

Documentation using Sources and Notes

Purpose of Documentation:

Good documentation is an essential element of genealogical data. Documentation should be consistent, clear, and thorough. The primary objective is to describe the source of data in such a way that anyone who desires can return to the source if there is ever a need to verify the information or to resolve conflicts in data.

Rules for Good Documentation of Sources in Family History Research:

- Document as you go.
- Enter sources and notes in a **consistent** format.
- Enter a source description only once.
- Use confidential information with discretion and sensitivity.
- List all sources found for each event.
- Identify and document conflicting or missing information.
- Avoid using abbreviations.
- Specify additional research where needed.
- Strive to obtain primary sources for each event.
- Welcome input and constructive review of your documentation.
- Identify all researchers by name for all contributions, including your own. Use your own name, not *I* or *me*.
- Recognize that good documentation requires continuous refinement.

Notes versus Sources in Personal Ancestral File:

PAF version 5 and most other modern genealogical database software allows the use of templates for sources, in place of a free-form or blank screen note. Notes still may be entered in the free-form screen, but the details of sources can now be entered into a formatted template, which is the preferred method.