

## GENEALOGY FORMS

### INSTRUCTIONS:

Three of the forms – the Ancestral Chart, the Family Group Sheet, and the Chronological Profile– are the basic forms used to capture family history information. The Genealogy Source List provides a common place to record the sources where you obtained information. They work together to show the ancestral lineage of a person, the family of each ancestor, and the details of an ancestor's life. The Chronological Profile can also be used as the basis to create a biography of an individual.

The other two forms – the Research Journal and the Correspondence Log – are the basic forms to record your search efforts and results. The Research Journal captures the resources you searched and the results, both positive and negative, while the Correspondence log records you mail campaign to try to track down ancestral tidbits.

**TIPS:** Print Surnames in CAPITAL letters. Always use the maiden (birth) name for women. Write dates in the format dd Mon yyyy, i.e. 23 Jun 1892, to avoid confusion that can occur when a number is used for both the month and the day, when the day is 12 or under. If the date is an approximation, use qualifiers such as **ca**, **abt** (for circa, about), **est**, **calc** (for estimated, calculated), **prob** (for probably), **likely**, **poss** (for possibly), **bef** (for before), **aft** (for after) or **maybe** to denote the certainty (or lack of it) for the date. Other qualifiers can include **since**, **from**, **by**, **to**, **from ... to ...**, and **bet ... and ...** (bet is short for between.) Write place names in the following order – city (or town/township), county (or parish/district), province/state (for Canada, the US and some other countries), country (can be excluded for Canada and the US, if desired, but consider using it if sharing data with overseas relatives.) Always use pencil, until you have determined with certainty a name, a date or a place.

### Ancestral Chart & continuation chart

(Also called a Pedigree chart.) Start with yourself (or another family member) and, in pencil, write your (their) full name on the line beside No. 1. Below that, write the birth date on the next line, and the place where born below that. Below the birth place, write in the date when married, and the place where married below that. There is a place below this that starts with "SP:" where you can write the spouse's name. Enter the spouse's date and place of birth on the appropriate lines. If you are completing this form for someone other than yourself, write in the date and place of death if the person has passed away.

The area above your name (or the first name) is for your (their) father. You will notice that the number (2) is double the previous number. The area below the spouse is for your (their) mother. You will notice that the number (3) is 1 greater than your father's. This is called Ahnentafel numbering. Each person's father, anywhere on the chart, is double the previous person's, while the mother's is 1 greater than the father's.

Complete the chart adding your parents information, then go to their parents, then their parents. Enter as much information as you know. If you know names, but not dates and places, that's fine – just enter what you know.

The top of the first chart "Ancestral Chart No. 1", and along the right side, 2 is in the top arrow, 3 in the second, down to 9 in the last arrow. These are continuation numbers for subsequent charts. If you know the last person in a generation on chart 1, that's great. Enter their name and information into position 1 on a new chart, and give this chart the number (in the space beside "Ancestral Chart No. \_\_\_\_"), which appears in the arrow beside their name. If you have continuation charts beyond the second charts, on chart No 2, the next continuation chart numbers start with 10 and go to 17, on chart 3, the continuation chart numbers would be 18-25, chart 4 would be 26-33, 5 (34-41), 6 (42-49), 7 (50-57), 8 (58-65) and 9 (66-73). On each subsequent chart, write the number that appears in the arrow onto the previous chart at the top of the page, as well as the chart number. Continue this sequence if your charts extend beyond the 10 generations.

As you find information, you can update these charts on an ongoing basis. Using pencil allows you to correct information as you discover and confirm discrepancies.

## **Family Group Sheet & continuation sheet**

Create a Family Group Sheet for each married couple on your Ancestral Chart. Write the individual's name at the top (in pencil), then write in the information from the Ancestral Chart and add whatever other information you know. Do you know the person's occupation or religion? Were they in the military? Do you know their parents? Do you know the cause of death? On this form, there is enough room to include names of institutions, such as the name of the Church or hospital or cemetery, in the appropriate place fields.

There is a space for details of the husband and wife, a space for their marriage and divorce. You could replace Divorce with Annulment if that was the case. In some cases, couples don't marry, they just live together. You can replace Marriage with "Cohabitated" or "Lived Common Law" or whatever they claimed as their arrangement. In this latter case, you would probably enter the date as "from" to note when they started this arrangement. Beside the name of the husband and wife, write in the number of the marriage, if they were married more than once.

Below the wife's information box, there are three child boxes. If there are more than three children, the Family Group Sheet continuation form has space for six additional children per page – use as many as you need. Children should be entered onto the forms in birth order, starting with the earliest born child.

Write the name and gender of each known child onto the form or forms. Then enter the date and place of birth, marriage and death. If the child was married, write in the date the child was married and the name of their spouse. If you know a child was married more than once, write a note to indicate when the first marriage ended, why it ended, and the date of each subsequent marriage and the spouse's name. Write this information on a new page, don't write it on the back of this page. This way, you can photocopy the front of each page and not forget that one of the pages had something on the back.

Continue creating Family Group Sheets for each couple on the Ancestral Charts, then create a Family Group Sheet for each of the married children shown on the Family Group Sheets.

## **Chronological Profile**

This form provides a list of events in the life of one ancestor. Write their name at the top of the form. Fill the known data into the spaces for the basic events shown on the form.

Below these events, you can enter other events that occurred in the life of the person. For some of these events, you may wish to write the dates as a range of years. These can include such things as: schools attended; confirmation; birth, marriage and death of children and grandchildren; death of parents; land purchases and sales; house or apartment rentals; awards received; fraternal, community or church group memberships and involvement; charitable activities; military experience; immigration; naturalization; appearance on a census (up to 1911 in Canada, to 1930 in the US, to 1901 in the UK, to 1911 in Ireland); vacations – anything that you can confirm or approximate a date for the event. This provides a clearer picture of the life of the ancestor, and can help to locate big gaps in time or missing information.

To put the individual into context of the world around him/her, you can include historical events of a local, provincial/state, national or international significance, such as World War II, the stock market crash and the Great Depression, World War I, the Boer War, the US Civil War, the Great Famine in Ireland, the War of 1812, the American Revolution, the landing of the Mayflower, etc. Include only those events during the lifetime of the individual, and the ones the individual likely participated in, or at least had an impact on his/her life or the life of his/her family.

At the right of the form is a column to insert a number for the source of the information.

## **Genealogy Source List**

This form provides space to list all of the sources you have found to gather the data you entered onto the accompanying charts. You enter a Source reference number in the first column and the details of the source in the next. For each person, you would enter the sources that are applicable to them as you find them. You would then reference these sources from the Ancestral Chart, Family Group

Sheet or the Chronological Profile by entering the respective number onto the charts beside the date or place or fact, as applicable, and circle it, or entering it into the appropriate column. Keep an ongoing list as you find new information.

## **Research Journal**

The Research Journal is used to record all the sources you have checked out looking for clues to your family history. This can be used to record the search for a single individual, an ancestral couple or a surname line. It can also be used to record a search through a specific record type in a certain location. You would fill in the information at the top accordingly. The Male, Female or Couple checkboxes are to record the gender of a person if you only have an initial or if the name is not obvious that it is male or female. (Note that some names seem to have gravitated from one gender to being used predominantly by the other gender over the years.)

When you start you search, and you find an interesting book, document or microfilm, be sure to jot down the date and the citation details before doing the search. It is too easy to get caught up in the excitement of a breakthrough find, and forget to record the source details afterward. Be sure to record complete details of the source, but don't worry that they are in the precise order. As you become accustomed to entering the citations according to your chosen reference, the order will become second nature. But occasionally you will encounter a new source for the first time may not familiar with the order for the citation. Remember to capture the details first and worry about order second.

When you start the search, record what you searched for, surnames, given names, range of dates, the name variations checked. Also record the results of the search if nothing was found. This can help you avoid repeating the same search in the future. If you do find something, record the details of where you found the information, such as the page number, the folio number, volume number, etc.

## **Correspondence Log**

This log is to record your contact with other relatives, with research facilities, with genealogy or historical societies, anyone you write to via the postal mail or e-mail. There is space for your own item number, when mailed and a response is received, details of any money sent, a summary of the subject of the correspondence, and the result from the reply, as well as any action that may come to mind. At the top you can record who the log deals with, a surname or a specific individual or couple, as well as a sheet number at the bottom to keep the logs in order.

## **In Summary**

These forms should form the nucleus of your research work. If you later decide to purchase a genealogy software program, the data from the Family Group Sheets can be entered into the program. From there, you will likely be able to regenerate the Ancestral (Pedigree) Charts, the Family Group Sheets and the Chronological Profiles. However, the data in Research Journal and the Correspondence Log is probably best left on the original forms. If you work at your computer, you may want to create a version of the Correspondence Log in a word processor or a spreadsheet program, where the data can be filled out on screen eliminating the re-copying task. Some genealogy programs have a correspondence log built in, which may suit your needs. I strongly recommend that the Research Journal remain a handwritten document; re-copying the data into the computer could result in errors creeping in. If you do enter the data into the computer, file the handwritten forms away in case you need to consult them later. With the advent of the net-book mini-laptops and the Palm and Windows CE handhelds, you may want to enter your data directly into electronic Research Forms, or into the genealogy program loaded on the device.

A bonus of some genealogy programs is that they can create a narrative biography from the data you enter. This helps to give you a feel for the information you have and how the information fits together to paint the legacy of the ancestor.

Good luck with your research and have fun discovering your family legacy... *Bill Bienia*