

GG 2018-2019 Email #1 to State Points of Contact
28 August 2018

As your new Genealogist General, I first would like to thank you for your support and assure you that I will be doing my best to serve the National Society SAR in the responsibilities of this position.

Genealogy and membership decisions at the Houston Congress. There were decisions regarding genealogy and membership made at Congress as follows:

1. Bylaw 1 Sec. 1 regarding membership removed the inclusion of “residence” in the required fields on our application forms. This now matches actual practice since our forms don’t currently have a field for residence. This is only a correction to the Bylaws so they match the existing format of our forms. It does not change requirements that evidence of residency must be provided in support of an application to show that the claimed patriot was in fact the person who provided the service stated.
2. Bylaw 1, Sec. 6 (to be reworded) removed the special onetime payment of an additional fee in addition to the normal processing fee for Memorial Memberships. The fee shall be the same as provided elsewhere in the Bylaws for Regular Members.
3. Bylaw 22, Fees and Dues added a new paragraph regarding Junior Memberships for new Junior Member applications registered on or after September 1st and in which the Jr. Member will attain the age of 18 before the following December 31st. The Jr. Member dues to be included with the application will be the same as those for a Regular Member since the dues will be for the following year in which the member will have become a Regular Member.

Issues with Pended Applications. As GG, I receive copies of emails that are sent to State Points of Contacts regarding pended applications. This is done to allow me to see the types of issues that are causing applications to be pended so hopefully, we can improve the number of applications that get pended by pointing out common errors. In my first month as GG, I received copies of 86 such notices sent back to Points of Contacts, as well as the statistics for the number of applications approved and pended. It appears that nearly 11% of the applications reviewed were pended on first review and required additional information, some of which was found and the issue resolved. Some of these were in response to supplemental information received so not all 86 represented a month of new pending actions. Several have subsequently been resolved. Here is a breakdown of the most common causes:

- Use of unacceptable sources (undocumented family histories, old or flagged DAR RCs, DAR Lineage Books or the DAR Patriot Index, LDS user submitted information, Ancestry family trees, user submitted narratives on FindaGrave, etc.).
- Missing proof of the bloodline spouse’s maiden name (a census record showing the married name of the spouse and the will of a claimed parent that only lists the daughter by her maiden name does not prove that the spouse is the same person as the daughter listed in the will).
- Missing documentation for one or more parent/child links.
- Unreadable documents submitted as proof.
- Documentation was referenced but not included with the application package.
- Unresolved conflicts in names shown on supporting documentation (for example, the name on a census record showing the ancestor as a child using one name or just an initial, and another census record showing that person as the parent for the next generation using a different name, possibly a middle name, without proof that both names are for the same person).
- Missing evidence for questionable situations such as the claim that a 56-year old woman is the mother of the child in the next generation.
- Proof of service questions such as age at the time of service (for example, military service claimed for a 65-year old man when another man with the same name and only aged 21 is

living in the same town at the time of service), or there are multiple persons of a reasonable age with same name in the same locality.

Many of these issues are ones that should be caught by the Chapter or the State Registrar before they are forwarded for review by the National Staff. Please remember that it is a disservice to a prospective member to forward his application with the required application fees (only part of which are refundable if the issues can't be resolved) when an obvious problem is apparent. Pending an application also requires additional staff time in their review process impacting the overall turnaround time for processing applications. Based on the current statistics, the time from an application entering the queue until it is reviewed by the Genealogy staff is about 6 weeks for new applications and 12 ½ weeks for supplemental applications.

Staff Issues – the Genealogy Staff has also commented on applications regarding some of the problems they are seeing:

- Applications using the online system have unnecessary blank lines in the references field. This is a known problem with the online system which will eventually be addressed when a new vendor is hired to work on our website and the modules in it. In the meantime, it can easily be avoided by not using the return key to separate the references, and by not use the return key at the end of the reference block. It is the return key that is creating the blank lines. Instead, separate references with a semicolon or comma and continue using a single wrap-around entry for the reference block. Since Chapter and State Registrars have online access to make corrections on applications using the online system, it is easy to see and correct this problem before a final application is printed.
- Partial pages are submitted for some references such as census records or parts of a page from a published book. See Policy 3.9002 regarding submission of entire pages.
- References submitted for published sources may be missing the title page of that source. See Policy 5.400.
- Information, either bracketed or corrected on DAR or SAR applications that are used to support a new application should either be left off if bracketed (unless additional supporting documentation is included with the submission) or entered exactly as corrected by the DAR or SAR reviewing staff.

Familysearch.org – in talking with several members, I have discovered that many members are unaware of some of the ways to access digitized records of primary source documents using the free site, familysearch.org. Many digitized records are now available online for the public using their home computers. A free account is easy to setup. Some of those I've talked with regarding using the site limit their search using the "Search/Records" pull down function and either entering a name of interest or using the "Research by Location" option to select a state of interest and then limit the search by name or see what is available by looking at the resources listed as available, either indexed or image only (not indexed).

What is also available, and much more useful for locating digitized records at the county level is the "Search/Catalog" option when using the website. Enter the name of the county of interest. A list of places that have that name will be provided. Select the one that matches the county and state of interest and then click the "Search" button. You will be given a list of record types, 'vital records', 'court records', 'land and property', etc. By click on any one of those record categories, you will get a list of what is available in the Family History Library for that category of records. Most of those that have an author other than the county clerk or court are published records and usually only available at the main library in Salt Lake City. However, many of those that are official records are now digitized. By clicking on the entry, you can see if digitized records are available online. Sometimes a red entry will come up showing that the records are available online and by clicking where it says "click here" you can see the records. Sometimes clicking on a record will give a listed of the filmed entries that comprise the set and there are different icons associated with each film. If the icon is a camera, that means it has been digitized and is usually available online for the

public by just clicking on the camera icon. If the icon is a camera with a key above it, that icon means that it is digitized but can't be accessed by a home computer but can be accessed on a computer in one of their local branch libraries. If the icon is a reel of film, that means that it hasn't yet been digitized. The Family History Library no longer supports interlibrary loans to their branch libraries so, until the film is digitized under their current program to digitize all of their films, it can only be seen at the main library in Salt Lake City.

I encourage all of our members, and especially Registrars helping prospective members locate the needed proofs for their application, to take advantage of the resources available at familysearch.org

**GG 2018-2019 Email #2 to State Points of Contact
27 November 2018**

Genealogy Policy Manual & Application Preparation Manual.

Updated versions of both of these documents are now available on the SAR website. The major changes to the Policy Manual reflect actions taken at the 2018 Fall Leadership Meeting and include:

- Policy 3.5003 - Removal of acceptance of Chapter DAR RCs as supporting evidence. Only official copies of DAR RCs are acceptable in compliance with DAR policies regarding the use of their proprietary records.
- Policy 6.1001, footnote 1 - Applications must be typed or computer-printed with black print." includes an understanding that the application shall be neat and not smudged but may contain very minor corrections in ink. *Applications that are messy, blurred, or which have several inked-in corrections should be reprinted before submission or they may be returned to the State Society for reprinting.*
- Policy 6.1002a – The provision that the Genealogist General has the authority to permit an adult other than an applicant, parent, or guardian to sign on behalf of an applicant has been removed.

Note also that only the current versions of the four application forms containing the revised certification, the deletion of applicant's children, and the Genealogist General's signature block are now acceptable. The NSSAR website provides links to all four application types.

Access to Genealogical Records

There is a national initiative being proposed by an organization of State vital records Registrars with the aim of lengthening the time frames for public access to vital records. The National Association for Public Health Statistics and Information Systems is seeking a consensus by the States on this issue and is recommending records be closed for 125 years for birth records, 75 years for death records, and 100 years for marriage and divorce records to protect the identity of individuals. Some jurisdictions are considering closing these records to anyone other than direct descents closer than great-grandchildren. Should these recommendations become reality, that could have a significant impact on the ability to obtain needed documents for membership proofs. This would be a good time to consider obtaining those official family vital records that might be needed for future application support not only for you but also for your children and grandchildren.

Membership & Application Status

Currently, the que for processing new applications is 7 ½ weeks and the que for supplemental applications is 10 weeks. As of this date, there are over 37,250 active members in the National Society. The number of applications approved since I was elected Genealogist General last July is 1,771 (1,237 new, 528 supplemental, and 6 memorial applications). There have also been 188 applications that have been pended (some of these have been subsequently resolved and approved). These figures indicate that around 10% of submitted applications are being pended, many for reasons that should have been caught before submission to National. Thus staff is using their valuable

time to make a brief attempt to resolve issues and/or preparing pended notices back to State Points of Contact.

One of the problems resulting in the pending of an application is claiming a patriot with the proper name found living in a vicinity without verifying that there are no other persons in that vicinity with the same name, and thus not providing sufficient evidence to show that the ancestor named was actually the patriot and not one of the other persons with that name. Working on a recent appeal involving this issue, I discovered 5 men of the same name, whose ages were all of the proper age to have served, living in the same town where the claimed patriot resided. It turned out that actually 2 of these men provided military service but the source for one of them only indicated the county but not the town of residency. It took over 20 hours of work to determine which of these 5 men were the two patriots and which was the ancestor listed in the application. This is not the type of work that staff does. If they determine that there is more than one possibility, they will appropriately pend the application. It is the applicant's or their sponsor's/Registrar's responsibility to check for these situations before merely deciding that there is a record that shows a patriot with the correct name and claiming that person is the same person as the proven ancestor without considering the other possibilities.

Print fonts on applications

The Genealogy Staff is receiving some applications that are printed using very small fonts that are difficult to read. For use of the PDF, MS Word, and SARApAid versions, the font size should be set at a minimum of 10 pt . 12 pt is preferred. For the on-line SAR Application, set the scale on the print setup in the range of 90 to 110. A scale smaller than 90 will increase the margins and shrink the font size on the printout making it very difficult to read. For the on-line system, trying different scale sizes between 90 and 110 can fix the page break between page 1 and page 2 of the application so the break falls properly between generations.

GG 2018-2019 Email #3 to State Points of Contact 31 January 2019

Recent Issues Noted.

Account Login Issues to Access Your Account.

Several members have reported problems in trying to access their accounts on SAR.org and have been unable to login and start new applications. One reason this problem has occurred is a misunderstanding of the account setup process on our National Society website. When the account is initially setup, an email address and password is requested. That information becomes the User ID and password. If the user changes his email address, his original email address is still his User ID. He can change his password within his account but he cannot, at this time, change his User ID. Be sure to keep a record of your User ID as well as your password when you create an account.

Applications Pended for re-printing

As a result of actions taking by the Genealogy Committee and the Trustees at the Fall 2018 Leadership Meeting and made effective November 1, 2018, the Genealogy Staff have been pending for reprinting several applications. The issues have been: 1) using an old application form that doesn't contain the proper certification and the removal of the applicant's children from the form, 2) using DAR Chapter Copies or other non-official copies which violates the DAR's restrictions on how their Chapter Copies can be used, 3) making numerous handwritten corrections and cross-outs on the final application submitted, and 4) printing the application as letter size on legal size paper. Applications with any of these problems are pended, indicating that the application is approvable but needs to be reprinted AND RESIGNED by the applicant, sponsors, and State officers (if other problems are found, they would have also been identified when the application was pended).

Research Tips.

Census records - how to check them for missing names.

When looking for a family in census records, there are often occurrences where the name being searched can't be found even though it is expected to be there. This may be caused by transcription errors by the person who indexed the census, it may be caused by the enumerator who took the census and what he thought was a correct spelling of a name, or it may be the result of the instructions given to the enumerator to get information from a neighbor if the family wasn't at home when he came knocking. Remember that even the first letter of a surname might be incorrectly indexed (I have found occurrences of my own surname Faulkinbury indexed as Taulkenberry). Don't give up, try using just the first three letters of the surname followed by the * wildcard to see what pops up. Maybe the person of interest was listed by a middle name instead of a given name (check for name and age matches for other family members). If that doesn't work, try just the given name or the first three letters and wildcard of the given name and approximate age of the head of household and check the list of possibilities in case the surname might have been indexed differently. If there is an unusual given name for a child that should be in the household, try a search just using just that child's given name and approximate age. If the family is expected to be in the same county where it was last encountered, try searching for the neighbors that were found in the previous census, or neighbors named in land records instead. These research strategies often find the missing family.

Using Oral Histories.

There are occasions, especially in lineages that involve slave ancestry where, in the absence

of any other public records, the only source of information may be an oral history. In using an oral history, there needs to be an indication of where that history originated, and how the original and successive sources of the oral history were in a position to have knowledge. When an oral history of slave ancestry is shown to have originated with a specific individual (possibly with a different surname), research is needed to show how that person could have reasonably received first-hand information. For each successive generation passing the history down, there needs to be research to show how the successive recipient would have been in a position to receive it from the original source. A case in point is a woman who was the sister-in-law of a slave who shared his parentage as a slave woman and her white father with his wife and sister-in-law. Documentation was found to show that a female slave with the given name of the mother did belong to the alleged father's family. Documentation was found to show that the source of the history did in fact live in same area and was closely associated with the ex-slave and his wife, the source's sister. Further information indicated that the oral history was passed down to a granddaughter of the original source and research showed that the granddaughter lived for many years with that source.

Other.

SAR Record Copies are now available via on-line credit card payment.

The National Society is making available, the ability to order a Record Copy of an application online, with the ability to pay by credit card. At this time, it is only for Record Copies where the **Name, National Number, and Patriot name are provided**. This will significantly reduce the amount of time for a member to receive a copy of an application. Most copies will be returned by email the same business day the order is placed. Please keep in mind that holidays, vacation, and sick days may delay the processing of Record Copy Requests, including those that are placed using the online system. This system cannot be used for an Ancestor Search, or a Documentation Request at this time. Please keep in mind that Record Copies of living members of the SAR is restricted to members of the SAR. If you are ordering a Record Copy of a living SAR member, you are required to enter your National Number to place the order. The link to this Online Ordering System is: <http://www.sar.org/record-copy>

Membership & Application Status

Currently, the que for processing new applications is 7 ½ weeks and the que for supplemental applications is 13 weeks. As of January 23rd, there were 37,607 active members in the National Society. The number of applications approved since I was elected Genealogist General last July is 2,584 (1,916 new, 654 supplemental, and 14 memorial applications). There have also been 319 applications that have been pended (some of these have been subsequently resolved and approved). These figures indicate that around 12% of submitted applications are being pended, many for reasons that should have been caught before submission to National. Thus staff is continuing to use valuable time to make a brief attempt to resolve issues and/or preparing pended notices back to State Points of Contact.

Jim L. W. Faulkinbury

Genealogist General

GG 2018-2019 Email #4 to State Points of Contact

11 March 2019

Spring 2019 Leadership Meeting Decisions by the Genealogy Committee

The Genealogy Committee met at Louisville on 1 March 2019 and made some policy decisions that are important information for applicants, Chapter Registrars and State Registrars to be aware of in New, Supplemental, and Memorial applications.

- Memorial Applications – the policy regarding signatures on Memorial Applications was changed from “*A memorial application is to be signed by an adult for the deceased applicant*” to “*A memorial application is to be signed by an adult member for the deceased applicant*”. The signature must be made by a SAR member.
- Applications using previous SAR applications as documentation – since Chapter and State Registrars, who have the responsibility of checking documentation submitted in support of an application, if the application uses a previously approved SAR application, a copy of that approved SAR application must be included in the package that will go to the Registrars so they can see if the sources used or unverified facts are present and make any necessary corrections or reprints before submitted to National. Copies of approved applications are provided to member and the member’s Chapters. Several State Societies maintain copies as well, but if a copy isn’t available from one of those possible repositories, copies can be obtained via credit card payment from the National Society per the notice that went out to the membership last month (see my Email #3). This requirement will be enforced by the Genealogy Staff for any application submitted by a State Society on or after 1 July 2019 using the date the State Registrar signs off on the application for forwarding.
- The language of Policy Manual, Sec. 6.1001 now includes the requirement that applications must be neat but may contain a few very minor corrections in ink. Applications must not be smudged or produced with loose toner. This language was previously a footnote and often ignored.

A subcommittee established at the Fall 2018 meeting to design a common format for all of the application forms. This format was presented to the Genealogy Committee which recommended the proposed format be sent to selected SAR stakeholders to get comments back by 17 April 2019 for any additional changes or recommendations. The significant format changes are use of 8 ½ X 11’ letter size paper with all of the applicant’s personal information on page #1 which, when removed, accomplishes needed personal privacy redaction. The new application’s pages #2 thru #3 contain the service of the qualifying ancestor or patriot and the associated reference/proof citations directly under the statement of service. Similarly, the Statement of Bloodline Section puts the reference source citations used directly under the vitals dates and places which also have “pop-up” modifiers of “in, near, or bap.” for birth; “in, near, liv, bur.” for death; and “in or near” for marriage. Dynamic spacing is provided for individuals’ names and location blank spaces, listings of reference document citations, and movement of the entire application down the form into a

planned blank area to accommodate generation data as additional typed words move the entire form down the pages. Space is provided at the end of the form for “optional information” on the burial place of the “Qualifying Ancestor” or Patriot with the location of the cemetery, town, county, and state place names as well as geographic coordinates in decimal latitude and longitude data.

Applications Pended for re-printing or use of DAR Chapter copies

This item listed in my previous Email #3 continues to be an issue with the staff having to return applications for reprinting on the proper forms, using the wrong fonts or scale for printing the final applications. The issues have been: 1) using an old application form that doesn't contain the proper certification and the removal of the applicant's children from the form, 2) making numerous handwritten corrections and cross-outs on the final application submitted, 3) printing the application as letter size on legal size paper, or 4) problems with margins or fonts making the form too small to be readable or too large forcing names, dates, or places to take more than the one line allotted. Applications with any of these problems are pended, indicating that the application is approvable but needs to be reprinted AND RESIGNED by the applicant, sponsors, and State officers. Another problem for pending is the use of DAR Chapter Copies for supporting documentation. The has indicated that the use of Chapter Copies or other non-official copies which violates the DAR's restrictions on how their copies of their applications can be used. We can only accept DAR copies which have be produced using their online GRS and have the notice that they are official record copies.

Application Status

Currently, the que for processing new applications is 6 weeks and the que for supplemental applications is 15 weeks.

Jim L. W. Faulkinbury

Genealogist General

GG 2018-2019 Email #5 to State Points of Contact 19 July 2019

129th Congress 2019 Leadership Meeting Decisions by the National Trustees

At the Trustees meeting held on 9 July 2019, the SAR Constitution was changed to define two additional classes of Membership; Emeritus and Memorial. A memorial Membership is defined as “a deceased male of the same family as a current member...”. Bylaw 1, Sec. 7, regarding Memorial Memberships, was also changed to clarify which deceased family members of a current SAR member would be eligible to receive a Memorial Membership. The Bylaw now states that qualifying family members are limited to the following: father, grandfather, brothers, uncles, grand-uncles, sons, grandsons, nephews, and/or grandnephews of the current member upon whose membership the Memorial Membership application is based. The Memorial application must use the same lineage as was used in the supporting SAR application. The Genealogy Policy requires that the signature on a Memorial Application be that of an adult SAR member.

Application Issues

Unnecessary Problems with Applications

Many membership applications, both new and supplemental, are being submitted to staff with problems that can and should be easily caught by the local or State Registrars. They result in unnecessary staff time to prepare a “pending” notice back to the State Point of Contact, thus impacting the overall staff time to process applications. These problems are easily recognizable and should be found and corrected by the Registrars before they are ever submitted to National. Some of these problems are:

- Applications using an outdated form. The current forms that can be found on the SAR website contain the revised formats previously approved by the Trustees.
- Applications printed on the wrong paper.
 - Some applications are being received on plain paper rather than the required SAR watermarked paper.
 - Some applications are printed letter size on the required legal sized SAR paper.
 - Some applications using the on-line SAR Application system are using a scale setting that is outside of the proper limits of 90-110.
[NOTE: by adjusting the scale setting when printing an on-line application, the break between generations can be made to occur on the normal page break - see the “online application printing tutorial” at <https://members.sar.org/media/uploads/pages/396/2SzY7avS7ZKk.pdf>].
- DAR Record Copies used as supporting evidence that are not official DAR Record Copies obtained from the DAR GRS. In accordance with DAR policy, Chapter or personal copies of DAR applications are not authorized by the DAR to use for other purposes such as supporting SAR membership applications. We can only accept DAR Record Copies that indicate that they are official DAR record copies as designated by the annotation on the bottom of the pages stating “Daughters of the American Revolution All Rights Reserved. Copy Services”.
- DAR Record Copies that are incomplete due to printing the legal sized Record Copy on letter sized paper, cutting off information.

- Neatness. SAR Genealogy Policy requires that applications are neat. They may contain a few **very minor** corrections in ink. Applications must not be smudged or contain a large number of corrections.

Published Family or Local Histories

Another frequently recurring problem with applications, resulting in a pended status, is the use of undocumented family or local histories. The SAR Genealogy Policy regarding published family or local histories states that if the publication does not provide citations indicating reliable sources for where the information was found, that information cannot be used as evidence. The only exception would be when it can be shown that the information was provided by someone who had first-hand knowledge of the event stated. An example would be a biographic sketch printed in a county history regarding a still-living member of the community, and the sketch names that person's parents. It can reasonably be assumed that the subject of the sketch provided the published information and would have first-hand knowledge of his/her parents (and possibly grandparents if he/she lived near them during his/her lifetime. Information in the sketch regarding earlier family members would not be acceptable as evidence. It should be easy to determine whether or not a family or local history provides source citations, footnotes, or transcripts of documents that support the information stated. **Books that just list names, dates, and places without source citations are not acceptable.** These unacceptable sources may, however, provide useful clues for further research.

Problems with Initials or Interchanging Given and Middle Names

A frequent reason for pending applications results from the inability of the Genealogy Staff to verify that the name in one record is for the same person named in another record. This may occur when, for example, a census record only provides initials (A.C.). Another frequent situation would be one census record listing the person with a given name and a middle initial, and another census record shows that person by the middle name and an initial for the first name (Albert C. vs Charles A.). **Additional evidence is needed to demonstrate that the person listed differently in multiple records is the same person. A proof argument may be needed to establish this.** By looking at other records beyond the census and checking information on siblings named in the available records, the connection can often be proven.

Problems with Multiple Persons of the Same Name

Another frequent problem resulting in the pending of applications is the occurrence of multiple persons of the same name living in the same area and same time frame. It is necessary to show that the person listed in the lineage is the correct person. A check of the censuses for the area in question is a good way to see if there are other possible families in an area. Some records of service don't indicate where the person lived, just the state that they served in. If there is more than one possibility found in records such as the 1790 census or other records, the identification of the proper person must be established. **A proof argument will probably be needed to prove the connection and/or eliminate other possibilities.**

Research Suggestions

Useful online sources.

Several sources are available that provide digitized copies of original records that are useful in establishing a lineage. Some are free and others are subscription sites. Many subscription sites can be reviewed at local public libraries or branch Family History libraries. The following is a list of some of the many useful sites. County Genweb sites can also be useful sources of information.

- <https://www.familysearch.org> (free but requires an account to be setup). Use the

“Search” pull-down to select “Catalog” to get to the available records for the county(s) of interest rather than/or in addition to, the “Search” option. Using the “Catalog” option you can enter the name of a place (county, town) of interest. There are many digitized records that are available online and not indexed by individuals. Once the list of available records is shown, by clicking on an entry such as land, probate, vital records, etc., the availability of that record is displayed. If a camera icon is shown, that film is digitized and can be seen online by clicking on the camera icon. If there is a key icon above the camera icon, that record can be seen a local FHL branch library but not on your home computer. The FHL is progressing in digitizing all of their microfilm holdings.

Online digitized images are continually being added. Those that can only be seen in a FHL.

- <https://www.ancestry.com> (**subscription**). In addition to census images, there are many other digitized images available. Some require clicking on the State image at the bottom of the “search/all collections” option. Use of state records can be further refined to see what county records are listed for the state.
- <https://archive.org> (**free**). This site contains searchable PDF images of out of copyright books. Family and local histories can be reviewed and searched using a word or words search such as a person’s name. The site contains many volumes that are not related to genealogical research but by using keywords in the search box, relevant records may be found. Most of these older books are not acceptable sources as evidence, but can provide useful clues for research in other sources.
- Fold3 (subscription). This site has many military records including Revolutionary pension files, rosters, service cards, etc. The records include military records for other wars as well as the American Revolution. World War I and World War II draft registration cards often provide useful information to help with lineage problems
- <https://americanancestors.org> (**subscription**). This site houses the records of the New England Historic Genealogical Society (NEHGS). In addition to many New England records, they have many records pertaining to other areas such as NY and VA, as well as many other areas.
- <https://www.lva.virginia.gov/chancery/Default.asp> (**free**). This site indexes Chancery Court documents for many Virginia counties. If an entry of interest is found, by clicking on the file, you can see digitized images of the original court documents containing valuable information that can help in Virginia lineages.
- Several newspaper sources that can provide useful information. Some are free such as <https://chroniclingamerica.loc.gov/>, digital images of historic newspapers held by the Library of Congress or <http://fultonhistory.com/Fulton.html> with 47,000,000 digitized newspaper pages (mostly NY). Others are subscription sites such as <https://www.newspapers.com/> and <https://newspaperarchive.com/>, just to name a couple.

Persons Not Named in a Will

Just because a person is not named in the expected parent’s will does not mean that the person wasn’t a child of the testator. It was common practice to provide children who have reached adulthood and begun their own family, to gift by deed, land or other assets to those children. In these circumstances a will may not mention a child who has already been provided for in another way, and only lists heirs that haven’t already received their share. Look at the land records to see if there are any deeds that are gift deeds. These would usually have a nominal exchange of money (for \$1 or 5 shillings) and often state “for the love and affection” with the remuneration involved. Also look in the deed indexes to see if there are any deeds that may be for the sale or

partitioning of the testator's land. All of the heirs who may have an interest would often have separate quit claim deeds for their potential interest in the land, or be listed among those selling the land. Look for deeds that have "et al" in the grantor or grantee index. Many published transcriptions of wills are incomplete and only list the beneficiaries while omitting the names of executors or providing other information that could identify other heirs. It is always a good idea to look for the original will if the transcription doesn't list the child of interest.

Intestate Estates

Intestate probates are opened when a decedent has not left a will and died with property that needs to be divided among heirs. An Administrator is assigned by the court to handle the distribution of property. Usually the Administrator is a close relative or friend of the decedent, but not necessary a child or heir. Often probate files only contain a Letter of Administration or the Administration Bond. Sometimes other useful information is included in a probate file such as inventories, results of the estate sale, and/or final distributions. If there is a final distribution, the names of the heirs would be listed. The widow would usually receive two shares as her dower rights, and each of the children would receive one share. However, if a child of the decedent was also deceased that share would be distributed among the children of that heir and each of their shares would be a portion of their parent's share. Another source that may be found is the property sale showing who bought what, and for how much. If a bedstead(s) is on the list (usually at the top of the list), it can almost always be attributed to a family member who lived in the home of the testator and who used the bed. All property assets would be sold and family members would be found purchasing the things they normally used. In the case of bedsteads, they would be purchasing their own bed. If real estate is involved, the court may request a partition of the land to be made. The resulting partition could be found in the land records for the county.

Application Status

Currently, the que for processing new applications is 8 weeks and the que for supplemental applications is 17 weeks.

Jim L. W. Faulkinbury

Genealogist General

GG 2019-2020 Email #6 to State Points of Contact 21 October 2019

The Patriot Research System (PRS)

The Genealogy Staff have recently been receiving membership applications that are using the pages from the PRS as supporting documentation for proof of service and/or lineage. **The PRS, available through the National SAR website, is an unacceptable source for use to document applications. Using PRS information as proof of service or lineage will result in a pended application.** The PRS database is only made available to provide clues for general research, and clues to find proof documents for SAR applications. You must still find the original references to the service or lineage when submitting an SAR application.

The search capabilities of the PRS allows users to locate information on patriots, information on applications previously approved, and patriot biographies. The information entered is user submitted and not vetted by the genealogy staff. Lineages (names, dates, and places) are entered from previously approved SAR applications and contain everything that was entered on application or corrected by the reviewing staff when approved. Recently the staff has begun bracketing information for which no supporting documentation was provided. Recently bracketed information is not entered into the PRS lineages. Be aware that the approved applications, as well as the entered PRS lineages, were often based on references such as undocumented family or local histories, or oral traditions that are no longer acceptable under current genealogical standards. Since bracketing is a recent change in how staff reviews statements, many of the entered lineages also may contain unsupported facts that were not previously bracketed due to lack of evidence. If you are unsure of whether a previously approved application can be used as supporting evidence, that actual application should be viewed and evaluated before it is submitted as an acceptable reference document.

Reasonably Exhaustive Search

Many applications are pended because insufficient evidence was provided to prove a relationship or correct service when multiple possibilities exist. A criteria of the Genealogical Proof Standard is to make a reasonable search of available records especially when there may be other possibilities. Finding a person whose 1850 census record in OH shows his state of birth was MA and then concluding that he was the same person as one found in a record for a specific location in MA, without finding evidence of his move or eliminating all other possibilities for men of the same name, will result in a pended application. Staff routinely uses early census records or other sources to verify that only one possibility exists if a person is named in the lineage and the documentation provided is insufficient to prove the link. If there are other possibilities, a proof argument must be used to establish which person is the correct one by finding conclusive proof or by eliminating the other possibilities. Likewise, correct service must be established in a similar manner when there are multiple possibilities for persons with that same name, or there is no documentation provided to show that the person claimed resided in the area of service when it was performed. Before submitting an application, a reasonable search should include a check of other possibilities for every link that isn't conclusively proven by the documentation being used. Don't assume that just because the name found is the same, that this is the correct person.

Decisions from the Fall Leadership Meeting

At the 2019 Fall Leadership meeting of the Genealogy Committee on September 20th, the following changes to current policy were made:

- Genealogy Policy 3.5003: “Official record copies of applications for membership in the Daughters of the American Revolution (DAR) or the Children of the American Revolution (CAR) approved after January 1, 1985 shall be accepted as evidence of corresponding service, lineage and related facts on SAR applications. This shall not apply with respect to portions of those approved DAR or CAR applications determined to be incorrect by the DAR, CAR, or the SAR. Official copies of DAR or CAR applications approved prior to 1 January 1985 may be accepted as evidence with respect to corresponding facts that have been individually marked as verified by the DAR or CAR. However, this does not apply to any verified facts which may be subsequently flagged as incorrect by the DAR, CAR, or SAR. Official copies have verification marks made by the reviewing DAR or CAR genealogist and have some indication that they are the official copies and not a personal or chapter copy.”
- Genealogy Policy 3.5004 “Documents Inadmissible in Evidence” was amended by adding “Index cards, such as the Mennonite Index Cards, cite various sources, some of which may be acceptable proofs. The actual proof must be submitted, not the index card.”
- Genealogy Policy 6.1001 “Application paper and printing” was amended by adding words shown in **bold**. “Applications must be typed or computer-printed with black print and must be neat and not smudged or produced with loose toner, but may contain **no more than five** very minor **neat** corrections in ink.”

In addition to these changes to policy, a presentation was made by the subcommittee on Redesign of the SAR Application Form and a motion made that the Genealogy Committee recommend to the Trustees that the proposed format be approved with a suitable transition period to be determined permitting the continued use of currently approved formats. The motion, after an approved amendment to keep the paper size at 8 ½ x 14, passed by a vote of nine to six. The next day, at the NSSAR Executive Committee meeting, the proposal was presented and the Executive Committee recommended that more work was needed to address concerns they raised. The proposal was not presented to the Trustees.

Another motion was passed that a Genealogy Subcommittee be established for the purpose of preparing guidance and examples of the use of DNA evidence as part of a proof argument to be included in an expanded section of the APM.

GG 2019-2020 Email #7 to State Points of Contact
6 November 2019

This email is being sent out to the State Registrars and Genealogy Points of Contact to make all members and Chapter Registrars aware of the actions that are being taken regarding use of DNA as evidence in applications. Please disseminate this information down to the local level.

New perspectives on the legal issues that surround the use and dissemination of DNA test results have resulted in numerous questions regarding our current and future DNA policies, and our acceptance of test results, which may involve multiple individuals. There are concerns raised by staff and our executives regarding how we will deal with the issues of privacy and confidentiality. The current policy on DNA allows use of DNA states:

DNA evidence can only be used as one element of a genealogical proof argument that includes additional conventional proof of the lineage. None of the major tests -- Y-DNA, autosomal DNA, mitochondrial DNA, or X-DNA alone can prove a descent from a specific individual. DNA tests can show with high probability that two individuals are related but without traditional evidence, they fail to determine whether the person being considered is a specific individual, a sibling of that individual, a cousin of, or other relation to that individual. However, by combining the various tests and using techniques to support predicted relationships, coupled with traditional evidence, a case can be built to demonstrate relationships.

The legal issue arises with the requirement for the additional conventional evidence. The conventional evidence required includes proof of the applicant's lineage to the common ancestor where a DNA match is found, the proof of the lineage of all matches to that same common ancestor, and proof of the lineage from the common ancestor to the patriot ancestor. This involves documentation for the lineages claimed by all of the matches used, which includes their private information. Their permission for use is needed and we need to address how to insure the privacy of that information used.

A genealogy subcommittee is being set up to prepare guidance on how to build a DNA Proof Argument and to look into the questions regarding the use of DNA and who has permission to access and share this information. When we accept results of a DNA test as part of a proof argument, we are receiving the most private of information. While we may have the permission of the applicant to use his DNA results, we do not necessarily have the permission of the other family members who are included in those results. They may not be aware that the SAR is being provided a copy of their DNA results as documentation. We need to establish procedures that protect those DNA results from becoming available to the public through Record Copy and Documentation Requests.

With these types of questions in mind, the President General has asked the Staff to put a hold on any further acceptance of DNA test results as proof of lineage documentation. This will be in effect until such time as the Chancellor General and the Legal Advisory Committee have an opportunity to review the National Society's standing from a legal prospective. The Genealogy Subcommittee will continue to work on guidance for the types of reporting that would be required for DNA review, but any acceptance policy would need to be reviewed and include safeguards for its legal aspects.

In the meantime, the Genealogy Staff has been instructed to automatically pend any application that uses DNA test results as proof or as part of a proof argument, pending the legal review by the Chancellor General and the Legal Advisory Committee. In the interim, those applications already submitted but not yet reviewed will be pended and shelved until the Policy decisions are completed. Since this change in policy retroactively affects applications already in the queue, the National Society is offering a refund of the National application fees for those applications already submitted but not yet reviewed if a withdrawal of the application is requested.