

Did I Get Everything? A Checklist for Online Genealogy Research

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While most genealogists endeavor to perform a “reasonably exhaustive search” to prove specific data points in their research, is it really possible to “cover all the bases?” How can you be certain that you didn’t miss a record set especially in an area of research that is new to you? Assuring yourself that your research is thorough is easier when you develop a checklist and you approach resources with a new perspective.

What Am I Missing? Identifying Gaps in Your Genealogy Research

While the task of determining “missing areas” of research can be daunting, it gets easier the more you research. You tend to get into a “groove” and tell yourself, “Oh, don’t forget to use _____ as a resource” or, “Remember when _____ website helped with a similar problem?” Here’s how to track all the gaps as well as helpful resources:

- **Research Log:** Create your own tracking system so you know what resources you’ve already used. A basic list consists of the date research performed, the record or record set, the results, analysis or evaluation of the results, and a source citation. Some genealogy database software such as **Legacy Family Tree** contain “to do lists.”
- **Timelines:** One of the best ways to visualize “gaps” is to use a timeline. You can create one manually by sketching it out on paper or digitally. Also check your genealogy database software program to see if your research data can be rendered into a timeline report. Also consider timeline websites such as **Timetoast** where you enter events and dates and you can see historical events which influenced your ancestors’ migration.
- **Software:** “Helper” programs like **Evidentia** can be used to analyze a GEDCOM file of your research and find errors and also note gaps and suggest resources for research.
- **Mind Mapping:** Again, the challenge of visualizing what’s been researched and what is left to do can be accomplished using mind mapping programs such as **Popplet**. Use shapes, lines, and colors to sort out completed research from your “to do” list.

Crafting a Genealogy Research Checklist

Every genealogist uses different record sets and different resources. For that reason, no single “checklist form” can possibly cover all the avenues of research. But you should create your own form (based on examples listed under Resources below) to use on a regular basis.

Here are links to the comprehensive Genealogy Research Checklist with over 280 records sets listed. The list is biased towards US research, but you are invited to use this list as a template to create your own. The list is available in Microsoft Excel, PDF, and Microsoft Word formats.

- **Genealogy Research Checklist – Excel**
<https://abundantgenealogy.com/genreschecklist-excel>
- **Genealogy Research Checklist – PDF**
<https://abundantgenealogy.com/genreschecklist-pdf>
- **Genealogy Research Checklist – Word**
<https://abundantgenealogy.com/genreschecklist-word>

Tapping Into the Power of Genealogy Networks

One of the focus areas for many genealogists is understanding “what we don’t know.” It isn’t possible to be an expert on every area of genealogy, and we often need the help of other genealogists. Utilize online as well as offline networks and resources.

Online

One of the best ways to gain instant access to a vast and FREE network of genealogy knowledge is through social media. While you may not be a fan of sites like Facebook or Twitter, you should consider using them only for genealogy purposes and only to gather information to assist in your research. Remember, no one ever said you had to go “all in” on any of these sites and share all of your personal information.

The fact is that genealogists are beginning to realize that while we may have used AOL, Prodigy and Everton’s Genealogical Helper in the 80s and 90s to connect with other researchers, those platforms have been replaced by social media.

Facebook Search: Facebook’s Search field is located in the upper left corner. Enter your search criteria and click the magnifying glass icon to see search results. Use surnames and locations in your searches for the best results.

- **Explore ALL results:** Click the magnifying glass icon at the top or bottom of the search results list. A new page will appear with results grouped by section in the **Result Type** sidebar on the left.
- **Use See More option:** Facebook limits the number of results shown for each section. Always click **See more** at the bottom of the results list.
- **Explore all Result Types:** Use the **Result Types** sidebar on the left to explore search results for Pages, Groups, Photos and more.

Facebook Groups: Before you can use any of the features of a Facebook Group, you may have to make a request to “join” that group. Most groups have a security setting of Closed in order to ensure that members understand the group’s rules and focus area.

- **Search within the group:** After joining a Facebook Group, scroll through the recent posts. Before posting a query, use the search box (upper right below the Cover Photo) to see if your question has already been posted and answered.
- **Post only relevant info:** A Facebook Group is not a billboard or a place to have general conversations. If the focus of the group is on German Genealogy, only post articles and queries relevant to that topic.
- **Update posts:** When asking for assistance with a problem, if a resolution has been found, return to the original post, click **Edit** and type SOLVED or RESOLVED at the beginning of the post.
- **Add group to Favorites:** On the left sidebar, under **Groups**, click **More**. A list of groups to which you belong will appear. Click **+Add to Favorites**.
- **Manage Notifications:** If you belong to an active group, click **Notifications** and decide how and when you want to be notified of updates.
- **Check Files section:** Locate the Cover photo at the top of the group and click on **Files**. Often, the group Admin and members will post templates and other downloadable files for genealogy.

- **Use hashtags:** Did you know that you can use hashtags in a Facebook post and it becomes a search tool for that group? Enter **#genealogy** or **#software** in the post. Then click on the hashtag to find similar posts within the group.

Facebook Pages: Facebook Pages have limited use for genealogists and family historians; think of a page as a news channel where you receive updates. Pages don't allow much interaction with those who "like" or follow a page; the conversation is often "one way."

- **Use Facebook Page as an information feed:** Click **Like** on a page to follow any updates made on the page. These updates will appear in your **News Feed**.
- **Use Facebook Pages for vendor customer service:** If you encounter an issue with a genealogy product or service, try sending a Message to the page Admin; most vendors monitor their pages for customer-service related inquiries.
- **Get Notifications:** Make sure you are notified when new items are posted to the page. Click the down arrow next to **Liked** and select **Get Notifications**.

Twitter Search: While you may not want to use Twitter in its normal fashion – as a means of posting status updates or commentary – you should be it as a search engine for clues in your genealogy research. You do not need a Twitter account . . . simply go to <http://search.twitter.com> and type in your keywords (especially surnames and location names). Also include “#genealogy” to exclude non-genealogy related posts.

Going Beyond Online Research

Remember that just as not every record can be found online, you should leverage in-person networks and resources as well.

- **Genealogy Societies:** While it isn't practical to join every genealogy society related to your research, you might consider contacting a specific society for assistance. Some societies offer research assistance – for free or a fee – while most have a list of resource on their website. And don't forget Facebook! Most societies now have a Facebook page or group where members and non-members can ask questions.
- **Genealogy Conferences:** Attend genealogy conferences and make sure you set aside time to just sit and talk with other genealogists. Also browse the exhibit hall and look for organizations that assist researchers based on ethnicities and geographical locations. Tip: also see if you can purchase or locate syllabus materials from past conferences related to your research.
- **Archives, Libraries and Repositories:** Locate an archive, library or repository related to your area research. Don't forget university libraries! And remember to use WorldCat to order books via inter-library loan and have them delivered to your local public library.
- **Family History Centers:** Locate the closest Family History Center for a variety of local, national and international resources. Remember, that as FamilySearch has terminated the ability to “rent” microfilms, you can find some local copies at these center as well as online databases of records that cannot be accessed online from your home or office.
- **Hiring a Professional Genealogist:** For those of us who pursue genealogy as a hobby, hiring a professional may not seem like an option. Rather than hiring a pro for a long term project, consider hiring a “coach” from GenealogyDotCoach to assist with a focused problem area. In addition, professional service sites such as Legacy Tree Genealogists offer packages within reach of the hobby genealogist.

Resources

- **Association of Professional Genealogists**
<http://apgen.org>
- **Conference Keeper**
<http://conferencekeeper.org/>
- **Evidentia**
<http://www.evidentiasoftware.com>
- **Facebook**
<http://www.facebook.com>
- **Family History Center Locator**
<https://www.familysearch.org/locations/enterlocator>
- **Federation of Genealogical Societies**
https://fgs.org/cstm_societyHall.php
- **Genealogy Dot Coach**
<https://genealogy.coach/>
- **Genealogy Libraries in the US**
https://www.gwest.org/gen_libs.htm
- **Genealogy on Facebook List**
<https://socialmediagenealogy.com/genealogy-on-facebook-list/>
- **Genealogy Record Reference Cheat Sheets** (Family Tree Magazine)
<https://www.familytreemagazine.com/cheatsheet/recordreferences/>
- **Genealogy Research Checklist – Excel**
<https://abundantgenealogy.com/genreschecklist-excel>
- **Genealogy Research Checklist – PDF**
<https://abundantgenealogy.com/genreschecklist-pdf>
- **Genealogy Research Checklist – Word**
<https://abundantgenealogy.com/genreschecklist-word>
- **Genealogy Research Log** (Excel)
<http://genealogyresearchlog.com>
- **Legacy Family Tree**
<http://legacyfamilytree.com>
- **Legacy Tree Genealogists**
<http://legacytree.com>
- **Popplet** (mind mapping)
<http://www.popplet.com>
- **Research Checklist** (Midwest Genealogy Center)
<https://abundantgenealogy.com/research-checklist-mwgen>
- **Research Checklist** (National Institute)
<http://www.genealogicalstudies.com/english/forms.asp>
- **Timetoast**
<http://www.timetoast.com>
- **Twitter**
<http://www.twitter.com>
- **WorldCat**
<http://www.worldcat.org>

Genealogy Research Checklist

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This checklist is NOT COMPREHENSIVE and is merely a starting point for your own research. Remember that in genealogy “your mileage may vary” and the record sets I use may not be useful to your own search. In addition, this checklist has a bias towards United States records; however, it can serve as a template for you to create your own country-specific research checklist.

NAME: _____

PRIMARY GROUP	RECORD SET	APPLICABLE?	START DATE	COMPLETE DATE
Around the House	Appointment Books			
Around the House	Baby Books			
Around the House	Bank Statements and Checks			
Around the House	Birth Records			
Around the House	Calling Cards			
Around the House	Death Records			
Around the House	Diaries			
Around the House	Family Bible			
Around the House	Family History Books			
Around the House	Family Stories			
Around the House	Government Records			
Around the House	Greeting Cards			
Around the House	Heirlooms			
Around the House	Insurance Records			
Around the House	Legal Records			
Around the House	Letters			
Around the House	Marriage Records			
Around the House	Medical Records			
Around the House	Memoirs			
Around the House	Photo Albums			
Around the House	Postcards			
Around the House	Prayer Cards			
Around the House	Recipes			
Around the House	Religious Records			
Around the House	School Records			
Around the House	Scrapbooks			
Around the House	Telegrams			
Around the House	Wedding Albums			
Around the House	Yearbooks			
Alumni Records	Alumni Directory			
Alumni Records	Magazines			
Alumni Records	Membership Records			
Alumni Records	Newsletters			
Adoption Records	Original Birth Certificate			
Adoption Records	Birth Certificate			
Adoption Records	Adoption Registry Online			
Archives	Genealogies and Family Files			
Archives	Vertical Files			

PRIMARY GROUP	RECORD SET	APPLICABLE?	START DATE	COMPLETE DATE
Archives	Local and County Histories			
Archives	Abstracts and Transcriptions			
Archives - Online	Archive Grid			
Birth Records	Birth Certificate			
Birth Records	Delayed Birth Certificate			
Birth Records	Adoption			
Birth Records	Baptism			
Books - Online	Ancestry			
Books - Online	Family Search Books			
Books - Online	Google Books			
Books - Online	Internet Archive			
Books - Online	Local Public Library			
Books - Online	MyHeritage			
Books - Online	WorldCat			
Business Records	Account Books			
Business Records	Apprentice Records			
Business Records	Business Insurance Records			
Business Records	Business Journals			
Business Records	Governmental Reports			
Business Records	Indenture Records			
Business Records	Membership Records			
Business Records	Newspaper Advertisements			
Business Records	Professional Licenses			
Business Records	Professional Organization Records			
Cemetery Records	Burial Records			
Cemetery Records	Grave Location Records			
Cemetery Records	Gravestone Inscription			
Cemetery Records	Plot Deed			
Census Records - Federal	1790 Population Schedule			
Census Records - Federal	1800 Population Schedule			
Census Records - Federal	1810 Population Schedule			
Census Records - Federal	1820 Population Schedule			
Census Records - Federal	1830 Population Schedule			
Census Records - Federal	1840 Population Schedule			
Census Records - Federal	1850 Population Schedule			
Census Records - Federal	1860 Population Schedule			
Census Records - Federal	1870 Population Schedule			
Census Records - Federal	1880 Population Schedule			
Census Records - Federal	1890 Population Schedule			
Census Records - Federal	1900 Population Schedule			
Census Records - Federal	1910 Population Schedule			
Census Records - Federal	1920 Population Schedule			
Census Records - Federal	1930 Population Schedule			
Census Records - Federal	1940 Population Schedule			
Census Records - Federal	1850 Mortality Schedule			
Census Records - Federal	1860 Mortality Schedule			
Census Records - Federal	1870 Mortality Schedule			
Census Records - Federal	1880 Mortality Schedule			
Census Records - Federal	1890 Mortality Schedule			
Census Records - Federal	1900 Mortality Schedule			

PRIMARY GROUP	RECORD SET	APPLICABLE?	START DATE	COMPLETE DATE
Census Records - Federal	1850 Agricultural Schedule			
Census Records - Federal	1860 Agricultural Schedule			
Census Records - Federal	1870 Agricultural Schedule			
Census Records - Federal	1880 Agricultural Schedule			
Census Records - Federal	1880 Defective, Dependent, and Delinquent			
Census Records - Federal	1810 Manufacturing/Industry Schedule			
Census Records - Federal	1820 Manufacturing/Industry Schedule			
Census Records - Federal	1850 Manufacturing/Industry Schedule			
Census Records - Federal	1860 Manufacturing/Industry Schedule			
Census Records - Federal	1870 Manufacturing/Industry Schedule			
Census Records - Federal	1880 Manufacturing/Industry Schedule			
Census Records - Federal	1850 Slave Schedule			
Census Records - Federal	1860 Slave Schedule			
Census Records - Federal	1850 Social Statistics Schedule			
Census Records - Federal	1860 Social Statistics Schedule			
Census Records - Federal	1870 Social Statistics Schedule			
Census Records - Federal	1880 Social Statistics Schedule			
Census Records - Federal	1840 Veterans Schedule			
Census Records - Federal	1890 Veterans Schedule			
Census Records - State	[YEAR] _____ State Census			
Church Records	Baptism Certificate			
Church Records	Confirmation Records			
Church Records	Congregational Histories			
Church Records	Excommunication Records			
Church Records	First Holy Communion Records			
Church Records	Membership Records			
Church Records	Ministers' Journals			
Church Records	Ordination Records			
Church Records	Organizational Records and Meeting Minutes			
Court Records	Adoption Records			
Court Records	Bastardy Records			
Court Records	Civil Suit Records			
Court Records	Coroners' Records			
Court Records	Criminal Records			
Court Records	Custody Records			
Court Records	Estate Inventories			
Court Records	Guardianship Records			
Court Records	Insanity / Commitment Records			
Court Records	Licenses and Permits			
Court Records	Property Foreclosures			
Court Records	Voter Registration Records			
Court Records	Wills			
Death Records	Autopsy Records			
Death Records	Burial Records			
Death Records	Cemetery Records			
Death Records	Coroners' Records			
Death Records	Death Certificate			
Death Records	Death Notice			
Death Records	Funeral Home Records			
Death Records	Gravestone Information			
Death Records	Necrologies (Newspapers)			

PRIMARY GROUP	RECORD SET	APPLICABLE?	START DATE	COMPLETE DATE
Death Records	Obituary			
Death Records	Social Security Death Index			
Directories	Biographical Directories			
Directories	Business Directories			
Directories	City Directories			
Directories	Gazetteers			
Directories	Professional/Occupational Directories			
Directories	Telephone Directories			
Directories - Online	Online Historical Directories			
DNA Records	DNA Match Records			
DNA Records	DNA Test Results			
Employment Records	Social Security Number			
Employment Records	Social Security Application			
Fraternal Records	Compiled Histories			
Fraternal Records	Membership Records			
Fraternal Records	Organizational Records and Meeting Minutes			
Fraternal Records	Yearbooks			
Genealogy Databases - Online	Ancestry			
Genealogy Databases - Online	Billion Graves			
Genealogy Databases - Online	Find A Grave			
Genealogy Databases - Online	Findmypast			
Genealogy Databases - Online	MyHeritage			
Genealogy Databases - Online	National Archives			
Genealogy Databases - Online	RootsWeb			
Immigration Records	Alien Registration Records			
Immigration Records	Border Crossing Records			
Immigration Records	Emigration Records			
Immigration Records	Naturalization Records			
Immigration Records	Passenger Lists			
Immigration Records	Passport Records			
Institutional Records	Alms House / Poor House Records			
Institutional Records	Hospital Records			
Institutional Records	Insanity / Commitment Records			
Institutional Records	Orphanage Records			
Institutional Records	Prison Records			
Institutional Records	Work House Records			
Insurance Records	Automobile Insurance Records			
Insurance Records	Business Insurance Records			
Insurance Records	Casualty Insurance Records			
Insurance Records	Health Insurance Records			
Insurance Records	Home Insurance Records			
Insurance Records	Life Insurance Records			
Land Records	Abstracts			
Land Records	County Map			
Land Records	Deeds			
Land Records	Grantee Index			
Land Records	Grantor Index			
Land Records	Homestead Application			
Land Records	Homestead Certificate			
Land Records	Land Grants			

PRIMARY GROUP	RECORD SET	APPLICABLE?	START DATE	COMPLETE DATE
Land Records	Land Patents			
Land Records	Land Survey			
Land Records	Mortgage Records			
Land Records	Plat Map			
Land Records	Promissory Notes			
Licenses and Permits	Driver's License			
Licenses and Permits	Professional Licenses			
Marriage Records	Marriage Certificate			
Marriage Records	Marriage License			
Marriage Records	Newspaper Announcement			
Marriage Records	Divorce Petition			
Marriage Records	Divorce Decree			
Military Records - Engagement	Colonial War Records			
Military Records - Engagement	Revolutionary War Records			
Military Records - Engagement	War of 1812 Records			
Military Records - Engagement	Indian Wars and Frontier Conflict Records			
Military Records - Engagement	Mexican-American War Records			
Military Records - Engagement	US Civil War Records			
Military Records - Engagement	Spanish-American War Records			
Military Records - Engagement	World War I			
Military Records - Engagement	World War II			
Military Records - Engagement	Korean Conflict Records			
Military Records - Engagement	Vietnam Conflict Records			
Military Records	Burial Records			
Military Records	Discharge Records			
Military Records	Draft Records			
Military Records	Enlistment Records			
Military Records	Land Bounty Records			
Military Records	Muster Rolls			
Military Records	Payroll Records			
Military Records	Pension Records			
Military Records	Prisoner of War Records			
Military Records	Relocation/Internment Records			
Military Records	Service Records			
Newspapers	Anniversary Announcements			
Newspapers	Birth Announcements			
Newspapers	Classified Ads			
Newspapers	Engagement Announcements			
Newspapers	Family Reunion Announcements			
Newspapers	Legal Notices			
Newspapers	Local News			
Newspapers	Marital Discord Ads			
Newspapers	Marriage Announcements			
Newspapers	Necrologies			
Newspapers	Obituaries			
Newspapers	Runaway Notices			
Newspapers	Shipping News			
Newspapers	Unclaimed Mail Notices			
Newspapers - Online	Ancestor Hunt			
Newspapers - Online	Chronicling America			

PRIMARY GROUP	RECORD SET	APPLICABLE?	START DATE	COMPLETE DATE
Newspapers - Online	GenealogyBank			
Newspapers - Online	Newspaper Archives			
Newspapers - Online	Newspapers.com			
Newspapers - Online	Online Historical Newspapers			
Personal Contacts	Family Members			
Personal Contacts	Family Friends			
Personal Knowledge	Family Stories			
Personal Knowledge	Family Member Interviews			
Probate Records	Bond Records			
Probate Records	Estate Sale Records			
Probate Records	Guardianship Records			
Probate Records	Property Inventory			
Probate Records	Will			
Published Sources	Abstracts and Transcriptions			
Published Sources	Genealogies and Family Files			
Published Sources	Local and County Histories			
Published Sources	Periodicals			
Published Sources - Online	PERSI			
School Records	Attendance Records			
School Records	College Records			
School Records	Diplomas			
School Records	Elementary School Records			
School Records	Finishing School Records			
School Records	High School Records			
School Records	Honor Roll Records			
School Records	Normal School (Teaching) Records			
School Records	Private School Records			
School Records	Report Cards			
School Records	School Census Records			
School Records	Seminary Records			
School Records	Trade and Vocational School Records			
School Records	Truancy Records			
School Records	Yearbooks			
Social Media	Facebook Groups			
Social Media	Facebook Pages			
Social Media	Facebook Search (name/location)			
Social Media	Instagram Search			
Social Media	Pinteret Search			
Social Media	Twitter Search			
Tax Records	Income Tax Records			
Tax Records	Real Estate Tax Records			
Tax Records	Personal Property Tax Records			
Tax Records	Poll Tax Records			
Vital Records	Birth Certificate			
Vital Records	Marriage Certificate			
Vital Records	Death Certificate			