

# Report & Portfolio Development

## Document Style Checklist

### Gate 1: Form and Style Review

Dr. Alianna J. Maren | Themesis, Inc. / Northwestern University MSDS | themesis.com

*Note to Students: This checklist is used in your Gate 1 strategy session with your AI Portfolio Coach (Claude). You will work through each item interactively with Claude — confirming each point visually in your own document and reporting back. Claude will guide you through the process one item at a time. Do not attempt to confirm all items at once.*

## 1. How to Use This Checklist

This checklist is not a self-assessment form to fill out alone. It is a structured dialogue tool. Your AI Portfolio Coach will walk you through each item in sequence, ask you to visually confirm it in your document, and record your response before moving to the next item.

Have your report open as both a .docx and a PDF while working through this checklist — the PDF is your visual reference; the .docx gives Claude access to your text.

For each item, Claude will describe what to look for, ask you to check it, and ask you to respond with one of three answers:

- Confirmed — the requirement is met.
- Not yet — it needs to be fixed.
- Not sure — Claude will help you figure out what to look for.

Claude will not move to the next item until the current one is confirmed or a correction plan is in place.

## 2. The Style Checklist

Item	Category	Requirement	How to Check
SC-1	Column Format	Single column only — not double-column.	<i>Scroll through your document. Every page should have text running the full width of the page, not split into two side-by-side columns.</i>
SC-2	Font Type	Clean, professional, highly legible font throughout. Times New Roman and Calibri are acceptable examples.	<i>Select all text (Ctrl+A / Cmd+A) and check the font name displayed in your toolbar. Confirm there is no mix of decorative or unusual fonts.</i>

Item	Category	Requirement	How to Check
SC-3	Font Size	12pt minimum throughout body text.	<i>Select a representative paragraph of body text and check the font size shown in your toolbar. Check several locations — introduction, methods, conclusions.</i>
SC-4	Title Page Numbering	Title Page has no page number.	<i>Look at your Title Page. There should be no number visible — not in the header, footer, or body. In Word, check View &gt; Header and Footer to confirm the Title Page is set to 'Different First Page' or has numbering suppressed.</i>
SC-5	Front Matter Numbering	Abstract and Table of Contents use small Roman numerals (i, ii, iii...).	<i>Go to your Abstract page and look at the page number. It should read 'i'. Your Table of Contents should read 'ii'. If Arabic numerals appear here, the page numbering sections need to be corrected.</i>
SC-6	Body Text Numbering	Body text beginning with the Introduction uses Arabic numerals starting at 1.	<i>Go to your Introduction page. The page number should read '1'. Check that subsequent pages count up correctly (2, 3, 4...).</i>
SC-7	Orphaned Headers	No section header appears alone at the bottom of a page without body text following it on the same page.	<i>Scroll through your document and look at the bottom of each page. If you see a section heading with no text below it before the page break, that is an orphaned header and must be corrected by adding a page break before it.</i>

### 3. Your Canvas Confirmation Statement

Once you have completed the Style Checklist review with Claude and all items are confirmed (or corrections are in progress), Claude will provide you with the following statement to copy and paste into the Comments field when you upload Assignment 1 in Canvas:

*Style Checklist Confirmed: I have completed the Gate 1 Document Style Checklist review with my AI Portfolio Coach (Claude). Items SC-1 through SC-7 have been reviewed. All confirmed items meet the requirements described in the checklist. Any items requiring correction have been identified and a correction plan is in place.*

Copy this statement exactly as written. Do not paraphrase it. The consistent wording allows Dr. Maren to confirm at a glance that the checklist process was completed, without requiring her to read a unique statement from each student.

#### **4. What Happens After Gate 1**

Completing the Style Checklist does not mean your formatting is perfect — it means you have reviewed it with Claude's guidance, identified any issues, and have a plan to address them. Dr. Maren will review the actual document when grading and will apply point deductions for any formatting requirements that are not met.

Once Gate 1 is complete, your AI Portfolio Coach will move with you to Gate 2: the Title Page Review. This is where you shift from form and style to professional positioning — making sure your Title Page presents you as an AI professional, not as a student submitting an assignment.