

# Techniques and Tools for Genealogy Research



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**Part**



# 1 About Genealogy Research

Genealogy is a lot of fun and often at times, it can feel like the lottery. People that play the lottery know they are taking chances in playing and don't always win, the same is true for genealogy. You may end up looking for a very long time and may never find that missing data. But the idea of winning is exciting, and when you do win, you are filled with excitement. The same excitement happens when you find a piece of information that you have been looking for.

All research starts with some known information about an ancestor. Interviewing your living relatives is a good place to start. Ask questions that include the basics such as names, hometowns, family structure, and trades or occupations. Also ask open-ended questions that help reveal stories about your heritage. This can help you to not only answer questions that might come up as you are following the trail of your ancestry, but it may provide additional insight into your family's personal history. Comb for clues about military involvement or how a period in history may have contributed to your family's lifestyle. You might also gain interesting leads by following up on research another relative has conducted – be sure to inquire about any existing family trees. Use information that has already been discovered to help verify your own findings or guide you in your efforts.

Once you begin, assemble the information you have into the form of a family tree by using a pen and paper or a genealogy program to record your family information. When you start to record your data, it can become overwhelming on what should be recorded, how it should be recorded, and how to uncover missing information.

Creating a family tree entails gathering the information that is known, as well as solving various family history questions. Just recording the facts of events (the dates and locations) is not enough. Data that is only copied from another person who did not have first hand or second hand knowledge of the facts does not constitute the information as being accurate and true. It is the historical documents, oral and written that can recount the events that are needed to prove the information is accurate.

This document is meant to help fellow genealogists with the research process, keep you focused with your task at hand, organize your data so you know where to spend your research efforts, and guide you to uncover missing information.

**Part**



## 2 Isolating Missing Information

When it comes to the basics of genealogy, research is used to solve a question. Most questions involve names, dates, locations, and/or relationships. Creating a chart for each person like the one below shows what documents you have to verify the life important facts, relationships, and what documents you have for that person. This is a good way of identifying where your holes are and where you should spend your time doing research. Along the way, it is important to fill in other family history information with photos, personal interviews, etc.

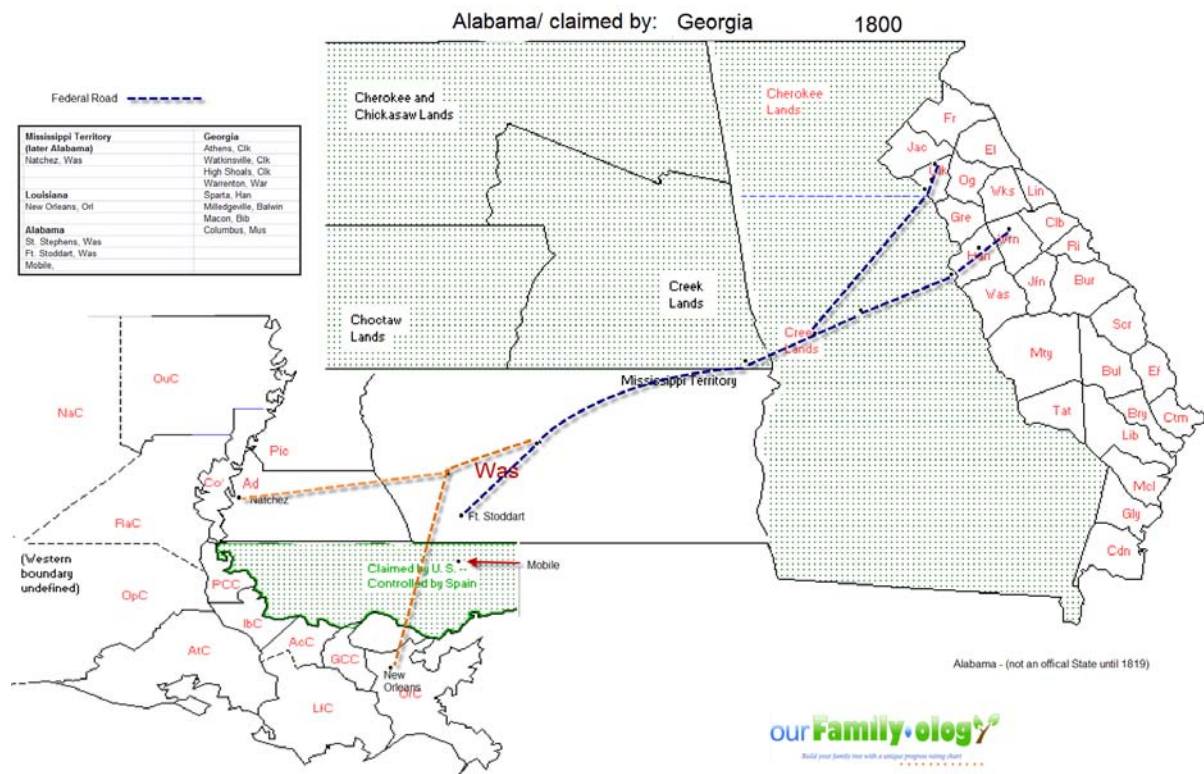
Fact	Applicable	Source Title	Progress
First & Last Name	✓	1930 Federal Census, Oregon - Jackson - Ashland, Page 1B; Death Certificate, Donald F Gay; Social Security SS-5 Form, Donald F Gay; Military Personnel Records; Birth Registration, Sherry Lou Gay; Muster Roll of US Marine Corp; California Marriage Index, 1965-1985, Donald F Gay	
Birth Date	✓	Death Certificate, Donald F Gay; Social Security SS-5 Form, Donald F Gay; Military Personnel Records; California Marriage Index, 1965-1985, Donald F Gay	
Birth Place	✓	Death Certificate, Donald F Gay; Social Security SS-5 Form, Donald F Gay; Military Personnel Records	
Death Date	✓	Death Certificate, Donald F Gay	
Death Place	✓	Death Certificate, Donald F Gay	
Links to Either Parent	✓	<b>(missing historical documents)</b>	
Links to Spouse	✓	Birth Registration, Sherry Lou Gay; California Marriage Index, 1965-1985, Donald F Gay	
Links to other Family Member	✗	Birth Registration, Sherry Lou Gay	

### Screen Overview:

Creating a way to easily identify what documents you are missing to fill in family history information is helpful to identify name, date, location, and relationship issues. This can help you with setting your goals and start the research process.

## 2.1 Location Challenges

Finding a person in a particular place can be a challenge due to county formation and changes, as well as knowing where our ancestors were at a given time due to them moving. To try and resolve these issues, look at county formation maps for the time period and see when the county was formed or changed. For tracing your ancestors due to them moving, use books that have the major and minor migration trails. Many gazetteers will describe the land, where people were traveling from, and reasons why some people moved at specific times due to issues such as disease, religion, and land problems, all of which can give insight to your history. Note the counties they would have to go through so you can trace their movements and research those counties too. Try finding land grants or deeds for the person. If you can't find your ancestor, try the same method for another relative or someone they were traveling with. Often a person got married or had a child, so look for possible records that help solve your family history question by expanding your search with other people in the family. Follow and trace their footsteps to help unlock information about the ancestor you are searching. Documents that may help are: tax records, voter registration, directories, wills, probate, military, land patent, plat maps, and deeds.





## 2.2 Issues with Names

Finding a person can be an issue due to the way the name was spelled either on purpose or by accident. Because the US census takers often did not confirm the spellings of names, the soundex calculator was created to index names in the 1880, 1900, 1910 and 1920 US Census. The soundex can also aid genealogists by identifying spelling variations for a given surname. Click on the link to use a free soundex calculator.

Other issues arise especially with finding females and their maiden name. Look at her children's middle names to see if they reveal her maiden name. Possibly one of her children is named with her maiden name or her mother's name.

## 2.3 Figuring out Important Dates

Trying to figure out when exactly someone was born, married, or died is a challenge for anyone that is researching an ancestor that we do not have first or second hand knowledge of. When you don't have a clue to when a person was born, married or died, it is a good idea to use estimates to begin your search. Using estimated dates of 5380 people from a personal family tree spanning from 1740 to 2000, the average age at marriage for males is 24 and 20 for females. If you are looking to use more scientific data, the chart below has been provided to help analyze important dates.

Century	Age at Marriage	Life Expectancy Male, Female
1700's	Mid to late teens <sup>1</sup>	36 <sup>2</sup> , 25 <sup>3</sup>
1800's	?	41 <sup>2</sup> , 36 <sup>3</sup>
1900's	22.8, 20.3 <sup>5</sup>	55 <sup>4</sup> , 47 <sup>3</sup>
2000's	27.1, 25.3 <sup>5</sup>	75 <sup>4</sup> , 77 <sup>5</sup>

### Reference:

<sup>1</sup> According to Colin R Chapman author of Marriage Laws, Rites, Records & Customs, "the legal age for girls was 12 and boys was 14".

"In medieval times marriage was arranged to protect family assets".

<sup>2</sup> Life expectancy for 1700's

<sup>3</sup> Life expectancy information

<sup>4</sup> Life expectancy information

<sup>5</sup> The average marriage age for males / females

We used the year 1950 as the average age for the 1900's.

For 2000's the chart went up to 2003.

Since we see the average age going up the number is conservative.

**Part**



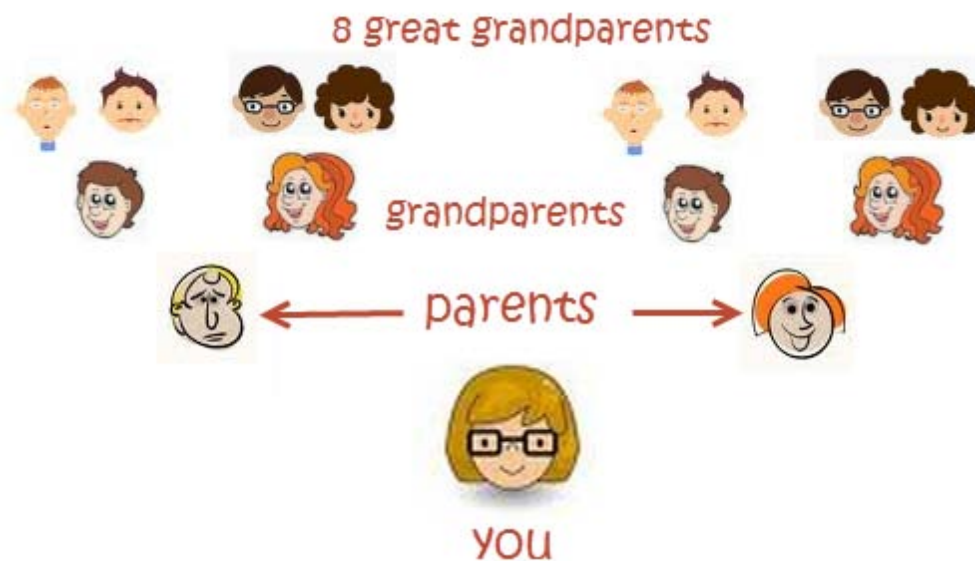
### 3 Ancestors and Relationships

The most common relationships are trying to link a child to their parents and link spouses. Figuring out an ancestor's relationship can sometimes be a challenge when no direct evidence can be found linking them to the family by blood or marriage.

Most people start with trying to find a child with their parents listed in census records to help establish a child / parent relationship. Even if you do find them in a census, are they the child to both the mother and father? This should be verified with a birth certificate or death certificate. What if these records don't exist for the person?

Look for clues to try to connect a child to a parent by their name. Either of the parents or grandparents first or middle names can be the same as the child's first or middle name, or it can contain the mother's maiden name. This information can help with discovering your ancestor's parent / child relationship. Look for biographies, church records, military pension applications, birth and death certificates, obituaries, immigration records, passenger lists, naturalization's, and cemeteries (families often bought plots in the same cemetery).

When you can't find a marriage license, probate, or will, you may find clues to an ancestors spouse by monitoring what families traveled and moved together, or found moving into the same area by analyzing census records. Look at the people found on the pages before and after the pages that you find your ancestor on. Other records that may give clues: land records, church records, and obituaries.



### 3.1 Exhaustive Research

With the ultimate goal of being able to assemble a family history that is as close to the truth as possible, you will want to follow the Genealogical Proof Standard set by the Board for Certification of Genealogists, as outlined below:

- Conduct a reasonably exhaustive search in reliable sources for all information that is or may be pertinent to the identity, relationship, event, or situation in question;
- Collect and include in our compilation a complete, accurate citation to the source or sources of each item of information we use;
- Analyze and correlate the collected information to assess its quality as evidence;
- Resolve any conflicts caused by items of evidence that contradict each other or are contrary to a proposed (hypothetical) solution to the question; and
- Arrive at a soundly reasoned, coherently written conclusion.

**Part**



## 4 Finding Primary and Secondary Sources

You can't find everything that exists in one place. There are several books and websites that give information on what they know. If you can't find what you are looking for, it doesn't mean it does not exist. Broaden your search efforts by trying different repositories.

There are thousands of repositories to help with your genealogy. As you start to research, you will have favorites that help with what you are looking for. Below are a few you can start with. If you don't find what you are looking for, try different repositories. If you still can't find anything, then work with a professional genealogist to get some help on where you might be able to find what you are looking for.

### Free Repositories:

- Books like *The Handybook for Genealogists* by Everton Publishers are available at most libraries and historical societies they give lots of hints for every county in the USA.
- Your local historical society and library are also great places to get started with your pre-research.
- Visit your local Family History Center, locations are found in almost every county across the USA and the world.
- Consult the lists in this document to help give a starting point for your pre-research.
- <https://wiki.familysearch.org>
- <http://www.familyhistory101.com>
- <http://usgenweb.org/>
- <http://www.rootsweb.ancestry.com>
- The Worldcat is a great library resource that can pull up books that are found in one library and can be loaned to your local library.
- Consult the local historical society and state archives (where you are researching) to get clues for what they have available.

### Paid Repositories:

<http://www.ancestry.com>  
<http://www.archives.com>  
<http://www.footnote.com>  
<http://www.worldvitalrecords.com>

### 4.1 Government Documents

Government records are clues to finding your ancestors. Unfortunately, many have been burned in fires or destroyed over the years. Couple that with records not being available because the information just wasn't recorded makes it tough to find the information you are looking for.

We have extracted information from *The Handybook for Genealogists* by Everton Publishers and information from FamilySearch to come up with a list of records that may

be available for each state for birth, death, marriage, divorce, taxation, probate, wills, and Federal and State Census Records. Keep in mind, that each county may or may not have information due to starting at a later time, destroyed, or lost documents.

State	Birth Records	Death Records	Marriage Records	Divorce Records	Taxation	Probate	Wills
Alabama	1908	1908	1936	1950	1865	1850	1808
Alaska	1913	1913	1913	1950	1867		
Arizona	1855	1844	1862	varies		1866	1866
Arkansas	1914	1914	1917	1923	1836	1808	1802
California	1905	1905	1905	1962	1849		
Colorado	1910	1900	1900	1900	1862	1878	1886
Connecticut	1897	1897	1897	varies	1637	1829	1665
Delaware	1913 (archives)/ 1965 (state)			1935	1681	1683	1683
District of Columbia	1874	1855	1811	1956	1790	1776	1776
Florida	1917	1877	1927	1927	1839	1886	1886
Georgia	1919	1919	1952	varies	1868	1733	1733
Hawaii	1853	1853	1853	1951		1844	1844
Idaho	1911	1911	1947	1947	1865		
Illinois	1916	1916	varies	varies	1818	1834	1838
Indiana	1907	1900	1958	varies	1851	1850	1850
Iowa	1880	1880	1880	varies	1862	1655	1655
Kansas	1911	1911	1913	1951	1862	1859	1859
Kentucky	1911	1911	1958	1958	1891	1808	1807
Louisiana	1914	1942	1914	varies	1845	1794	1794
Maine	1892	1892	1892	varies	1875	1917	1640
Maryland	1898	1898	1865	varies	1659	1655	1655
Massachusetts	1841	1841	1841	1952	1760	1655	1655
Michigan	1867	1867	1867	1867	1862		
Minnesota	1900	1908	1958	1970	1857	1843	1843
Mississippi	1912	1912	1926		1869	1846	1846
Missouri	1889 - 1893, 1910	1889 - 1893, 1910	1837	1948	1820	1820	1871
Montana	1907	1907	1943	1943	1864		
Nebraska	1904	1904	1909	1909	1875	1885	1885



State	Birth Records	Death Records	Marriage Records	Divorce Records	Taxation	Probate	Wills
Nevada	1911	1911	1968	1968	1864	1855	1855
New Hampshire	1640	1640	1640	1880	1727	1623	1623
New Jersey	1848	1848	1848	1900	1778	1705	1705
New Mexico	1920	1920	varies	1900	1862	1685	1685
New York	1881	1880	1880	1847	1760	1626	1626
North Carolina	1913	1913	1962	1958	1820	1690	1690
North Dakota	1881; 1894-1920 incomplete		1925	1949	1889	1898	1898
Ohio	1908	1908	1949	1949	1801	1655	1655
Oklahoma	1908	1908	1908	varies	1839	1883	1883
Oregon	1903	1903	1906	1906	1859	1887	1887
Pennsylvania	1906	1906	1885	varies	1773	1682	1682
Rhode Island	1853	1853	1853		1862	1638	1638
South Carolina	1915	1915	1911	1962	1864	1781	1781
South Dakota	1905	1905	1905	1905	1889	1894	1894
Tennessee	1908	1908	1861	1905	1834	1655	1655
Texas	1903	1903	1966	1905	1845	1639	1639
Utah	1905	1905	1887	1978	1867	1859	1859
Vermont	1857	1857	1857	varies	1861	1700	1700
Virginia	1912, some back to 1853		1853	1918	1787	1675	1675
Washington	1907	1907	1968	1968	1889	1887	1887
West Virginia	1917	1917	1921	1968	1787	1753	1753
Wisconsin	1907, some back to 1814		1836	1907	1848	1700	1700
Wyoming	1909	1909	1941	1941	1865	1870	1870

For a reference to what is available for Federal and State Census Records, go to [http://www.family-genealogy.com/State\\_Census.html](http://www.family-genealogy.com/State_Census.html).

## 4.2 Solving your Puzzle with Records

### Solve Age Issues with:

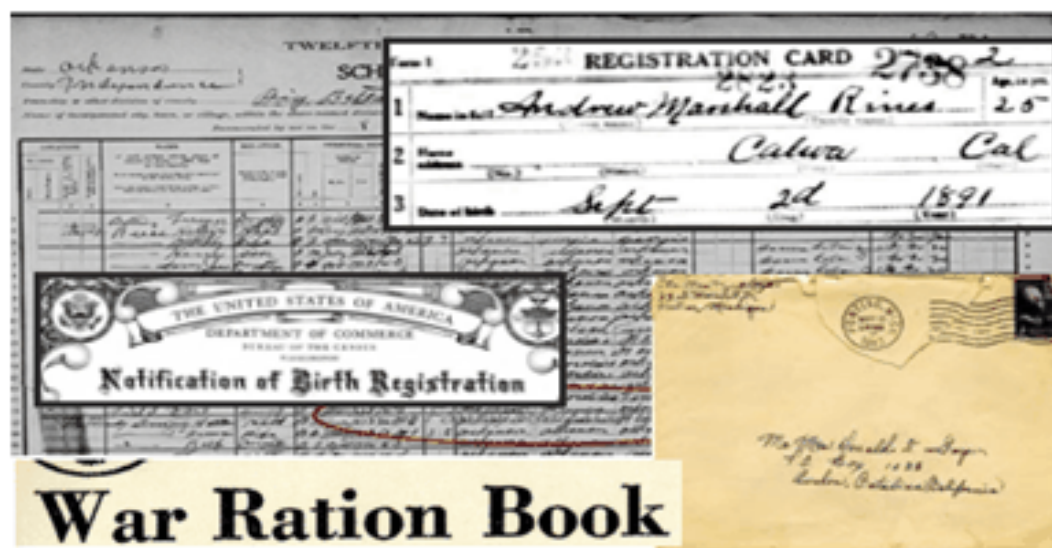
Census, cemeteries, military records, obituaries, SS-5 form, vital records.

### Find a Birth Date and Place with:

Bible records, birth certificate, census, church records, military records, newspapers, obituaries, passports, SS-5 form, vital records, war ration books.

### Discover Death Date and Place with:

Church records, cemeteries, court records, death certificate, funeral home records, funeral program, guest book, land and property, military records, newspapers, obituary, probate records, prayer cards, tombstone.



### Confirm Family Members with:

Census, church records, court records, guardianship, land records, marriage records, obituaries, passenger lists, plat maps, probate records, naturalization, SS-5 form, tombstone, vital records, wills.

### Uncover Marriage Date and Place with:

Bible records, census, church records, guest book, marriage announcement, certificate or license, newspapers.

### Identify Place of Residence with:

Biographies, city directories, census, land and property, maps, marriage records, migration trails (minor and major routes), military, passports, probate, tax payers lists, voter registration, wills.

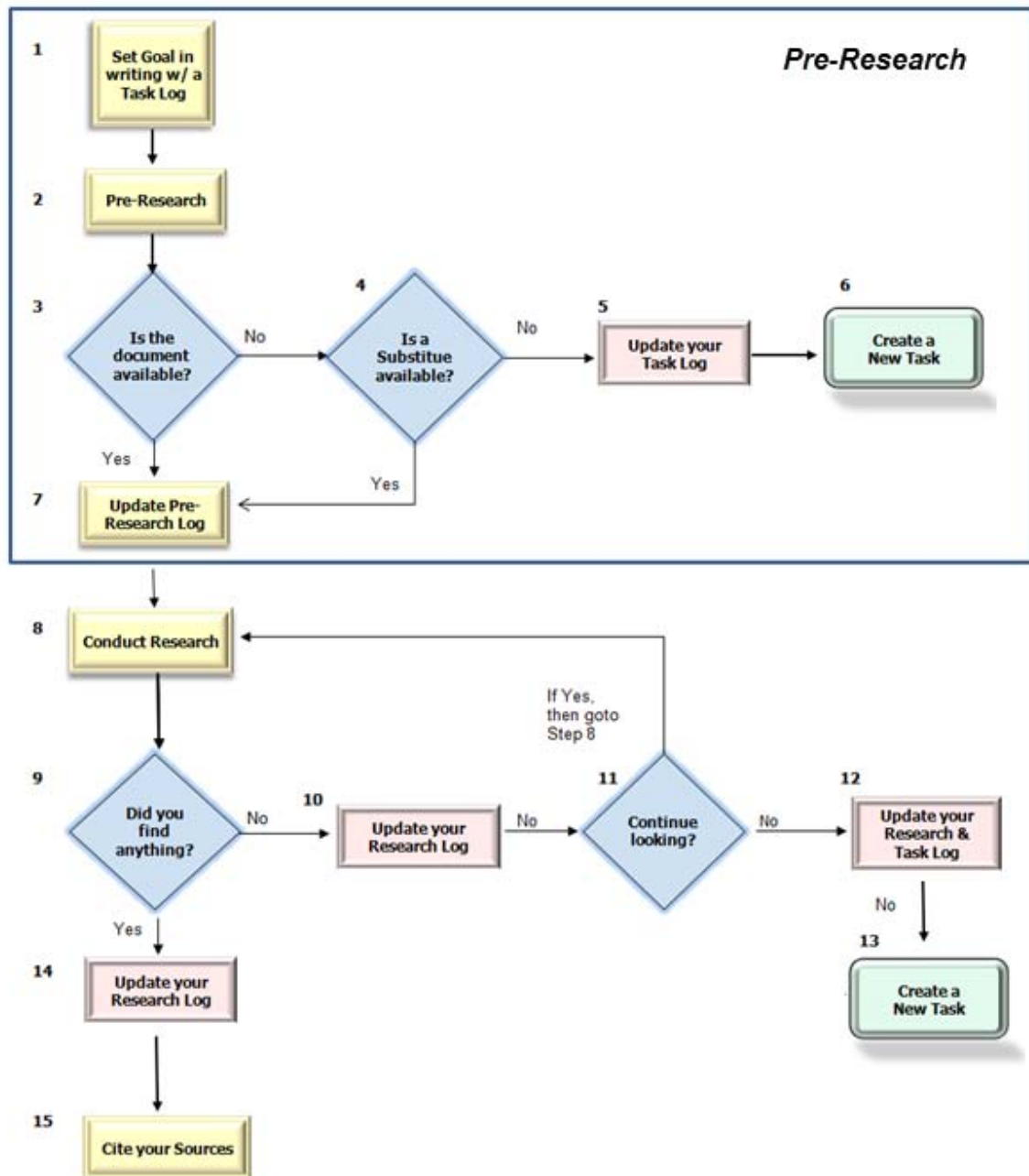
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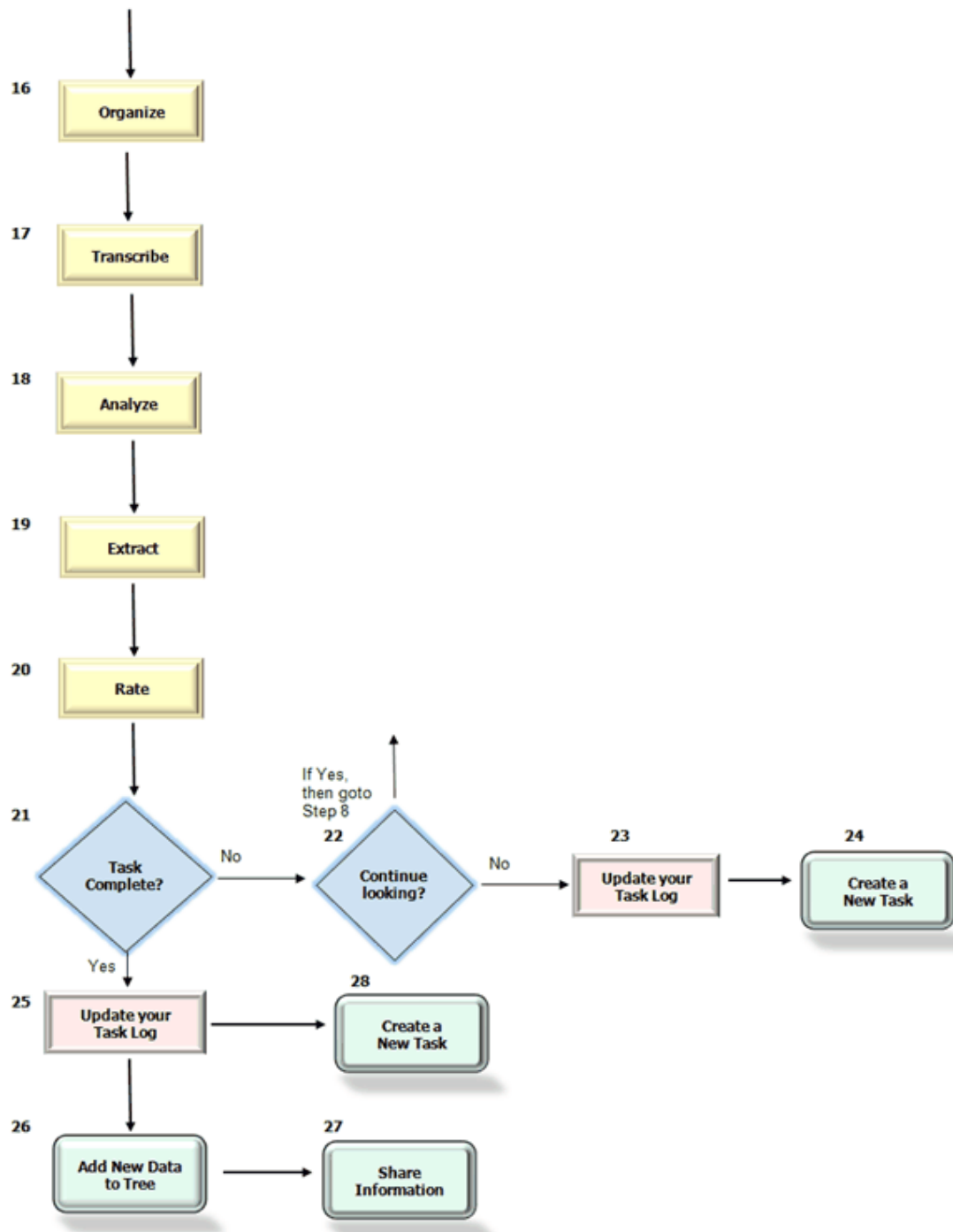


## 5 28 Steps to Genealogy Research

Several steps are involved to complete the genealogy research process. Below is a diagram outlining the steps followed by detailed information for each step.

### Research Diagram





## 5.1 Step 1 - Your Goals

Set a goal in writing using a task list that contains fields so you can write down and monitor your progress. Creating specific well thought out goals, with as much information as you already know will lead to a more focused research approach and better chances of a positive outcome.

**Task List Example:**

Start Date	Family Name	What are you trying to find?	Purpose of Task	Notes	Completed Date
10-Jan-2009	Riece, Henry	place of birth	confirm info we currently have		

**5.2 Step 2 - Pre-Research Planning**

Create a pre-research log based on your task. Do some pre-research homework to find out what is available by making phone calls and doing some legwork before getting in your car or flying somewhere only to discover what you are looking for is not available.

You should record what you know, even if it is not available, this will keep you from trying to do research for something that can't be found. When a document can't be found, you should try to look for alternate documents to help fill in the missing family history data.

**Pre-Research Log Example:**

Last name	First Name	What Year are you Researching ?	What is the City, County & State	What document are you looking for?	Does this type of records exist for this place and time?	Next Steps
Reice	Henry	1810	Greene, Tennessee	Birth certificate	No, started in 1908	

**5.3 Step 3 - Is the Document Available?**

If you are looking for a document and it is not available then go to step four (4). If it is, go to step seven (7).

**5.4 Step 4 - Is a Substitute Available?**

Can an alternate document be found to supply the information you are seeking?

The first step is to analyze where you think you can find what you are looking for. Is it in a book, on a microfilm, in a letter, or a legal document? There are thousands of sources

that can help with your genealogy, finding the right one to answer a question about a family detail, will only be found through research.

**Records that may provide Genealogy Information:**

Gov. Documents: Census, court, deeds, probate, tax entries, voter registration, last will and testament, probate

Religion: Baptism, Bar Mitzvah, Bat Mizvah, Bible, christening, church archives

Vital Information: DNA, medical records, hospital reports

Birth: Adoption, birth certificate, social security SS-5, drivers license, birth announcement

Marriage: Annulment, marriage certificate, divorce, engagement or marriage announcement

Death: Cemetery, cremation, death certificate, death index, mortuary, obituary, prayer/memorial card

Military Service: draft registration, military records, veterans schedules

Migration: immigration, emigration, passenger list, passports, deeds, naturalization

General: Criminal, educational, employment

Residence: Census, court archives, deeds, voting, tax registers

## 5.5 Step 5 - Update your Task Log

If you can't find anything after trying several repositories, update your task log with your next steps.

## 5.6 Step 6 - Create a New Task

When you can no longer continue to research a fact, create a new task for a new event, or a new person and start the process again.

## 5.7 Step 7 - Update your Pre-Research Log

If your pre-research reveals some possibilities, update your pre-research log with your newly found information.

Use several repositories to help with your pre-research process. You may have a list of repositories that work for finding specific locations, or a type of record. With pre-research practice you will build lists that work best for you.

### Updated Pre-Research Log Example:

Last name	First Name	What Year are you Researching?	What is the City, County & State	What document are you looking for?	Does this type of records exist for this place and time?	Next Steps
Reice	Henry	1810	Greene, Tennessee see	Birth certificate	No, started in 1908	Consult Tenn St. library, World Cat, Local historical society & FHL film set for alternative sources
Reice	Henry	1810	Greene, Tennessee see			World Cat - Historic Green County Tennessee and its People 1783 - 1992
Reice	Henry	1810	Greene, Tennessee see			Local historical society - has a newsletter - Greene County Pioneer. The name appears in Vol 16, 5, 17, and 113
Reice	Henry	1810	Greene, Tennessee see			FHL - Book, Sherrill, Charles A. the Reconstruction 1810 Census of Tennessee #976 8 x2

## 5.8 Step 8 - Start Researching

Based on your pre-research, once you have identified where you can find what you are looking for then it is time to execute your research plan by gathering the information yourself, or hire someone to do the research for you.

## 5.9 Step 9 - Did you find Anything?

While conducting your research did you find what you were looking for? Did the source contain the information you were looking for? If no, go to step ten (10). If yes, go to step fourteen (14).

## 5.10 Step 10 - Update your Research Log

If your research was or was not successful, update your research log with what you looked at and the results. Writing down all your research efforts is essential so you don't do the same research over and over again. Some research problems last a long time,



and you may get tired of working on an issue and decide to work on a new task. If you don't write down everything you have done, you will end up doing some of the same research again, wasting valuable time and effort. Sometimes when you get to your research facility you may find another source that is helpful, or it may not. Write down all the sources you used so you don't duplicate your research.

### Research Log Example:

Date of Search	Repository	Source Information (author, title, year, pages)	Comments	Next Steps
12-Feb-2009	Greene County Historical Society	Green County Pioneer, filed form to get copies of issues		
15-Feb-2009	World Cat	Ordered inter-library loan Historic Greene County Tennessee and its People		

## 5.11 Step 11 - Continue Looking

Decide if you will continue to look for information. If yes, go back to step eight (8), and try a new approach, if not go to step twelve (12). Below are some suggestions for finding information:

### Try a New Research Approach:

- Consult with someone about the issue to get a different perspective. Being able to share your research efforts to date will help give the consultant an idea of what you have already tried and lend some new research ideas.
- Try a new repository to conduct your research. Find a local genealogical society, historical commission, local library, or research genealogy club.
- Try different name spellings. The information could have been recorded differently than what you were expecting, either accidentally, or on purpose. If you don't find something you are looking for in a certain county, widen your search criteria to the next county over. Remember, counties formed over time and knowing this can be the key to finding a certain document.

## 5.12 Step 12 - Update Task and Research Logs

By deciding to stop your research for a task, update your log so you have a record of what was tried. You may want to research this same person in the future and it will remind you of what you have already tried.

## 5.13 Step 13 - Create a New Task

Create a new task and start with step one (1).

## 5.14 Step 14 - Update your Research Log

If you found information that is helpful for your task, update your research log with the details and make the necessary copies of the document you found. If the information comes from a book, copy the cover and make sure you know who the author and publisher is. Make sure you have everything you are looking for, and that you copied every page that pertains to your ancestor.

## 5.15 Step 15 - Cite your Sources Fully

Cite your Sources so you can get another copy of the document. It is almost certain that you may lose or misplace part of the information you found; or you may discover you should have copied more pages from the document you were using. If you found the document while traveling, it will be much easier to call the repository and tell them exactly what you need so someone can make a copy and send it to you. This is one (1) good reason to document everything; you will be glad you did.

### **Source citation begins by writing down the document information:**

- The repository – contains the information of where you found the document
- Author – who created the information
- Title & Information – contains the title, page numbers, and any important reference details
- Publication – includes the publisher and, ISBN # if available

**Citing Books is different than citing online sources. As a rule:**

- Websites showing their URL should be placed in “< >”.
- Website Titles, Newspapers and Magazines should be in italics. When you cannot use italics, place an underscore line “\_” before and after the Title.
- Articles and database titles should be in quote marks “Title”.

**Citation Example:**

James Reece, Probate records, July Term 1895; citing pages 304 and 205, probate court (original papers), Searcy County, Arkansas; photocopy from Family history Center, Microfilm #1031126, Item #1 : 2008

For a quick reference sheet, for citing online historical documents, see Elizabeth Shown Mills. *QuickSheet, Citing Online Historical Resources*. Genealogical Publishing Co., ISBN # 978-0-8063-1776-2

## 5.16 Step 16 - Organize all your Findings

Before getting consumed with lots of papers, set up a filing system that works for you and stick with it. There are several options to consider. You may consider filing your documents by year, alphabetically, or by setting up folders for direct family members then alphabetically for subsequent ancestors. You may want to file your documents by surname and then cross-file your documents by putting all similar documentation in color coded folders filed by year and then alphabetically; or alphabetically and then by year.



Whatever organization method is used: folders, notebooks, boxes, large envelopes, etc., be consistent with a filing system. Scanning all documents and adding them to a genealogy program will help keep your genealogy documents organized.

Make sure you have a back-up of all your records. You can lose your data if your file is only stored on your hard drive and your computer crashes. Having an external recovery plan is always a good idea.

## 5.17 Step 17 - Transcribe your Sources

After organizing your documents and you get the time, you should transcribe them. Especially wills and probate records. Understanding old handwriting takes time. If you don't get the chance to look at a document for some time and it is not transcribed, you will need to learn the hand writing all over. And sometimes a detail will only be noticed after the transcription. Transcription entails starting with the source citation which contains where you got the information and enough details to get another copy. Then copy the document line for line (grammar errors and all punctuation). Don't forget to check your data for accuracy. It is easy enough to make a mistake while recording information.

## 5.18 Step 18 - Analyze your Data

Most sources do not easily prove a family relationship that helps to substantiate the person belongs' in the tree. Solving kinship with accumulated evidence may conflict with each other, or you may have substantial indirect evidence that when assembled properly, reveals the answer to the research problem even though no one document states the facts explicitly.

All records are subject to interpretation and can contain errors. Your analysis should take into account the clues that further substantiate or contradict information known about the ancestor and their family.

Because this is such an important step of the genealogy research process, keep in mind the following when doing your analysis and before adding a document to your ancestor:

- ❖ Having sources does not mean a family tree is accurate. An index entry accompanied by an associated image does not necessarily relate to an ancestor, even if the person's name, age, and origin are matching the information you have.
- ❖ Names are common, so are dates and places. Even if a person does have sources for an ancestor, it does not mean it is providing the correct evidence for a person to belong in the tree. Just because we can "see an image" does not mean we should stop looking for corroborating evidence or for alternatives. If we don't we will create genealogies (based on original images) that should not be trusted.
- ❖ Even primary sources in their original form or copies of them (not extracted or indexed versions) such as marriage, and military enlistment forms can contain errors, either on purpose so a person would appear old enough to get married or enlist in the military, or were recorded with errors on accident.
- ❖ Indexed and transcribed documents rarely contain enough information to verify kinship and they often contain errors during the transcription process.



The two images above are not the same. When doing genealogy research, analysis is needed to make sure you are adding the proper sources to your ancestors.

## 5.19 Step 19 - Extract the Information

Because it is not the source alone that proves the person belongs in the tree, genealogists need to collect several documents that provide the date and location of birth, marriage, death, and burial information; and provide parents, siblings, spouse, aunts, uncles, cousins, grandparents, and other important relationships that solve family history related questions. The information from the documents should be added to your family tree to support important events by adding the dates and locations as the facts; and adding the sources to back up those facts.

## 5.20 Step 20 - Rate your Sources

The Board for Certification of Genealogists uses a standard to rate sources. There are three (3) parts to the GPS standard: Reliability, Quality, and Information. It is the rating and extracting the important facts from the document that will help build a reliable family tree.

### Source Reliability

Reliability helps to identify the information that is being presented as a measure of knowledge. Source rating is ranked in the order they are listed. From the document you are using, is the information directly or indirectly stated? Can it stand on its own or is another document needed to fill in the missing information?

- First-Hand /Directly Stated: A person who has personal knowledge of the facts, which may be written or audible, and directly states the facts as related to the source evidence.
- First-Hand/Indirectly Stated: A person who has personal knowledge of the facts, which

may be written or audible, and indirectly states the facts as related to the source evidence.

- Second-Hand /Directly Stated: A person who has been told about the facts, and directly states the facts as related to the source evidence.
- Second-Hand/Indirectly Stated: A person who has been told about the facts, and indirectly states the facts as related to the source evidence.

### **Source Quality**

Quality helps to further establish the sources reliability by its attributes. Something that is handwritten and has lots of details is considered more reliable than a document that is an abridged version that may contain errors.

- None: Established for first-hand knowledge.
- Original/copy: An original or copy of an original that is a reproduction.
- Derivative: A hand written document or typed information that contains an abridged version of what was in the original document.

### **Important Note:**

If you are using first-hand knowledge, quality and information will be grayed out when rating a source.

### **Source Information**

Source Information contained in the source is judged by the informant's level of participation and knowledge. Some of the information from a source will provide assertion evidence. It is this evidence that should be looked at as primary vs. secondary and not the document as a whole or information that does not answer: name, birth date, birth place, death date, death place, links to either parent, links to spouse, links to other family member.

- None: Established for first-hand knowledge.
- Primary: Contains information that was documented at or near the time of the event.
- Mixed, Mostly Primary: Contains information that is partially primary and partially secondary, but mostly primary.
- Secondary: Contains information that was documented after the time of the event.
- Mixed, Mostly Secondary: Contains information this is partially primary and partially secondary, but mostly secondary.

### **Important Note:**

All records are subject to interpretation and can contain errors during the recording of the information. Also, a person may have supplied the incorrect information on purpose. Such as a date of birth on a military or marriage record, so they would appear to be old enough to enlist in the military or get married.

If the document contains both birth and death information, then it is a document with mixed information.

### 5.20.1 Rating Example

Sources are rated for the facts that can be extracted. Each source provides different information and should be rated as such. Not every source is easy enough to figure out how to rate, sometimes it is personal opinion.

#### SS-5 Form

This is the application form used to get a social security number. It was filled out by a person over the age of 15 in order to get a job.

Form SS-5  
TREASURY DEPARTMENT  
INTERNAL REVENUE SERVICE  
(Revised August 1941)

APPLICATION FOR SOCIAL SECURITY ACCOUNT NUMBER  
REQUIRED UNDER THE FEDERAL INSURANCE CONTRIBUTIONS ACT  
READ INSTRUCTIONS ON BACK BEFORE FILLING IN FORM

447-14-

DO NOT WRITE IN THESE SPACES

1. FIRST NAME: [redacted] MIDDLE NAME: [redacted] LAST NAME: [redacted]

2. SHOW NAME YOU GAVE YOUR PRESENT EMPLOYER, OR IF UNEMPLOYED, THE NAME YOU TELL THE EMPLOYER: *Shanks*

3. CITY: *OK* STATE: *Willis, Newton, R*

4. AGE AT LAST BIRTHDAY: *59* DATE OF BIRTH (MONTH): *Oct* (YEAR): *26 1882* PLACE OF BIRTH (CITY): *Marshall County*

7. FATHER'S FULL NAME, REGARDLESS OF WHETHER LIVING OR DEAD: *Samuel Wood* MOTHER'S FULL NAME BEFORE EVER MARRIED, REGARDLESS OF WHETHER: *Mary Ann*

8. SEX:  MALE  FEMALE COLOR (CHECK  WHICH):  WHITE  OTHER (SPECIFY):

11. HAVE YOU EVER BEFORE APPLIED FOR (CHECK  WHICH):  
(A) SOCIAL SECURITY ACCOUNT NUMBER:  YES  NO  
(B) RAILROAD RETIREMENT NUMBER:  YES  NO

12. BUSINESS NAME AND ADDRESS OF EMPLOYER: *None* (STREET AND NUMBER):

13. DATE SIGNED: *1-29-42* 14. SIGNATURE: *Willis M. [redacted]*

RETURN COMPLETED APPLICATION TO, OR SECURE INFORMATION ON HOW TO FILL IN APPLICATION FROM NEAREST SOCIAL SECURITY BOARD FIELD OFFICE. THE ADDRESS CAN BE OBTAINED FROM LOCAL POST OFFICE.

#### Screen Overview:

Source Reliability – First-Hand Knowledge / Directly States the Facts (gives exact assertion evidence for: name, birth date, birth place, and links to either parent). Because the information is being supplied by the person with first-hand knowledge, in our program the quality and source information are grayed out.

### 5.21 Step 21 - Is your Task Complete?

Did you get the information that you were looking for? If no, go to step twenty-two (22). If yes, go to step twenty-five (25).

### 5.22 Step 22 - Continue Looking?

If you are not satisfied with your task being completed, you need to decide if you will continue to do more research? If yes, go back to step eight (8). If not, go to step twenty-three (23).

### **5.23 Step 23 - Update your Task Log**

Research is a process that can last many years. You may have to stop what you are researching, so writing down your results will help organize and keep track of what you have done. It will also make it easier to pick-up where you left off and keep you from doing the same research over gain.

### **5.24 Step 24 - Create a New Task**

Create a new task and start with step one (1).

### **5.25 Step 25 - Update your Task Log**

If your task is complete, update your task log with your finding. This will help you with recording your new information in your family tree.

### **5.26 Step 26 - Add your New Data to your Tree**

Use your research log to record your sources and information. Compile your information in a genealogy program so you can easily manipulate your date and get various reports.

### **5.27 Step 27 - Share the Information**

Share the information with other family members to help spread the newly found information and see if they agree with your new findings.

### **5.28 Step 28 - Create a New Task**

Create a new task, and start with step one (1).



**Part**



## 6 Summary

Follow the research process to stay focused and organized.

You do not need to have a birth, marriage, or death certificate to have an accurate family tree. There are other documents that can help you with verifying these events as pointed out earlier in this document.

If you don't have enough documentation to provide exact places or dates, you may have to settle for the information that you can find and provide an analysis as to why the person belongs in the tree.

Good luck with your family research!

### 6.1 About the Document

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### 6.2 About the Author

Brandy Sacco is the owner and founder of ourFamilyology, Inc. as well as the ourFamilyology online genealogy program. As a genealogy hobbyist with more than 18 years of experience, she recognized the epidemic of people copying family histories that are unverified and not supported up with sources. She felt compelled to remedy this by creating a program that actually helps people create source verified, responsible family histories.

Prior to starting ourFamilyology, she was an executive at a Fortune 500 company. Her abilities as a team leader were quickly recognized as she spearheaded the development and deployment of a multitude of world-wide projects. She is known for her troubleshooting abilities and has the know-how and can-do attitude to get the job done in difficult to near impossible situations.

Brandy has spoken at RootsTech, is a member of National Genealogical Society, The Bergen County Historical Society, and is involved with several groups that are trying to

increase the awareness and advocate standards that will help shape the future of genealogy.

