

Requirements List

Committee of Assistance

Google Group

Cox Software Date Fix

Registrar Training

Genealogy Committee Policy Changes

Status of application approval

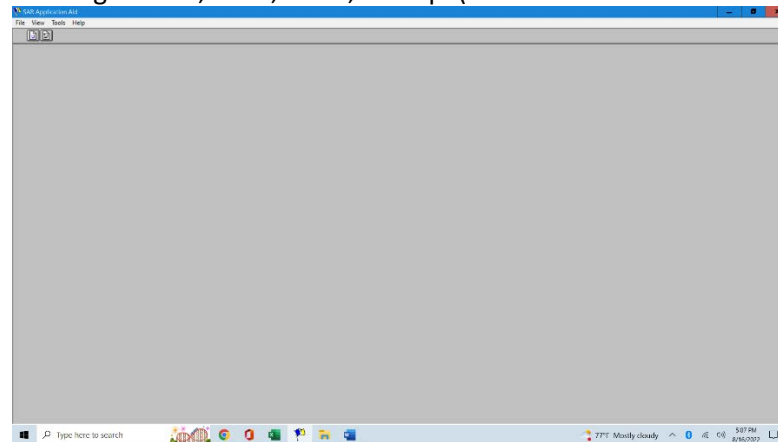
1. Requirements List – Thanks to Compatriot Terry Briggs (CA), we have a Requirements List Checklist that abbreviates the Requirements List. I have also heard some strong feedback that State Registrars are already signing the application; therefore there is no need for their signature on the checklist. I am sensing a need for the chapter registrar to be involved with both new and supplemental applications; although there is no written requirement to involve the chapter registrar in supplemental applications, the percentage of pended supplemental applications indicates that we need to do something different. Also, the chapter registrar may or may not be a Sponsor or Co-Sponsor on the application but he does need to review all applications before they are sent to the State Point of Contact.
2. Committee of Assistance – The Genealogy Committee has offered assistance for pended new applications that a state society may need to have some help with. John Schatzel (KS) is the chairman of the committee. He can be reached by email at jschatz82@aol.com
3. Google Group – Christopher Smithson (MD) has developed an Applications Helpers Group Google Chat that allows folks to ask for help about applications that are difficult to complete. It is also a good place to ask for assistance in getting documents that are not from your local area; someone in the group might live in the area from which you need to obtain a document/gravesite, etc. Here is the link for those that are interested in joining the SAR Application Helpers Group.
<https://groups.google.com/g/sar-application-helpers>

It will send me an alert for me to accept them. There is a spot to put a message with it. I am asking that they put their name and Chapter and/or State Society that they are from.

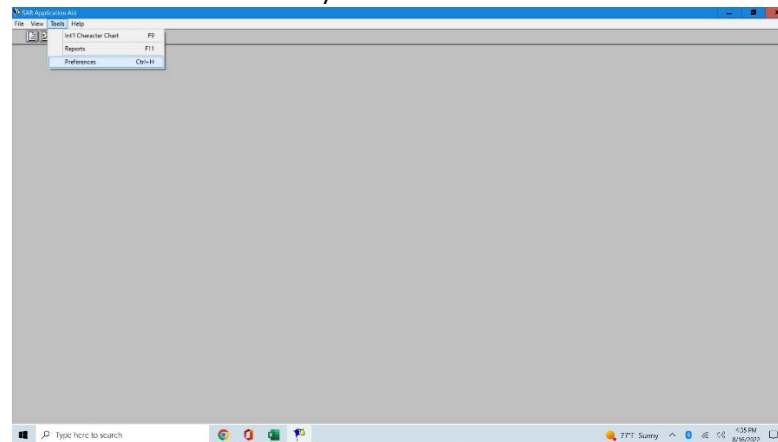
To send an email to the group once you are a member is
sar-application-helpers@googlegroups.com

4. Date Fix for COX Software - Compatriot Ron Bearden (AL)
 - a. If you are having a problem entering certain dates into the COX Software in the genealogy section of the form, this fix should take care of it. The problem you may be having is when you enter Mar 1876 into the blank and the COX Software changes your entry to 01 Mar 1876. "01" is added as a default because of the way the preferences are set. Follow these instructions to change the preferences setting.
 - b. This will allow you to enter the date Mar 1876 without the program changing it and adding the default date of "01". Open the COX Software so that you see the menu

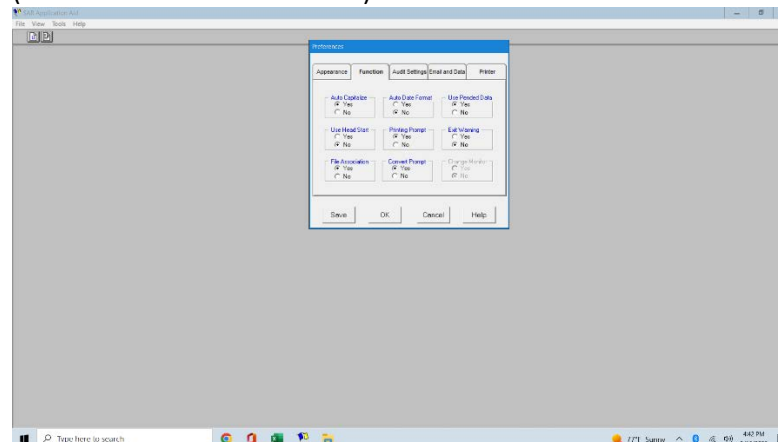
headings of File, View, Tools, & Help. (as illustrated in screenshot A)



- c. Left click "Tools." When you see the "Tools" menu, go down to "Preferences." (as illustrated in screenshot B) Left click "Preferences."



- d. When you see the "Preferences" window pop up, left click the second tab, "Function." (as illustrated in screenshot C)



- e. With the "Function" tab open, look for "Auto Date Format." Change the bubble from "Yes" to "No."
- f. Click "Save" in the lower left corner of the "Preferences" window.
- g. This should allow you to enter any date onto the application form without COX changing it to a default date format.

5. Registrar Training – We have a plan to present an online Registrar Training Class prepared by a Genealogy Committee Member, Dennis van Wormer, (MI). This is a six-week course, one day a week. The topics to be covered include:
 - a. Correctly filling out an application
 - b. Proper documentation and citation
 - c. Application printing, review, and submission
 - d. Genealogy research best practices
 - e. Genealogical proof arguments
 - f. Final topics and thoughts
6. Genealogy Committee policy changes – The most recent rendition of the Genealogy Committee Policies is dated 25 Jul 2022. The significant changes in the document include:
 - a. Identifying a date, 1 Jan 2012, after which applications can be accepted as reliable sources for future applications, as long as the application or patriot has not been subsequently flagged by the genealogy staff.
 - b. There is now a requirement to “List on the application only information for which a proof is given.”
7. Supplemental Applications are being pended at an alarming rate. Approval of these applications for 2022 is only 81.95 % nationwide. We need to do a better job of review of the supplemental applications before submission for Genealogy Staff approval.
8. As of 31 Jul 2022 we have about 866 new applications and 734 supplemental applications received at Louisville that need to be reviewed and approved.

GARY O GREEN
Genealogist General

Genealogist General's Forum #2

- Welcome
- Goals
- Requirements List
- Housekeeping
- Registrar Training Course – October 2022
- Service versus reference for service
- Open Forum/questions

Welcome

- Genealogy staff members
- Committee Chairman
- Distinguished visitors
- State points of contact
- Chapter registrars

Goals

- Reduce the backlog of applications to four weeks
 - August Report
 - New - 11 weeks 4 days – Approved: 379; Added: 255
 - Supplemental – 24 weeks – Approved: 174; Added: 54
 - Pended 172 (42% of supplementals were pended; 29% new)
 - Memorials – Approved: 14
- Raise application approval rate to 90%
- Reduce genealogy staff member time per application to one hour

Requirements List

- Guidance/References
 - Application Preparation Manual
 - Genealogy Policy Manual

- Genealogist General letters/emails
- Useful for new or beginning registrars
- Strongly encouraged for supplemental applicants
- Requested to be reviewed for each application-NOT mandatory
- Pended items

Pended Items

- **Application paper & printing must be on forms dated 2017 or later**
- **The font size for PDF or Word applications must be no less than 10 pt., with 12 pt. preferred. For the online application, the scale on the print setup must be between 90 and 110% AND the page break between pages 1 and 2 must occur between generations.**
- **Applicant must sign the application unless another is allowed to sign on his behalf.**
- **Birth certificate is required for all new applicants that specifies his gender as male.**
- **All dates must be entered using the format “01 Jan 1900,” using only the first three letters of each month**
- **If using a DAR application as proof, it must: (1) be an official DAR record copy (not a chapter copy), and (2) include all four pages, printed in their entirety.**

Housekeeping

- DAR Record copy
- Calls to individual staff limit to state POCs
- Updates of information for applications
 - First 45 Days
 - Six-month intervals from the pended date

National Registrar Training Course

- October 3 - November 7
 - 8:00 pm Eastern Time Zone
 - Daylight savings is 6 Nov 2022
- Six weeks
- Topics
 - Correctly filling out an application
 - Proper documentation and citation
 - Application printing, review, and submission
 - Genealogy research best practices
 - Genealogical proof arguments
 - Final topics and thoughts

Service versus Reference/Source

- **2.0000 ACCEPTABLE REVOLUTIONARY SERVICE – Front of PDF and top of online**
 - **2.1000 Military Service** – Rank and for whom he served plus unit
 - **2.2000 Civil Service** - the conduct of public business other than military
 - **2.3000 Patriotic Service** - not in a military or civil capacity
- **3.1000 Source citations – Listed in the References section – Back of PDF and bottom of online**
 - Pension number
 - Document with page numbers
 - DAR RC # 111222 [Patriot Ancestor] cites ...
 - SAR RC # 333444 [Patriot Ancestor] cites ...
 - C.A.R. RC # 555666 [Patriot Ancestor] cites ...

Open Forum

- Questions
- Comments

Sons of the American Revolution

General Officer's Report Form

General Officer's Name: Gary O Green		
Mailing Address: 4225 Dutch Cove Ct		
City: Castle Hayne	State: NC	ZIP Code: 28429-1301
Telephone Number: 910-612-3676	E-Mail Address: garyogreen@gmail.com	
Filing Date: 26 Jan 2023	SAR General Office: Genealogist General	

Reports, Activities, and Recommendations

(Note that additional paper may be used as required to reply to this prompt below; please include all relevant information deemed necessary. Please put the General Officer's name and General Officer's position at the top of each supplemental page and attach them with this form.):

- **Goals**
 - Reduce the backlog of review of applications to four weeks
 - Attain at least a 90% approval rating for both new and supplemental applications
 - Reduce the time per genealogy staff member review of applications to one hour or less

- **Results Status of Applications since 31 Dec 2022 Membership count– 38,322**

Applications received (31 Jul -31 Dec)

- Regular – 1881
- Supplemental – 1035
- Memorial - 17
- Total - 2933

Applications Approved (31 Jul -31 Dec)

- Regular & Jr – 2409
- Supplemental – 805
- Memorial 51
- Total – 3265

Pended applications New Sup Admin Total

- 1 Jan -31 Dec 309 230 183 772

Percentage of applications approved 1 Jul – 31 Dec 2022

- New – 87.2%
- Supplemental – 77.7%

Backlog status New Oldest Sup Oldest

- 3 Jul 2022 12 wks 37 wks
- 31 Dec 2022 13 wks 5 Oct 26 wks 7 Jul

Applications and Patriots Flagged in PRS 12 Jul 22 - 31 Jan 23 – 289

- **Accomplishments**
 - Conducted a Genealogist General's Forum in early September
 - Find a way to include the requirements of the Application Preparation Manual and the Genealogy Committee policies in the day-to-day preparation of all applications
 - Adjust the review of the proposed supplemental applications to attain the same rigor as is exemplified in new applications
 - Updated the Application Preparation Manual to include the Requirements List
 - Presented an eight-part Zoom Chapter Registrar's class 3 Oct-14 Nov on consecutive Mondays
 - Presented Zoom meeting for registrars to encourage the use of the Patriot Research System (PRS)
 - Flagged 285 patriots/lineages in the PRS
 - Identified an additional 139 patriots who no longer meet Genealogy Committee standards
 - Supported the Records Digitization and GRS Committee recommendations to PRS
 - Reformatted the Genealogy Committee Policies to include a Table of Contents
 - Submitted Opinion on six appealed applications

- Accepted 37 applications to use the Expedited process
- Participated in revising the in-house process to address applications' administrative errors

- Activities

- 5 Oct – 25 Jan Participated in bi-weekly Website Committee Meeting
- 6 Oct - Attended South Atlantic District Meeting
- 7 Oct – Participated in the Battle of Kings Mountain commemoration
- 11 Oct – 31 Jan Participated in bi-weekly Patriot Records Committee Zoom meeting
- 13 Oct – 26 Jan Participated in bi-weekly Genealogical Research System Committee Zoom Meeting
- 19 Oct – 25 Jan Participated in bi-weekly Ad Hoc Digitization Committee Zoom Meeting
- 21 Nov & 23 Jan – Participated in Genealogy Committee Zoom meeting
- 8 Dec – Participated in Charter Ceremony for Col Daniel Boone Chapter of NC SAR
- 11 Jan – Participated in George Washington Endowment Fund Board Meeting
- 25 Jan – Participated in EXCOM meeting
- 27 Jan – Participated in Georgia Society Registrar Training

- Planned activity

- Coordinate the upgrade of the online application system to reduce workarounds
- Add an approved but unfunded 9th genealogist to the staff
- Add a subcommittee of the Genealogy Committee to advise the Genealogist General about suspect patriots and lineages in the Patriot Research System
- Present a State Registrars' Training presentation
- Present an updated Registrar Training class once the online application system is updated