Genealogy & Family Stories Guided Workbook

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A standalone educational working guide for general US readers. Examples are fictional unless explicitly described as source references. Use the guide for one manageable task and keep its supporting records with it.

Print and write by hand, or use the editable Word file. The PDFs are not fillable. Use aliases and private record locations; omit passwords, access codes and full identification/account numbers. Label continuation pages with the sheet code, question and date.

Reader, physical-print, native Word and assistive-technology acceptance remain open. PDFs are untagged; no PDF/UA compliance, professional signoff, or tested classroom outcome is claimed. Try a sample page before a full print run.

Page 01: welcome to a question-led workbook

This workbook helps you move from a family clue to a documented account of what you found. It does not require you to resolve every relationship or share private history. Use the fictional Rivera case throughout, your own material where appropriate, or a mixture clearly labeled in your notes.

Each page asks for a manageable action. You will name a question, identify the people involved, record sources, compare uncertain information, and write a short account whose limits remain visible. A blank field can remain blank when the information is unknown.

Starting question: _____. Material I will use: fictional / personal / mixed. Information I do not intend to share: _____.

Your notes / continuation reference

Page 02: the question and its boundary

Write the person, event, place, and period involved. Avoid beginning with a conclusion you hope the records will confirm. “Did Elena move in 1962 or 1963?” leaves room for either answer, an earlier answer, or no supported answer yet.

Explain why the question matters to the account you are building. Then state what this research cycle will not attempt. A question about an address does not require an explanation of every later event in the person's life.

Person reference: _____. Event: _____. Place and period: _____. Outside this cycle's scope: _____.

Your notes / continuation reference

Page 03: the clue you have now

Describe the starting item before interpreting it. Is it an undated note, a labeled photograph, a recollection, or a dated record? Record the wording relevant to your question and identify where the full item is kept.

In the expanded fictional Rivera exercise, S1 is an undated family note whose writer is unknown. It names 1962 as a possible move year and connects the job with the move. The document's own date is unknown even though a year appears in its account.

Source label: _____. Exact short detail: _____. Creator and creation date, known or unknown: _____.

Your notes / continuation reference

Page 04: the first research plan

Choose the next item you will seek and explain how it could help. “Search more websites” names an activity but not a purpose. “Look for a dated address item before March 1963” connects the search to the unresolved interval.

Record the collection or holder, any access question, and a sensible stopping point for this attempt. A limited search can produce a clear note even when it produces no answer.

Next source sought: _____. Why it could help: _____. Access or permission question: _____. Stopping point and review date: _____.

Your notes / continuation reference

Page 05: identify a person without merging two people

Create a person reference and record the name exactly as it appears in each source. A familiar name does not prove that two records describe the same person. Keep the dates, places, relationships, and other identifying context beside the name.

For the teaching case, P1 remains Elena Rivera. A later item signed “E. Rivera” would not automatically be assigned to P1 without examining its context. The workbook does not turn a similar name into an identity match.

Person reference: _____. Name forms: _____. Context supporting identity: _____. Unresolved identity question: _____.

Your notes / continuation reference

Page 06: record a relationship and its basis

Write the relationship relevant to the question and the source supporting it. In the fictional family account, Rosa is Elena's sister and Sam is Rosa's child. These relationships form the teaching case; real research should identify its own evidence.

Use the terms people use for their relationships where appropriate, and separate an asserted relationship from a documented legal status. A research diagram should not erase adoption, caregiving, chosen family, or uncertainty because a form has only a narrow set of boxes.

People connected: _____. Relationship wording: _____. Source: _____. Limit or question: _____.

Your notes / continuation reference

Page 07: create an event timeline

List events with their date precision. Exact day, month only, year only, and approximate period are different levels of information. Preserve that difference instead of converting every entry into an exact date.

Rosa's fictional recollection of carrying boxes in autumn belongs in the timeline as an autumn recollection with the year unresolved. The March 1963 envelope belongs as a dated item connected to an address, not as the moving day.

Event: _____. Date and precision: _____. Source reference: _____. What the date actually refers to: _____.

Your notes / continuation reference

Page 08: separate event time from record time

A document may be created after the event it describes. An interview recorded this year may concern something remembered from decades earlier. Record both dates where known, and leave either unknown when necessary.

This distinction helps prevent a writing date from becoming an event date. It also gives you a question to ask about how the creator knew the information. The gap alone does not settle whether the account is useful.

Event date or period: _____. Record creation date: _____. Date you obtained it: _____. Reason the distinction matters: _____.

Your notes / continuation reference

Page 09: build the source register

Give each source a stable identifier. Record its title or description, creator, holder or collection, date, and exact location. Keep the identifier stable when your interpretation changes.

For a digital source, record enough detail to return to the same item or version. For a physical item, identify the holder and the permitted access route. A vague reference such as “family papers” may not be enough for another reader to find it.

Source ID: _____. Description: _____. Creator and date: _____. Holder and locator: _____. Access date and limits: _____.

Your notes / continuation reference

Page 10: copy a detail without improving it

Transcribe the small portion needed for the question and preserve uncertainty in the reading. Do not silently modernize a name, fill an unreadable word, or correct a date. Put your proposed reading in a separate note.

The aim is not to reproduce an entire source unnecessarily. It is to keep a clear distinction between the source's marks or words and your interpretation. When exact wording matters, retain the permitted source image or locator for later checking.

Short transcription: ________. Unclear portion: ________. Proposed interpretation, separately labeled: ________. Location for rechecking: ________.

Your notes / continuation reference

Page 11: write a useful search log

Record the question, collection, terms or range checked, and result. A search log should tell you what you already tried so the next attempt can be more deliberate.

Include relevant limits. Perhaps the collection covers only part of the year, the index uses an unfamiliar name form, or the item is not available for inspection. These are limits of the attempt, not conclusions about the person's life.

Search date: _____. Collection and coverage: _____. Terms or pages checked: _____. Result: _____. Limit and next adjustment: _____.

Your notes / continuation reference

Page 12: an unsuccessful search is still a record

Sam searches the fictional 1962 directory and finds no matching listing for Elena. The available copy is incomplete. The supported statement is that no match was found in the part searched with the recorded approach.

The unsupported statement is that Elena did not live there. The search may have missed the relevant portion, used an incomplete name, or involved a collection that did not list everyone. Record the limited result and choose the next search accordingly.

No-result statement I can support: _____. Conclusion I must not draw yet: _____. Better next test: _____.

Your notes / continuation reference

Page 13: compare two sources on one question

Write the same question above both sources. S1 names 1962 as a possible move year. S3, the March 1963 envelope, is addressed to Elena at 18 Pine Street. One describes a possible move year; the other documents an address on a later item.

The dates look different, but the items do not necessarily disagree. A move in 1962 is compatible with an address in March 1963. Compare what each item actually claims before calling it a conflict.

Question: _____. Source A claim: _____. Source B claim: _____. Agreement, conflict, or different event: _____.

Your notes / continuation reference

Page 14: identify what remains unresolved

The provisional Rivera conclusion is that Elena used the Pine Street address by March 1963. A move in 1962 remains possible but unconfirmed. Neither the envelope nor the undated note establishes a precise moving day.

Write an unresolved question in a form that suggests a next source. “Find a dated item from the transition period” is more useful than “prove the family story.” The next source may narrow the answer, change the question, or leave it unresolved.

Supported conclusion: _____. Remaining uncertainty: _____. Source that might distinguish the possibilities: _____.

Your notes / continuation reference

Page 15: a second conflict about a job

This new fictional exercise adds S5, an April 1963 letter attributed within the teaching case to Elena, saying she is still learning the sewing work. It also adds S6, an unsigned note reading “E. Rivera, job, 1964,” with no explanation of what the date means.

Do not decide that one item disproves the other. S5 suggests the work was underway by April 1963 in this invented case. S6 may refer to a different person, job, or event; its meaning is unresolved.

What each item supports: _____. Identity and date questions: _____. Conclusion that would overreach: _____.

Your notes / continuation reference

Page 16: do not average uncertain dates

Suppose one source suggests 1962 and another suggests 1964. Writing 1963 as a compromise does not create evidence for 1963. It only hides the disagreement.

Keep each date attached to its source and describe the reason for preferring, limiting, or withholding a conclusion. When you cannot resolve the issue, preserve a range or an open question only as far as the evidence warrants. The page is allowed to end without a single date.

Competing details: _____. Reason each may or may not fit: _____. Provisional wording: _____. Next check: _____.

Your notes / continuation reference

Page 17: prepare an interview invitation

Explain the project in a few sentences. Say what you hope to discuss, how long you expect the conversation to be, and what choices the participant has about notes, recording, and sharing. Make it easy to decline a topic or the invitation.

Use the oral-history companion for the choices discussion. Do not treat agreement to a family conversation as permission for a public article, classroom handout, or commercial book.

Invitation wording: _____. Topic and proposed duration: _____. Choices to discuss: _____. Follow-up contact method: _____.

Your notes / continuation reference

Page 18: record participation choices separately

Create separate fields for taking part, note-taking, recording, review, and intended audience. A single yes or signature cannot explain all of those decisions without a clear scope.

In the Rivera case, Rosa permits handwritten notes and limited family review after checking them. No recording is permitted. Keep that choice with the resulting note, not in an unrelated folder that may be overlooked.

Participation: _____. Notes: _____. Recording: _____. Review process: _____. Audience and limits: _____.

Your notes / continuation reference

Page 19: ask an open question

Begin with a question that allows the participant to describe what they remember. “What do you remember about that home?” leaves more room than “You moved there in 1962, didn't you?”

Listen for the distinction between what the person experienced and what they later heard. Ask a neutral follow-up when that distinction matters. Do not pressure the participant to choose a year simply because your timeline has an empty cell.

Opening question: _____. Participant's wording: _____. Clarification asked: _____. Uncertainty retained: _____.

Your notes / continuation reference

Page 20: preserve the interview's limits

Review your notes while the conversation is still understandable to you. Mark any sentence that is your summary rather than a direct quotation. Give the participant the review opportunity you agreed upon, and record any requested correction or restriction.

A polished sentence should not become more certain than the original answer. Rosa's “autumn, but I am not sure which year” should remain uncertain after editing. The uncertainty is part of the account.

Note reference: _____. Summary versus quotation: _____. Review outcome: _____. Correction or restriction: _____.

Your notes / continuation reference

Page 21: inventory one photograph

Assign an item identifier before making an interpretation. Describe the visible content, the existing label, the holder, and any known history. Keep a tentative identification visibly tentative.

RIV-PH-001 is a fictional monochrome print of two people outside a house. Its back says Pine Street. The left person may be Elena; the other person and date are unresolved. No actual photograph is supplied or identified by this exercise.

Item ID: _____. Visible description: _____. Original label: _____. Known information: _____. Tentative information: _____.

Your notes / continuation reference

Page 22: connect the original and the copies

Record the original's location separately from the digital files. A front image, a back image, and a transcript can share a stable item identifier while remaining distinct files.

Use filenames that describe the item and view, not a conclusion you have not established. A file named with an uncertain person's name can make the guess look settled when the file is shared outside its original context.

Original location: _____. File names and views: _____. Copy creation date: _____. Quality or completeness question: _____.

Your notes / continuation reference

Page 23: plan preservation without attempting repair

Begin by preventing unnecessary handling and documenting what you have. National Archives guidance separates handling, storage, digitization, display, and repair questions. Use the guidance appropriate to the material rather than treating every paper or photograph the same way. [R09]

When an item is fragile, damaged, or unfamiliar, record its condition and seek appropriate guidance before intervening. This workbook is an inventory and research aid, not a conservation manual.

Observed condition: _____. Action postponed pending guidance: _____. Applicable source or specialist to consult: _____.

Your notes / continuation reference

Page 24: decide what may be shared

Before sharing a family item, identify the proposed audience and use. A private conversation, a small family album, a public website, and a paid publication are different uses. Record unresolved permission and privacy questions before preparing the final copy.

Do not infer permission from possession alone. The purpose of this page is to identify decisions that need review, not to issue a universal legal conclusion about ownership or publication rights.

Item and proposed use: _____. Intended audience: _____. Permission record or open question: _____. Information to omit: _____.

Your notes / continuation reference

Page 25: outline a story around the question

Choose an opening that introduces the question, a middle that follows the evidence, and an ending that explains the supported conclusion and remaining uncertainty. A family story can be engaging without filling every gap.

For the Rivera example, the opening can begin with an undated note rather than an invented moving-day scene. The middle can compare the recollection and envelope. The ending can explain why the address is better supported than the move date.

Opening question: _____. Evidence sequence: _____. Supported ending: _____. Unresolved detail: _____.

Your notes / continuation reference

Page 26: draft the supported account

In the fictional Rivera papers, an undated note connects Elena's sewing work with a move to Pine Street. Rosa recalls helping with boxes in autumn but is uncertain of the year. A March 1963 envelope addressed to Elena at 18 Pine Street provides a dated connection to that address. Together, the items support a cautious account: Elena used the address by March 1963, while the exact move date and job start remain unresolved.

Notice what the paragraph does not supply: weather, dialogue, motives, or a precise arrival day. Those details would need their own basis.

My supported paragraph: _____.

Your notes / continuation reference

Page 27: distinguish recollection from narration

Introduce a recollection as a recollection. Identify the speaker and the agreed form of attribution. A narrator's smooth transition should not turn “Rosa remembered” into “this definitely happened exactly this way.”

When you paraphrase, preserve meaning and uncertainty. When you quote, verify the wording against the permitted record and keep the quotation within the agreed use. Do not create dialogue to make a nonfiction account feel complete.

Recollection used: _____. Attribution choice: _____. Exact or paraphrased wording: _____. Review needed: _____.

Your notes / continuation reference

Page 28: check every meaningful claim

Read the draft one sentence at a time. For each factual statement, identify the source or label it as an inference, recollection, or unresolved question. A sentence may contain several claims that need different support.

Replace unsupported certainty with accurate wording, or remove the claim. Qualifying a sentence is not an excuse to imply more than the source supports. “Possibly” should identify a genuine uncertainty, not make an invented detail acceptable.

Sentence: _____. Claim types: _____. Supporting sources: _____. Revision: _____.

Your notes / continuation reference

Page 29: invite a limited review

Ask a willing reviewer to check a defined part of the draft. They might review their own interview wording, a family relationship, or the clarity of the source notes. Explain that a review is not a request to endorse every conclusion.

Record what the reviewer said and whether it changes the draft. A disagreement can become a new source note or an unresolved question. Do not silently replace one account with another because the later response feels more confident.

Reviewer role and scope: _____. Feedback: _____. Change made: _____. Question retained: _____.

Your notes / continuation reference

Page 30: keep a revision history

Give the draft a version label and record meaningful changes. A corrected date, a restricted quotation, and a formatting change are different kinds of revision. Brief notes make the history useful without turning it into a second manuscript.

Retain the source identifiers across revisions. A new interpretation does not require renaming every source. Stable references let a future reader understand how the account changed.

Version and date: _____. Change and reason: _____. Source or review behind it: _____. Earlier copy location: _____.

Your notes / continuation reference

Page 31: prepare a handoff another researcher can use

Gather the question, person references, timeline, source register, search log, interview choices, and current draft. Identify which records may be shared and which require a separate permission check.

The handoff should tell the next researcher where to begin and what not to assume. A list of unresolved questions is valuable. It prevents them from repeating a search or treating a provisional statement as settled.

Current conclusion: _____. Most useful next source: _____. Access limits: _____. Files and records included: _____.

Your notes / continuation reference

Page 32: close this cycle and choose the next one

Review the original question. What can you now say that you could not say before? What remains unknown? Which part of the process became clearer? A completed cycle may end with a narrower question rather than a final answer.

For the fictional Rivera case, the dated address is clearer while the move and job dates remain open. The next cycle can focus on one of those questions without pretending that the whole family history has been resolved.

What I learned: _____. What I cannot yet conclude: _____. Next question: _____. First action: _____.

Your notes / continuation reference

Fictional Rivera practice sources

All people, records and details on this page are invented teaching material, not archival reproductions. P1 Elena Rivera; P2 Rosa, her sister; P4 Sam, Rosa's child. Relationships are stipulated for this exercise only.

S1 — Undated family note, writer unknown: “Elena moved to Pine Street in 1962 and began sewing work around the move.” The note supplies no basis for the year.

S2 — Sam's summary of a fictional conversation with Rosa: she remembers helping carry boxes in autumn but is unsure of the year. She permits handwritten notes and review before sharing with Elena's adult children; no recording or public workshop reuse is permitted by that fictional agreement. Readers may use this invented exercise itself.

S3 — Fictional envelope, postmarked March 1963, addressed to Elena Rivera at 18 Pine Street. The writer of the address and contents are not supplied. This establishes a dated address connection within the exercise, not a moving day.

S4 — Fictional search log: Sam checks the available part of a 1962 directory for Elena Rivera and finds no matching listing. The copy is incomplete. The result describes that limited search, not proof Elena lived elsewhere.

S5 — Fictional April 1963 letter attributed to Elena within the exercise: “I am still learning the sewing work.” It suggests the work was underway by that date, without identifying the start date.

S6 — Undated, unsigned note: “E. Rivera, job, 1964.” The person, meaning of the year and relationship to S5 are unresolved. Do not average the dates or merge people by initials.

Practice conclusion: the Pine Street address connection is supported by March 1963. The exact moving day and job start remain unresolved. An earlier dated address record could help narrow the question.

Sources and keeping useful records

R09 — U.S. National Archives and Records Administration: How to Preserve Family Archives; Handling Family Archives

https://www.archives.gov/preservation/family-archives

Conservative care and handling. Related handling guidance: https://www.archives.gov/preservation/family-archives/handling.html

Editorial basis: the existing DTP writing collection, expanded into standalone guide and worksheet pages. Original fictional examples remain labeled; no external source endorses them.

References checked November 2, 2026; only the narrow point stated in the guide is attributed to each reference.

Keep one current master record. Preserve meaningful revisions and carry open questions forward. Related editions and updates: davidtompublishing.com/books-and-publications/.