



Genealogy Tool Kit

Getting Started—Research Basics

This checklist offers a step-by-step process to start your family history research, organize your work, and introduce you to federal records of genealogical value. Each step outlines essential information and strategies to conduct your research in a logical and successful way. As you follow these steps and complete each worksheet in the tool kit, use the appropriate checkboxes to mark your progress.

Step 1: Preparing to do research

Get organized

The best approach is to organize yourself according to your own personal preferences for taking notes, filing records, and scheduling research activities. Some basic items to assemble include:

- Binders or file folders
- Notebooks
- Pens, pencils
- Calendar or schedule book

Basic tools you will need to record the information you find in the course of your research include:

- Pedigree charts
- Family group worksheets
- Correspondence record sheet
- Computer software programs (for more advanced research)

Read books about genealogy

It is always very helpful to do as much background reading as possible to become familiar with the basic methodology of genealogy research. Different types of records or sources require different methods of interpretation or organization. A few basic works include:

- Croom, Emily Anne. *Unpuzzling Your Past: The Best-Selling Basic Guide to Genealogy*. Cincinnati: Betterway Books, 2001.
- Croom, Emily Anne. *The Genealogist's Companion and Sourcebook*. 2nd ed. Cincinnati: Betterway Books, 2003.
- Greenwood, Val D. *The Researcher's Guide to American Genealogy*. Baltimore: Genealogical Publishing Co., 2000.
- Luebking, Sandra Hargreaves and Loretto Dennis Szucs, eds. *The Source: A Guidebook to American Genealogy*. 3rd edition. Provo, UT: Ancestry, Inc., 2006.
- Powell, Kimberly. *The Everything Guide to Online Genealogy: A Complete Resource for using the Web to trace your Family History*. Avon, MA: F & W Publications, Inc., 2008.

- Renick, Barbara. *Genealogy 101: How to Trace your Family's History and Heritage*. Nashville, TN: Rutledge Hill Press, 2003.

Join a Genealogy club or society

The key to genealogy research is sharing information. Join a local genealogy club or society; meet veteran researchers who can share their successful research tips. These organizations often sponsor “how to” workshops, lectures, or classes that meet a variety of skill levels, from beginner to expert. As your confidence increases, seek out national genealogical organizations for more advanced knowledge.

Focus on one person at a time

As you work your way through the next steps, it is helpful to focus your research on specific individuals rather than casting a wide net. Identifying information about one person will often lead to other family members you may not know existed.

Step 2: Do your homework

Identify what you already know

To start a family tree, you need to identify certain basic facts that are unique to each individual. Recall information about each member of your family, including yourself, that is already general knowledge. Basic facts to identify include:

- Full name (first, middle, last) and any name changes
- Important dates (birth, baptism, marriage/divorce, death, burial)
- Places of important events (city, county, state, country)

After vital statistics, identify other personal facts of interest:

- Education, (names and locations of schools, colleges, universities)
- Occupations
- Religion and churches attended
- Personal anecdotes and stories

Start with yourself and work backwards

A family tree always grows exponentially (1 self; 2 parents; 4 grandparents; 8 great-grandparents; 16 great-great grandparents; 32 great-great-great grandparents, etc.) To begin your family tree and identify missing information:

- Start with yourself (date and place of birth/baptism/marriage)
- Work back to your parents (names, dates/places of birth/baptisms/marriage/death)
- Work back to your grandparents (same as above)
- Repeat the same process for earlier generations
- Record everything you know on family charts and forms

Review what you have

Once you have identified information that is already general knowledge, look at your charts to see where gaps exist. To fill those gaps, proceed to Step 3.

Step 3: Expand your sources

Talk to your relatives

Your relatives can help fill in the blanks on your family tree. Older relatives, especially, might remember generations that are no longer alive. Other family members may have already researched your family history and might be willing to share their work. Some useful tips for contacting relatives include:

- Be respectful and considerate
- Decide what specific information to ask for
- Take accurate notes
- Respect privacy, there might be information others are unwilling to share
- Be willing to share your information
- Document your sources

Locate family documents

Beyond general knowledge, information about your family may be recorded in a variety of records. The following types of personal documents are useful to identify basic vital information (names, dates, places); they will most likely be in the possession of your immediate family or other relatives:

- Family Bible (birth/marriage/death information)
- Birth/baptism/marriage/death certificates
- School report cards/diplomas (information about education)
- Old family letters
- Scrapbooks/photographs
- Diaries or journals

Locate public records

Vital records are also available from various levels of government, published sources, and religious organizations. These types of records include:

- Church registers—for baptism/marriage/death/burial records
- Newspapers—for birth/wedding notices, obituaries
- Municipal records (city hall or county courthouse)—for birth/death registers, marriage licenses, estate records (wills, inventories), deeds, naturalization papers (before 1906)
- State records (vital statistics)—for birth/death certificates, contact the appropriate state office of vital records
- Local and state archives/historical societies/libraries—for copies or transcriptions of all the records listed above, and published family histories
- Federal records

Check internet resources

Much family information, and many of the public records listed above, is already available on the internet. Check the following web sites for further information:

- Genealogy.com, <http://www.genealogy.com>. A subscription-based web site that allows researchers to post and share family trees, communicate via message boards, and search data collections.

- FamilySearch.org, <http://familysearch.org>. A free web site sponsored by the LDS (Mormon) Church, that offers many tips and resources for starting genealogy research, including tutorials, searchable indexes, and databases of records and sources from the U.S. and around the world.
- Ancestry.com, <http://www.ancestry.com>. This web site is subscription based, but access is free of charge at any NARA research facility. It contains many collections of records, including newspapers and periodicals; birth, marriage, and death records; obituary collections; city directories; court, land, wills, and financial records; military records; published local and county histories; and census/voter lists.
- HeritageQuest.com, <http://www.heritagequestonline.com>. Another subscription-based web site that is free of charge at any NARA research facility. It contains many family and local histories, the U.S. Serial Set, and indexes to genealogy and local history articles.

Step 4: Cite your sources

Whenever you identify sources that relate to your family, regardless of their location, remember to document where you found the information.

Published sources

- Record the author, publisher, and page where the information is cited

Archival records

- Record the record item; file unit; series; subgroup; record group; repository

Microfilm records

- Record the same elements for citing textual records above
- At the series level, the microfilm publication title; roll or fiche number; frame number

More information

For more information on citing federal records, see General Information Leaflet 17, *Citing Records in the National Archives of the United States*. Washington, DC: National Archives and Records Administration, revised 2007.