Genealogical Standards

The three most important things when getting records ready for Temple work or just for minimal genealogical research are: Names, Places, and Dates. This document discusses standards for these and a few other fields. They should be used to ensure the best quality of data that will help minimize possible duplicate records.

1. **Names**:
    a. The old standard was to put surnames in uppercase, but that led to confusion in the name. The standard now is to use mixed case. For example, use /MacHart/ or /Machart/ (whichever is appropriate) instead of /MACHART/.
    b. Use full, legal name at time of birth: including given name, middle name, maiden name[4], etc. The following should not be included "Title (prefix)", "Married Name", "Also Known As"[4], or "Nickname"[4] as each have their own field and/or go into sources/notes (see later in this document). Although the Guide[1] refers to writing other names or nicknames after the birth given name separated by "or", as in "Elizabeth or Betty", this is referring to hand-written family group sheets and should not be used in computer databases.
    c. The surname is listed within forward slashes[4]. Proper spacing should also be used. For example, "William Arthur /Smith/" or "Jose Juan ante Portam Latinam /Gonzalez Espinoza y de Nunez y Sainz y Rodriguez/"[1]. Some cultures have multiple names and are not in the same order, so they should be placed in the spoken/written order of the culture[4]. However, the surname is always in the forward slashes. For example, "/Sun/ Tao" or "Edwardo /Rodriguez/ Manoel".
    d. Suffixes at the time of birth usually go after the surname[4] and are abbreviated (e.g. Jr., III, etc.). Suffixes used, but not at the time of the birth usually go in another field (see "'Other' Fields" below).
    e. Descriptions or titles (prefixes)[4] should not be used in the name field, such as: boy, girl, child, stillborn, Miss, Mr., Dr., unknown, baby, father, Mrs., Sir, etc[1]. Other fields exist for these type of descriptions or titles (see "'Other' Fields" below) and use the standard abbreviations listed above. The only exception may be if a wife's given and maiden names are not know, cannot be found, and the name is being submitted for Temple work. In this case, the name would be entered as "Mrs." plus the husband's full name[1].
    f. If a part of the name (such as given or surname) is not known, put in what is known such as "/Jones/" or "Mary //"[4]. For clarity and consistency, the slashes should always be used. A child without a known given name would list the father's surname and the appropriate gender in the sex field. Temple ordinances require at least the given name or surname[1].
    g. Tribes, clans, and similar information should be entered in a custom event or attribute[4].
    h. Searching will also be easier when using the right format and the appropriate fields. For example, populating the "Married Name" with the married name will allow you to search for anyone that has a certain surname as a birth surname or married surname.
2. **Places**:
    a. Use exact and complete locations (including all government level[5]) where possible. The absolute minimum place required for TempleReady is the country. However, research should be done to the fullest extent possible.
    b. Always use mixed case.
    c. Always use the same format containing four place levels starting with the smallest municipality and ending with the country, each separated with a comma and space. (It is a fallacy that a space after the comma increases database size tremendously. PAF uses a database format that stores

any location only once per variation.). Typically, the place levels may be defined as:

    i.   City, parish, borough, village, town, clan/band/totem, etc.
    ii.   County, shire, district, tribe/nation, etc.
    iii.   State, province, etc.
    iv.   Country, empire, kingdom, etc.

Examples include: "Chicago, Cook, Illinois, USA", "St. Dunstan, Canterbury, Kent, England", "Victoria, Peel, Ontario, Canada". For nomadic or tribal people, such as Native American, the standard format is "Clan/Band/Totem, Tribe/Nation, Province/State, Country"[2,17,18].

By following this standard for all place names, searching will be easier as you can, for example, search for everyone that lived at some point in a certain county. Also, the formatting when printing to a file, such as in book form, will appear according to appropriate grammatical guidelines.

d.   You may want to always include the country in place names. This adds clarity and avoids confusion especially if sending your database outside your own country or in certain localities (e.g. Georgia is a state as well as a country).

e.   If for some reason, you do not know the county (or any of the other place levels) or the locality does not have one, you would leave it out but add the comma and space: "Hendersonville, , North Carolina" or "Vancouver, , British Columbia, Canada"[2,5]. This will help you use filed filters correctly to find all records from a certain place[5].

f.   You should not include a place level description in the name unless it is part of the actual name. For example, "Salt Lake City" is correct, but "Seattle City" and "Utah County" is not.

g.   If you MUST make an educated guess on the location (which should not happen much with the current research tools available), you would include "of " before the city name. The guess may occur in cases where, for example, the birth of a child is known and the guess of the marriage is in the same place. Obviously, the exact place is uncertain, may not be the actual location, and has not been proved. Examples include: "of Hendersonville, Henderson, North Carolina, USA" and "of , , Germany" (this was modified slightly to satisfy the rule of missing city, etc.)[3,5,8,18].

h.   The use of abbreviations may be confusing or ambiguous ("MN" used to mean Maine, but now means Minnesota, is "CO" county or Colorado, is "CA" California or Central America?) and should not be used[5]. Generally, the only abbreviations that should be used include "USA", "St." (Saint) as in "St. Croix", "Mt." (Mount, not Mountain) as in "Mt. Saint Helen", or "Ft." as in "Ft. Lauderdale". Most abbreviations should include a period, followed by a space[2].

i.   Use the name at the time of the event[5]. For example, Miami has been in the following counties, Miami and Miami-Dade. Even though the latter is what is used at this time, you would use the former if that is what is was called at the time of the event. Another example is what the USA was called in the 1600s. To be sure, you may have to research boundary changes. If the place-name has changed since then, you can add an explanation to the source[5].

j.   Some individuals put hospital, cemetery, or other names in the place. However, it is recommended to put these names in sources, notes, custom events, or attributes instead[5].

k.   Sometimes, especially when dealing with rural areas, you may find a landmark, farm name, or other description instead of or in addition to a town or city name. Especially when the location is not in a town or city, it is okay to include more information such as "Crawfish Creek (near Chattanooga), Marion, Tennessee, USA"[5]. Otherwise, the extra information should be put in the source.

l.   It is recommended to use the more specific names of Channel Islands, England, Ireland, Isle of Man, Scotland, Wales, etc. instead of the generic names of United Kingdom or Great Britain.

m.   Boundaries on political maps may not correspond to those accepted by nomadic or tribal peoples, such as native peoples and gypsies. In such cases, provide as complete a place-name as you can, or type the name of a place that was nearby. Include a detailed explanation in the source. You can

also include tribes, clans, ancestral homes, clan seats, and other similar information as other events and attributes[5].

n. When you obtain information from church records, the place information may reflect the ecclesiastical (religious) jurisdiction rather than the governmental jurisdiction. Type the ecclesiastical jurisdiction. For example, if a christening occurred in a parish named St. Martin, you might want to type the parish name instead of a city name, as follows: "St. Martin, Salisbury, Wiltshire, England"[5].

3. **Dates**:

a. Use exact dates where possible. If you do not have it, do more research to the fullest extent. The absolute minimum required is the year (birth, death, and marriage).

b. Generally, use the format of "dd Mmm yyyy" as in "24 Apr 2005"[2,6]. You may choose another format within PAF, but it is not recommended. Especially be careful if choosing to use only numbers (e.g. is 02/07/2005, Feb 7th or Jul 2nd?).

c. For the month name, stay in same language you are using for your database.

d. Include all dates you find on an individual (birth, christening, marriage, death, burial, etc.).

e. If you know only part of the information, you can use what you have, e.g. "Dec 1845", "1799"[6].

f. The acceptable standard date formats are from the Gregorian calendar and Japanese Emperor dates[6]. It is recommended that other date formats, such as a Hebrew date, may be noted in the source and may be converted before entering it into the appropriate field.

g. If you are not sure on what day or during what year an event occurred or if an event occurred during the year that a country switched from the Julian to the Gregorian calendar, type a forward slash mark (/) between the two days or years, e.g. "14/15 May 1854" or "28 Apr 1721/1722". If you use a forward slash mark, be sure to put an explanation in the source. If you submit a date with a forward slash mark to Ancestral File, TempleReady, or Pedigree Resource File, only the first day or year will be used[6]. Alternatively, you may use the word "or" (e.g. "1878 or 1888"), but that is not recommended within PAF[2].

h. If you CANNOT prove a date, you can use an assumed date by using one of the indicators listed below[6,7,8]. A date is always preferred[6].(If there are multiple options listed within a single indicator, it is recommended to use the one listed first as the standard format.)

   i. Abt or About or Circa = unsure of exact date (purely estimating), e.g. "Abt 1745"[3].

   ii. Aft or After = know date was after date, e.g. "Aft 1900"

   iii. Bef or Before = know date was before date, e.g. "Bef 1930"

   iv. Cal or Calculated = calculated date from a source. If you can only calculate, for example, a birth/marriage date based upon a census or the birth date based upon the death date, e.g. "Cal 1854"[2,6,8]. Explain the calculation in the Comments field of the source[8,14].

   v. Dead or Deceased = Used in the death date field and you are certain the individual is dead, but cannot get date or even guess. This is only required if the individual died within the last 110 years (not an infant or child) and you wish to submit the individual for ordinances. Normally, the field is left blank[6]. Other alternatives may also include "Chi", "Sti", or "Inf" (see information below)[6]. "D" as noted in the Guide is not recommended within PAF. (The Guide[2] has 110 years whereas Help[6] shows 100.)

   vi. Est or Estimated = estimated date based upon family stories / traditions / standard genealogical estimations, e.g. "Est 1848"[3]. Standard genealogical standards include: man marrying at 25, woman marrying at 21, first child one year after marriage, and subsequent children every two years[18]. For example, marriage in 1825, would give the husband's birth "Est 1800", wife's birth "Est 1804", first child's birth "Est 1826", second child's birth "Est 1828", etc[3,8]. Remember, the Guide was originally written before PAF (it only referred to "Abt") and using the "Est" is the latest standard.

       vii.   Not Married = Use for the marriage date when the couple never got married but had a child[6].

      viii.   From/To = If an event covers a range of dates, put both dates in the field. Type "from" before the first date and type "to" between dates, e.g. "From 10 Sep 1867 To 17 Aug 1869"[6].

      ix.   BC = If a date occurred before the birth of Christ, type the date, and then type BC[6].

i.   Ancestral File (or some other programs) used < > to designate a computer calculation, e.g.. "<1854>"[6]. We usually substitute "Cal" before the date, e.g. "Cal 1854".

j.   In relation to LDS ordinances, the following may be used[6,7,12]:

      i.   Inf or Infant = died as an infant and cannot get a death date, no baptism/endowment needed.

      ii.   Sti or Stillborn = baby born stillborn (only if known to be born dead[6]), no Temple ordinances needed.

      iii.   Child = died as a child and cannot get a death date, no baptism/endowment needed.

      iv.   BIC = born in the covenant. This prevents the ordinance from being submitted.

      v.   Can or Cancelled = sealing was cancelled

      vi.   Cle or Cleared or In Process = Temple work cleared, work not done yet. This prevents the ordinances from being resubmitted.

      vii.   Sub or Submitted = Temple work submitted by you, but not done yet. This prevents the ordinances from being resubmitted.

      viii.   The following are not used very often, but may be used as appropriate:

          (1)   Com or Completed or Done = Temple work completed, but no date

          (2)   DNS/Can = Sealing to spouse was cancelled and should not be redone

          (3)   DNS = do not seal, remember who is the judge though. Many things will be worked out in the millennium with the Lord as the judge.

          (4)   Pre-1970 = Temple work before 1970 and cannot get date. (This rarely appears in FamilySearch.)

          (5)   Unc or Uncleared = Temple work submitted, but not cleared for lack of information. This prevents the ordinances from being resubmitted.

4.   **'Other' fields**: It is easier to do 'Other' information early that will help you in the future. Consider putting some of the information in notes or sources as well, since some information will not appear in reports. If you need more name fields, add them as custom events[10]. For example:

a.   **Married Name**: Surname taken at time of marriage. If married more than once, list in order separated with a comma followed by a space. This makes it easier to search, for example, for any female that married into a certain surname.

b.   **Nickname**: Nickname(s) also used[4].

c.   **Also Known As**: Names used possibly from legal name changes, stage names, pen names, criminal aliases, other names the individual may have used, etc[4].

d.   **Title**: Various abbreviations that are not normally part of the legal name, but used much of the individual's life. May be non-inherited titles (Sr.), professional titles (Dr.), government titles (Sir), etc. (this was modified slightly to satisfy the name field rules)[4].

5.   **Maintain Family Ties**:

a.   Families should be tied together. This includes biological and adopted parents (if both are known), all spouses even when a divorce occurs, all children, etc.

6.   **Sources**:

a.   The sources are very important to fully document where you found your information and what it contained. Sources are listings of the records or documents used to identify a specific individual or event. Citing sources means that you record where you found information about an individual.

Sources can help to make your work "a book worthy of all acceptation" (D&C128:24)[17]. Type in your sources as you work, or you may forget them[9].

b. They should be as complete as possible so that others may follow and even reproduce the work that you did. When you share information with others, they will most likely want to know where you found the information[9,17].

c. Items that can provide dates, locations, and family connections are all considered sources. Examples include[17]: Birth certificates, Census records, Marriage certificates or licenses, Death certificates, Wills, Tax records, Documented histories of towns/societies/etc., and Newspapers/periodicals.

d. Sources allow you to evaluate the reliability of your information; they provide a history of the sources you have examined; they help you evaluate conflicting information; and they acknowledge work done by others[17].

e. Consider entering the contents of your source in the "actual text" field for future reference and searching.

f. Sources may be marked as confidential through confidential events.

g. Cite the source you actually use. If you used an abstract or index, cite it and not the actual record. Abstracts and indexes may contain errors[9].

h. Identify all researchers' contributions, including your own. Use your name, not *I* or *me*, when referring to yourself[9].

7. **Notes**:

a. You can use notes to keep track of many types of information, such as the following[11,17]:
   i. Interesting or special circumstances of an individual's life
   ii. Stories
   iii. Journal entries
   iv. Your research notes and "to do" lists

b. Notes may be marked as confidential with a tilde ("~") before the note or tag[10]. Notes marked with an exclamation point ("!") will be tagged for printing. Both can be still printed or exported if the options are selected.

c. Sources were documented and stored within notes in very old versions (2.31 or earlier) of PAF[15]. However, with newer versions of PAF as well as with the new FamilySearch, it is strongly recommended to store these within sources instead of notes. Use the Sources feature for sources. Do not record source information in your notes[10]. Doing so save space in the database, make it easier to add citations, allow exporting/printing/creating web pages with sources and/or notes, and allow more precise searching[15].

d. Use custom events, not notes, to record information such as emigration, naturalization, military service, occupations, and physical attributes[10].

e. Also use custom events or attributes for Latter-day Saint baby blessings (not in the confirmation field), priesthood ordinations, and so forth[10,12].

f. Make sure your notes are understandable to other researchers. For example, when you refer to yourself, you should use your name rather than the word *I*[10]. Also, use names, places, and dates in the standard formats. Be consistent with tags.

g. Prior to PAF version 3.0, notes may be stored in separate files. In the latest version, the notes should be converted into notes in the .paf file[13].

8. **Custom Events**:

a. In the DOS versions of PAF, you could not add custom events for individuals or marriages. You had to type military service, occupation, immigration, Latter-day Saint baby blessings, and other such information in the notes. Since version 5.0, you should put this information as custom events. If you have updated from a previous version, you should move event information from

notes to custom events. Doing so will allow charts to print these events, include events separate from notes in various reports, allow more precise searching, takes less space in the database and GEDCOM files, and sources can be included for custom events[16].

[1] A Member's Guide to Temple and Family History Work, page 10
[2] A Member's Guide to Temple and Family History Work, page 11
[3] A Member's Guide to Temple and Family History Work, page 12
[4] PAF Help file, topic "Guidelines for names"
[5] PAF Help file, topic "Guidelines for event places"
[6] PAF Help file, topic "Guidelines for event dates"
[7] PAF Help file, topic "Table of date abbreviations"
[8] PAF Help file, topic "Estimating information for temple ordinances"
[9] PAF Help file, topic "Guidelines for citing sources"
[10] PAF Help file, topic "Guidelines for notes"
[11] PAF Help file, topic "Using notes"
[12] PAF Help file, topic "Guidelines for Latter-day Saint ordinance information"
[13] PAF Help file, topic "How to input notes that were stored in separate files"
[14] PAF Help file, topic "Tips for citations"
[15] PAF Help file, topic "Converting sources that are stored in notes"
[16] PAF Help file, topic "Converting notes to custom events"
[17] Church's Internet Learning System, Lesson: Personal Ancestral File 5.2
[18] BYU Independent Study, Lesson: Finding Your Ancestors