study number alone is acceptable) must be cited in the Materials and Methods section in the final version of the manuscript. For manuscript review, either submit the data file together with the manuscript (if data are not yet in TreeBASE) or provide the name and P.I.N. of the author who submitted the data to TreeBASE. Referees will need this information to gain access to the submitted data sets.

Citations for primers or sequences for new primers must be given.

**Statistics [Skip parts of this section if not applicable to your manuscript.]**

Key descriptive statistics of all samples must be either numerically (mean ± standard deviation) or graphically reported.

Reporting of all statistical tests of hypothesis must include the test statistic (*e.g.,* F, T, or R2), sample size(s), and associated p-value.

The methods by which parametric assumptions of parametric tests of hypothesis were tested and the results of those tests must be reported, *e.g.*, “Assumption of homoscedasticity was met per Levene’s test using a critical value of 0.05”).

When parametric assumptions are not met, appropriate non-parametric tests of hypothesis must be used.

Post-hoc tests must be reported for all significant multi-sample tests of hypothesis; *e.g.*, ANOVA or Kruskal-Wallis tests.

The program(s) used to conduct each statistical test must be reported.

Rationale for using a critical value other than the standard of 0.05 must be justified.

**Taxonomic Treatments [Skip this section if not applicable to your manuscript.]**

If a new taxonomic name or combination is included in the title of the manuscript, do NOT include the name of the taxonomic authority associated with the new name.

For nomenclatural matter (*i.e.*, synonymy, typification) use one paragraph per homotypic basionym (see *Regnum Vegetabile* 58:39-40. 1968). Heterotypic basionyms are in separate paragraphs.

New names and combinations must always be included in the Abstract.

New names and new combinations must be in bold and italicized. All other names of accepted taxa and synonyms must be italicized but not in bold.

If specimens are cited, use the following forms:

Type: MEXICO. Nuevo León: 24 km S of San Roberto Jct., 26 Sep 1970, *Turner 6214* (holotype: TEX!; isotype: UC!).

*Additional Specimens Examined*. U.S.A. Michigan: Lapeer Co., along Flint River, 1.5 mi NE Columbiaville, 5 Jul 1955, *Beal s.n.* (NCSC). Ohio: Wood Co., just W Scotch ridge, 7 Jun 1955, Elev. 350m, *Beal 1073* (US).

Note that specimens in the nomenclatural section directly examined by the authors must be followed by an exclamation point (*e.g*., US!).

Images of specimens seen by the author must be noted (*e.g*., Holotype K, image seen).

Each country begins a new paragraph.

Descriptions of new taxa (species and below) must include the following: 1) an illustration (line drawing) clearly showing the diagnostic characters, 2) a comparison with related (or sympatric, or similar) taxa in a dichotomous key or table, and 3) a discussion of the characteristics, ecology, geography, or reproductive biology, etc. that are the basis for its distinctiveness.

When designating a lectotype (or neotype) in your manuscript, use the following format after the specimen citation: (lectotype, here designated: NY). If citing a lectotype (or neotype) previously designated, use the following format: (lectotype, designated by Mori, 1991: NY) and add this citation to the Literature Cited.

**Formatting Literature Cited:**

List references in alphabetical order according to first author’s surname (last name). List the references by a given first author in chronological order, regardless of the number of additional authors. For references that would otherwise have the same in-text citation (*e.g*., the same authors and year of publication for those references with three or fewer authors, or the same first author and year of publication for those references with more than three authors), follow the date by the character “a”, “b”, etc.

Each reference cited in the text, appendices, or captions must be provided in the Literature Cited, and vice versa.

Names of all authors must be in small caps format, including the “and” in multiple-author citations (*e.g.,* Rodriques, A., and R. T. Smith).

Abbreviate authors first or middle names and place a space between each initial (*e.g.,* R. T. Smith).

For multiple author works, use ‘and’ in small cap letters and preceded by a comma before name of last author (*e.g*., R. T. Smith, Y.-L. Wang, and A. J. Ramirez).

For multi-authored works, the names of all authors (up to 12) must be provided.

Provide complete titles for all journals. **Do not abbreviate**.

Volume and page numbers must be separated by a colon only, not a colon followed by a space, with a period after the last page number (*e.g.,* 107:85–96.).

**Do not cite the issue of a volume** if the journal is paginated continuously across the issues. If the journal is **not** paginated continuously, number or issue of the volume may be inserted parenthetically after the volume (*e.g.,* 107(1):85–96.).

To separate page numbers use an en dash (*e.g.,* 45–78) *not* a hyphen (-).

For chapters within a book, cite these using the following format: Wagner, W. H., Jr. 1990. Ophioglossaceae. Pp. 193–197, *in* K. U. Kramer and P. S. Green (eds.), *The Families and Genera of Vascular Plants. Volume I. Pteridophytes and Gymnosperms*. Springer-Verlag, New York.

For other matters of form or style, consult recent issues of the American Fern Journal and The Chicago Manual of Style, 14th ed. (1993, Univ. of Chicago Press, Chicago).

**Figures and Illustrations:**

Authors must pay charges for the use of color figures. The mandatory charge for color in the pdf version only and grayscale in print is $60 per figure. The mandatory charge for color in both pdf and print is approximately $90 per figure.

Illustrations must be proportioned to fit the **page width** (5 inches or 12.5 cm) with caption ultimately to be included on the same page.

High-resolution files are *required* for final publication.

All figure files must be at least 200 dpi resolution.

Minimum thickness for lines is 0.25 points.

Submit image files in TIFF (.tif), JPEG (.jpg), PDF (.pdf), Photoshop (.psd) or EPS (.eps) format.

In composite blocks, abut edges of adjacent photographs.

Avoid combining continuous-tone and line-copy in single illustrations.

Include a scale and indication of latitude and longitude in each map.

Please note that nearly all images that are downloaded from the Internet or that are in JPEG or GIF format will be 72 dpi and **not acceptable** for the printing process.

**For additional information, please refer to the Allen Press online “Allen veriFig User Guide” and “Art Specifications Guide” at: http://** **http://verifig.allenpress.com/login**

**Formatting Shorter Notes:**

Place the heading **Shorter Note** at the top of the first page in bold, small caps.

Shorter Notes do **not** have Abstracts or Key Words.

Begin manuscript with descriptive title in bold, followed by a period and an em dash. (*e.g.,* **First record of *Pellaea ovata* (Pteridaceae) from Brazil.**⎯).

Immediately (no spaces) after title, place text, double spaced.

Citations must be provided parenthetically (*e.g.,* Reed, American Fern Journal 42:53–56. 1952). Spell out journal titles (**do not abbreviate**) and do not include title of journal articles.

Once a source has been cited, a second citation of the same source need only refer to the author(s) and year of publication.

Volume and page numbers must be separated by a colon only, not a colon followed by a space, with a period after the last page number (*e.g.,* 107:85–96.).

Do not cite the issue of a volume if the journal is paginated continuously across the issues. If citing number or issue of volume, do so parenthetically after the volume (*e.g.,* 107(1):85–96.)

To separate page numbers, use an en dash (*e.g.,* 45–78) *not* a hyphen (-).

Names of authors must follow acknowledgements in final paragraph of manuscript. Last sentence of acknowledgements must end with a period followed by an em dash (*e.g.*, …for improvements to the manuscript.⎯). Author names must be formatted in small caps (*e.g.*, C. J. Rothfels, E. M. Sigel, and M. D. Windham) followed by address.

Figures and Illustrations must be formatted per instructions for full-length manuscripts; see above.