

Author Toolkit

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Welcome

Thank you for agreeing to author content for the APTA Learning Center. If you have questions about any aspects of developing your presentation or online course, please contact:

Sharon Pugh, MEd
Professional Development
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Direct Dial: 703/706-3130

APTA Learning Center Overview

The Technology

The APTA Learning Center provides a centralized source for educational content. It is a learning management system (LMS), Web-based software that provides an online platform for learners to complete courses, earn CEUs, and print CEU certificates all from one convenient place.

For APTA, the LMS provides a way to administer courses, assessments, and evaluations. It also allows us to run reports so that we can track user's course enrollment and completion rates.

The Authoring Tools - PowerPoint

PowerPoint is an effective tool to create presentations; however, for your presentation to be captured in video format and retooled to ultimately be a self-directed, online course- there are various design implications we ask you to follow to ensure learner satisfaction.

This means a variety of things for the layout and format of your screens, including using less text, more visuals and more white space on the screen. These concepts are addressed in more detail in the *Designing Instructional Aides for Online Learning* section of this document.

Welcome CONTINUED...

How to Use this Manual

The Author Toolkit provides a generalized overview of the many aspects of developing an online course for the APTA Learning Center. Main areas addressed include:

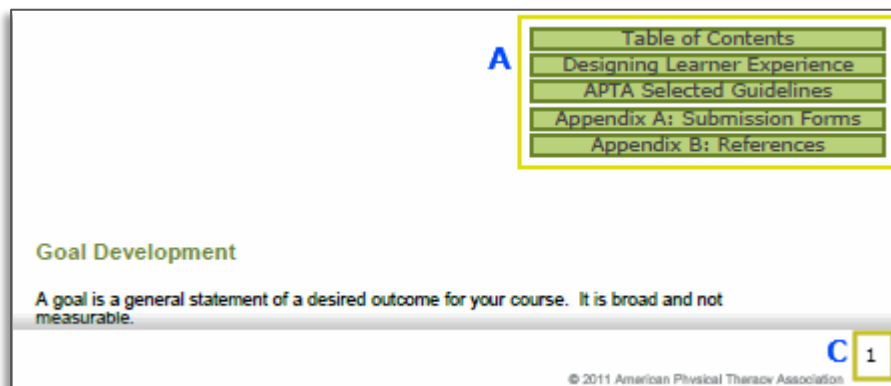
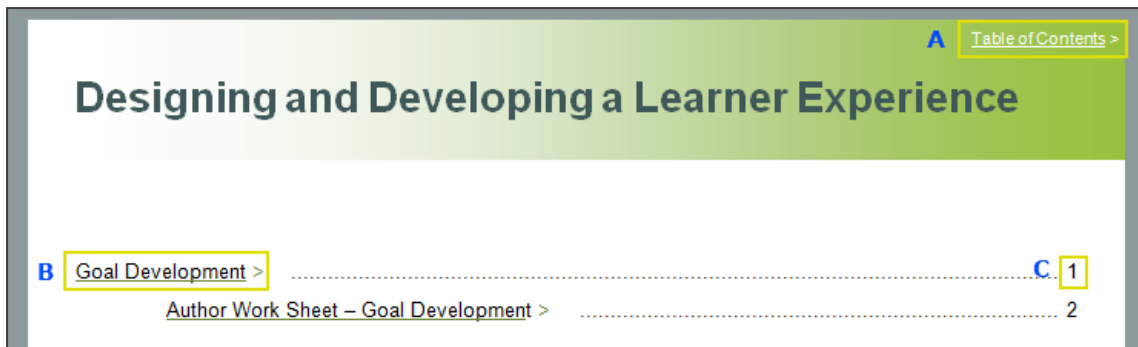
- Designing and Developing a Learner Experience
- APTA Selected Styles and Guidelines
- Appendices -
 - A: Submission Forms
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Generally within each section you will be provided with a basic overview about a topic related to creating an effective presentation that will be repurposed for use in an online course. In addition, you will find author worksheets that will help you to formulate or modify the content for your presentation.

Navigation

This manual was designed to be a quick reference divided into small sections for easy navigation. The table of contents (TOC) lists all of the main sections and subsections. Each section begins with a page that includes a sub-TOC for information included only in that category.

All page headings include a link back to the TOC (A) and/or previous main section. The index is hyperlinked (B), and also includes page numbers (C) for easy referencing if you choose to print this manual.



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Goal Development

A goal is a general statement of a desired outcome for your course. It is broad and not measurable.

- 1) For the designated audience, describe the goal the online educational module intends to achieve.

Example:

This course will help physical therapists learn how to recognize and report signs of child abuse.

- 2) Are there defined prerequisite knowledge, skills or abilities (KSAs)?

Example: None

- 3) List behaviors associated with the goal.

Example:

- a) Identify signs of child maltreatment.
- b) Recognize injuries associated with child abuse.
- c) Ascertain how patterns of behavior may indicate neglect.
- d) Learn the legal and ethical obligation to report suspected child abuse.
- e) Describe the basic requirements for reporting.

- 4) Will each item from Step 3, above, lead to achievement of the overall goal?

Author Worksheet: Goal Development

Presentation Title: _____

Goal		Prerequisite Knowledge, Skills and Abilities (KSAs)	Behaviors Associated with Goals	
a)			a1)	
			a2)	
			a3)	
			a4)	
b)			b1)	
			b2)	
			b3)	
			b4)	
c)			c1)	
			c2)	
			c3)	
			c4)	
d)			d1)	
			d2)	
			d3)	
			d4)	

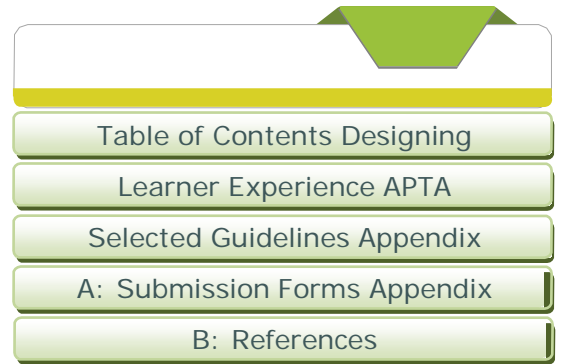


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Writing Learning Objectives

In order to properly evaluate learning outcomes, learning objectives should be *performance based*. Performance-based objectives clearly state what the learner *should be able to do* upon completion of the educational activity.

Elements of a Learning Objective

- 1) Action verb which describes what the learner will be able to do after the course
- 2) Description of the expected behavior

Example:

After completing this course, you will be able to:

- Identify adverse effects of cardiovascular drug XX
- Recognize how this drug impacts physical therapy interventions

Observable and Measurable Action Verbs

When you start developing your objectives, you will have the tendency to use verbs such as “understand,” “learn,” or “comprehend.” These are **vague verbs** and you should **never** use them in your objectives. Instead, use **action verbs** that are measurable and specific. They will help an objective be stated clearly enough that two different instructors would be able to assess students using the same criteria and get the same results. Refer to **Table 1** below for appropriate action verbs to use when writing your objectives.

Building Learning Objectives

Use the chart on the page 3 to help you write your learning objectives. Use the statements developed under Step 3 of Goal Development. Use the action verbs from Table 1 to assist you.

Describe exactly what learners should be doing to demonstrate goal achievement. Ask yourself: “if someone understood/knew/learned about concept xyz how would they demonstrate that understanding/knowledge/learning?”

You can also ask yourself “how would I construct an assessment item for someone who understood this concept?” This will lead you to choosing an appropriate verb for your learning objective.

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Table 1: Action Verbs

Type	Action Verbs for Online Learning			
KNOWLEDGE	adjust	describe	list	predict
These verbs refer to learning information (facts, definitions, concepts, etc.) and developing thinking and learning abilities.	assess	explain	name	report
	calculate	identify	mark	review
	define	label	plan	state
COMPREHENSION	catalogue	duplicate	index	label
Interprets, translates, summarize or paraphrases information.	categorize	estimate	interpret	match
	describe	gather	itemize	order
	derive	group	join	relate
APPLICATION	apply	compute	interpret	solve
Uses information in a situation different from original learning context.	calculate	differentiate	link	use
	change	examine	practice	
	characterize	illustrate	schedule	
ANALYSIS	analyze	contrast	distinguish	relate
Separates whole into parts until relationships among elements is clear.	appraise	criticize	examine	test
	calculate	debate	experiment	translate
	classify	diagram	interpret	
SYNTHESIS	affirm	compose	generate	plot
Combines elements to form new entity from original ones.	arrange	create	modify	prescribe
	assemble	design	organize	propose
	complete	formulate	plan	rearrange
EVALUATION	appraise	conclude	estimate	justify
Involves acts of decision making, judging or selecting based on criteria and rational.	assess	contrast	evaluate	measure
	choose	criticize	interpret	rank
	compare	discriminate	judge	relate
ACTION	construct	identify	participate	select
These verbs refer to performing an activity and carrying out actions. They clearly describe the action you want your learners to perform.	demonstrate	illustrate	perform	sketch
	develop	locate	practice	solve
	employ	measure	repeat	
ATTITUDE	adopt	cooperate	join offer	praise
This objective refers to the learning of new attitudes or beliefs.	agree	defend	participate	select
	avoid	help		support

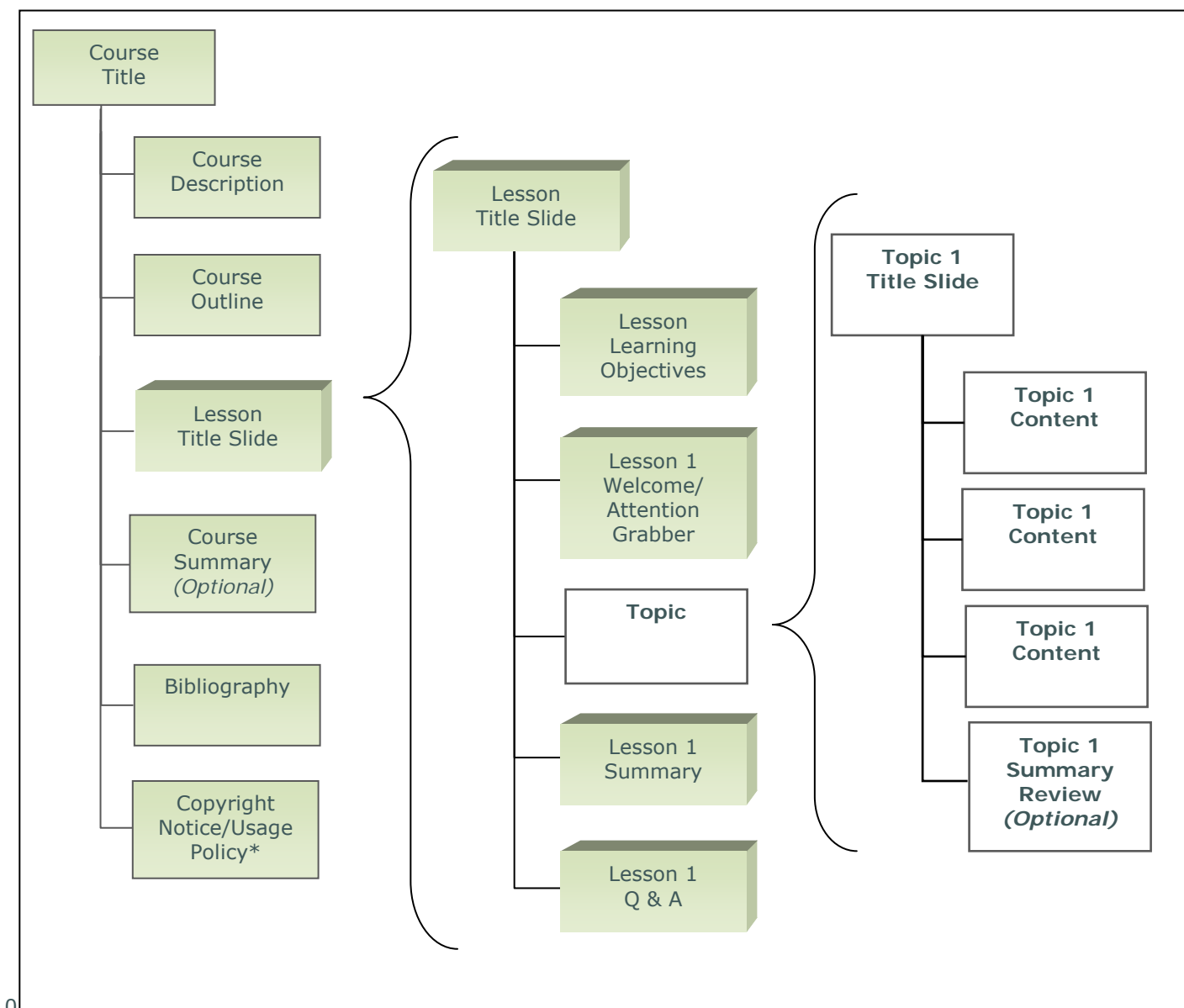
Author Worksheet: Learning Objective Development

Presentation Title: _____

	Behavior Associated with Goal	Action/Behavior (use an action verb and be specific)
a)		
b)		
c)		
d)		

Course Content Organization

The following organizational framework is recommended for your live presentation for online learning. This framework will ensure that you “chunk” your content into small pieces that will be easily digestible for the learner.



*Include copyright permissions at end of presentation for any specific materials you need to gain permissions for. On all slides referencing copyrighted material, include a note stating you have permission to reuse the material.

Creating a Content Map

As you begin to organize your content for online presentation, use the information below to assist you in verifying that you have covered each objective. This content map may be used to organize material from a pre-existing course, or a new course you are in the process of creating.

Step 1: Outline Content According to Learning Objectives

Example 1: Mapping Conception Content to a Learning Objective

Objective 1: Describe four types of child maltreatment.

- Child Maltreatment
 - a) Definition
 - b) Four types, define each
 - i) Neglect,
 - ii) physical abuse,
 - iii) sexual abuse,
 - iv) emotional abuse
 - c) Four types, when do they occur?

Example 2: Mapping Existing Content to a Learning Objective

Learning Objective	Content
Describe four types of child maltreatment.	Use this column to note slide, page and/or paragraph numbers of existing content that is related to this learning objective. If you have materials in electronic format, you may choose to cut and paste the exact text here. Slides 3-7 <i>OR</i> Page 2, paragraphs 2-5 <i>OR</i> Cut and Paste existing content here.

Step 2: “Chunking” Content

Use the table below, or create one of your own, to help you “chunk” your content into small, easily digestible pieces of information. One row equals one PowerPoint Slide.

Learning Objective	Content Chunk
Describe four types of child maltreatment	<p>Definition:</p> <p>CAPTA defines child abuse and neglect at a minimum as any recent act or failure to act—by a parent or caretaker who is responsible for the child’s welfare—that results in imminent risk of serious physical or emotional harm, death, sexual abuse, or exploitation of a child under 18 years of age.⁹ Specific definitions of child maltreatment are determined at the state level, and there is considerable variation in these definitions.</p>
Describe four types of child maltreatment	<p>Four types, define each</p> <p>There are four main types of child maltreatment: neglect, physical abuse, sexual abuse, and emotional abuse. All state definitions of maltreatment include sexual abuse, which is most likely to be perpetrated by people whom the child knows and trusts. Neglect involves failure to provide for a child’s basic physical, emotional, or educational needs and may or may not be a willful act on the part of the parent or caretaker. Emotional abuse involves acts—such as unreasonable parental demands—that could result in behavioral, cognitive, emotional, or mental disorders. Eventually, emotional abuse may severely damage the child’s self-worth.</p>
Describe four types of child maltreatment	<p>Four types, when do they occur?</p> <p>The four types of abuse may occur separately or in combination; however, Ney et al found that one form of abuse occurred in isolation in only 5% of cases. Neglect is the most commonly reported form of maltreatment (54% of all cases in 1997). More than half of the 984,000 children who were confirmed as victims of maltreatment in 1997 were 7 years old or younger, and one quarter were under 4 years of age. The majority of children who were neglected were under the age of 8 years; the majority of children who were physically, emotionally, or sexually abused were 8 years of age or older. The majority of the 1,196 children who were reported to have died as a result of abuse or neglect in 1997 were 3 years old or younger.</p>

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Author Worksheet: Content Mapping

Step 1: Outline Content According to Learning Objectives

1a. New Content

Practical Exercise: Use the following chart to help you define the course learning objectives and determine key concepts to be covered by each objective.

Reference Example 1: Mapping Conception Content to a Learning Objective

Presentation Title: _____

Learning Objective		Key Concepts
a)		
b)		
c)		
d)		
e)		

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1b. Existing Content

Practical Exercise: Use the following chart to help you map previously existing content from the course to the correct learning objectives.
Reference [Example 2: Mapping Existing Content to a Learning Objective](#).

Presentation Title: _____

Learning Objective		Content
a)		
b)		
c)		
d)		
e)		

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Step 2: “Chunking” Content

Practical Exercise: Use the table below, or create one of your own, to help you “chunk” your content into small, easily digestible pieces of information. One row equals one PowerPoint Slide. [Reference Step 2: Chunking Content.](#)

Presentation Title: _____

Learning Objective		Content Chunk
a)		
b)		
c)		

Assessment Question Writing Guideline

When writing assessment questions, consider the following:

1. **Is the question/statement written as clearly as possible?**
 - a. Include what is necessary to answer the question. Use the same “language” as you used in the lecture/hand-outs/article. Don’t use phrases that can mislead the learner.
2. **Are all the answer choices similar in length and structure?**
 1. The best aid for a broken leg is:
 - a. crutches
 - b. cane
 - c. manual wheelchair with custom seating system
 - d. walker

Note: Choice “3” has more words and is longer than the other choices. A learner may choose it just because it has more detail than the rest.

Suggested modifications to answer choices:

- a. crutches with auxiliary pads
 - b. single point cane
 - c. manual wheelchair with custom seating system
 - d. posterior walker with swivel front wheels
3. **Are the answer choices listed in alphabetical or numerical order?**
 1. Alphabetical order:
 - a. Ankle dorsiflexion
 - b. Ankle plantarflexion
 - c. Hip flexion
 - d. Knee extension
 1. Numerical order (lowest to highest value)
 - a. 60 degrees
 - b. 90 degrees
 - c. 120 degrees
 - d. 150 degrees
 4. **Are all abbreviations defined when being used for the first time?**
 - a. Diagnoses (Duchenne Muscular Dystrophy, DMD)
 - b. Standardized tests (Alberta Infant Motor Scale, AIMS)
 - c. Lab tests (Pulmonary Function Tests, PFT)
 - d. Lab values (hemoglobin, Hg)
 - e. Public laws (Americans with Disabilities Act, ADA)
 5. **Are the True/False questions written in a “pattern” that is easy to follow? i.e.: T,T,F; T,T,F; etc. (Spread them out and don’t allow a pattern to form.)**
 6. **Has the assessment been edited for spelling and grammar?**

Adding Narration to Your PowerPoint

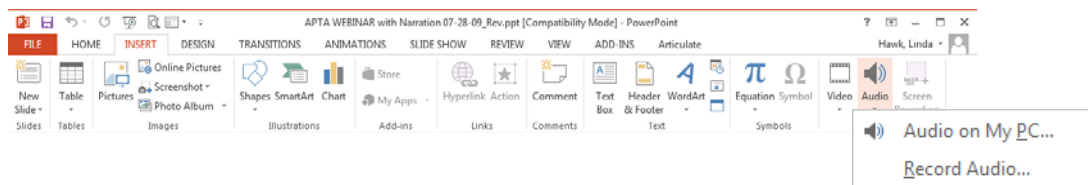
If you wish to add narration to your power point, follow these easy steps:

1. Set-up

- Find a quiet space
- Headset with microphone
- Test sound level and clarity

2. Open your presentation

- Click on “insert” tab
- Click on “audio” drop down
- Click Record audio
 - Enter slide number as “Name” in pop-up box
 - Click red dot and begin speaking
 - Click blue box when finished speaking
 - Click green triangle to play back
 - NOTE: this can be done with the first slide as your audio test



3. When you have finished narrating the entire deck:

- Select File > Save as > enter file name > select “save as type”: MPEG-4 Video (*.mp4)
- This will create a new file

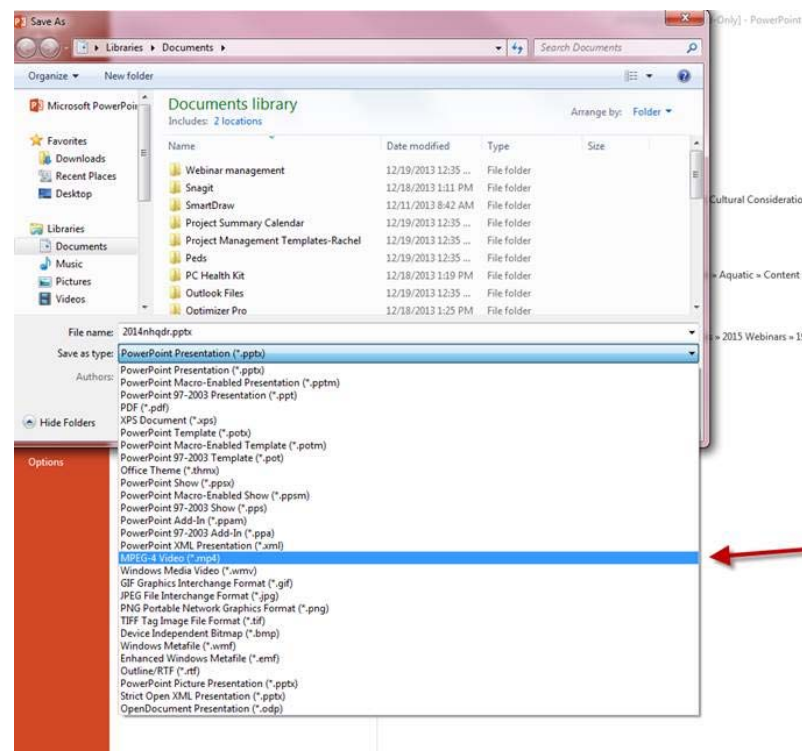


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Designing Instructional Aids for Online Learning

Overall

- Begin with a welcome screen that covers the date, time, title, and speaker(s)
- Include a course outline and objectives to address the major points of the presentation
- Include navigational elements (slide number, presentation or section title) in the footer to help cue learners about where you are in the presentation.
- Organize the presentation according to your outline and objectives
- Treat the PowerPoint as a visual enhancement for your presentation
- Copyright permission is required for all content that is not original to the presenter. Acknowledgement must be written on each slide (picture, graph, chart, drawing, cartoon).
- Refer to [Copyright Basics](#) in this toolkit for more information.
- Step back 6 feet from your monitor to view slides for readability or try the Squint Rule: (Squint eyes and look at screen, whatever you can see will be what your learners will take away.)

Design Principles

1. **Use spatial relationships to present information clearly.** The design concept of proximity holds that items next to each other appear related to each other. Items distant from each other appear unrelated.
2. **Use alignment to create a visual focus.** Place text and graphics on the page so that they line up to create a unified whole. Alignment creates a visual focus that ties the different elements together.
3. **Use repetition to establish patterns.** Graphics and headers should appear in the same place on each slide, and they should have the same design features. Footers should also be consistent on every slide.
4. **Use contrast.** Make your text stand out against the background. Use graphics or colors to signal important information.
5. **Use moderation.** Using too many colors will confuse your audience. Filling every inch of the screen with information will overwhelm your audience. Including meaningless graphics or sounds will annoy your audience.

[“Preparing Presentation Slides: A Tutorial by John Battalio”](#)

Basic Visual Design Tips for PowerPoint

Colors and Fonts

- Use a simple background with muted color patterns or combinations.
- Use dark text with a light background.
- Use one standard font throughout.
- Use color and italics ONLY for emphasis within text.
- Avoid using greens and reds as instructional cues (for colorblind learners).
- Have font sizes 20 points or larger.
- Select san serif fonts like these:
 - Arial; Calibri; Articulate
- Don't use decorative fonts like these:
 - **ALGERIAN**; Blackadder ITC; *Magneto*; Tempus Sans ITC; Times New Roman
- Allow for plenty of white space on the slide.

Graphics and Data

- Use bullets of key words or short summaries. Highlight one bulleted item at a time as you're discussing it with the audience. Dim other bulleted items to avoid learner distraction.
- Use pictures, graphics, and videos only when they lend to the topic; not just to fill space.
- Display data using graphs and charts. **Caution:** they must be easy to read or they won't be effective. Consider using a hand-out for hard to read graphs and charts.
- Include a list of references using [Zotero](#) or other source management systems.
- Don't embellish slides with your organization's logo - use once or twice at the beginning and/or end of the presentation. To brand your PowerPoint, try incorporating the organization's logo colors into the theme.
- Only use all CAPS when writing slide headings.
- Use short, informative headings to describe the content on a slide.
- Remember 7x7 for body text – No more than 7 words per line, 7 lines per slide.
- Keep text clear and concise when paraphrasing an idea. Use an active voice and apply the same syntax to all information displayed on the slide.
- A list should contain two or more bulleted items.

Designing Instructional Aids for Online Learning



American Physical Therapy Association

The Point of this PowerPoint?

To show you a few examples of how to format presentation slides.





American Physical Therapy Association's Combined Sections Meeting

CSM 2011

February 9-12 x New Orleans

Design Principles

Welcome screen
should include:

- Date, title, speaker
- Logo if applicable

Peer Review

Anita Bemis-Dougherty, PT, DPT, MAS

Module 1: Communication

Learning Objectives

After completing this lesson you should be able to:

1. Outline the process of communication with peers/providers to focus on education and performance improvement.
2. Describe the process of communication with payers in regards to information sharing and appeals, including educational components



Design Principles

- 7x7 Rule
- Font : 24+, San Serif
- Concise Headings
- Navigation in Footer
- Include Course Objectives

Communication with Peers/Providers

Focus on education and performance improvement:



1) Use established guidelines and pertinent resources.



2) Develop action plans.

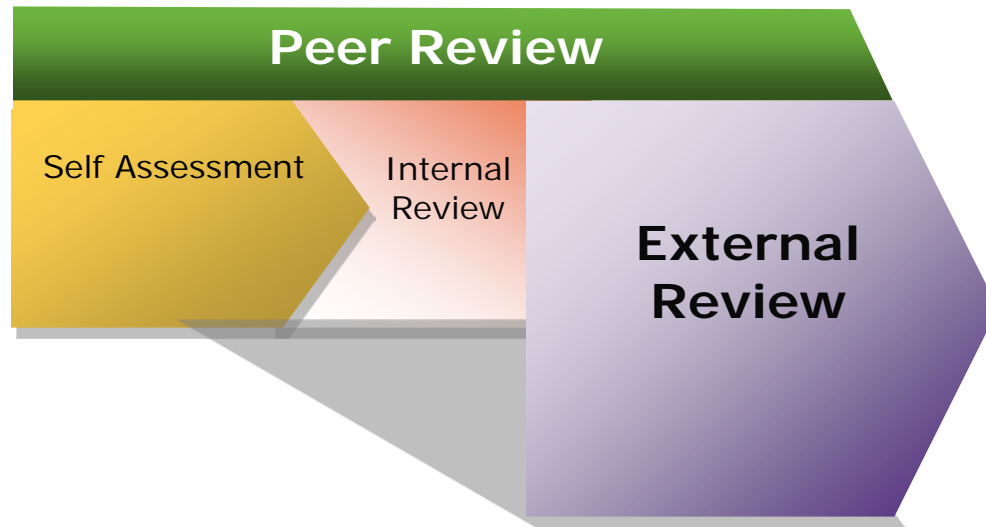


3) Vary means of communication depending on the type of review.

Design Principles

- Spatial Relationship
- Alignment
- Repetition
- Contrast
- Moderation
- Similar Look and Feel of Clipart

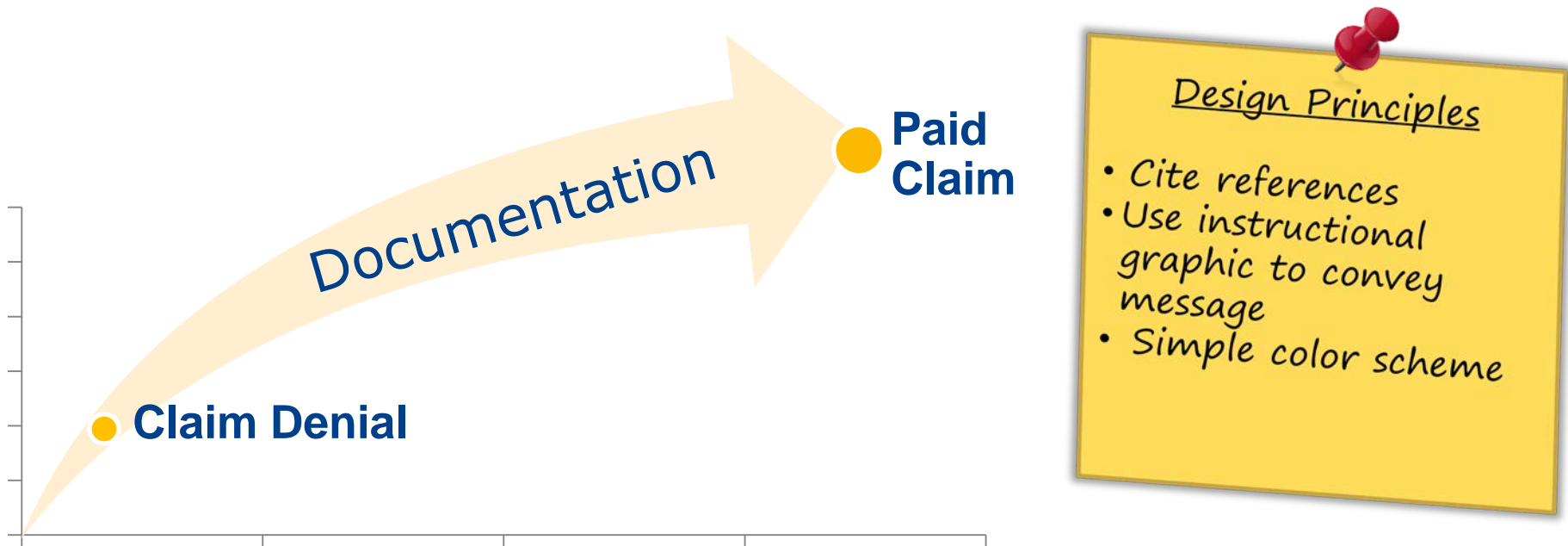
Reviewer Standards for Review Process



Physical Therapists should possess an active license without current⁵ sanctions.

Why Do an Internal Record Review

Internal Review = Justify Claims*





Design Principles

Welcome screen should include:

- Date, title, speaker

Instructional Design: A Systematic Approach

Linda S. Hawk, M.Ed.

February 2016

Why Do You Need Instructional Design?

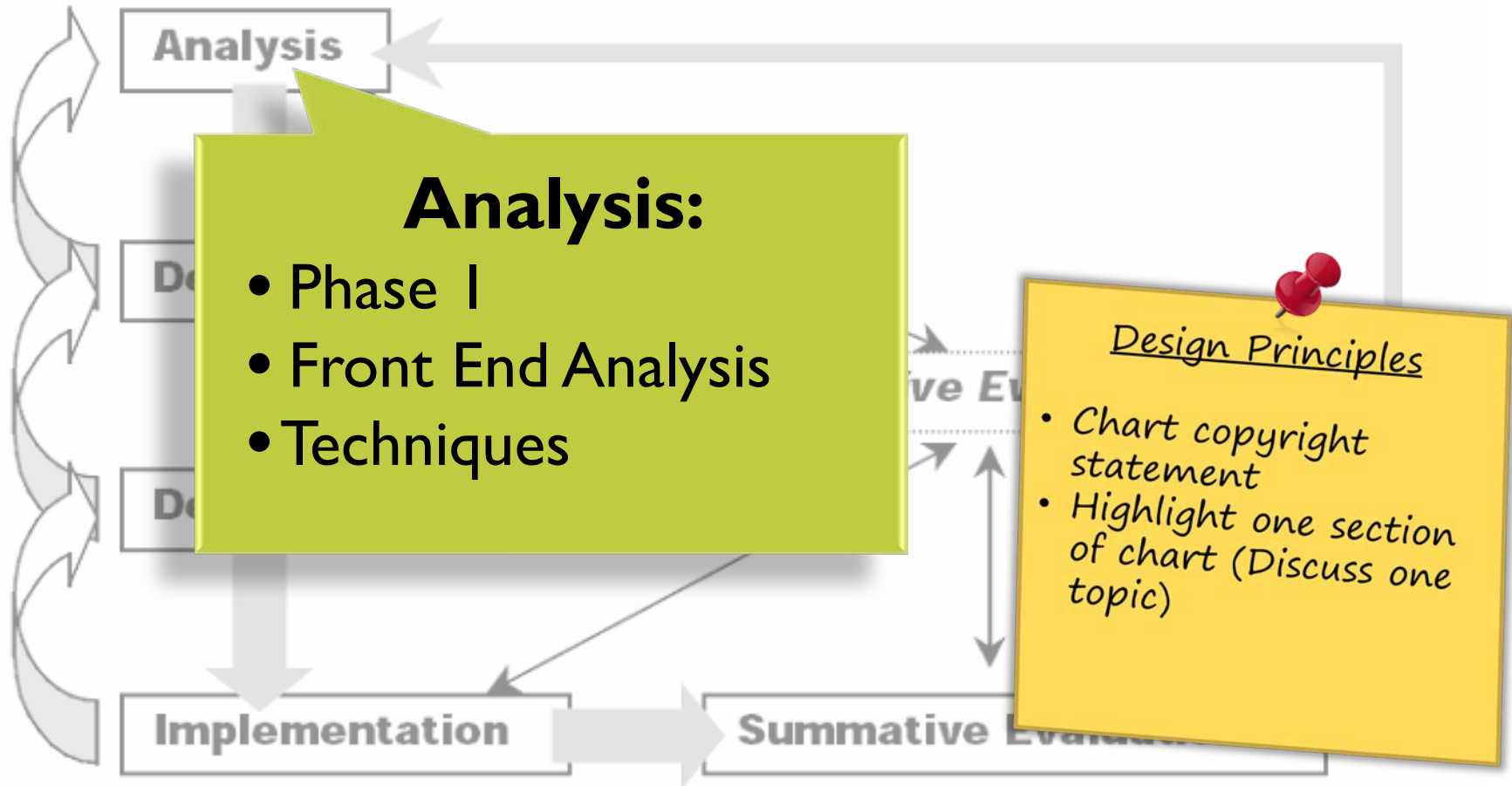


Design Principles

- Image copyright statement
- Use image to convey message



A Classic Method: ADDIE





Need to Know More?

[Designing Instructional Aids for Online Learning Checklist](#) >

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Inclusive Language

Patient and People-First Language

When writing about people in general, use “people-first” language. Only use the term “patient” when referring to the person as their care-provider in the context of a clinical setting.

- Put the patient before the disability (so child with a disability not disabled child; patient with diabetes not diabetic patient).
- Avoid using the label “the disabled” as a blanket term.
- Patients have a disease, they don’t suffer from it.
- Use the term disability, not handicap, differently abled, special, or challenged.
- Use stroke survivor (not stroke victim).
- Use patient who is deaf (or hard of hearing or deaf-blind), rather than patients who are hearing impaired or deaf patients. Never use the term deaf-mute.
- Patients report symptoms, they don’t complain of them.
- Pediatric patient is okay, but use patient who is older rather than geriatric patient and patient with an orthopedic problem not orthopedic patient.
- Use congenital disability to describe a disability that has existed since birth (not birth defect).
- Individual with an amputation or individual with limb difference are preferable to amputee.
- Use person of small (or short) stature (not person with dwarfism, although it is an accepted medical condition).
- Use person who is alcohol/substance dependent or person with substance use disorder (not person who is an alcoholic).

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Patient-Management Language

- Patients *adhere* to treatment plans, they don't *comply* with them.
- *Clients* are individuals who are not necessarily sick or injured but who can benefit from physical therapist services, as well as businesses, school systems, and others to whom PTs offer services. *Patients* are individuals who are the recipients of physical therapy and direct intervention.
- APTA has adopted the ICF model based on the following definitions:
 - *Body Functions* are physiological functions of body systems (including psychological functions).
 - *Body Structures* are anatomical parts of the body such as organs, limbs and their components.
 - *Impairments* are problems in body function or structure such as a significant deviation or loss.
 - *Activity* is the execution of a task or action by an individual.
 - *Participation* is involvement in a life situation.
 - *Activity Limitations* are difficulties an individual may have in executing activities.
 - *Participation Restrictions* are problems an individual may experience in involvement in life situations.
 - *Environmental Factors* make up the physical, social and attitudinal environment in which people live and conduct their lives.
- As per the Board of Directors, the term *fitness* has been replaced by the preferred term of *physical fitness*:

Physical fitness: A dynamic physical state—comprising cardiovascular/pulmonary endurance; muscle strength, power, endurance, and flexibility; relaxation; and body composition—that allows optimal and efficient performance of daily and leisure activities.

When writing about the role of PTs in the area of physical fitness, clearly identify and distinguish between the services provided, target populations, and outcomes. There are specific criteria a PT must meet to fit in this category.

Example:

A PT can be profiled if 1) offering a program of physical fitness for 2) individuals without (but at risk for) impairments with 3) a desired outcome of physical

fitness. OR

A PT can be profiled if 1) offering physical therapist services as part of a multidimensional wellness program for 2) individuals with acute impairments with 3) a desired outcome of health.

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The elements of patient and client management are (refer to [Introduction to the Guide to Physical Therapist Practice](#). *Guide to Physical Therapist Practice 3.0*. Alexandria, VA: American Physical Therapy Association; 2014. Available at: <https://guide.apta.org/>):

- *examination*
- *evaluation*
- *diagnosis*
- *prognosis*
- *intervention*
- *outcomes*

- The PT's *examination* includes:
 - History (including symptom investigation and review of systems)
 - Systems Review (a limited examination of the musculoskeletal, neuromuscular, cardiovascular/pulmonary, and integumentary systems)
 - Tests and measures

- PTs *evaluate* patients. Evaluation is the process by which physical therapists:
 - Interpret the individual's response to tests and measures;
 - Integrate the test and measure data with other information collected during the history;
 - Determine a diagnosis or diagnoses amenable to physical therapist management;
 - Determine a prognosis, including goals for physical therapist management; and
 - Develop a plan of care

- Making a *diagnosis* requires the clinician to collect and sort data into categories according to a classification scheme relevant to the clinician who is making the diagnosis. These classification schemes should meet the following criteria:
 - Classification schemes must be consistent with the boundaries placed on the profession by law (which may regulate the application of certain types of diagnostic categories) and by society (which grants approval for managing specific types of problems and conditions).
 - The tests and measures necessary for confirming the diagnosis must be within the legal purview of the health care professional.
 - The label used to categorize a condition should describe the problem in a way that directs treatment options that are within the legal purview of the health care professional who is making

- The *prognosis* is the determination of the predicted optimal level of improvement in function and the amount of time needed to reach that level and also may include a prediction of levels of improvement that may be reached at various intervals during the course of therapy.

- Physical therapist *interventions* are organized into 9 categories:
 - Patient or client instruction (used with every patient and client)
 - Airway clearance techniques

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- Assistive technology
- Biophysical agents
- Functional training in self-care and domestic, work, community, social, and civic life
- Integumentary repair and protection techniques
- Manual therapy techniques
- Motor function training
- Therapeutic exercise
- *Outcomes* are the actual results of implementing the plan of care that indicate the impact on functioning (body functions and structures, activities, and participation). As the individual reaches the end of the episode of care, the physical therapist measures the global outcomes of the services provided by characterizing or quantifying the impact of the physical therapist intervention on the following domains:
 - Pathology/pathophysiology (disease, disorder, or condition)
 - Impairments in body function and structure
 - Activity limitations
 - Participation restrictions
 - Risk reduction and prevention
 - Health, wellness, and fitness
 - Societal resources
 - Patient or client satisfaction
- Orthopedic is spelled with an a (“Orthopaedic”) only when referring to the Orthopaedic Section.
- *Health care* is always two words. Use *health care reform*, not *healthcare reform*.
- *Orthosis* is singular. The plural is *orthoses*. The word *orthotic* is only used as a modifier, eg, *orthotic device*. *Orthotics* is only used to refer to the field of knowledge related to orthoses and their use.
- *Prosthesis* is singular. *Prostheses* is the plural form. *Prosthetic* is used as a modifier. *Prosthetics* is only used to refer to the field of knowledge related to prostheses and their use.
- *Service learning* is a noun. *Service-learning* with a hyphen is used as a modifier, eg “We were involved in a *service-learning program*.”

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Cultural Competency

What is meant by *Cultural Competence*?

"A set of congruent behaviors, attitudes, and policies that come together in a system, agency, or among professionals and enable that system, agency, or those professionals to work effectively in cross-cultural situations."

There are 8 Primary Diversity Dimensions covered under cultural competence as defined by APTA. These include age, race, gender, sexual orientation, ethnicity/nationality, mental/physical ability, socioeconomic status, and religion.

Age

<u>Descriptors</u>	<u>Approximate Age Range</u>
Neonates or newborns	Birth – 1 month
Infants	1 month – 1 year
Children	1-12 years
Adolescents	13-17 years
Young Adults	18-24 years
Adults	25-39 years
Middle Aged	40-59 years
Young Old	60-74 years
Old Old	75-100+ years
Centenarians	100 years and older
Under 65	64 years and younger
Adults of All Ages	18 years and older

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Preferred terms for referring to a population of elderly persons include: *older persons, older people, elderly patients, geriatric patients, older adults, older patients, aging adults, persons 65 years and older, or the older population.*

Race/Ethnicity

Race and ethnicity should be referred to as follows, but note that if it is not relevant to the discussion, it does not need to be indicated.

- Official APTA race/ethnicity categories of members are Caucasian (not of Hispanic origin) or white, African American/black, Hispanic/Latino, American Indian/Alaska Native, Asian, and Pacific Islander/Hawaiian Native.
- “African American” is never hyphenated, even as a modifier.
- In most instances, “Hispanic/Latino” should be used together to encompass both groups; however, in instances where you refer to a population or group of people that specifically identify themselves as Latino, rather than Hispanic, it is acceptable to only use “Latino.”
- Do not capitalize *white* or *black* as a designator of race.

Gender

Just as you would not define someone by his or her disability, you must also be careful to avoid sex/gender bias in written materials.

- Sex refers to genetic male or female (“What sex is the baby?”), whereas *gender* refers to social roles and behaviors (“What gender role are you fulfilling now?”).
- The words *man* and *woman* are used as nouns (“That man stole my wallet!”), whereas the words *male* and *female* are used as adjectives (“That male doctor stole my wallet!”).
- Avoid using *him/her*; use *him or her* instead, use plurals. “Physical therapists should trust their judgment” is better than “A physical therapist should trust his or her judgment.”
- You could also address this problem by rewording the sentence to use a neutral noun equivalent or a change of voice.

Example:

Avoid: “One must allocate her time effectively.”

Suggested: “People must allocate their time effectively” or “Time must be allocated effectively.”

Sexual orientation

You should reference sexual orientation only when it is scientifically relevant.

- Avoid the term *sexual preference*, as it implies a voluntary choice not supported by scientific literature.
- When referring to homosexual men, use the noun *gay men*. Avoid using *gays* as a noun.
- When referring to homosexual women, use the noun *lesbians*.
- *Heterosexual* and *homosexual* may be used as adjectives.
- Refer to a member of a homosexual or heterosexual couple as *spouse*, *companion*, *partner* or *life partner*.
- *Same-sex couple* and *same-sex marriage* are appropriate terminology.

APTA Basic Copyright Information

Tip Sheet on How to Properly Secure Copyright Permission from a Publisher

- 1) Identify the copyright owner.
- 2) Identify the publisher's method of requesting permission (electronic form, email).
- 3) Identify material being used (publication, article title, authors, year, volume, page numbers, figure/table numbers, if applicable).
 - a) Many publishers outsource permissions to companies like RightsLink, Science Direct, or Copyright Clearance Center—electronic or they manage permissions in-house.
 - b) Requestor will find the article online and click on the permissions request which will go to the permissions office or vendor.
- 4) Identify specific use (print, online, seminar, presentation, classroom education, personal - is a fee going to be charged for use).
- 5) Identify intended audience and demographics. Include the approximate number of people that will be viewing the material and, in the case of Web use, how long the material will be posted online. Note that some electronic forms don't require this, but be prepared in case they do. Always include it in an email or letter request.
- 6) Don't wait until the 11th hour to request permission—it could take many weeks or more to hear back.
- 7) Be prepared to pay fees (most publishers require credit card payment but some will invoice).
- 8) Read the copyright disclaimer and comply with it.
- 9) Make sure proper attribution is given to the copyright owner.
- 10) Keep and file copyright letter or statement from publisher as proof in case there is a question later on.

Copyright Do's and Don'ts:

- 1) **Do** familiarize yourself with US Copyright Law (17 United States Code), <https://www.copyright.gov/title17>.
 - a) Note Section 107: Fair Use; Section 109: First Sale Doctrine; Section 110(1): Performance and Displays in Face-to-Face Teaching; Sections 110(2) and 112(f): Distance Learning. Additional information may be found in Copyright Basics (Appendix A).
- 2) **Do** investigate the copyright status of each item you plan to digitize, duplicate, or use. If you determine that you do have the rights to make the reproduction, such as a document in the Public Domain (see # 3 below), keep a record of your analysis in case your decision is questioned or challenged later.
- 3) **Do** feel free to digitize or duplicate materials in the Public Domain, i.e., works not protected by copyright. Such materials include works of the US Government; works published before 1923; and, works for which an original term of copyright was not renewed.
- 4) **Do** keep current on developments and changes to US Copyright law, including congressional acts and new court cases.
- 5) **Don't** ignore copyright law. If you commit copyright infringement, you could be liable for statutory damages ranging upwards to hundreds of thousands of dollars.
- 6) **Don't** assume that all reproduction or reuse is permissible because the use is "educational" or "not-for-profit".
- 7) **Don't** confuse copyright with other types of rights that can also be restricted including intellectual property rights such as trademarks and patents, privacy rights, and rights protected under contract law such as trade secrets.
- 8) **Don't** assume that permission for one set of circumstances applies to everything you want to do. Permission is granted for one-time use only and you must request it again for another use.
- 9) Include copyright permissions at end of presentation for any specific materials you need to gain permissions for. On all slides referencing copyrighted material, include a note stating you have permission to reuse the material.

When in doubt, always ask!

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Author Worksheet: Copyright Permissions Checklist

Use this form as a checklist to secure permission for use of articles in your course. Duplicate it as many times as you need to track all of the material you will have to obtain permissions for. Refer to the contract you signed with APTA to determine the terms of use needed for obtaining permissions for creative works used in the course.

Presentation Title:

Material:

Source (Location):

Cost to obtain article:

Owner (s):

Territory:

Cost of copyright permission:

Written approval obtained:

License/release obtained:

Copyright permission statement to Learning Center for posting:

Notes

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Course Submission Form

Course Title: (as it will be shown on the certificate)

Instructor/Author(s): Full name and credentials for each instructor/author

Section and/or Sponsor: (if appropriate)

Course Delivery method: i.e. In-person, webinar, online, blended, text

Course Length: (if appropriate)

Audience Level: i.e., Basic, advanced, intermediate, multiple

Description: A brief description of the course (150 word limit)

Learning Objectives: No more than 3 per hour of learning:

i.e. 1 ½ hr. course = 3 learning objectives.

See “Writing Course Objectives” in the Author resources, if you need guidance

CEU value: (optional - this will be calculated and confirmed by APTA)

Resources: Articles, links, etc. – follow the APTA selected styles and guidelines

(These items will be attached to the course and may be downloaded by the learner)

Assessment: 1-3 items per objective per course/module:

1 contact hour or less = 10-15 assessment

items; 2 contact hours = 20 assessment

items;

3 contact hours = 25 assessment items

Follow the instructions for “assessment question writing” in the Author resources. The format is as follows:

1. *Multiple choice/case study question*
 - a. Response 1
 - b. Response 2 (correct response)
 - c. Response 3
 - d. Response 4 (limit of 8 response choices)
2. *True-False question*
 - a. True
 - b. False (correct response)

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Lead Name and Contact Information:

Session:

Note: Please submit one cover sheet with all course materials, limit one packet per course. If you need additional resources, please refer to the author toolkit included within this PDF book.

Session Presenter Information

Presenter 1 Name: _____

Attachments: Biography Author Image Presentation Handout Posttest Items

Presenter 2 Name: _____

Attachments: Biography Author Image Presentation Handout Posttest Items

Presenter 3 Name: _____

Attachments: Biography Author Image Presentation Handout Posttest Items

Presenter 4 Name: _____

Attachments: Biography Author Image Presentation Handout Posttest Items

Additional Attachments:

Key Concepts Worksheet

Other: _____

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Lead Name and Contact Information:

Session:

Note: Please submit one cover sheet with all course materials, limit one packet per course. If you need additional resources, please refer to the author toolkit included within this PDF book.

Objectives: List all objectives for the online version of this presentation.	Content: List corresponding slide numbers for each objective.	Assessment: List corresponding posttest item numbers for each objective.*
<i>Example: Identify 3 factors of congenital heart disease.</i>	<i>Example: Slides # 41-50, 53, 57-59</i>	<i>Example: Questions # 1-3</i>

*1 contact hour or less = 15 posttest items; 2 contact hours = 20 posttest items; 3 contact hours = 25 posttest items; 1-3 items per objective

Submission Notes:

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Course Key Concepts

Course key concepts are used to inform participants about your course. Please use the space below to identify 3 – 4 new concepts about your course. Include references that inform your work. The following are guiding questions to consider.

1. Is there new research your course cites?
2. What important information from your course directly applies to clinical practice techniques?
3. Are there any current statistics about the subject matter that creates a need for people to learn the information within your course?
4. What is the key take away for the learners in this course?

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APTA Style Quick Reference

References

- The official style guide of the American Physical Therapy Association is the *AMA Manual of Style*.
- *Webster’s Collegiate Dictionary* is APTA’s preferred dictionary for style and spelling.
 - If two spellings are acceptable choose the preferred spelling, usually listed first with the definition.

Quick Reference

Words

- health care (two words)
- e-mail (with hyphen)
- Web site (two words, “Web” capitalized)

Writing Style

To ensure that the writing helps instead of hinders students, practice the **KISS** formula. **Keep It Simple and Straightforward**.

- **Keep it simple.** Avoid run-on sentences. When your sentence starts to get long and confusing, consider creating a new sentence.
- **Avoid dense paragraphs.** Use bulleted lists, charts, tables, and illustrations where appropriate.
- **Keep text short** for training presentations.
 - Use short sentences
 - Keep content relative to the topic
- **Use the present tense** – it keeps things shorter
- **Address the user.** Use personal pronouns – for example, “you”

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APTA Basics: APTA, PT, PTA, and “the association”

Do	Don't	Example
Use “the American Physical Therapy Association” or “APTA”	Use “the APTA”	
Always spell out physical therapy		<i>The physical therapist (PT) conducted an examination/evaluation.</i>
PT refers only to physical therapist		<i>After determining the patient’s diagnosis, the PT considered the best evidence-based interventions for treatment.</i>
Use physical therapist assistant	Use physical therapy assistant	
	Capitalize “association” when referring to APTA unless you spell out the entire name	<i>American Physical Therapy Association</i> <i>The association for physical therapists.</i>

Abbreviations – General: Titles, Suffixes, Initials

Do	Don't	Example
Use periods for initials within people’s names.	Use periods or spell out titles/suffixes related to people’s names <i>Military title styles differ among the branches of the military; check AMA or verify with the person being referenced</i>	<u>Do</u> <i>Jules M. Rothstein</i> <u>Don't</u> <i>Dr, Ms, Sen/Sens, Gov/Govs, Jr, Esq</i>
	Use periods after a) scientific terms, b) acronyms, c) legislative bill numbers, d) company names, e) other abbreviations.	a) <i>E coli</i> b) <i>APTA, AMA</i> c) <i>HR 633</i> d) <i>Inc, Corp</i> e) <i>am/pm, St Louis</i>
Place a comma after <i>Jr</i> or <i>Sr</i> only when another abbreviation, such as a credential.	Place a comma before <i>Jr</i> or <i>Sr</i> in a person’s name	• <i>Martin Luther King Jr</i> • <i>Martin Smith Jr, PT, DPT, dreams of a cure for cerebral palsy.</i>

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Abbreviations – Physical Therapy Credentials

Do	Don't	Example
	Use periods after credentials/honorifics.	<i>PT, PhD, MD, Esq</i>
Follow each credential with a comma if the sentence continues.		<i>Florence Kendall, PT, FAPTA, signed the letter to the editor.</i>
For a list of names that includes designations only, separate the names by commas.		<i>Florence Kendall, PT, FAPTA, and Eugene Michels, PT, FAPTA, signed the letter to the editor.</i>
When names also include other information separate them by semicolons.		<i>The letter to the editor was signed by Florence Kendall, PT, FAPTA, Maryland; Eugene Michels, PT, FAPTA, Virginia; and Jules Rothstein, PT, PhD, FAPTA, Illinois.</i>
Physical therapy credentials should be listed first with all other designations following.		<ol style="list-style-type: none"> 1) <i>PT or PTA (this refers to a person's licensure/certification as a PT or PTA, not the level of education—see next).</i> 2) <i>Highest earned physical therapy-related degree (DPT, MPT).</i> 3) <i>Other earned academic degree(s) (PhD, MBA).</i> 4) <i>Specialist certification credentials in alphabetical order, specific to ABPTS (OCS, PCS).</i> 5) <i>Other credentials external to APTA (ATC, CWS).</i> 6) <i>Other certification or professional honors (FAPTA).</i>
Include a specialized degree (such as <i>BPharm</i>). List after the highest academic degree.	Include degree at master level if individual has a doctorate, unless it is a specialized degree.	<i>Karen Jones, PT, DPT, BPharm</i>
Include an individual's baccalaureate degree if they request.		
	Add <i>SPT</i> as a “credential” after the names of student physical therapists or <i>SPTA</i> after the names of student physical therapist assistants.	

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Personal Titles

Do	Don't	Example
Only capitalize when the title directly precedes the person's name without a comma, otherwise it is lowercase.		a) <i>Director of Publications Lois Douthitt cares about the correct use of language.</i> b) <i>Lois Douthitt, director of publications, cares about the correct use of language.</i>
Use <i>chair</i>	Use <i>chairman, chairwoman or chairperson</i>	

General Punctuation: Acronyms, Commas, Dashes

Do	Don't	Example
Limit the use of acronyms. Only use familiar acronyms, don't make up your own or use jargon.		
Use a comma before the conjunction that precedes the last term in a series.		<i>The five elements of patient/client management are examination, evaluation, diagnosis, prognosis, and intervention.</i>
Use em-dashes (—) with no space on either side to indicate a break in thought.		<i>He saw—really saw—a UFO.</i>
Use an en-dash (–), which is slightly shorter than an em-dash and slightly longer than a hyphen, to show a relational distinction in a hyphenated or compound modifier or when the word being modified is a compound.		a) <i>health care–related, non–self-governing</i> b) <i>post–physical therapy, non–physical therapy personnel</i>

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General Punctuation: Dates, Phone Numbers, Addresses

Do	Don't	Example
	Use ordinal numbers for dates	<i>Correct: The meeting will be held October 31</i>
Use a slash between area code and phone number.	use a 1 before area codes in phone numbers (even 800 numbers)	<i>412/555-1212, 800/999-2782</i>
Write out a full address (street, city, state, zip) using the 2-letter postal abbreviations in all caps.		
When writing a city and state, or just a state, spell out the state name.		<i>Our offices are in Alexandria, Virginia, along the banks of the Potomac River.</i>
Use commas before and after the state when combined with the city.		<i>Send your comments to APTA, 1111 North Fairfax Street, Alexandria, VA 22314.</i>

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Recommended Resources

Designing and Developing a Learner Experience

Goal Development

- 1) [Outcome-Based Education: Writing Instructional Goals](https://www.paeaonline.org/Project04/MTO/html/obe/outcome4.html), Meeting the Objective: Physician Assistant Education, Curriculum Objectives Resource Guide
<https://www.paeaonline.org/Project04/MTO/html/obe/outcome4.html>
- 2) [Instructional Goals](https://vfc3.project.mnscu.edu/index.asp?Type=B_BASIC&SEC=%7bE3F7CF73-CDCD-4C9D-929F-172867E72B9B%7d), Minnesota State Colleges and Universities
https://vfc3.project.mnscu.edu/index.asp?Type=B_BASIC&SEC=%7bE3F7CF73-CDCD-4C9D-929F-172867E72B9B%7d

Learning Objectives

- 1) [Outcome-Based Education: Writing Instructional Objectives](https://www.paeaonline.org/Project04/MTO/html/obe/outcome5.html), Meeting the Objective: Physician Assistant Education, Curriculum Objectives Resource Guide
<https://www.paeaonline.org/Project04/MTO/html/obe/outcome5.html>
- 2) [A Quick Guide to Writing Learning Objectives](https://www.nwlink.com/~donclark/hrd/templates/objectivetool.html), Big Dog & Little Dog's Performance Juxtaposition <https://www.nwlink.com/~donclark/hrd/templates/objectivetool.html>

Organizing and Structuring Content – Instructional Design

- 1) [Sequencing and Structuring Learning Modules in Instructional Design](https://www.nwlink.com/~donclark/hrd/isd/sequence.html), Big Dog & Little Dog's Performance Juxtaposition
<https://www.nwlink.com/~donclark/hrd/isd/sequence.html>
- 2) [Rapid E-Learning 101](https://www.articulate.com/rapid-elearning/powerpoint-for-e-learning/), The Rapid E-Learning Blog
<https://www.articulate.com/rapid-elearning/powerpoint-for-e-learning/>

Item Writing

- 1) [Outcome-Based Education: Using Objectives in Assessing Student Performance](https://www.paeaonline.org/Project04/MTO/html/obe/outcome9.html), Meeting the Objective: Physician Assistant Education, Curriculum Objectives Resource Guide
<https://www.paeaonline.org/Project04/MTO/html/obe/outcome9.html>

Recommended Resources CONTINUED...

Designing Instructional Aides

- 1) [Accessibility Guidelines: Creating Accessible Continuing Education](#), American Speech-Language-Hearing Association
<https://www.asha.org/CE/for-providers/Accessibility-Guidelines/>
- 2) Microsoft Office PowerPoint Help and How-to, [2003](#); [2007](#); [2010](#); Microsoft Corporation
2003- <https://office.microsoft.com/en-us/powerpoint-help/CL010072915.aspx>
2007- <https://office.microsoft.com/en-us/powerpoint-help/CL010072914.aspx>
2010- <https://office.microsoft.com/en-us/powerpoint-help/CL010254952.aspx>
- 3) [Learning center – Microsoft Office and Adobe](#), HP
https://h30187.www3.hp.com/campus/p/campusId/11263/Microsoft_Office_and_Adobe.htm?hplcpsession.id=9a3fafcf240383f9ea4e97308536
- 4) [Preparing Presentation Slides: A Tutorial](#), by John Battalio, Bedford St. Martin's Re: Writing <https://bcs.bedfordstmartins.com/rewriting/wr6.html>
- 5) [PowerPoint for E-Learning](#), The Rapid E-Learning Blog
<https://www.articulate.com/rapid-elearning/powerpoint-for-e-learning/>
- 6) [Instructional Design](#), The Rapid E-Learning Blog
<https://www.articulate.com/rapid-elearning/instructional-design/>
- 7) [Tips for creating and delivering an effective presentation](#) (Microsoft Office PowerPoint 2007), Microsoft Corporation
<https://office.microsoft.com/en-us/powerpoint-help/tips-for-creating-and-delivering-an-effective-presentation-HA010207864.aspx>

Writing Guidelines and Tips

Styles

- 1) [AMA Manual of Style, 10th Edition](#)
<https://www.amamanualofstyle.com/oso/public/index.html>
- 2) [Webster's Collegiate Online Dictionary](#) <https://dictionary.reference.com/>

Inclusive Language

- 1) [Blueprint for Teaching Cultural Competence in Physical Therapy Education](#), APTA
https://www.apta.org/AM/Template.cfm?Section=Minority_Affairs1&Template=/CM/ContentDisplay.cfm&ContentID=49349
- 2) [House of Delegates Position on Cultural Competence](#), APTA
https://www.apta.org/AM/Template.cfm?Section=Policies_and_Bylaws&CONTENTID=25403&TEMPLATE=/CM/ContentDisplay.cfm

Recommended Resources CONTINUED...

- 3) [Language about Aging – Designations for Older Adults](https://medicine.jrank.org/pages/953/Language-about-Aging-Designations-older-adults.html), Medicine Encyclopedia
<https://medicine.jrank.org/pages/953/Language-about-Aging-Designations-older-adults.html>
- 4) [Guidelines for Reporting and Writing About People with Disabilities](https://www.lsi.ku.edu/news/featured/guidelines.shtml) The Research and Training Center on Independent Living, University of Kansas
<https://www.lsi.ku.edu/news/featured/guidelines.shtml>

Copyright Basics

- 1) [Copyright Basics](https://www.copyright.gov/circs/circ1.pdf), United States Copyright Office
<https://www.copyright.gov/circs/circ1.pdf>
- 2) [Introduction to the Permissions Process](https://fairuse.stanford.edu/Copyright_and_Fair_Use_Overview/chapter1/), Stanford Copyright & Fair Use Center
https://fairuse.stanford.edu/Copyright_and_Fair_Use_Overview/chapter1/

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https://www.astd.org/LC/2006/0106_lange.htm. Accessed June 27, 2007.
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https://www.iacmeonline.org/system/files/meeting/IACME_Fall_Meeting/5.+ADDIE-1.pdf. Accessed January 31, 2011.
- Overview and Resources. Stanford University Libraries & Academic Information Resources. Copyright and Fair Use. https://fairuse.stanford.edu/Copyright_and_Fair_Use_Overview/. Accessed December 16, 2010.
- Resources for CE Presenters and Planners. American Speech-Language-Hearing Association.
<https://www.asha.org/ce/for-providers/ResourcesForPresenters.htm>. Updated 2010. Accessed December 10, 2010
- The Research and Training Center on Independent Living, The University of Kansas. Guidelines for reporting and writing about people with disabilities. 7th ed. 2008.
<https://www.rtcil.org/products/RTCIL%20publications/Media/Guidelines%20for%20Reporting%20and%20Writing%20about%20People%20with%20Disabilities%207th%20Edition.pdf> Published 2008. Accessed December 7, 2010.

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Copyright Basics

What Is Copyright?

Copyright is a form of protection provided by the laws of the United States (title 17, *U.S. Code*) to the authors of “original works of authorship,” including literary, dramatic, musical, artistic, and certain other intellectual works. This protection is available to both published and unpublished works. Section 106 of the 1976 Copyright Act generally gives the owner of copyright the exclusive right to do and to authorize others to do the following:

- To reproduce the work in copies or phonorecords;
- To prepare derivative works based upon the work;
- To distribute copies or phonorecords of the work to the public by sale or other transfer of ownership, or by rental, lease, or lending;
- To perform the work publicly, in the case of literary, musical, dramatic, and choreographic works, pantomimes, and motion pictures and other audiovisual works;
- To display the work publicly, in the case of literary, musical, dramatic, and choreographic works, pantomimes, and pictorial, graphic, or sculptural works, including the individual images of a motion picture or other audiovisual work; and
- In the case of sound recordings,* to perform the work publicly by means of a digital audio transmission.

In addition, certain authors of works of visual art have the rights of attribution and integrity as described in section 106A of the 1976 Copyright Act. For further information, see Circular 40, *Copyright Registration for Works of the Visual Arts*.

It is illegal for anyone to violate any of the rights provided by the copyright law to the owner of copyright. These rights, however, are not unlimited in scope. Sections 107 through 121 of the 1976 Copyright Act establish limitations on these rights. In some cases, these limitations are specified exemptions from copyright liability. One major limitation is the doctrine of “fair use,” which is given a statutory basis in section 107 of the 1976 Copyright Act. In other instances, the limitation takes the form of a “compulsory license” under which certain limited uses of copyrighted works are permitted upon payment of specified royalties and compliance with statutory conditions. For further information about the limitations of any of these rights, consult the copyright law or write to the Copyright Office.

***NOTE:** Sound recordings are defined in the law as “works that result from the fixation of a series of musical, spoken, or other sounds, but not including the sounds accompanying a motion picture or other audiovisual work.” Common examples include recordings of music, drama, or lectures. A sound recording is

not the same as a phonorecord. A phonorecord is the physical object in which works of authorship are embodied. The word "phonorecord" includes cassette tapes, CDs, and vinyl disks as well as other formats.

Who Can Claim Copyright?

Copyright protection subsists from the time the work is created in fixed form. The copyright in the work of authorship immediately becomes the property of the author who created the work. Only the author or those deriving their rights through the author can rightfully claim copyright.

In the case of works made for hire, the employer and not the employee is considered to be the author. Section 101 of the copyright law defines a "work made for hire" as:

- 1 a work prepared by an employee within the scope of his or her employment; or
- 2 a work specially ordered or commissioned for use as:
 - a contribution to a collective work
 - a part of a motion picture or other audiovisual work
 - a translation
 - a supplementary work
 - a compilation
 - an instructional text
 - a test
 - answer material for a test
 - an atlas

if the parties expressly agree in a written instrument signed by them that the work shall be considered a work made for hire.

The authors of a joint work are co-owners of the copyright in the work, unless there is an agreement to the contrary.

Copyright in each separate contribution to a periodical or other collective work is distinct from copyright in the collective work as a whole and vests initially with the author of the contribution.

Two General Principles

- Mere ownership of a book, manuscript, painting, or any other copy or phonorecord does not give the possessor the copyright. The law provides that transfer of ownership of any material object that embodies a protected work does not of itself convey any rights in the copyright.
- Minors may claim copyright, but state laws may regulate the business dealings involving copyrights owned by minors. For information on relevant state laws, consult an attorney.

Copyright and National Origin of the Work

Copyright protection is available for all unpublished works, regardless of the nationality or domicile of the author.

Published works are eligible for copyright protection in the United States if any one of the following conditions is met:

- On the date of first publication, one or more of the authors is a national or domiciliary of the United States, or is a national, domiciliary, or sovereign authority of a treaty party,* or is a stateless person wherever that person may be domiciled; or
- The work is first published in the United States or in a foreign nation that, on the date of first publication, is a treaty party. For purposes of this condition, a work that is published in the United States or a treaty party within 30 days after publication in a foreign nation that is not a treaty party shall be considered to be first published in the United States or such treaty party, as the case may be; or
- The work is a sound recording that was first fixed in a treaty party; or
- The work is a pictorial, graphic, or sculptural work that is incorporated in a building or other structure, or an architectural work that is embodied in a building and the building or structure is located in the United States or a treaty party; or
- The work is first published by the United Nations or any of its specialized agencies, or by the Organization of American States; or
- The work is a foreign work that was in the public domain in the United States prior to 1996 and its copyright was restored under the Uruguay Round Agreements Act (URAA). See Circular 38B, Highlights of Copyright Amendments Contained in the Uruguay Round Agreements Act (URAA-GATT), for further information.
- The work comes within the scope of a Presidential proclamation.

*A treaty party is a country or intergovernmental organization other than the United States that is a party to an international agreement.

What Works Are Protected?

Copyright protects "original works of authorship" that are fixed in a tangible form of expression. The fixation need not be directly perceptible so long as it may be communicated

with the aid of a machine or device. Copyrightable works include the following categories:

- 1 literary works
- 2 musical works, including any accompanying words
- 3 dramatic works, including any accompanying music
- 4 pantomimes and choreographic works
- 5 pictorial, graphic, and sculptural works
- 6 motion pictures and other audiovisual works
- 7 sound recordings
- 8 architectural works

These categories should be viewed broadly. For example, computer programs and most "compilations" may be registered as "literary works"; maps and architectural plans may be registered as "pictorial, graphic, and sculptural works."

What Is Not Protected by Copyright?

Several categories of material are generally not eligible for federal copyright protection. These include among others:

- Works that have not been fixed in a tangible form of expression (for example, choreographic works that have not been notated or recorded, or improvisational speeches or performances that have not been written or recorded)
- Titles, names, short phrases, and slogans; familiar symbols or designs; mere variations of typographic ornamentation, lettering, or coloring; mere listings of ingredients or contents
- Ideas, procedures, methods, systems, processes, concepts, principles, discoveries, or devices, as distinguished from a description, explanation, or illustration
- Works consisting entirely of information that is common property and containing no original authorship (for example: standard calendars, height and weight charts, tape measures and rulers, and lists or tables taken from public documents or other common sources)

How to Secure a Copyright

Copyright Secured Automatically upon Creation

The way in which copyright protection is secured is frequently misunderstood. No publication or registration or other action in the Copyright Office is required to secure copyright. (See *following note*.) There are, however, certain definite advantages to registration. See "Copyright Registration" on page 7.

Copyright is secured automatically when the work is created, and a work is "created" when it is fixed in a copy or phonorecord for the first time. "Copies" are material objects from which a work can be read or visually perceived either directly or with the aid of a machine or device, such as books, manuscripts, sheet music, film, videotape, or microfilm. "Phonorecords" are material objects embodying fixations of sounds (excluding, by statutory definition, motion picture soundtracks), such as cassette tapes, CDs, or vinyl disks. Thus, for example, a song (the "work") can be fixed in sheet music ("copies") or in phonograph disks ("phonorecords"), or both. If a work is prepared over a period of time, the part of the work that is fixed on a particular date constitutes the created work as of that date.

Publication

Publication is no longer the key to obtaining federal copyright as it was under the Copyright Act of 1909. However, publication remains important to copyright owners.

The 1976 Copyright Act defines publication as follows:

"Publication" is the distribution of copies or phonorecords of a work to the public by sale or other transfer of ownership, or by rental, lease, or lending. The offering to distribute copies or phonorecords to a group of persons for purposes of further distribution, public performance, or public display constitutes publication. A public performance or display of a work does not of itself constitute publication.

NOTE: Before 1978, federal copyright was generally secured by the act of publication with notice of copyright, assuming compliance with all other relevant statutory conditions. U.S. works in the public domain on January 1, 1978, (for example, works published without satisfying all conditions for securing federal copyright under the Copyright Act of 1909) remain in the public domain under the 1976 Copyright Act.

Certain foreign works originally published without notice had their copyrights restored under the Uruguay Round Agreements Act (URAA). See Circular 388 and see the "Notice of Copyright" section on page 4 for further information.

Federal copyright could also be secured before 1978 by the act of registration in the case of certain unpublished works and works eligible for ad interim copyright. The 1976 Copyright Act automatically extends to full term (section 304 sets the term) copyright for all works, including those subject to ad interim copyright if ad interim registration has been made on or before June 30, 1978.

A further discussion of the definition of “publication” can be found in the legislative history of the 1976 Copyright Act. The legislative reports define “to the public” as distribution to persons under no explicit or implicit restrictions with respect to disclosure of the contents. The reports state that the definition makes it clear that the sale of phonorecords constitutes publication of the underlying work, for example, the musical, dramatic, or literary work embodied in a phonorecord. The reports also state that it is clear that any form of dissemination in which the material object does not change hands, for example, performances or displays on television, is not a publication no matter how many people are exposed to the work. However, when copies or phonorecords are offered for sale or lease to a group of wholesalers, broadcasters, or motion picture theaters, publication does take place if the purpose is further distribution, public performance, or public display.

Publication is an important concept in the copyright law for several reasons:

- Works that are published in the United States are subject to mandatory deposit with the Library of Congress. See discussion on “Mandatory Deposit for Works Published in the United States” on page 11.
- Publication of a work can affect the limitations on the exclusive rights of the copyright owner that are set forth in sections 107 through 121 of the law.
- The year of publication may determine the duration of copyright protection for anonymous and pseudonymous works (when the author’s identity is not revealed in the records of the Copyright Office) and for works made for hire.
- Deposit requirements for registration of published works differ from those for registration of unpublished works. See discussion on “Registration Procedures” on page 7.
- When a work is published, it may bear a notice of copyright to identify the year of publication and the name of the copyright owner and to inform the public that the work is protected by copyright. Copies of works published before March 1, 1989, must bear the notice or risk loss of copyright protection. See discussion on “Notice of Copyright” below.

Notice of Copyright

The use of a copyright notice is no longer required under U.S. law, although it is often beneficial. Because prior law did contain such a requirement, however, the use of notice is still relevant to the copyright status of older works.

Notice was required under the 1976 Copyright Act. This requirement was eliminated when the United States adhered to the Berne Convention, effective March 1, 1989. Although works published without notice before that date could have entered the public domain in the United States, the Uruguay Round Agreements Act (URAA) restores copyright in certain foreign works originally published without notice. For further information about copyright amendments in the URAA, see Circular 38B.

The Copyright Office does not take a position on whether copies of works first published with notice before March 1, 1989, which are distributed on or after March 1, 1989, must bear the copyright notice.

Use of the notice may be important because it informs the public that the work is protected by copyright, identifies the copyright owner, and shows the year of first publication. Furthermore, in the event that a work is infringed, if a proper notice of copyright appears on the published copy or copies to which a defendant in a copyright infringement suit had access, then no weight shall be given to such a defendant’s interposition of a defense based on innocent infringement in mitigation of actual or statutory damages, except as provided in section 504(c)(2) of the copyright law. Innocent infringement occurs when the infringer did not realize that the work was protected.

The use of the copyright notice is the responsibility of the copyright owner and does not require advance permission from, or registration with, the Copyright Office.

Form of Notice for Visually Perceptible Copies

The notice for visually perceptible copies should contain all the following three elements:

- 1 The symbol © (the letter C in a circle), or the word “Copyright,” or the abbreviation “Copr.”; and
- 2 The year of first publication of the work. In the case of compilations or derivative works incorporating previously published material, the year date of first publication of the compilation or derivative work is sufficient. The year date may be omitted where a pictorial, graphic, or sculptural work, with accompanying textual matter, if any, is reproduced in or on greeting cards, postcards, stationery, jewelry, dolls, toys, or any useful article; and
- 3 The name of the owner of copyright in the work, or an abbreviation by which the name can be recognized, or a generally known alternative designation of the owner.

Example: © 2008 John Doe

The “C in a circle” notice is used only on “visually perceptible copies.” Certain kinds of works — for example, musical, dramatic, and literary works — may be fixed not in “copies”

but by means of sound in an audio recording. Since audio recordings such as audio tapes and phonograph disks are “phonorecords” and not “copies,” the “C in a circle” notice is not used to indicate protection of the underlying musical, dramatic, or literary work that is recorded.

Form of Notice for Phonorecords of Sound Recordings

The notice for phonorecords embodying a sound recording should contain all the following three elements:

- 1 The symbol © (the letter P in a circle); and
- 2 The year of first publication of the sound recording; and
- 3 The name of the owner of copyright in the sound recording, or an abbreviation by which the name can be recognized, or a generally known alternative designation of the owner. If the producer of the sound recording is named on the phonorecord label or container and if no other name appears in conjunction with the notice, the producer’s name shall be considered a part of the notice.

Example: © 2008 A.B.C. Records Inc.

NOTE: Since questions may arise from the use of variant forms of the notice, you may wish to seek legal advice before using any form of the notice other than those given here.

Position of Notice

The copyright notice should be affixed to copies or phonorecords in such a way as to “give reasonable notice of the claim of copyright.” The three elements of the notice should ordinarily appear together on the copies or phonorecords or on the phonorecord label or container. The Copyright Office has issued regulations concerning the form and position of the copyright notice in the *Code of Federal Regulations* (37 CFR 201.20). For more information, see Circular 3, *Copyright Notice*.

Publications Incorporating U.S. Government Works

Works by the U.S. government are not eligible for U.S. copyright protection. For works published on and after March 1, 1989, the previous notice requirement for works consisting primarily of one or more U.S. government works has been eliminated. However, use of a notice on such a work will defeat a claim of innocent infringement as previously described provided the notice also includes a statement that identifies either those portions of the work in which copyright is claimed or those portions that constitute U.S. government material.

Example: © 2008 Jane Brown
Copyright claimed in chapters 7–10,
exclusive of U.S. government maps

Copies of works published before March 1, 1989, that consist primarily of one or more works of the U.S. government should have a notice and the identifying statement.

Unpublished Works

The author or copyright owner may wish to place a copyright notice on any unpublished copies or phonorecords that leave his or her control.

Example: Unpublished work © 2008 Jane Doe

Omission of Notice and Errors in Notice

The 1976 Copyright Act attempted to ameliorate the strict consequences of failure to include notice under prior law. It contained provisions that set out specific corrective steps to cure omissions or certain errors in notice. Under these provisions, an applicant had five years after publication to cure omission of notice or certain errors. Although these provisions are technically still in the law, their impact has been limited by the amendment making notice optional for all works published on and after March 1, 1989. For further information, see Circular 3.

How Long Copyright Protection Endures

Works Originally Created on or after January 1, 1978

A work that was created (fixed in tangible form for the first time) on or after January 1, 1978, is automatically protected from the moment of its creation and is ordinarily given a term enduring for the author’s life plus an additional 70 years after the author’s death. In the case of “a joint work prepared by two or more authors who did not work for hire,” the term lasts for 70 years after the last surviving author’s death. For works made for hire, and for anonymous and pseudonymous works (unless the author’s identity is revealed in Copyright Office records), the duration of copyright will be 95 years from publication or 120 years from creation, whichever is shorter.

Works Originally Created Before January 1, 1978, But Not Published or Registered by That Date

These works have been automatically brought under the statute and are now given federal copyright protection. The duration of copyright in these works is generally computed in the same way as for works created on or after January 1, 1978: the life-plus-70 or 95/120-year terms apply to them as well. The law provides that in no case would the term of copyright for works in this category expire before December 31, 2002, and for works published on or before December 31,

2002, the term of copyright will not expire before December 31, 2047.

Works Originally Created and Published or Registered before January 1, 1978

Under the law in effect before 1978, copyright was secured either on the date a work was published with a copyright notice or on the date of registration if the work was registered in unpublished form. In either case, the copyright endured for a first term of 28 years from the date it was secured. During the last (28th) year of the first term, the copyright was eligible for renewal. The Copyright Act of 1976 extended the renewal term from 28 to 47 years for copyrights that were subsisting on January 1, 1978, or for pre-1978 copyrights restored under the Uruguay Round Agreements Act (URAA), making these works eligible for a total term of protection of 75 years. Public Law 105-298, enacted on October 27, 1998, further extended the renewal term of copyrights still subsisting on that date by an additional 20 years, providing for a renewal term of 67 years and a total term of protection of 95 years.

Public Law 102-307, enacted on June 26, 1992, amended the 1976 Copyright Act to provide for automatic renewal of the term of copyrights secured between January 1, 1964, and December 31, 1977. Although the renewal term is automatically provided, the Copyright Office does not issue a renewal certificate for these works unless a renewal application and fee are received and registered in the Copyright Office.

Public Law 102-307 makes renewal registration optional. Thus, filing for renewal registration is no longer required to extend the original 28-year copyright term to the full 95 years. However, some benefits accrue to renewal registrations that were made during the 28th year.

For more detailed information on renewal of copyright and the copyright term, see Circular 15, *Renewal of Copyright*; Circular 15A, *Duration of Copyright*; and Circular 15T, *Extension of Copyright Terms*.

Transfer of Copyright

Any or all of the copyright owner's exclusive rights or any subdivision of those rights may be transferred, but the transfer of exclusive rights is not valid unless that transfer is in writing and signed by the owner of the rights conveyed or such owner's duly authorized agent. Transfer of a right on a nonexclusive basis does not require a written agreement.

A copyright may also be conveyed by operation of law and may be bequeathed by will or pass as personal property by the applicable laws of intestate succession.

Copyright is a personal property right, and it is subject to the various state laws and regulations that govern the ownership, inheritance, or transfer of personal property as well as terms of contracts or conduct of business. For information about relevant state laws, consult an attorney.

Transfers of copyright are normally made by contract. The Copyright Office does not have any forms for such transfers. The law does provide for the recordation in the Copyright Office of transfers of copyright ownership. Although recordation is not required to make a valid transfer between the parties, it does provide certain legal advantages and may be required to validate the transfer as against third parties. For information on recordation of transfers and other documents related to copyright, see Circular 12, *Recordation of Transfers and Other Documents*.

Termination of Transfers

Under the previous law, the copyright in a work reverted to the author, if living, or if the author was not living, to other specified beneficiaries, provided a renewal claim was registered in the 28th year of the original term.* The present law drops the renewal feature except for works already in the first term of statutory protection when the present law took effect. Instead, the present law permits termination of a grant of rights after 35 years under certain conditions by serving written notice on the transferee within specified time limits.

For works already under statutory copyright protection before 1978, the present law provides a similar right of termination covering the newly added years that extended the former maximum term of the copyright from 56 to 95 years. For further information, see circulars 15A and 15T.

***NOTE:** The copyright in works eligible for renewal on or after June 26, 1992, will vest in the name of the renewal claimant on the effective date of any renewal registration made during the 28th year of the original term. Otherwise, the renewal copyright will vest in the party entitled to claim renewal as of December 31st of the 28th year.

International Copyright Protection

There is no such thing as an "international copyright" that will automatically protect an author's writings throughout the entire world. Protection against unauthorized use in a particular country depends, basically, on the national laws of that country. However, most countries do offer protection to foreign works under certain conditions, and these conditions have been greatly simplified by international copyright treaties and conventions. For further information and a list of

countries that maintain copyright relations with the United States, see Circular 38A, *International Copyright Relations of the United States*.

Copyright Registration

In general, copyright registration is a legal formality intended to make a public record of the basic facts of a particular copyright. However, registration is not a condition of copyright protection. Even though registration is not a requirement for protection, the copyright law provides several inducements or advantages to encourage copyright owners to make registration. Among these advantages are the following:

- Registration establishes a public record of the copyright claim.
- Before an infringement suit may be filed in court, registration is necessary for works of U.S. origin.
- If made before or within five years of publication, registration will establish prima facie evidence in court of the validity of the copyright and of the facts stated in the certificate.
- If registration is made within three months after publication of the work or prior to an infringement of the work, statutory damages and attorney's fees will be available to the copyright owner in court actions. Otherwise, only an award of actual damages and profits is available to the copyright owner.
- Registration allows the owner of the copyright to record the registration with the U.S. Customs Service for protection against the importation of infringing copies. For additional information, go to the U.S. Customs and Border Protection website at www.cbp.gov/xp/cgov/import. Click on "Intellectual Property Rights."

Registration may be made at any time within the life of the copyright. Unlike the law before 1978, when a work has been registered in unpublished form, it is not necessary to make another registration when the work becomes published, although the copyright owner may register the published edition, if desired.

Registration Procedures

Filing an Original Claim to Copyright with the U.S. Copyright Office

An application for copyright registration contains three essential elements: a completed application form, a nonre-

fundable filing fee, and a nonreturnable deposit—that is, a copy or copies of the work being registered and “deposited” with the Copyright Office.

A copyright registration is effective on the date the Copyright Office receives all required elements in acceptable form, regardless of how long it takes to process the application and mail the certificate of registration. The time needed to process applications varies depending on the amount of material the Office is receiving and the method of application (see below).

Here are the options for registering your copyright, beginning with the fastest and most cost-effective method.

Option 1: Online Registration

Online registration through the electronic Copyright Office (eCO) is the preferred way to register basic claims for literary works; visual arts works; performing arts works, including motion pictures; sound recordings; and single serials. Advantages of online filing include

- a lower filing fee
- fastest processing time
- online status tracking
- secure payment by credit or debit card, electronic check, or Copyright Office deposit account
- the ability to upload certain categories of deposits directly into eCO as electronic files

NOTE: You can still register using eCO and save money even if you will submit a hard-copy deposit, which is required under the mandatory deposit requirements for published works. The system will prompt you to specify whether you intend to submit an electronic or a hard-copy deposit, and it will provide instructions accordingly.

Basic claims include (1) a single work; (2) multiple unpublished works if they are all by the same author(s) and owned by the same claimant; and (3) multiple published works if they are all first published together in the same publication on the same date and owned by the same claimant.

To access eCO, go to the Copyright Office website at www.copyright.gov and click on *electronic Copyright Office*.

Option 2: Registration with Fill-In Form CO

The next best option for registering basic claims is the new fill-in Form CO. Using 2-D barcode scanning technology, the Office can process these forms much faster and more efficiently than paper forms completed manually. Simply complete Form CO on your personal computer, print it out, and mail it along with a check or money order and your deposit.

To access Form CO, go the Copyright Office website and click on *Forms*. Do not save your filled-out Form CO and reuse it for another registration. The 2-D barcode it contains is unique for each work that you register.

Option 3: Registration with Paper Forms

Paper versions of Form TX (literary works); Form VA (visual arts works); Form PA (performing arts works, including motion pictures); Form SR (sound recordings); and Form SE (single serials) are still available. They are not available on the Copyright Office website; however, staff will send them to you by postal mail upon request. Remember that online registration through eCO and fill-in Form CO (see above) can be used for the categories of works applicable to Forms TX, VA, PA, SR, and SE.

Types of Applications that Must Be Completed on Paper

Certain applications must be completed on paper and mailed to the Copyright Office with the appropriate fee and deposit. Forms for these applications include

- Form D-VH for registration of vessel hull designs
- Form MW for registration of mask works
- Form GATT for registration of works in which the U.S. copyright was restored under the 1994 Uruguay Round Agreements Act
- Form RE for renewal of copyright claims, and
- Forms for group submissions, including Form GR/PPh/CON (published photographs); Form GR/CP (contributions to periodicals); Form SE/Group (serials); and Form G/DN (daily newspapers and newsletters)

To access these forms, go to the Copyright Office website and click on *Forms* or call the Copyright Office. Informational circulars about these types of applications and current registration fees are available on the Copyright Office website or by phone.

NOTE: Complete the application form using black ink pen or type. You may photocopy blank application forms. However, photocopied forms submitted to the Copyright Office must be clear, legible, on a good grade of 8½ × 11" white paper suitable for automatic feeding through a photocopier. The forms should be printed, preferably in black ink, head-to-head so that when you turn the sheet over, the top of page 2 is directly behind the top of page 1. Forms not meeting these requirements may be returned resulting in delayed registration. You must have Adobe Acrobat Reader® installed on your computer to view and print the forms accessed on the Internet. Adobe Acrobat Reader may be downloaded free from www.copyright.gov.

Mailing Addresses for Applications Filed on Paper and for Hard-Copy Deposits

Library of Congress
U.S. Copyright Office
101 Independence Avenue SE
Washington, DC 20559-****

To expedite the processing of your claim, use the address above with the zip code extension for your type of work:

6222 for literary work
6211 for visual arts work
6233 for performing arts work
6238 for motion picture or other audiovisual work
6237 for sound recording
6226 for single serial issue

Filing a Renewal Registration

To register a renewal, send:

- 1 A properly completed application Form RE and, if necessary, Form RE Addendum, and
- 2 A nonrefundable filing fee* for each application and each Addendum. Each Addendum form must be accompanied by a deposit representing the work being renewed. See Circular 15, *Renewal of Copyright*.

***NOTE:** For current information on fees, please check the Copyright Office website at www.copyright.gov, write the Copyright Office, or call (202) 707-3000.

Deposit Requirements

If you file an application for copyright registration online using eCO, you may in some cases attach an electronic copy of your deposit. If you do not have an electronic copy or if you must send a hard copy or copies of your deposit to comply with the "best edition" requirements for published works, you must print out a shipping slip, attach it to your deposit, and mail the deposit to the Copyright Office. If you use Form CO, you must mail the form, fee, and deposit in the same package. Send the deposit, fee, and paper registration form packaged together to:

Library of Congress
U.S. Copyright Office
101 Independence Avenue SE
Washington, DC 20559-****

To expedite the processing of your claim, use the address above with the zip code extensions found above.

The hard-copy deposit of the work being registered will not be returned to you.

The deposit requirements vary in particular situations. The general requirements follow. Also note the information under "Special Deposit Requirements" below.

- If the work is unpublished, one complete copy or phonorecord.
- If the work was first published in the United States on or after January 1, 1978, two complete copies or phonorecords of the best edition.
- If the work was first published in the United States before January 1, 1978, two complete copies or phonorecords of the work as first published.
- If the work was first published outside the United States, one complete copy or phonorecord of the work as first published.

When registering with eCO, you will receive via your printer a shipping slip that you must include with your deposit that you send to the Copyright Office. This shipping slip is unique to your claim to copyright and will link your deposit to your application. Do not reuse the shipping slip.

NOTE: It is imperative when sending multiple works that you place all applications, deposits, and fees in the same package. If it is not possible to fit everything in one package, number each package (e.g., 1 of 3; 2 of 4) to facilitate processing and, where possible, attach applications to the appropriate deposits.

Special Deposit Requirements

Special deposit requirements exist for many types of works. The following are prominent examples of exceptions to the general deposit requirements:

- If the work is a motion picture, the deposit requirement is one complete copy of the unpublished or published motion picture and a separate written description of its contents, such as a continuity, press book, or synopsis.
- If the work is a literary, dramatic, or musical work published only in a phonorecord, the deposit requirement is one complete phonorecord.
- If the work is an unpublished or published computer program, the deposit requirement is one visually perceptible copy in source code of the first 25 and last 25 pages of the program. For a program of fewer than 50 pages, the deposit is a copy of the entire program. For more information on computer program registration, including deposits for revised programs and provisions for trade secrets, see Circular 61, Copyright Registration for Computer Programs.
- If the work is in a CD-ROM format, the deposit requirement is one complete copy of the material, that is, the

CD-ROM, the operating software, and any manual(s) accompanying it. If registration is sought for the computer program on the CD-ROM, the deposit should also include a printout of the first 25 and last 25 pages of source code for the program.

In the case of works reproduced in three-dimensional copies, identifying material such as photographs or drawings is ordinarily required. Other examples of special deposit requirements (but by no means an exhaustive list) include many works of the visual arts such as greeting cards, toys, fabrics, and oversized materials (see Circular 40A, *Deposit Requirements for Registration of Claims to Copyright in Visual Arts Material*); computer programs, video games, and other machine-readable audiovisual works (see Circular 61); automated databases (see Circular 65, *Copyright Registration for Automated Databases*); and contributions to collective works. For information about deposit requirements for group registration of serials, see Circular 62, *Copyright Registration for Serials*.

If you are unsure of the deposit requirement for your work, write or call the Copyright Office and describe the work you wish to register.

Unpublished Collections

Under the following conditions, a work may be registered in unpublished form as a "collection," with one application form and one fee:

- The elements of the collection are assembled in an orderly form;
- The combined elements bear a single title identifying the collection as a whole;
- The copyright claimant in all the elements and in the collection as a whole is the same; and
- All the elements are by the same author, or, if they are by different authors, at least one of the authors has contributed copyrightable authorship to each element.

NOTE: A Library of Congress Control Number is different from a copyright registration number. The Cataloging in Publication (CIP) Division of the Library of Congress is responsible for assigning LC Control Numbers and is operationally separate from the Copyright Office. A book may be registered in or deposited with the Copyright Office but not necessarily cataloged and added to the Library's collections. For information about obtaining an LC Control Number, see the following website: <http://pcn.loc.gov/pcn>. For information on International Standard Book Numbering (ISBN), write to: ISBN, R.R. Bowker, 630 Central Ave., New Providence, NJ 07974. Call (877) 310-7333. For further information and to apply online,

see www.isbn.org. For information on International Standard Serial Numbering (ISSN), write to: *Library of Congress, National Serials Data Program, Serial Record Division, Washington, DC 20540-4160*. Call (202) 707-6452. Or obtain information from www.loc.gov/issn.

An unpublished collection is not indexed under the individual titles of the contents but under the title of the collection.

Filing a Preregistration

Preregistration is a service intended for works that have had a history of prerelease infringement. To be eligible for preregistration, a work must be unpublished and must be in the process of being prepared for commercial distribution. It must also fall within a class of works determined by the Register of Copyrights to have had a history of infringement prior to authorized commercial distribution. Preregistration is not a substitute for registration. The preregistration application Form PRE is only available online. For further information, go to the Copyright Office website at www.copyright.gov.

Effective Date of Registration

A copyright registration is effective on the date the Copyright Office receives all the required elements in acceptable form. The time the Copyright Office requires to process an application varies, depending on the amount of material the Office is receiving.

If you apply online for copyright registration, you will receive an email saying that your application was received.

If you apply for copyright registration using a paper application, you will not receive an acknowledgment that your application has been received (the Office receives more than 600,000 applications annually). With either online or paper applications, you can expect:

- A letter, telephone call or email from a Copyright Office staff member if further information is needed or
- A certificate of registration indicating that the work has been registered, or if the application cannot be accepted, a letter explaining why it has been rejected.

Requests to have certificates available for pickup in the Public Information Office or to have certificates sent by Federal Express or another mail service cannot be honored.

If you apply using a paper application and you want to know the date that the Copyright Office receives your material, send it by registered or certified mail and request a return receipt.

Corrections and Amplifications of Existing Registrations

To correct an error in a copyright registration or to amplify the information given in a registration, file with the Copyright Office a supplementary registration Form CA together with the filing. Form CA may be filed in the same manners as described above under "Registration Procedures." The information in a supplementary registration augments but does not supersede that contained in the earlier registration. Note also that a supplementary registration is not a substitute for an original registration, for a renewal registration, or for recording a transfer of ownership. For further information about supplementary registration, see Circular 8, *Supplementary Copyright Registration*.

Mandatory Deposit for Works Published in the United States

Although a copyright registration is not required, the Copyright Act establishes a mandatory deposit requirement for works published in the United States. See the definition of "publication" on page 3. In general, the owner of copyright or the owner of the exclusive right of publication in the work has a legal obligation to deposit in the Copyright Office, within three months of publication in the United States, two copies (or in the case of sound recordings, two phonorecords) for the use of the Library of Congress. Failure to make the deposit can result in fines and other penalties but does not affect copyright protection.

If a registration for a claim to copyright in a published work is filed online and the deposit is submitted online, the actual physical deposit must still be submitted to satisfy mandatory deposit requirements.

Certain categories of works are exempt entirely from the mandatory deposit requirements, and the obligation is reduced for certain other categories. For further information about mandatory deposit, see Circular 7D, *Mandatory Deposit of Copies or Phonorecords for the Library of Congress*.

Use of Mandatory Deposit to Satisfy Registration Requirements

For works published in the United States, the copyright law contains a provision under which a single deposit can be made to satisfy both the deposit requirements for the Library and the registration requirements. To have this dual effect,

the copies or phonorecords must be accompanied by the prescribed application form and filing fee.

Who May File an Application Form?

The following persons are legally entitled to submit an application form:

- **The author.** This is either the person who actually created the work or, if the work was made for hire, the employer or other person for whom the work was prepared.
- **The copyright claimant.** The copyright claimant is defined in Copyright Office regulations as either the author of the work or a person or organization that has obtained ownership of all the rights under the copyright initially belonging to the author. This category includes a person or organization who has obtained by contract the right to claim legal title to the copyright in an application for copyright registration.
- **The owner of exclusive right(s).** Under the law, any of the exclusive rights that make up a copyright and any subdivision of them can be transferred and owned separately, even though the transfer may be limited in time or place of effect. The term "copyright owner" with respect to any one of the exclusive rights contained in a copyright refers to the owner of that particular right. Any owner of an exclusive right may apply for registration of a claim in the work.
- **The duly authorized agent of such author, other copyright claimant, or owner of exclusive right(s).** Any person authorized to act on behalf of the author, other copyright claimant, or owner of exclusive rights may apply for registration.

There is no requirement that applications be prepared or filed by an attorney.

Fees*

All remittances that are not made online or by deposit account should be in the form of drafts, that is, checks, money orders, or bank drafts, payable to *Register of Copyrights*. Do not send cash. Drafts must be redeemable without service or exchange fee through a U.S. institution, must be payable in U.S. dollars, and must be imprinted with American Banking Association routing numbers. International Money Orders and Postal Money Orders that are negotiable only at a post office are not acceptable.

If a check received in payment of the filing fee is returned to the Copyright Office as uncollectible, the Copyright Office will cancel the registration and will notify the remitter.

The filing fee for processing an original, supplementary, or renewal claim is nonrefundable, whether or not copyright registration is ultimately made. Do not send cash. The Copyright Office cannot assume any responsibility for the loss of currency sent in payment of copyright fees. For further information, read Circular 4, *Copyright Fees*.

***NOTE: Copyright Office fees are subject to change. For current fees, please check the Copyright Office website at www.copyright.gov, write the Copyright Office, or call (202) 707-3000.**

Certain Fees and Services May Be Charged to a Credit Card

If an application is submitted online, payment may be made by credit card or Copyright Office deposit account. If an application is submitted on a paper application form, the fee may not be charged to a credit card.

Some fees may be charged by telephone and in person in the office. Others may only be charged in person in the office. Fees related to items that are hand-carried into the Public Information Office may be charged to a credit card.

- **Records Research and Certification Section:** Fees for the following can be charged in person in the Office or by phone: additional certificates; copies of documents and deposits; search and retrieval of deposits; certifications; and expedited processing. In addition, fees for estimates of the cost of searching Copyright Office records and for searches of the copyright facts of registrations and recordings on a regular or expedited basis may be charged to a credit card by phone.
- **Public Information Office:** These fees may only be charged in person in the office, not by phone: standard registration request forms; special handling requests for all standard registration requests; requests for services provided by the Certifications and Documents Section when the request is accompanied by a request for special handling; search requests for which a fee estimate has been provided; additional fee for each claim using the same deposit; full term retention fees; appeal fees; Secure Test processing fee; short fee payments when accompanied by a Remittance Due Notice; in-process retrieval fees; and online service providers fees.
- **Public Records Reading Room:** On-site use of Copyright Office computers, printers, or photocopiers can be charged in person in the office.
- **Accounts Section:** Deposit Accounts maintained by the Accounts Section may be replenished by credit card. See

Circular 5, *How to Open and Maintain a Deposit Account in the Copyright Office*.

NIE recordations and claims filed on Form GATT may be paid by credit card if the card number is included in a separate letter that accompanies the form.

Search of Copyright Office Records

The records of the Copyright Office are open for inspection and searching by the public. Upon request and payment of a fee,* the Copyright Office will search its records for you. For information on searching the Office records concerning the copyright status or ownership of a work, see Circular 22, *How to Investigate the Copyright Status of a Work*, and Circular 23, *The Copyright Card Catalog and the Online Files of the Copyright Office*.

Copyright Office records in machine-readable form cataloged from January 1, 1978, to the present, including registration and renewal information and recorded documents, are available for searching on the Copyright Office website at www.copyright.gov.

For Further Information

By Internet

Circulars, announcements, regulations, certain applications forms, and other materials are available from the Copyright Office website at www.copyright.gov.

By Telephone

For general information about copyright, call the Copyright Public Information Office at (202) 707-3000. Staff members are on duty from 8:30 AM to 5:00 PM, eastern time, Monday through Friday, except federal holidays. Recorded information is available 24 hours a day. If you want to request paper application forms or circulars, call the Forms and Publications Hotline at (202) 707-9100 and leave a recorded message.

By Regular Mail

Write to:

Library of Congress
Copyright Office-COPUBS
101 Independence Avenue SE
Washington, DC 20559-6304

For information on other copyright-related publications, read Circular 2, *Publications on Copyright*.

The Copyright Public Information Office is open to the public 8:30 AM to 5:00 PM Monday through Friday, eastern time, except federal holidays. The office is located in the Library of Congress, James Madison Memorial Building, 101 Independence Avenue SE, Washington, DC, near the Capitol South Metro stop. Staff members are available to answer questions, provide circulars, and accept applications for registration. Access for disabled individuals is at the front door on Independence Avenue SE.

The Copyright Office is not permitted to give legal advice. If information or guidance is needed on matters such as disputes over the ownership of a copyright, suits against possible infringers, the procedure for getting a work published, or the method of obtaining royalty payments, it may be necessary to consult an attorney.

NOTE: The Copyright Office provides a free electronic mailing list, *NewsNet*, that issues periodic email messages on the subject of copyright. The messages alert subscribers to hearings, deadlines for comments, new and proposed regulations, new publications, and other copyright-related subjects of interest. *NewsNet* is not an interactive discussion group. Subscribe to the Copyright Office free electronic mailing list via the Copyright Office website at www.copyright.gov. Click on "Email updates." You will receive a standard welcoming message indicating that your subscription to *NewsNet* has been accepted.