



Montgomery County Chapter Ohio Genealogical Society

Lineage Society Rules and Application Procedures

The following rules and procedures apply to all applications for First Families of Montgomery County, Ohio and Settlers and Builders of Montgomery County, Ohio. Each society is a separate entity. Applicants must submit an application, the application fee, and full documentation to each society they wish to join. Documentation is not shared by the two lineage societies. Those wishing to apply to both societies **must** submit separate applications, fees and documentation to both societies. All applications received by the Montgomery County Chapter of the Ohio Genealogical Society which contain ancestors for both societies on a single application will not be accepted for consideration and shall be returned to the applicant. Please read these pages before beginning the application process.

Section A: Membership Requirements and General Information

1. Applicants must be current members of the Montgomery County Chapter of the Ohio Genealogical Society.
2. Applicants must prove :
 - For First Families of Montgomery County, Ohio that their ancestor(s) first resided in Montgomery County, Ohio on or before 31 December 1830.
 - For Settlers and Builders of Montgomery County, Ohio that their ancestor(s) first resided in Montgomery County, Ohio between 1 January 1831 and 31 December 1860.
3. Only blood lines are eligible. Adoptive lines are not eligible.
4. Illegitimacy is not grounds for denial.
5. Eligible Ancestors for First Families of Montgomery County, Ohio may not be submitted to Settlers and Builders of Montgomery County, Ohio. Settlers and Builders of Montgomery County, Ohio ancestors later may be proved for First Families of Ohio as new evidence is uncovered. A new application to the First Families of Montgomery County, Ohio lineage society with complete documentation must be submitted for those ancestors who were first approved for the for the Settlers and Builders of Montgomery County, Ohio lineage society.
6. A \$15.00 application fee must accompany each application. This fee is non-refundable. Upon application approval, the applicant will be presented with the appropriate lineage society certificate and pin at the Montgomery County Chapter OGS meeting in June. Only one lineage society pin will be issued to each approved member. Replacement pins may be purchased for a \$10.50 fee each. Replacement certificates may be purchased for a \$2.00 fee each.
7. After being approved for a particular lineage society, there will be no fee for submitting additional ancestors to that same lineage society in future years. Montgomery County Chapter OGS refers to this process as submitting a supplemental application. Please use the regular application to submit additional ancestors and clearly mark your First Families or Settlers and Builders member number on that application. You will receive a certificate listing approved supplemental ancestors Montgomery County Chapter OGS meeting in June.
8. Deadline for applications is 01 April of each year. Applications must be delivered to the Montgomery County Chapter OGS or postmarked by that date.
9. Applicants who are not accepted during the year in which they apply will have their applications filed by the Montgomery County Chapter OGS for a five-year period. Applicants have five years in which to submit sufficient documentation for acceptance. After this five-year period, the applicant must file a new application and pay the appropriate fee.
10. This application and accompanying documents become the property of the Montgomery County Chapter of the Ohio Genealogical Society.

11. Applications may be signed by the applicant or by a person who compiled the application for the applicant. Unsigned applications will not be reviewed.
12. The final application approval decision rests with the Lineage Society's committee chair.

Section B: Application and Evidence Document Preparation Procedures

1. Please use dark blue or black ink when filling out applications by hand. Applicants may download a PDF file of the society's application from the Montgomery County Chapter OGS web site. This Microsoft Word file may be filled in on a computer, then printed and mailed with its accompanying documentation. The filled-in application can be saved to your personal computer. If completing the application by hand, please print.
2. Submit the completed application(s) with photocopies of evidence documents. Do not send original documents as they will not be returned.
3. All photocopies submitted must be legible or must be accompanied by a transcription certified as a True Copy by a third party not related to the applicant, preferably a librarian or court official. A True Copy certification means that a third party has viewed the original and the transcription and finds them to be identical.
4. When a photocopy is not possible, applicants may substitute a typed, hand-printed, or written transcription of documents. Transcriptions must be certified as True Copies as defined in #3 above.
5. Only one photocopy of any document is necessary even though that document may be used as evidence for more than one event, more than one generation, or more than one applicant. If you are submitting applications for multiple family members, the Montgomery County Chapter OGS only needs one photocopy of documentation for common ancestors. Multiple photocopies of the same document will be discarded due to storage limitations.
6. If you are submitting a supplemental application, do not duplicate the documents that were included with your original application
7. Submit a pedigree chart (5-generation chart) showing all lines submitted in the application.
8. Organize evidence documents by generation, according to your pedigree chart, before beginning to number them. For example, your birth certificate should be Document #1; your marriage certificate is Document #2. Number each piece of evidence in the upper right-hand corner according to its corresponding number on the Document List page. The applicant may substitute a numbered list of evidence documents produced on a computer or typewriter instead of using the Document List page. All submitted documents must be identified in this list.
9. Fill out the application blanks using the evidence documents that will accompany the application.
10. In each generation, the vital information for the male always should be written first and the information for the female second, no matter which ancestral line(s) you are following in the application.
11. Documentation must be provided for each date, place or name written on the application. If you do not have an acceptable evidence document, leave that application space blank.
12. Names, places and dates provided on the application must match the supporting documentation for the fact indicated. Examples:
 - If a place is given as Ohio on the application and the supporting documentation shows Ohio, it is acceptable.
 - If a place is given as Van Buren Twp., Montgomery County, Ohio on the application, the supporting documentation must also show Van Buren Twp., Montgomery County, Ohio.
 - If a date is given as 1873 on the application and the supporting documentation indicates 1873 or 1873 can be calculated using straight math using information from the supporting documentation, it is acceptable.
 - If a date is given as 22 Apr 1873 on the application, the supporting documentation must also show 22 Apr 1873.
13. Dates should be written in day, month and year format, i.e. 12 May 2006. Dates may be estimated using censuses or tombstones. If estimating a date (circa), write it like this: c 1810. Dates calculated (e.g. from age at death on tombstones) must have "cal" written after the date.
14. All females must be identified by their maiden names in order to be approved. Exceptions are made only in the case of African Americans and Native Americans, and only when such ethnicity and lack of surname is

proved.

15. List and submit documentation for as many spouses as possible, even if they are not in the ancestral line(s) you are following in the application
16. Because all applications will be stored in letter size archival file folders and will be microfilmed or digitized for use by future researchers, please follow these directions for preparing evidence documents:
 - It is preferred that all submitted documents be on letter sized paper (8.5 by 11). If an item is small, please re-copy it onto letter size paper so it does not become lost. Documents larger than 8.5 by 11 will be folded to fit the archival file folder.
 - Do not use highlighter, staples, tape of any kind, white-out products, gummed labels, sheet protectors, or binders. Paper or binder clips are acceptable as are sticky notes but will be removed before the application is filed.
 - To indicate specific evidence in difficult-to-read document photocopies, use a red pen or pencil to mark an arrow in the margin of the document or use a blue, non-photocopying pencil to underline. These pencils are available at hobby and art supply stores.
 - All documents submitted must have the applicant's name and address on the back. Do not use gummed labels. Print, type or use a computer to print this information on each document. An inked address stamp is acceptable.
17. Married applicants must include records for their marriage and for their spouse's birth (and death, if applicable).
18. Each legal name change for anyone listed on the application must be documented.
19. Information for additional ancestral lines may be included on additional applications or on the extra un-numbered generation application sections provided at the end of each application. Application pages may be photocopied to provide space for additional ancestors.
20. If an ancestor has been previously proven by another individual, the applicant may submit evidence only to the nearest common ancestor. Include the name and member number of the appropriate lineage society member. The extent of the evidence and documentation required for all applications shall be determined by the Lineage Society Committee Chair. ***Complete evidence and documentation for each step/generation may be required if the referenced application(s) contain insufficient evidence and/or documentation to meet the current standards for acceptance.***
21. It is recommended that applicants keep photocopies of the application and all accompanying documents.

Evidence Citation

All documents must include a full citation to the original source. This requirement is true for electronic format, internet and traditional source documents. Other researchers should be able to use the citations to find the document themselves. Citations may be written in any accessible location on the front of the photocopy or you may include a photocopy of the title page showing all bibliographic information. Some citation requirements:

- Court Documents: Give state, county, volume and page number.
- Books and other published works: Give all bibliographical information (author/editor, title, publisher, city of publication, page number, and copyright date).
- Compiled Military Service Record (CMSR): List soldier's name, unit, state and repository where the record is stored (NARA, state archives, etc.). If the record is on microfilm, cite publication and roll numbers.
- Pension File: List soldier's name (or widow's or other dependent's name if filed by other than the soldier) and certificate number.
- Other Military Records: Give all identifying information such as packet number, publication series and, if on microfilm, roll number. Cite repository. Include any additional pertinent citation information.
- Family Bible Pages: Must be accompanied by a photocopy (or True Copy transcription; see #3 above) of the Bible's title page and of any section showing the publication date of the Bible. Bibles must be contemporary with the information they prove. Please list the Bible's provenance and the current owner.
- Family Records: Old family papers may be accepted if the provenance of the family papers is stated and the application contains other documents that support the information these papers prove.

- Census Photocopies: Must show, or have written on the front of the copy, all necessary finding information, i.e. town, county, state, year and date of census. Please do not send census summaries typically found on such sites as Ancestry. Reviewers need to see the original census page. In some cases, photocopies from census books, done by reputable organizations such as local genealogical societies, may be substituted.
- Photographs must be identified, preferably on the back side.
- Tombstone Photographs: Must be identified by cemetery name and location. If the tombstone is not legible, a written transcription must be included.
- Newspaper Articles and Obituaries: Should show the name and city of the newspaper and the date and page of publication. If the newspaper item has been clipped out and no identifying information exists, please state the provenance of the clipping, e.g. "my grandmother saved these in an old shoebox and gave them to me in 1957."
- If the document is copied from microfilm, add the microfilm number and the repository where you used the microfilm.
- Internet Documents: If the document was obtained from an internet web site, you must cite the original source as per the above list and must list the web site name, URL and date of access. Please do not copy and paste a long web address leading to a specific document. Citing the web site name, URL and date of access is sufficient for future researchers to find the same document later.
- Electronic Format Publications: Cite as if it were the printed copy of the publication but include the web page URL and date accessed or the title and other bibliographic information for the CD (or other media storage) publication.

Section C: Rules of Evidence

The rules of evidence applying to membership in First Families of Montgomery County, Ohio and Settlers and Builders of Montgomery County, Ohio follow and are the standards by which all evidence is judged. There are no exceptions. The acceptance or denial of an applicant into a lineage society shall be based only on the content of the application submitted for review and its compliance to the current standards and rules of evidence. The compliance of an application to the current standards and rules of evidence shall be judged on an individual basis.

The nature and extent of the evidence submitted with all applications shall be sufficient to prove that the applicant is directly descended from the ancestor(s) named in the application, and shall be sufficient to differentiate between any two persons of the same name who might be residing in the same area at the same time.

Documents used as evidence, either alone or in conjunction with other acceptable documents, must state the fact to be proved. Inferred evidence is not acceptable. All documents submitted must have a Document Number, preferably located in the upper right corner. This number must correspond to the fact(s) it proves on the application page(s) and to the description on the Document List.

In cases where documents used as evidence contain conflicting statements regarding a fact used in the application, a proof statement that addresses the conflicting documents must be included with the application.

This proof statement should meet the Genealogical Proof Standard (GPS). The proof statement is subject to evaluation by members of the Lineage Society Committee. The GPS consists of five (5) elements:

1. Reasonably exhaustive research has been conducted.
2. Each statement of fact has a complete and accurate source citation.
3. The evidence is reliable has been tested through analysis, correlation and interpretation.
4. Any contradictory evidence has been resolved.
5. The conclusion is soundly reasoned and coherently written.

The inclusion of statements with the application is encouraged as they provide clarity and insight into the applicants reasoning. All statements shall be evaluated based on their individual merits.

Evidence Types

1. Vital statistics, courthouse or other government records, and church records usually are considered excellent evidence documents. Other evidence such as Bible records, diaries or letters, censuses, newspaper clippings, county histories and family records contemporary to the facts reported are considered as corroborating evidence.
 - Applicants who use documents (such as Death Certificates) where there is an “informant” providing information that is used as evidence to prove a fact on the application should evaluate the information provided on the document thoroughly.
2. Oral, written, or published family traditions may be in error and cannot be accepted as evidence.
3. Printed or manuscript genealogies, genealogical records or compilations, family group sheets and charts, family reunion records and similar material are not considered evidence unless the document is contemporary with the information being proved and is supported by other evidence.
4. Old letters or family records can be accepted as evidence for only the facts that the writer could logically know as contemporary knowledge. Identification of the writer and the document date is necessary as is a statement of the document’s provenance. Provenance is defined as the history of the ownership of a particular item.
5. Unsupported information from an amateur or professional genealogist is not acceptable, including such records printed in genealogical, historical, or similar publications. Scholarly journal articles that are supported by citations to acceptable documentation may be acceptable.
6. Published or manuscript material authored by the applicant or his family will not by itself be accepted as evidence but may be included with other qualifying evidence.
7. A marriage license is not acceptable evidence for a marriage; it only proves intent. If no marriage return or record exists, write the word "Lic" after the license date on the application.
8. Pre-1880 censuses cannot be used as sole evidence of relationship since no relationships are stated in these records.
9. Pre-1850 censuses cannot be used as sole evidence of residence for anyone other than the head of household.
10. Land or real estate tax records are acceptable only if they specify that the individual was a resident of Montgomery County, Ohio.
11. Photographs of tombstones are acceptable for evidence of birth and death dates and for relationships actually stated on the stone. Include the name and location of the cemetery in which the tombstone is found. Most Published compilations of tombstone readings are acceptable. Tombstone photographs must be transcribed when they are difficult to read. Tombstones must be contemporary in style with the ancestor’s death date.
12. Documents written or printed in a foreign language must be accompanied by a translation into English and the translation certified as a True Translation by the translator (a third party; not the applicant or his/her family member).
13. Lineage applications, accepted or unaccepted, from other patriotic or hereditary societies are not considered evidence.
14. E-mail is not considered evidence.
15. Information taken from Internet resources or electronic publications must be acceptable in its original form. The original source must be cited as well as the web page URL and date accessed. If taken from an electronic publication on CD or other media, bibliographic information for the electronic publication must accompany the original source citation.
16. DNA evidence and supporting documentation will be handled on an individual basis.
17. Images of actual documents and records that are available on-line are acceptable but must include the original document citation if that information is not visible on the copy submitted.
18. Transcriptions and abstractions from web sites such as Heritage Quest, Ancestry, and from many other genealogical organization sites are considered acceptable evidence but must have the original source fully cited as well as the basic URL citation. Web site information will be judged on an individual basis by the individual lineage society chair(s) as to the credibility of the data presented.

19. The IGI may be used as a finding aid to original records. Every attempt must be made to obtain the original record rather than to use the IGI citation as evidence.
20. Ancestral File (and similar undocumented genealogical databases) information is not acceptable.
21. The Social Security Death Index (and similar documented and governmental indexes) may be acceptable.
22. Examples of implied evidence which are not acceptable are:
 - Unnamed individuals specified in court records as heirs or heirs-at-law are not proved by such records unless it is known that applicable laws at the time included only bloodline descendants.
 - A father is not proved as being in an area just because his child was born there. The birth only proves the mother and child were in that location on that date.
 - Blood descent is not necessarily proved by owning the same land as an earlier owner of the same name.
 - Census proximity does not prove relationship.