Athens-Clarke County Library Heritage Room
Getting Started with Genealogy #1 Handout

There are a variety of reasons why a person wants to research their family history. This guide and the resources are to help you on your journey no matter the reason. With delineated steps and up-to-date information the Heritage Room is here to help you on your genealogy journey. Please contact us at heritageroomref@athenslibrary.org if you have any questions.

The Steps!

Work from what you know to the unknown. Even though each of us is unique and has had a one of a kind life, the records we leave behind don't always separate us from others. There are people who share the same name and birthday, and live in the same area at the same time. In order to avoid attaching the wrong person to a family tree, you need to (Rule #1) start from the known and work to the unknown.

1. **Record what you know.** Start by writing down what you know onto a standard family tree form. Identify key information like: names, relationships, dates and places of birth, marriage, and death. Talk to relatives. Record the “modern” day data.

2. **Determine your goal.** Review the data you have collected so far. What is missing? What do you want to learn more about? Focus on one question at a time.

3. **Locate and identify your sources.** Start with information in your house and family members. Genealogical information is online, in libraries, court houses, churches, and your own home.

4. **Research! Rule #2 Write EVERYTHING down!** Go through your research questions and create a plan of action. A date or name without a source is merely hearsay rather than information. Exhaust all types of sources—You never know what you may find. Manage expectations.

5. **Analyze.** Don't just read, evaluate. Who provided the information on the record? How long after the event was the information provided? What new questions occur? This will direct your future research.

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**STEP #1: RECORD WHAT YOU KNOW.**

Before you jump on a computer or start searching for information, write down what you know about yourself, your parents, and/or your grandparents. Write down ALL of the VITAL information: Birth, Marriage, and Death dates and places.

**Genealogical Recording Conventions**

The field of genealogy has several conventions for recording information.

- **Dates:** Dates are usually displayed as day–month–year, ex. 22 June 1928
- **Maiden Names:** list a woman under her maiden name. If her maiden name is unknown, leave a blank space (Mary ____ or Mary ____).
- **Surnames:** Many genealogists record surnames in capital letters to highlight the name in the text field.
- **States:** Either spell out states or use standard abbreviations: [https://www.thoughtco.com/state-abbreviations-1691753](https://www.thoughtco.com/state-abbreviations-1691753). Do NOT use the two letter postal codes.
- **Common Genealogy Abbreviations:** [https://homepages.rootsweb.com/~sam/abbr.html](https://homepages.rootsweb.com/~sam/abbr.html)

Updated May 2024, Ashley Shull
Tools for recording Genealogy Research: No matter what, ALWAYS write down the source citation!

- **Digital v. Paper:** Will you use a combination of paper and digital for recording your genealogical information? Paper only? Digital only?
- **Software v. Web-based:** If going digital, where will you create your family tree? On a software program or within a web-based platform?
- **Charts & Forms:** Whether using digital or paper versions, charts & forms are a necessary tool for all genealogists. Some folks use Excel spreadsheets, Airtable Databases, Fillable PDFs, or just plain paper and PENCIL (always use a PENCIL)
  - **Multi-Generational Chart:** Use a multi-generational chart as the basic framework for genealogical documentation. This chart provides an outline of your ancestors and includes basic information about each person such as full name, date and place of birth, death, and marriage. A great way to standardize your research is to assign each person a number. The subject of the chart is number 1; the subject’s father is 2, the mother is 3; the father’s father is 4, the father’s mother is 5; etc. Men always receive even numbers; women odd numbers. Each chart is assigned a number and cross-referenced to connect charts and generations. Thus, every ancestor receives a unique number that can be used as shorthand or for filing. Gender assignments such as trans and non-binary as well as same-sex relationships have yet to be addressed in the genealogical framework as a whole. However, your definition of family is always the valid choice. When assigning numbers take this into consideration.
  - **Family Group Sheet:** The family group sheet provides a snapshot of each nuclear family and records pertinent information about each family member. The basic information for a couple includes: given and surname(s); birth, death and marriage date and place; parents’ names; other marriages. For children: sex, given and surnames; birth, death, and marriage date and place; spouse’s name. The family group sheet also includes space for your source references—that is, where you found the information. With each coupling there is a new Family Group Sheet.
  - **Research Log:** Research logs are an excellent way to keep track of the research you have done. They contain a list of every source you consulted and the results. Handwritten or typed, these logs help prevent duplicate searches and look-ups.
  - **Additional Sources for Charts & Forms:**
    - Cyndi’s List (A great source for all kinds of Genealogical information)
    - Charts and Forms: [https://www.cyndislist.com/charts/](https://www.cyndislist.com/charts/)
    - Heritage Room Genealogy Forms and Templates: [accheritageroom.wordpress.com/2024/05/28/getting-started-with-genealogy-2/](https://accheritageroom.wordpress.com/2024/05/28/getting-started-with-genealogy-2/)

Beginning Techniques

- **Consult Sources from Home:** Look for vital records: birth certificates, death certificates, marriage records. Pull out old photo albums to jog your memory. Scrapbooks, Newspaper clippings, yearbooks, diaries, letters and other sources of personal information will be great additions to your genealogical sources. Consider donating materials like this to a local archive or library in the area.
- **Interview your Relatives:** Interviewing your relatives may seem like a daunting task. Recording conversations with permission from participants is encouraged; you can even use a smartphone, no need for “special” equipment. Consider using questions like these:
○ Where did you live growing up?
○ How did your family come to live there?
○ Were there any other family members in the area? What were their names?
○ What older relatives do you remember, and what do you remember about them? What were their nicknames and where did they live? Do you remember any traditions associated with them?
○ What was your family religion?
○ What family stories have you heard about your parents? Your grandparents? More distant relatives?
○ Conducting a Family History Interview from American Ancestors: https://www.americanancestors.org/conducting-family-history-interview

STEP #2: DETERMINE YOUR GOAL.

Take a look at your charts and your notes. Where are you missing key pieces of information such as a date or a name or a place?

● Make a list of the information you need to find.
● Decide which questions interest you the most. Pick a handful of questions to begin.
● Typical genealogical questions include:
  ○ Who are the parents?
  ○ What is the date or place of birth?
  ○ What is the date or place of marriage?
  ○ What is the date or place of death?
  ○ What is the spouse's name, or maiden name?
  ○ Who are the siblings?

Tips
● START SLOWLY. Don’t rush to answer all your questions at once. This is a marathon not a race.
● Don’t skip generations in planning your research; it ultimately leads to mistakes. Complete a generation before moving on to the next or another branch.
● If you hit a wall, it’s okay to take a break and move to another family, but NEVER skip generations.

STEP #3: LOCATE AND IDENTIFY YOUR SOURCES

Tools
For the majority of beginners, the internet and the library provide the most accessible sources of information about family history, although not everything is online or in a book. An efficient use of the internet or the library rests on understanding where the information you seek may be found. Popular internet websites for resources include: FamilySearch, Ancestry, Heritage Quest, Fold3, and FindMyPast. Be sure to check the AVAILABLE GENEALOGY RESOURCES handout from the Heritage Room at the Athens-Clarke County Library. acheritageroom.wordpress.com/2024/05/28/getting-started-with-genealogy-2/

Databases and Records
● Know the difference between genealogy databases and genealogical records!
  ○ Genealogical databases store and provide access to genealogical records.
  ○ Not all genealogical records are available online in genealogical databases.
  ○ A record, for example, is the Georgia Deaths, 1928-1943. The original records are available at the Georgia Archives in Morrow, Georgia; however the online database, FamilySearch provides access to the digitized Georgia Death records for free online.
  ○ Most records are available to search within a database because they have been indexed.
Some records are not indexed and must be browsed through in order to find the record pertinent to your search.

**Techniques**

There are three levels of government records. We must determine how our ancestors might have interacted with the government, federal, state, and local agencies in the time in which they lived.

- **Federal (NARA in DC or Regional Offices)**
  - US Federal Census, immigration records (passengers lists), naturalization records, military records, land records
  - National Archives in Atlanta has WWI Draft Registrations from the entire USA and WWII and Railroad retirement records. Serves Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, South Carolina, and Tennessee

- **State (usually at the State Archives)**
  - Court records
  - Land records
  - Tax Records and many others

- **Local (varies: courthouse, libraries, local archives, state archives...)**
  - Deeds, wills, estate inventories, tax lists (Clarke begins 1802, Athens 1806). Taxes were paid in cash, which was often hard to come by in an agrarian society. If you couldn't pay your taxes then you could work for a daily rate. Road Lists (road work was taken care of by the people living on it), poor lists (often in order by militia district).
  - Newspapers--Varies by state. Georgia Historic Newspapers has thousands of historical newspapers online for the state of Georgia. Check with local libraries in the area of where you are searching.

**Table 1: Records with Genealogical Information**

<table>
<thead>
<tr>
<th>Type of Record</th>
<th>Description</th>
<th>Information in Record</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Vital Records</strong>—Created by Governments</td>
<td>Birth, marriage, and death records kept by towns or states. In 1919 the U.S. required these records to be kept by the state</td>
<td>Name, date, and place and sometimes parents’ names, including mother’s maiden name.</td>
</tr>
<tr>
<td>Church Records</td>
<td>Records kept by religious institutions of parishioners, including marriage certificates, baptisms, confirmations, burials, birth records, Hebrew School attendance, and other materials. These are important substitutes for vital records.</td>
<td>Same as above, plus witnesses to the event.</td>
</tr>
<tr>
<td>Bible Records</td>
<td>Records kept by families. These serve as vital record substitutes.</td>
<td>Name and date and sometimes place</td>
</tr>
</tbody>
</table>

**Updated May 2024, Ashley Shull**
<table>
<thead>
<tr>
<th><strong>Census</strong></th>
<th>US Census: Conducted every ten years beginning in 1790. Until 1850, the census only listed the head of household and tabulated the ages of household members by certain name categories. From 1850 onward, the census became a much more useful source for genealogical information. State Census: Some states conducted their own censuses in between federal census years.</th>
<th>Name, age, and gender of each family member, occupation, birthplace and other information, depending on year.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cemeteries</strong></td>
<td>Tombstones vary in the amount of information captured. Online websites like <a href="http://www.Findagrave.com">www.Findagrave.com</a> may include transcriptions of obituaries or biographical information in addition to a photo of the tombstone.</td>
<td>Name, date of birth, date of death.</td>
</tr>
<tr>
<td><strong>Immigration and Emigration Records</strong></td>
<td>Records generated in tracking individuals arriving or departing a country. Includes ship passenger lists, border crossing records, and passport applications.</td>
<td>Few lists pre-1820. From 1820-1893 - just the name, age, gender, and country of origin were recorded. Beginning in 1893 more extensive information such as last residence and marital status were recorded. Passport applications typically include name, date and place of birth.</td>
</tr>
<tr>
<td><strong>Naturalization and Citizenship Records</strong></td>
<td>Records generated through the process of an individual applying for and becoming a citizen of a country. Beginning in 1790 the US naturalization process required two steps. After living in the US for at least two years a person could file a declaration of intent to become a citizen, followed three years later by a petition for naturalization. The final certificate was issued based on the petition.</td>
<td>Name, nationality, date and place of birth, port and date of arrival. After 1907, may find spouses name, date and place of birth as well as information about children.</td>
</tr>
<tr>
<td><strong>Land and Property</strong></td>
<td>Records generated by the purchase and sale of land, such as warrants, deeds and mortgages. In the colonial period, most rural heads of house owned land.</td>
<td>Name, name of wife, names of family members, names of neighbors. Some states, such as Maryland, gave parcels of land names such as “Peace,” or “Dorsey’s Folly,” which makes tracing ownership across generations somewhat easier.</td>
</tr>
<tr>
<td>Source</td>
<td>Description</td>
<td>Information</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Probate</td>
<td>Records generated by the process of settling an estate after death. If a person made a will, they are said to have died “testate;” without a will, “intestate.”</td>
<td>Wills mention relationships: husband, wife, children, and sometimes enslaved people.</td>
</tr>
<tr>
<td>Taxation</td>
<td>Records generated to track receipt of taxes paid to the government.</td>
<td>Name, property. In colonial periods, the presence of a name on a list signified the person was of legal age (16, 18, or 21 depending on the colony).</td>
</tr>
<tr>
<td>Military</td>
<td>Records generated as a result of an individual's involvement in the armed forces, including draft registration cards, service records, pension records, and bounty land records</td>
<td>Draft: Name, age, place of birth, occupation, and residence Service: Name, age, and dates of service Pension: name, date of birth, death, family members.</td>
</tr>
<tr>
<td>Newspapers</td>
<td>Birth, marriage, and death notices are the principal uses of newspapers by genealogists although some ancestors generate news articles.</td>
<td>Names, dates of events, location, family members. Oftentimes you will need to search for a woman using her husband's name, ex. Mrs. Charles Strong</td>
</tr>
</tbody>
</table>

Table 2: Other Sources of Genealogical Information

<table>
<thead>
<tr>
<th>Source</th>
<th>Description</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compiled Genealogies</td>
<td>Published family histories.</td>
<td>Descendants, lineage. Some compiled genealogies have been carefully documented, other present data without source citations and must be treated as finding aids.</td>
</tr>
<tr>
<td>Local Histories</td>
<td>Histories of towns, counties, and states provide a wealth of useful information for genealogists. They describe the early settlement of an area and describe the founding of churches, schools, and businesses. Many histories include lists of colonists, soldiers, and civil officials.</td>
<td>Names, relationships' places, occupations. These histories may place your ancestor in an area before the ancestor left a record. Also note that this is one perspective and that these histories can often be whitewashed and focused on</td>
</tr>
<tr>
<td>Information Needed</td>
<td>Search These Records First</td>
<td>Then Search These Records</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------</td>
<td>-----------------------------------------------------------------</td>
</tr>
<tr>
<td>Age</td>
<td>Census, Vital Records, Cemeteries</td>
<td>Military Records, Taxation</td>
</tr>
<tr>
<td>Birth date and place</td>
<td>Vital Records</td>
<td>Cemeteries, Newspapers, Census</td>
</tr>
<tr>
<td>Country of Foreign Birth</td>
<td>Naturalization Records, Vital Records, Census</td>
<td>Military Records, Newspapers</td>
</tr>
<tr>
<td>Death date and place</td>
<td>Vital Records, Cemeteries, Public Records, Newspapers</td>
<td>Bible Records, Military Records</td>
</tr>
<tr>
<td>Foreign Birth location</td>
<td>Vital Records, Published Genealogies, Biographies, Naturalization, Immigration, Census</td>
<td>Newspapers, History, Emigration and Immigration</td>
</tr>
<tr>
<td>Immigration date</td>
<td>Census, Immigration, Naturalization</td>
<td>Newspapers, Biographies</td>
</tr>
<tr>
<td>Maiden Name</td>
<td>Vital Records, Newspapers</td>
<td>Cemeteries, Military Records, Probate Records, Land Records</td>
</tr>
<tr>
<td>Marriage date and place</td>
<td>Vital Records, Census, Newspapers</td>
<td>Cemeteries, Military Records, Probate Records, Naturalization, Land</td>
</tr>
<tr>
<td>Parents’ names</td>
<td>Vital Records, Census, Probate Records, Newspapers, Published Genealogies</td>
<td>Emigration</td>
</tr>
<tr>
<td>Places family has lived</td>
<td>Census, Land, Local Histories, Directories</td>
<td>Military Records, Taxation, Obituaries</td>
</tr>
</tbody>
</table>
Tips
Start your research with the U.S. federal census. The census will anchor your ancestor to a place and time and give you clues about family relationships. A note: Census takers often made assumptions about spelling of names, race, and literacy levels; and every person was NOT recorded. In 1960 data on race was finally self-reported; up until 1950 the census taker recorded what they thought the person's race was. It is always good to remember that these were humans recording data about other humans meaning bias cannot be totally eliminated. History of the Census information from the United States Census Bureau: https://www.census.gov/history/www/census_then_now/

STEP #4: RESEARCH.

Tools
- Research Plan: Start with a research question and plan. Narrow your question to a specific relationship set within a time and place. Be specific. Draw out a plan--what sources are you going to access and where are those resources stored? Some articles about creating a research plan: https://cyndislist.com/research-methodology/research-plans/articles/
- Research Log: Whether you use a pre-formatted form, a computer program, or an online tool, it's important to list every resource you have checked and the information you did and did not find. Keeping track of your negative search results is critical to avoid duplicating your work. Do you use FamilySearch? Try using the Google Chrome extension, Goldie May. It is a research tool that will automatically log the sources you access while you search through records. https://www.goldiemay.com/
- Organization system Set up and use a simple filing system: it does not matter if this record is physical (paper) or digital, use what feels comfortable to you. Genealogy researchers commonly choose to organize data by the surname of the head of household. Each person in a tree exists in at least two families: as a child and later as an adult. Traditionally at marriage a person would move to their own tree as a "parent." However, in the modern world this model does not always fit. You can decide how you want to draw that line. Cyndi’s list links out to a lot of blogs and other tools that might be helpful: https://www.cyndislist.com/organizing/

Techniques
- Sibling Research: Sometimes a person's siblings have information pertaining to the person you are researching. Find out the names of as many siblings as possible and research as necessary. Do the same thing for uncles, aunts, grandparents, and cousins. You never know what you may find.
- F.A.N. Network or Cluster Research: Researching members of the FAN network of the Friends, Acquaintances, and Neighbors of your ancestor will often lead to some clues. Scan the census pages--these are the neighbors of your ancestor. Who did they see on a daily basis?
- Cyndi’s List Cluster Research articles: https://cyndislist.com/research-methodology/fan-club/

Tips
- Write everything down.
- Alternative Spellings: If you don’t find the record try alternative spellings of the name. Spelling was fluid until the twentieth century and the opportunities for misspelling are numerous.
- Less is more when searching online: If you enter too much information, or too much precise information (ex. exact death year) into the search engine you will be disappointed more than likely.
You might find TOO much information or too little. Try date ranges or less precision about the place.

- Click through to the original record when it exists: Don’t rely on the transcription. Errors in transcription occur. The original record may have substantially more information than was abstracted for the search engine.
- Collect as many records as possible about an individual or family. This helps you evaluate the “fit” or validity of any new information you find.
- Learn the geography, laws, and social setting of your subject. Knowing the land, the laws, and social values of the society in which your ancestor lived will provide you with much needed context. Were women allowed to own property? Was your ancestor a slave holder or enslaved? Did the family experience relocation due to urban renewal or eminent domain/red lining? Did they live on company property? (miners and laborers)

STEP #5: ANALYZE.

Critically evaluate the information you have found before you decide to add it to your tree.

Criteria
Modern genealogy has developed 3 sets of criteria for evaluating information:
- The terms original or derivative are applied to sources;
- The terms primary or secondary are used to determine where the information came from;
- And the terms direct or indirect or circumstantial are applied to evidence.

Information can be evaluated using the following standards:

- Original vs. Derivative Sources. Original indicates the information was created at the time of the event with first-hand knowledge, such as a death certificate. Derivative is everything else, including some of the information found on an original source, such as the date of birth on a death certificate.

- Primary vs. Secondary Information. Primary information comes from a participant or witness, such as the date of death given by the attending physician on a death certificate. Secondary information is a retelling of what was heard from a participant or witness, such as the age of death given in a newspaper obituary, or the names of parents of the deceased on a death certificate if the informant did not personally know them well.

- Direct vs. Indirect vs. Circumstantial Evidence. Direct indicates that a definitive answer is obtained, such as the date of death on a death certificate. Indirect indicates a possible definitive answer, but does not fully resolve the question, such as the date of birth on a death certificate that was provided by a close family member. Circumstantial indicates you have reasons to believe beyond the specific piece of information that you have the answer, such as when the date of birth on a death certificate is close to a date also found in a Census document. (From Devine, Donn. “Evidence Analysis.” Mills, Elizabeth Shown, ed. Professional Genealogy: a Manual; for Researchers, Writers, Editors, Lecturers, and Librarians. Baltimore: Genealogical Publishing Company, 2001.)

  Questions to Ask Yourself: Ask the following questions in order to determine whether the source is original or derived from some other source? Is the information provided on the source primary or secondary? Does this information from this source contain direct or indirect evidence to support my claim?
  - Does it confirm or contradict what you already know?
  - Does the record tell you the fact that you need to know (direct evidence) or do you need
to infer something from the information given (indirect evidence)? Example: indirect evidence is the age on the census from which you infer year of birth.

- Who provided the information for the record? Was the informant a participant in the event or someone else? Information provided by the participant is often more reliable.
- How long after the event was the information provided? Memory over time fades or changes; we don't always remember events as they actually happened.
- If you are viewing a compiled genealogy (printed or online), does the author cite his or her sources? Are the sources accurate?

**Contact Us!**

Remember to take your time. Write everything down. And reach out to your library for help! The Heritage Room at the Athens-Clarke County Library provides 45 minute one-on-one research assistance appointments. In order to book one please visit our events calendar at [www.athenslibrary.org/events](http://www.athenslibrary.org/events)

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