

PURPOSE

The purpose of this Work Instruction is to aid volunteer editors of the PRS in transcribing data found in original Record Copies.

SCOPE

This process should be used by all volunteers editing Patriot records within the PRS.

DEFINITION



This icon opens the transcribed generations from the original member Record Copy. This option is available to all users.



This icon opens the original member Record Copy. This view is only available to roles within the SAR who are authorized to view it.

PDF - Abbreviation that stands for Portable Document Format. It's a versatile file format created by Adobe that gives people an easy, reliable way to present and exchange documents.

PRS – Patriot Research System, the Sons of the American Revolution online research tool for users searching for individuals who served or aided the United States during the Revolutionary War period.

RC – Record Copy.

Record Copy – A scanned copy of an original member application.

ROLES

- PRS Volunteer Editors
- PRS Volunteer Publishers



Transcribing Record Copies - Module 2 Working with Header Fields

PRS

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Part 1. Completing Header Information – Overview of Fields

When you open the transcription edit screen, you'll see something similar to the image below. The header information fields are the section outlined in red.

The following pages will review each section of the header record.

Application Info
ID: 308764
ProdID: 261709
ACN:
Date Approved: 10/14/1969
Application Type: Primary
DataSource: ancestry
Volunteer ID: 249

Record Copy Info
Status: **On File**
Filename: Ancestry/32596_242396/32596_242396-00592.pdf
[View Record Copy](#)

Lineage Remarks:

Member Info
Prefix:
First: Rob
Middle: John
Last: Le Patriote
Suffix:
National Num: 99999999
Society: MA
Society Num: 000
[Get Member Info](#)

Patriot Info
Patriot Name:
Patriot Name First: Peter
Patriot Name Last: Le Patriote
Patriot Name Suffix:
Patriot ID: P-
[Get Patriot Info](#)

Generation Info
This applicant is sibling of another application
ACN = 0
[ImportGenerations](#)

Include Generation 1
Husband: ☐ Is Applicant
Name: Prefix: First: Middle: Last: Suffix:
Birth Date: Birth Place:
Death Date: Death Place:
Notes:

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Part 2. Completing Header Information Fields

Section 1. Record Copy Info. The application record copy is one of the sources of the information we will use to complete the Header Information Fields.

IF there is no Filename showing, then the Record Copy is unavailable.

- Do not continue.
- Do Not use a chapter copy unless directed to do so by a PRS Administrator.

<u>Application Info</u> ID: 308764 ProdID: 261709 ACN: Date Approved: 10/14/1969 Application Type: Primary DataSource: ancestry Volunteer ID: 249	<u>Record Copy Info</u> Status: On File Filename: Ancestry/32596_242396/32596_242396-00592.pdf View Record Copy
Lineage Remarks:	
<u>Member Info</u> Prefix: First: Rob Middle: John Last: Le Patriote Suffix: National Num: 99999999 Get Member Info Society: MA Society Num: 000	<u>Patriot Info</u> Patriot Name: Patriot Name First: Peter Patriot Name Last: Le Patriote Patriot Name Suffix: Patriot ID: P- Get Patriot Info
<u>Generation Info</u> This applicant is sibling of another application ACN = 0 ImportGenerations	

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Section 1. Record Copy Info. Opening the PDF Application Record Copy:

Record Copy Info

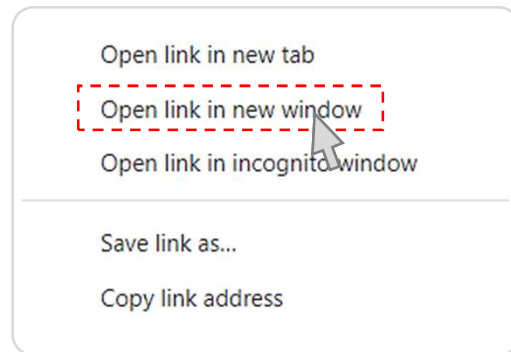
Status: **On File**

Filename: Ancestry/32596_242396/32596_242396-00592.pdf

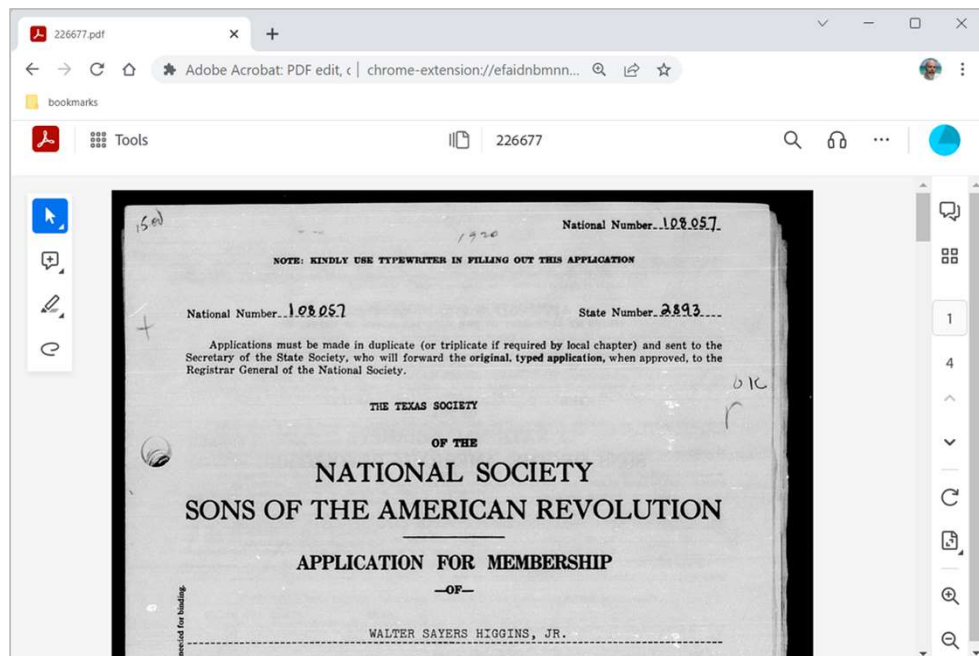
View Record Copy 



- Right-click on the green button labeled **View Record Copy**.
- This will open a Windows pop-up menu similar to the one shown below.
- Select the option for **Open Link in New Window**.
- The PDF Application Record Copy should now be displayed in a new browser window



Example of an
Application
Record Copy
image – top of
the first page.



Section 2. Patriot Info. The key field in the Patriot Info fields is the **Patriot ID P** number. This unique number identifies a single Patriot found in the PRS system.

A. Prepopulated fields:

- There are two possible scenarios you may find. First, the Patriot ID has been pre-populated and the Patriot's name is shown (as in the example below):

Patriot Info
Patriot Name:
Patriot Name First: John
Patriot Name Last: MOORE
Patriot Name Suffix:
Patriot ID: P-251600

Get Patriot Info

- When this is your situation, you only need to press the green button labeled Get Patriot Info to refresh the record with the latest information.

B. Unpopulated fields:

- The second scenario is the Patriot Info section is unpopulated. In this case, you'll need to find the correct Patriot ID "P Number."

Patriot Info
Patriot Name:
Patriot Name First:
Patriot Name Last:
Patriot Name Suffix:
Patriot ID: P-0


Get Patriot Info

B. Unpopulated fields - continued

- From the record copy, identify the Patriot's vital information, as shown below:

and his () wife <u>SARAH Grigsby</u>	died <u>1821</u>	
	born <u>1757</u>	
	died	
(8) great-grandson of <u>JOHN GRIGSBY</u>	Married <u>1775</u>	
	born <u>1720</u>	<u>Stafford Co. Va</u>
and his (M) wife <u>ROSANNA Etchison</u>	died <u>1794</u>	<u>Rockbridge Co. Va</u>
<u>ELIZABETH PORTER</u>	born <u>1730</u>	
	died <u>1761-1762</u>	
(C) <u>Capt. John Grigsby</u>	Married <u>1746</u>	
(C) <u>Capt. William Anderson</u>		
and he, like said (No.) are the ancestor who assisted in		
establishing American Independence, while acting in the capacity of (C) Commanding a Co. in 13th Regt.		
of the Va. Line during Rev. War (Capt.) Record on Thos. Welch. (C) Capt. in Rev. War.		
Served with distinction in the Battle of Kings Mountain and was rewarded for bravery		
at the battle.		
<u>Grigsby Data in FC</u>		
<u>Capt. Va. Line</u>		

- Open a new PRS Patriot Search window:



PATRIOT RESEARCH SYSTEM
EXTENDED ACCESS

[Patriot Search](#)
[Member Search](#)
[Descendant Search](#)
[Biography Search](#)
[Cemetery Search](#)
[About PRS](#)
[Volunteers](#)

Search Patriots

Search the database for Patriot records based on Patriot Number, Patriot Name, and other criteria. If the search only matches a single record, then that record will be displayed. Otherwise, when matching multiple entries, a list of matching entries will be displayed and you can select the one you wish to view in more detail. The search will return records meeting all search criteria, so entering multiple fields of information will limit the results that are returned.

FYI - Searching on a Patriot Number will limit the search to a single entry, as those values are unique.

Patriot Number:

P

Surname

Given Name

Spouse Name

State of Service

Birth Year



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B. Unpopulated fields - continued

- Once you identify a likely candidate, examine the Patriot detail page to validate that the facts show match the information on the Record Copy.
- Not every fact may be a match, but the preponderance of the information should be a good match.
- IF you do not find an acceptable Patriot, contact a PRS Administrator at PatriotGraves@SAR.org before you proceed.

PRS Patriot Search results

John GRIGSBY Edit Patriot Add Flag Search Possible Duplicates		SAR Patriot #: P-170899	
Patriot Detail	Grave Detail	Biography	Supporting Documents
State of Service: VA Qualifying Service: Captain / Patriotic Service		DAR #: A048485	
Birth: 1720 / Stafford / VA Death: 07 Apr 1794 Glasgow / Rockbridge / VA			
Patriotic Service Description: 1. Rendered material aid as Captain of 13th Regiment of VA Lines 2. NSDAR RC# 597614 states PAID SUPPLY TAX, 1783			
Sources: 1. Hamilton J Eckenrode, Virginia Soldiers of the American Revolution, 1912, pg 192 2. The Darsts of Virginia, Jackson Darst, Williamsburg, Virginia 1972. pp 352-353			
Spouse: (1) Rosanna Etchison; (2) Elizabeth Porter Children: Reuben; Elisha; Jane; Rachel/Rachael; Joseph; Elizabeth; Sarah/Sally; James; Charles; Frances; William; John;			

Application Record Copy

and his () wife SARAH Grigsby	died..... 1821
	born..... 1757
	died.....
(8) great-grandson of JOHN GRIGSBY	Married..... 1775
	born..... 1720 Stafford Co. Va
	died..... 1794 Rockbridge Co. Va
and his (int) wife ROSANNA Etchison	born..... 1730
ELIZABETH PORTER	died..... 1761-1762
(*) Capt. John Grigsby	Married..... 1746
and he, like said () Capt. John Grigsby (No.) is the ancestor who assisted in establishing American Independence, while acting in the capacity of () Commanding a Co. in 13th Regt. of the Va. Line during Rev. War (Capt.) Record on Thos. Welch. (2) Capt. in Rev. War. Served with distinction in the Battle of Kings Mountain and was rewarded for bravery after the battle.	
Original Data in f.c	
Capt. Va. Line	

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B. Unpopulated fields - continued

- Copy the six-digit P-Number from the PRS Patriot Detail Page and Paste it into the Patriot ID field in the Header Record field.
- Next, press the green button labeled **Get Patriot Info** to populate all the fields.

PRS Patriot Detail Page


John GRIGSBY
Edit Patriot
SAR Patriot #: P-170899

Header Fields

Patriot Info
Patriot Name:
Patriot Name First:
Patriot Name Last:
Patriot Name Suffix:
Patriot ID: P- Get Patriot Info



- Volunteer errors confuse our users.
- Creates work for our administrators who have to fix your errors.
- Makes the PRS look bad.



- ☒ Slow Down
- ☒ Be Careful
- ☒ Ask for help

Section 3. Member Info. The **Member Info** fields you will find generally fall into one of two scenarios: Completely populated and partially populated.

A. Completely prepopulated fields:

- When you get a brand new member (current) record to transcribe, you will probably find the Member Info fields are completely populated (shown below). There is nothing for you to do and you can skip to Section 4.

<u>Member Info</u>	
Prefix:	
First:	Rob
Middle:	John
Last:	LePatriote
Suffix:	
National Num:	9999999
Society:	MA
Society Num:	9999

B. Partially populated fields:

- When working with older application record copies, you may find a scenario where all the fields are blank except the National Number and the State of Service.
- The following guidelines will help you complete these fields.

<u>Member Info</u>	
Prefix:	<input type="text"/>
First:	<input type="text"/>
Middle:	<input type="text"/>
Last:	<input type="text"/>
Suffix:	<input type="text"/>
National Num:	9999999
Society:	MA
Society Num:	0

[Get Member Info](#)

B. Partially populated fields - continued

- Review the Application Record Copy to find the member's name:

NOTE: KINDLY USE TYPEWRITER IN FILLING OUT THIS APPLICATION

National Number... 61466 State Number... 1467

APPLICATION FOR MEMBERSHIP

—OF—

DONALD MONROE HOPKINS

DESCENDANT OF

- Manually type the member's name into the name fields.
- If there is a State Number on the Record Copy, type it in the Society Num. field. If not, leave it blank.
- Do Not Press the green button labeled "Get Member Info."

Member Info

Prefix:	
First:	Donald
Middle:	Monroe
Last:	Hopkins
Suffix:	
National Num	61466
Society:	MD
Society Num:	1467

Get Member Info





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Section 4. Application Info. The information you need to complete this section is found on the Application Record Copy. Much like the previous sections, this section may appear in one of two scenarios:

A. Completely prepopulated fields:

- If all the fields are populated, you cannot edit them.
- Continue to Section 5.

Application Info
ID: 323715
ProdID: 266239
ACN: 106008
Date Approved: 2023-03-17
Application Type: 1
DataSource: National
Volunteer ID:

B. Unpopulated fields:

- You will need to populate both the Date Approved and the Application Type fields.
- use the following steps to find the correct information on the application Record Copy.

Application Info
ID: 323720
ProdID: 266662
ACN:

Date Approved:

☐

Application Type:

DataSource: ancestry
Volunteer ID:

B. Unpopulated fields - continued

- On the Application Record Copy, usually on the last page, you'll find a section with signatures and dates. Look for the line that reads Approved by National or Registered by National. Enter the corresponding date field on your header record.

Recommended by the undersigned members (Please Type or Print)		Filed with State Secy.....	OCT 8 1969
Name	Hugh J. Dudley	Fees Paid	OCT 8 1969
Street	901 Cole Drive SE	Sent to Nat. Hqts.....	OCT 10 1969
Town	Huntsville, Alabama 35802	Registered by Nat.....	OCT 14 1969
Signed <i>George J. Dudley</i>		Resigned	19
Co-Sponsor <i>George J. Dudley</i>		Transferred	19
Signed <i>George J. Dudley</i>		Deceased	19
		OCT 14 1969 OCT 27 1969 OCT 14 1969 Registrar General	


- For the Application Type field, you will need to look at the top of the first page of the Application Record Copy. Here you will find one of several types of applications:
 - Primary = "Application for Membership" or "Under 40"
 - Supplemental
 - Memorial (rare)
 - Junior (rare)
 - Youth (rare)
- In the header field for Application Type, use the drop-down menu to select the Application Type that best matches what you found on the Record Copy.

15.00

Under 40

APPLICATION FOR MEMBERSHIP

THE ALABAMA SOCIETY



National number.....97224

State number.....749

OK

Application submitted must be made in duplicate (or triplicate if required by local chapter) and sent to the Secretary of the State Society, who will forward the original, typed application, when approved, to the Registrar General of the National Society.



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Section 5. Generation Info. The function of this option is to import multiple generations from an existing transcribed record copy belonging to the member's close relative, such as a parent or sibling.

Generation Info

This applicant is sibling of another application



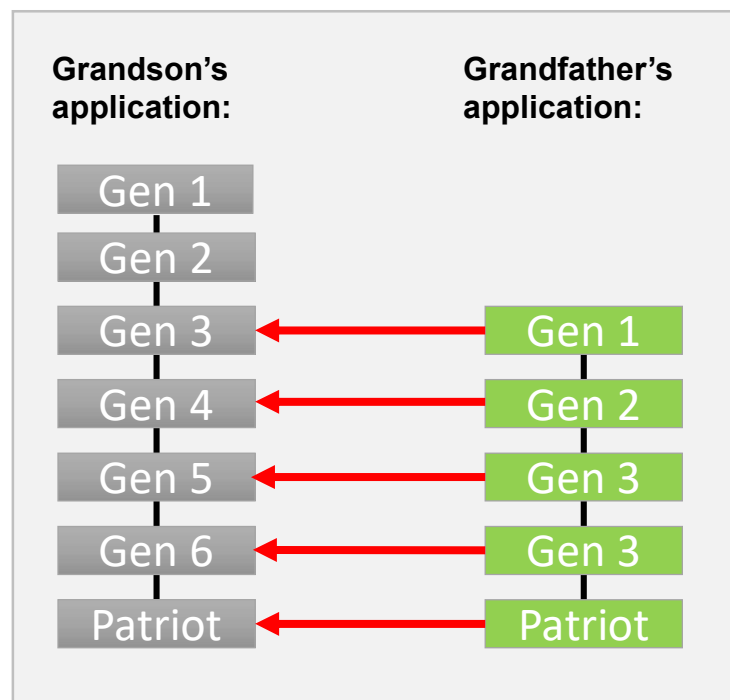
ACN =



0

ImportGenerations

- For example: The Application Record Copy you are working on is the grandson of another SAR member, and that member's application has been transcribed for the PRS. You can import the grandfather's information into the corresponding generations in the new member's generations.
- As a transcriber/editor, this means you will only have to enter the generations that were not imported manually. However, you must edit the imported information to ensure it matches the new member application.



Section 5. Generation Info – continued.

A. Identifying a possible source for importing generations. Review the sources listed on the Application Record Copy to see if the “reference” section in the first few generations list an existing SAR member.


- In the example below, Generation 3 lists a Reference of SAR [member number] 98765421.

STATEMENT OF BLOODLINE TO PATRIOT ANCESTOR			
		DATE	CITY/COUNTY/STATE
1 - I am Rob John Le Patriote	born	2/01/2000	
and my 1st spouse	born		
NSDAR#	died		
	married		
References: b/c: Rob John LePatriote;			
2 - I am the son of William Edward LePatriote	born	03 Mar 1976	Boston / Essex / MA
NSSAR#	died		
and his wife Abigail Adams	born	1976	// MA
NSDAR#	died		
Who is the son X /daughter of	married	01 Jun 1998	Boston / Essex / MA
References: b/c: William Edward LePatriote; b/c: Abigail Adams; m/c William E LePatriote to Abigail Adams			
3 - Grandson of Brian Edward Le Patriote	born	01 Jan 1945	Boston // MA
NSSAR#	died		
and his wife Martha C Washington	born	01 Dec 1946	Newton // MA
NSDAR#	died		
Who is the son X /daughter of	married	01 Jul 1976	
References: SAR: 98765421			



B. In PRS, go to the Member Search page and search for the existing member using the National member number identified in the References (above).

- Click on the PDF icon in the View Application column to view previous members generations

PRS Member Search details:


Brian Edwin LePatriote
 National Number: 98765421
 Society MA
 Chapter Maine

Found 1 Patriot for whom this member has proven lineage.

Date Approved	ACN	Patriot Name	View Application
2013-08-13	98765421	 Peter LEPATRIOTE (P-111111)	

[Click to Purchase](#)
[Edit Application](#)



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- Compare the Records copies to make sure you have matching generations.
- In this example, the New Member Application Record Copy, generation 3 to the Patriot, matches the existing member's application, from generation 1 to the Patriot.

New Member "grandson"

	DATE	CITY/COUNTY/STATE
1 - I am <u>Rob John Le Patriote</u>	born <u>2/01/2000</u>	
and my <u>1st</u> spouse	born	
NSDAR#	died	
References:	married	
2 - I am the son of <u>William Edward LePatriote</u>	born <u>03 Mar 1976</u>	<u>Boston / Essex / MA</u>
NSSAR#	died	
and his wife <u>Abigail Adams</u>	born <u>1976</u>	<u>// MA</u>
NSDAR#	died	
Who is the son <u>X</u> /daughter of	married <u>01 Jun 1998</u>	<u>Boston / Essex / MA</u>
References:		
3 - Grandson of <u>Brian Edward Le Patriote</u>	born <u>01 Jan 1945</u>	<u>Boston / / MA</u>
NSSAR#	died	
and his wife <u>Martha C Washington</u>	born <u>01 Dec 1946</u>	<u>Newton / / MA</u>
NSDAR#	died	
Who is the son <u>X</u> /daughter of	married <u>01 Jul 1976</u>	
References:		
4 - Great Grandson of <u>Edward George Le Patriote</u>	born <u>01 Jan 1885</u>	<u>Boston / / MA</u>
NSSAR#	died <u>1950</u>	<u>// MA</u>
and his wife <u>Betsey Ross</u>	born <u>ts 1921</u>	
NSDAR#	died <u>ts 1997</u>	<u>bur Boston / Essex / MA</u>
Who is the son <u>X</u> /daughter of	married	
References:		


Existing Member "grandfather"

STATEMENT OF BLOODLINE TO PATRIOT ANCESTOR		
(Give all names, dates, and places known. Show dates as day, month, and year e.g. 01 JAN 1900)		
	DATE	CITY/COUNTY/STATE
1. I am <u>Brian Edward LePatriote</u>	born <u>01 Jan 1945</u>	<u>Boston / / MA</u>
and my <u>1</u> wife <u>Martha C Washington</u>	born <u>01 Dec 1946</u>	<u>Newton / / MA</u>
NSDAR#	died	
(If Remarried)	married <u>01 Jul 1976</u>	
my wife	born	
NSDAR#	died	
2. I am the son of <u>Edward George LePatriote</u>	married	
NSSAR#	born <u>01 Jan 1885</u>	<u>Boston / / MA</u>
and his wife <u>Betsey Ross</u>	died <u>1950</u>	<u>// MA</u>
NSDAR#	ts <u>1921</u>	
	died <u>ts 1997</u>	<u>bur Boston / Essex / MA</u>



C. Next, you must link the two members by selecting the existing member's ACN.

- Go to the existing members' details page again and find the column listing the ACN number. If the member has more than Patriot, make sure you get the correct ACN number.
- Copy the number to your clipboard.

PRS Member Search details:


Brian Edwin LePatriote
 National Number: 98765421
 Society MA
 Chapter Maine

Found 1 Patriot for whom this member has proven lineage.

Date Approved	ACN	Patriot Name	View Application	
2013-08-13	98765421	 Peter LEPATRIOTE (P-111111)		Click to Purchase Edit Application


- Next, return to the **Generation Info** section of the Header Fields.
- Select the "type" of generational link to the existing member.
- You are limited to relationships in the dropdown list, as shown below.

Generation Info

This applicant is grandchild of another application


This applicant is great-grandparent of another application
 This applicant is grandparent of another application
 This applicant is parent of another application
 This applicant is sibling of another application
 This applicant is child of another application
 This applicant is grandchild of another application

- Next, make sure the option **ACN =** is selected in the, as shown below:



Generation Info

- Paste the ACN number you copied from the existing member's record into the field located just right of the **ANC =** option.



Generation Info

- Before you press the Import Generations, button, make sure all "*Include Generations*" checkboxes are **Unchecked!** The import function will skip any active generations.



☐ Include Generation 8

Husband: ☐ Is Patriot

Name: Prefix: First: Middle: Last: Suffix:

Birth Date: Birth Place:

Death Date: Death Place:

Notes:

Wife: ☐ Is Patriot

Name: Prefix: First: Middle: Last: Suffix:

Birth Date: Birth Place:

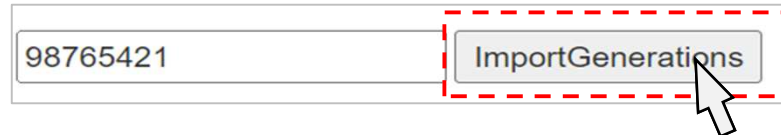
Death Date: Death Place:

Marriage Date: Marriage Place:

Notes:

Relationship: ☐ Son ☐ Daughter

- The last step is to press the gray button entitled **Import Generations**.



- Since Generation 3 to the Patriot has been imported from the existing member app, we must complete Generations 1 and 2 from the new member's application.
- Obviously, this will vary based on the generational connection between the new and existing member.
- Next, using the new member's application, verify and update all the imported information to match the new application exactly.

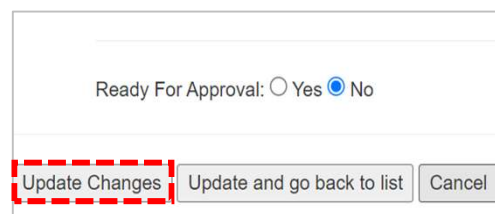


D. Troubleshooting. If you make an error in the process and you import the information to the wrong generations, you can clear those fields, make corrections in your settings, and reimport.

- First, uncheck the box **Include Generation** for each generation in error:










- At the bottom of the transcription screen, verify the button for **Ready for Approval** is set to **NO**.
- Press the gray button labeled **Update Changes**.



- With the generations fields clear, you can now reimport.

E. What if the ACN is **Unassigned**? When you find an existing member an ACN listed as Unassigned, you must find the Production ID number to use the import generations.

- In the example below, we want to use the first member's details. We will click on the word Unassigned in the ACN column to do this.
- This will open the transcription details for that member.

Members Who Share This Ancestor 					
Date Approved	Society	ACN	SAR Member Info	Lineage via Child	View Application I
1977-12-12	MA	Unassigned	 John T LePatriote (88888)	Tom LePatriote Jr	 
2014-03-11	MA	98765421	 Brian Edward LePatriote Jr (99999)	Tom LePatriote Jr	 

- On the detail screen, you'll see the ACN field is empty, but just above that is the ID: number. Copy that number to your clipboard.

Application Info

ID: 225894

ACN:

Date Approved: 1975-02-17

Application Type: 1

DataSource: ancestry_post1970

Volunteer ID: 206

Publisher ID: 219

- Go to your Generation Info in the Header field, and change the **ACN =** option to **ProdID =**.
- Paste the **ID** number from the clipboard into the empty box to the left of the ImportGenerations button.
- Press the ImportGenerations button to import from the selected members Record Copy.

Generation Info

This applicant is grandchild of another application

ProdID =

ACN =

ProdID =

ImportGenerations



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Section 6. Lineage Remarks. This text field documents issues found with the original record copy that impact more than one generation. In the previous version of the PRS app, this field was also used to document issues found within a single generation or individual. The current release of PRS now adds a text field to each individual for targeted remarks.

Lineage Remarks:

- It is unlikely you, as a front-line editor, will need to use this field.
- It only records overall Record Copy issues you might identify during transcribing.



Do not use this field for biographical or service information

- Example of commonly used phrases in the Lineage Remarks:

RC Historical Comment: GRANDFATHERED: This Application was Approved under the GRANDFATHER Provision of the SAR Bylaw 1 Section 5, CANNOT be used by future applications until Problems in previous application are resolved

RC Historical Comment: FAMPCL: Future Applicants Must Prove Correct Lineage

RC Historical Comment: FAMPCS: Future Applicants Must Prove Correct Service

RC Historical Comment: SHORT FORM: Missing parts of Lineage detailed in SAR RC
xxxxxxx

RC Historical Comment: SHORT FORM: Missing parts of Lineage detailed in DAR RC
xxxxxxx

RC Historical Comment: LINE CLOSED

RC Historical Comment: PROBLEMS: Problems have been discovered with at least one previously approved application – See Patriot Ancestor’s full record

RC Historical Comment: Genealogy staff indicates there is an error in the lineage on this application

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- Example of commonly used phrases in the Lineage Remarks - continued:

RC Historical Comment: IGNORE: Ignore this record copy from tallies. Effectively, we will never get the issue resolved (IGNORE)

RC Historical Comment: NO USE: This line Cannot be used for Membership in the SAR

RC Historical Comment: FUTURE APPLICANTS MUST COMPLETE - - -

RC Historical Comment: BLOCKED INFORMATION

RC Historical Comment: Bad RC requested New Scan ____ (date) _____

RC Historical Comment: Application Withdrawn / Removed: by Genealogy staff

This completes the work instruction.

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