Research Process & Filing Documents

Video Link

Research

#1 Review What You're Starting With

- ☐ **Identify Your Target Ancestor** (the next person or family unit you wish to research).
- ☐ Back up to the younger generation and **make sure that you're confident in the children** of this Target Ancestor before research begins.
- ☐ **Review the records you have on hand** for the Target Ancestor.

#2 Start Research Notes with What You Have

- ☐ One set of **Research Notes** per ancestor.
- ☐ **Cite the sources** of each record you find.

#3 Review Hints (Low Hanging Fruit)

- ☐ **Ignore Member Trees** to start. We'll get back to them later.
- ☐ Carefully **review each document** and import if necessary.
- ☐ **Select Later or Maybe** (if on Ancestry) **for records you are unsure about**. You may find they are a match later when you have learned more information. You may need to keep notes or hyperlinks to records you suspect are related.

#4 Review What is Missing

- ☐ Review all documents and think about **what is missing**.
- ☐ Review the timeline of your Target Ancestor. Is there a gap in time?

#5 Search the "3 Way Method" (Trifecta Strategy)

- ☐ **Search in three places** (Ancestry, FamilySearch, plus one more that makes sense).
- ☐ **Search in three ways** (Name, Place, and Time).

#6 Create a Research Plan

- ☐ Now that you've done some searching... now is the time to do some "Research."
- ☐ **Create a list of what is missing**, what you might be able to find and where to look for it. Don't research until your plan is as complete as possible. I do this right in my research notes changing the font to red, so it jumps out at me.

#7 Research the Plan

- ☐ Follow the **Research Plan**. Don't deviate, but you can add to it if you think of more.

Plan your research and research your plan! – Connie Knox

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#8 Research F.A.N. Club Members

- ☐ **Research the Immediate Family** with the same method as listed here. You may find clues to your target ancestor in other family records.
- ☐ **Research** key **Friends, Associates, and Neighbors** (a.k.a. the FAN club). It is often in the FAN club that we see how records tie together.

#9 Member Trees

- ☐ This is the **last thing** I look at when researching an ancestor's records and that is the other **member trees**. By the time you go through this process, you'll likely have more records than anyone else.
- ☐ **Look for photos**. Often members will photograph documents and add them to the gallery without any transcriptions or searchable data.
- ☐ Look on **other platforms** for members searching for the same ancestors.

#10 Review DNA Matches

- ☐ If you have **DNA Matches** that connect to your Target Ancestor, review their trees for additional clues and records.

Organizing Records Found

#11 Create Research Notes

- ☐ One Research Notes document per ancestor.
- ☐ Keep in chronological order.
- ☐ Use Headers for your title
- ☐ Use Footers for your contact information.
- ☐ Don't upload these to any online platform as you will constantly change them.
- ☐ **Update Research Notes** throughout your research process. Don't wait until you're finished looking for records.

Your Research Notes are the most important document in your ancestor's file! – Connie Knox

#12 Transcribe Documents

- ☐ Don't skip this step. It is vital that you **transcribe documents**. It makes you pay attention to the details.
- ☐ Add Source Citations to your Transcriptions
- ☐ Add your contact information in footer.
- ☐ Insert a picture of the document on the last page of your transcription with a source citation.

#13 Abstract

- ☐ Abstract the details from your transcript. In short, removed the boilerplate language and pull the specific information from the transcript, keeping it in the same order.
- ☐ Add the Abstract to your Research Notes in chronological order.

#14 File Folders for Ancestors
- Name highest level folders as SURNAME
  - Then under each SURNAME folder put individual ancestors, such as "SURNAME First Middle b. year of birth or death depending on what you have.
  - Example:
  - DOE (folder)
    - DOE John b. 1827 (folder)
    - DOE Mary Jane b. 1826 (folder)

#15 File Documents Within Ancestor Folders
- Use the same naming convention adding the item type and date of document.
- Example: **DOE John – Death Certificate 1932** (document)
- File said document within the **DOE John b. 1827** folder.

Next Steps

There is a lot more to research than just finding and filing. From here you would want to go through the process of evaluating documents, correlating the evidence, resolving any conflicts, and writing up your conclusion in... you guessed it... Your Research Notes!

Wrapping it Up

Once you have gone through this process, you likely have more records than anyone else. You likely have confidence in your connections from one generation to another.

Is this the end of your search? Absolutely not. You likely did not set foot outside your home and **visit the places your ancestors lived**, but you are now armed to do so on location at **archives, libraries, cemeteries, historical and genealogical societies** in the area where your ancestors lived.

Additionally, you may find more records online as time progresses and more records are added to the online repositories.

Lastly, **KEEP UP YOUR RESEARCH NOTES AS YOU GO!** Your Research Notes are a living breathing document that is constantly being updated.

Genealogy TV Academy

If you want to learn more about these skills described above, consider joining the Genealogy TV Academy. There you can find:

- Live Zoom Calls 2 Times Per Month
- A Website Full of Lessons
- All Handouts from both the Genealogy TV YouTube channel (2022 forward) + The Genealogy TV Academy.

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