Genealogy Standards for Beginners, Part I: The Basics

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A solid understanding of basic genealogical guidelines and standards will assure accuracy in recording data, bridge communication gaps between researchers, promote common courtesies in shared research environments from archives to online trees, and hopefully prevent one from having to "do it all over again.” For the LDS researcher, this knowledge base must also include a clear understanding of temple ordinance reservation policies.

Standards for Recording Information

How one records information affects how someone else may interpret it. Fortunately, we no longer live in the restricted data world of long-carriage typewriters or DOS computer programs. Present day technology allows us to leave nothing to the imagination. We may, however, find cryptic abbreviations in previously recorded research, in which case, our responsibility is two-fold:

1. record new information correctly, and
2. update and carry forward previously proven information accurately

Consider the following examples:

What date is this? 12/06/51
is it December 6th or June 12th?
1851, 1951, or 1751?

What place is this? Cad., Leic., Eng.
Cadbury, England? Or could it be Cadeby?
And if so, which Cadeby?

Or this? Christiana, NC
North Carolina might be a logical guess
Or could NC refer to a county name, like New Castle, which is in Delaware?

One can quickly see why a bit of research will be prudent before updating or “standardizing” abbreviated data, lest we create a new “brick wall” with an incorrect translation.

Proper data entry techniques can bridge the gap between european, western, and potentially confusing dates; eliminate guesswork and confusion over names and jurisdictions; even clarify the unknown. The following guidelines apply across the board from family tree entries to written reports.

• Names: should be entered in the order spoken, as recorded on official records, in the original language or alphabet (included diacritics), and capitalized according to tradition. Nicknames, “also known as”, titles (Dr.), and suffixes (Sr., Jr.) are often placed in separate data fields to eliminate confusion. Females should be recorded by their maiden name.

• Missing Information: Blank fields are preferred when information is unknown. Titles such as Mr. and Mrs. should not replace unknown given names in order to extend a generation.

• Dates: should be written in day month full-year format, without punctuation, the month spelled out completely.

Examples: 3 October 1849 October 1849 1849

• Calculated or Estimated Years: use words such as before, after, calculated, and about as appropriate. For example, one may estimate a birth year from the age listed at the time of death (calculated 1871), or from a census record (about 1895). One might even estimate a death date from someone’s status (i.e. widower) at the time of the event (before 1899). Estimates may also be made based on the traditions of the geographic area,
such as the average age of marriage (i.e. woman age 20, man 25); these act as placeholders and research tools until more accurate information can be found.

- **Christening Dates:** Christening dates should be recorded separately in the christening field. LDS blessings should be listed under “Other Events.” Note that a christening, for various reasons, may or may not have occurred near the time of birth; therefore, unless the birth date is also given, it can only be estimated at best.

- **Advanced Date Issues:** A general awareness of the use of various calendars (from Solar to Chinese), changes (Julian to Gregorian), and language barriers, will help one seek more information when needed.

  - Examples: 24 February 1752/1753 — not a clerical error; rather shows both the Julian and Gregorian year — the above may also be found as 1752OS for “old style” or 1753NS for “new style”
  - 7th could be either July or September, depending on the calendar in place at the time
  - “ten days after Easter” in 1888 will require accessing a conversion table

- **Places:** should be entered from the smallest jurisdiction to largest, as known at the time of the event, spelled out entirely including the country name, using a comma and space between jurisdictions. An extra comma might notify the reader that data is missing. Being “of” a location does not prove an event occurred at that location (i.e. residence at the time of death); that information should be placed in notes. The words county, province, etc., are not used unless clarification is needed.

  - Examples: Richmond, Cache, Utah, United States
  - Richmond, Cache, Utah Territory
  - Christiana, , Delaware, United States

- **Standardizing in FamilySearch and other Databases:** Many databases such as FamilyTree suggest “standardized” place names. It is important to maintain historical accuracy while allowing the database search engines sufficient information to assist with hints and record searches. If there is one time to read the instructions thoroughly, this would be it (see resources).

- **Places Old and New:** To help other researchers, a separate note, such as “presently known as…..” may be added for clarification. Some catalogs, such as FamilySearch, provide examples of modern-day and earlier place names, although we still need to do the research to assure we have the right place at the right time. The place finder tool in FamilySearch (see resources) may also help.

- **Additional place information:** Place details, such as a street address, cemetery name, or church name are not considered part of a place name, but there are exceptions. FamilyTree allows church names to be added to christenings and cemetery names added to burials. This provides detail where no additional fields are provided.

  - Examples: Mater Dolorosa Cemetery, Owensboro, Daviess, Kentucky, United States
  - Leicester St. Martin, Leicestershire, England (wherein Leicester denotes both city and parish location)

- **Rural Areas, Landmarks, and Missing Locations:** Places that no longer exist should be listed as they were at the time of the event; rural areas, landmarks, and places of nomadic tribes as “near” the closest actual place; with additional details and descriptive information placed in notes.

  - Examples: near Alda, Nebraska
  - Waupooni clan seat, near . . .

- **Relationships:** should be recorded accurately (biological, step, adopted, ward) to eliminate confusion when multiple parents are included in the research.

- **Sources:** (see Part II) should be cited for all information recorded and conclusions drawn.
Standards for Tracking your Research

Yes, there are even standards for keeping track of our research. But first, let’s talk about the “why” of this process. The Genealogy Standards Fiftieth Anniversary Edition clarifies: “Documentation is fundamental to planning and executing genealogical research, collecting and recording data, and compiling research results.” Learning how to document your research at all levels, including (but not limited to) citing sources in family trees, writing blogs or family stories, and this step — keeping good research notes, will make a huge difference in the quality of your research, not to mention your believability as a researcher.

Sometimes called a research calendar or research log, this singular document or tracking process contributes greatly to our research efficiency — allowing us to pick up where we left off, find a note or document saved, check the parameters of a previous online search, and avoid duplication of effort. After all, who wants to read the same microfilm twice? Even with these benefits, developing the habit of keeping one is difficult for some, not just newbies; but the time invested in developing this habit will be well-rewarded.

As a minimum, this log should include:

- Date of search
- Who and what was searched for
- What was searched and where
- Search parameters
- What was found or not found
- Where information is filed/stored

<table>
<thead>
<tr>
<th>Date of Search</th>
<th>Location/Repository</th>
<th>Description of Source</th>
<th>Search/Findings</th>
<th>Comments</th>
<th>Action needed</th>
<th>Doc #</th>
<th>Doc Loc</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/13/10 Home</td>
<td>Personal Research File</td>
<td>Review of data previously compiled (approx. 2008) from various sources; organization of research binder and log.</td>
<td>Was able to add siblings of Isaiah Brooks to the database citing the 1950 census as cited by Favel Plant. Able to classify other data and update in system.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9/14/10 Home of Favel Plant (also my home), 1994 S. 30 North, Springville, UT</td>
<td>Typed and handwritten Pedigree charts and Family Group Records compiled by Favel Plant on the Plant, Webb, Skidmore, and Whatwood Lines. Comparison of compiled data and provided source citations with my computerized records as it relates to the Webb/Book line.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9/15/10 Home of Favel Plant</td>
<td>Favel Plant, “Bits of History”, short typed notes</td>
<td>Review of her handwritten family group research records, typed pedigree line related to the Brooks line.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9/16/10 Home of Favel Plant</td>
<td>Typed and interview with Favel Plant concerning the Harriet Brooks Skidmore line</td>
<td>Review of her handwritten family group research records, typed pedigree line related to the Brooks line. Personal knowledge of historical data on Harriet Brooks Skidmore to the extent it was available (Mom married into the family just one year prior to her death).</td>
<td></td>
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</tr>
<tr>
<td>9/17/10 Home of Favel Plant</td>
<td>Lucy Grace Webb Merrill, History of Harriet Brooks, as well as direct data and sources</td>
<td>Provided insights into the life of Harriet Brooks Skidmore, as well as direct data and sources. Provided some quotes from this document in Notes.</td>
<td></td>
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</tr>
</tbody>
</table>

If you plan to work toward accreditation, you will want to be familiar with ICAPGen’s specific requirements. Otherwise, there is no right or wrong way to log your research, from creating a detailed spreadsheet to typing snippets into a word-processing document. Some have built personal databases while others write on the back of the printed catalog entry; still others keep their notes in their online tree. The keys are consistency, accessibility, and search-ability.

Simple Guidelines for Research, Writing, and Playing Nicely in the Sandbox

- Whenever possible, get to the original record — use the indexes to guide you there
- Always review all information in the record — don’t just extract names and dates
- Review the record in proper historical context using references and dictionaries of the day
- Consider a compiled record carefully — there are differing values and levels of accuracy
- Do consult published research (including online trees) — they might hold important clues, or they might just reinforce a brick wall, so always review, consider, research, and test their theories; don’t copy
- Inherited your research? Even if well-sourced, consider re-proving
- Honor the rules of the repository — use courtesy in libraries, archives, and special collections
• Avoid boxing yourself in — use the FAN Club principle
• Make accurate statements — use words like “possible” or “likely” to clarify as necessary
• Be Honest and Ethical. Avoid plagiarism. Respect authorship and copyright. Obtain consent.
• Learn the genealogical way — use of proper writing and citation techniques will yield more respect

Guidelines and Standards for Temple Work

For Whom should we do the work? “Our preeminent obligation is to seek out and identify our own ancestors. Those whose names are submitted for proxy temple ordinances should be related to the submitter.” (First President of The Church of Jesus Christ of Latter-Day Saints, March 1, 2012).

So, how do you tell you are related? Software settings, relationship calculators, “View my relationship” in FamilyTree.

In descendancy research, we are related as we work down the line, but not back up. For example, one may seal a direct relative to their spouse (who is not related), but not seal that spouse to their parents (that is someone else’s family).

Summary of Other Temple Guidelines and Policies:
• May also do work for collateral family lines (great-uncles, aunts, cousins) and their families
• May not do private extraction projects
• Should not submit names of certain groups (i.e. holocaust victims, or individuals born before 1500 AD) without expressed permission from the church
• Should not repeat ordinances already completed
• Should perform ordinances in the right order (although not negated if inadvertently out of order)
• For unique and specific cases, see “Get Help” in FamilySearch

110 year rule: This rule is about respect. It protects the rights of the direct family to do the work and creates goodwill among those still living. It is a hard fast rule, not a “guideline.” If someone was born less than 110 years ago, we should not reserve their ordinances unless we are a closest living relative or have permission from a closest living relative. The closest living relative is defined as a surviving (non-divorced) spouse, a child, a parent, or a sibling. “No” is no, not a challenge to seek a better answer. If you find information on someone born less than 110 years ago that is deceased, the information may be entered into FamilyTree to make it available to be found; just don’t reserve it.

Guidelines for Everything Else
It is impossible to know everything; instead, know where to look to find the answers. You might start with the FamilySearch wiki.

Resources
• See also the resources listed in the Standards for Beginners, Part II syllabus
• “Providing Temple Ordinances” in Member’s Guide to Temple and Family History Work (out of publication), now in several articles found in FamilySearch “Help” https://familysearch.org/ask/#/temple/