Digging Deeper

Using Essential Pre-1850 Records

An Intermediate Genealogy Guidebook

by Karen Clifford, AG®

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Introduction

As a professional genealogist and a college instructor in the field of family history, I am often asked questions that are not easy to answer. For example, "If you have only a little time left to complete a research project, is it best to spend your time looking for new sources or should you take the time to explain to others what has already been located?"

The answer to this question will depend on the researcher's experience and training in writing, and on how thorough and comprehensive the existing research was. For example, is the researcher able to explain what kind of evidence is available in each record and how that evidence applies to the goal?

On the other hand, has the researcher spent the time to be informed about the availability of new sources? Genealogy conferences, newsletters, and publications have been introducing new sources for some time, but many professionals have not found the time to keep themselves updated. As a result, some are comfortable using just one tool instead of all the tools in the toolbox.

Another commonly reoccurring complaint among family historians is: "How can I easily explain the "process" I used to solve a difficult research problem to a new cousin I found online? He is messing up my family tree by adding unsubstantiated information to what I entered. It makes me want to just give up!"

The diversity of these situations led me to the conclusion that a different kind of textbook is needed. It should address the process of solving and reporting on difficult research problems during specific eras (such as the pre-1850 time period). At the same time it should encourage the use of today's modern research tools (such as unique features in various genealogy computer programs, specialized genealogy search engines, and other advances).

While national conferences and special society publications provide excellent processes for solving specific research studies, they usually deal with one individual, locality, or surname. Unfortunately, a researcher who is not doing work in that locality or with that surname would likely over-look the value of the problem-solving research processes suggested.

And, since I was already engaged in teaching a college course aimed at those elements, and was updating the curriculum in another college that could use these principles, the timing was right to produce the needed textbook. The course being updated, and the curriculum being written was

for intermediate researchers who had previously taken one to two semesters learning how to use a genealogy computer program to enter at least four generations of their family. These students had also learned how to:

1. Order vital records;
2. Locate and transcribe federal census records between 1850 and 1930;
3. Locate records in a public and/or college/university library;
4. Find published surname histories in the Library of Congress, the Family History Library, using online college and university libraries, and Google Books;
5. Obtain access to free and fee-based Internet sites to study online family trees;
6. Learned how to perform a preliminary survey, fill out research planners, and started to compare various genealogy computers as far as data entry of sources and evidence.

Knowing that the students had these foundation skills meant that this text could weave specific pre-1850 sources and research processes together. Then the process of solving specific research problems could train the student researchers to produce well-written conclusions based on the work performed and the analyses made.

When the time came to categorize the various research processes in the index, the question arose as to where to place these professional tips. If the processes were listed separately in the index, students might not recognize that this is one of a set of strategies that could be used to reach a research objective.

I've been rather partial to the term "methodology" and thought of putting everything under that label. Besides, groups of procedures or processes that are articulated as a rule are called "methodologies." Methodologies are, after all, general processes that apply across regions.

Pondering that idea for several months, I realized that when I compare the methodologies that both apply to Southern States regional research practices as well as to the Midwestern States region, the term works quite well. But, it is also true that there are "techniques" that only apply to the South and not the Midwest.

"Techniques" are considered systematic procedures or routines that are used to accomplish more specific tasks. There are some good techniques for using search engines, for working with published finding aids, and even for reading old handwriting. However, the term often implies a personal preference rather than a standard principle. Also techniques are constantly changing as new tools become available. I was looking for

another word which would describe the proven process of goal setting and other steps taken by hundreds of successful researchers to achieve results.

What label should be used to describe, capture, and pass on to the next generation the principles that will help them be successful?

For me, the word "strategy" is more appropriate than either "method" or "technique." The word strategy encompasses both the general methods and specific techniques a researcher would use to achieve a specific research goal—and it also includes the purposeful use of appropriate records and sources.

Thus thirty-five of those commonly and sometimes "uncommonly" used processes are found in the index under the label "research strategy." For ease of reference, these strategies are also listed separately.

Digging Deeper, therefore, weaves together pre-1850 census records, census substitutes such as tax records and historical records, testate and intestate probate records, historical newspapers and periodicals, land grants and patents, special purpose land records, private and public domain land, military (pre-service, service, and benefit) records and cemetery sources with useful strategies for research success.

Digging Deeper is not only about essential pre-1850 records, it is also about the research strategies needed to use those records to achieve personal research goals. It is intended to be a guidebook for the budding family historian who comes up against a roadblock and wants to know what others have done to solve a similar problem.

New research strategies and source examples are published regularly, and this book also demonstrates how genealogists can find that information to keep their research skills current. Even when new printed and electronic sources emerge, the successful strategies described on these pages will be needed.

Thanks for reading this book. Let me know if it helps you overcome any of your research roadblocks. Or if you discover a new research strategy, please share it with me and others.

Karen Clifford
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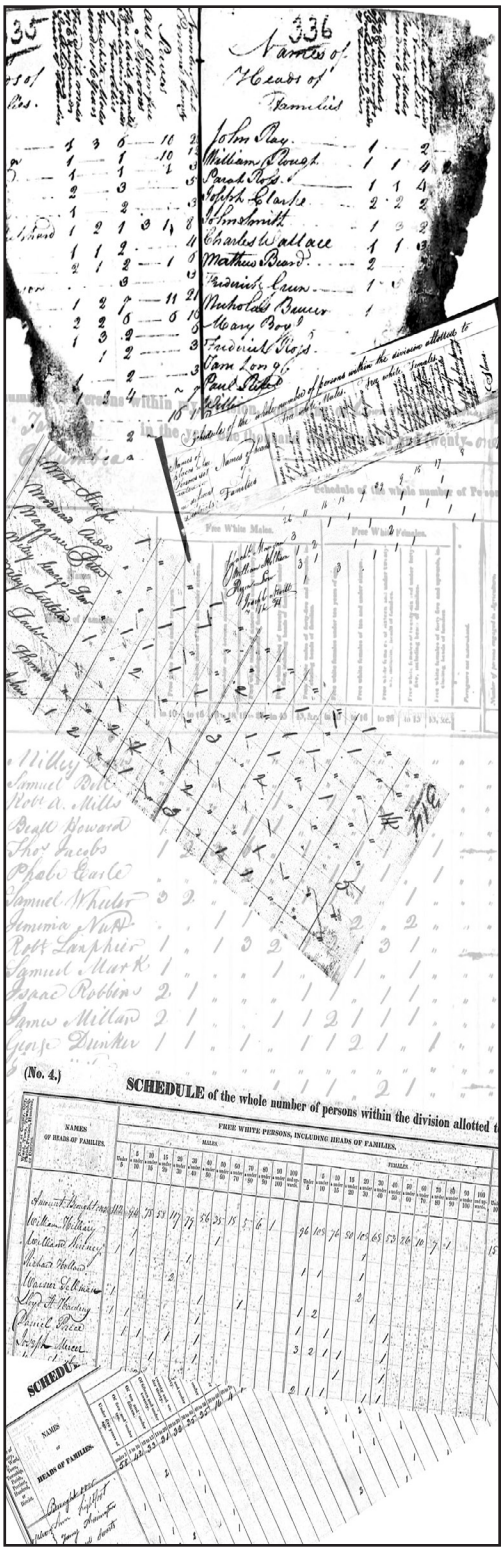


Chapter 1

Working with Pre-1850 Census Records

You will learn the following concepts in this chapter:

- Reasons for Using 1790-1840 Census Records
- Locating Pre-1850 Census Indexes
- Overcoming Difficulties with Early Census Searching
- A Review of 1850-1930 Census Records
- Contents of 1790-1840 Census Records
- Locating Census History Forms

Introduction

The first step in effective genealogy research is to set a goal to document something specific about an individual. This might be to determine a birth date or place.

Finding specifics about an individual who lived in the 1900s is readily accomplished using information from state birth, marriage, and death certificates (generally referred to as ***vital records***).

Learning more about an individual's complete family relationships, however, is usually more quickly accomplished (with less monetary expense) when vital records are used in conjunction with publically available United States Federal Census Records.

In fact, new family history researchers may quickly find themselves at a brick wall if they do not search complete family units between 1900 and 1930. The 1930 census is the latest one publically available to researchers until about 2012 when the 1940 census will become available.

By 1900 a youthful beginning genealogist will have progressed beyond known information, in most cases, and will find themselves in unknown territory. They may not know anyone who has first-hand, family personal knowledge of those who came before. Without complete family units, pieces of evidence that document the individual are missing because rarely does one person in a family leave behind everything about his or her grandparents, siblings, aunts, uncles, cousins, or specific accomplishments about each of the above.

As genealogists seek information on earlier ancestors, the 1850 to 1900 federal census records continue to form the foundational support for evidence because birth and death records in most of the United States (except in New England) were less frequently kept by the states and counties. Eventually, all U.S. researchers stumble into the pre-1850 census records.

Reasons for Using 1790-1840 Census Records

Many researchers turn away from federal census records when they reach the pre-1850 time period, however. They often cannot imagine finding much of real value in these earlier census records. After their first exposure to them, they think that since only the head of the household is listed plus some check marks to indicate ages, there is little to be gained by using these earliest census records.

However, there are very good reasons for spending as much time, or more, on evaluating the evidence provided in these earliest enumeration

records. Below are valuable reasons for searching early (1790-1840) census records:

1. To discover a county of residence.
2. To limit the scope of research.
3. To help locate individuals in unindexed county histories.
4. To determine who the neighbors were in case a neighborhood search is necessary
5. To establish movement patterns during a 50-year period.
6. To determine family wealth, occupation, and property ownership.
7. To determine an approximate time period of death.
8. To establish longevity of family members and family sizes.
9. To determine when male members come of age and begin to appear as family heads.

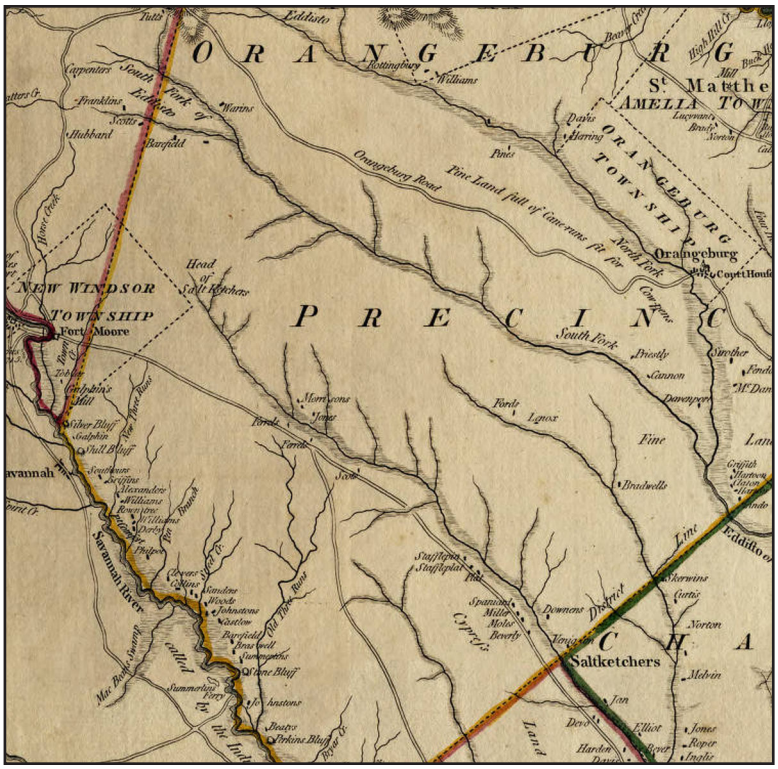
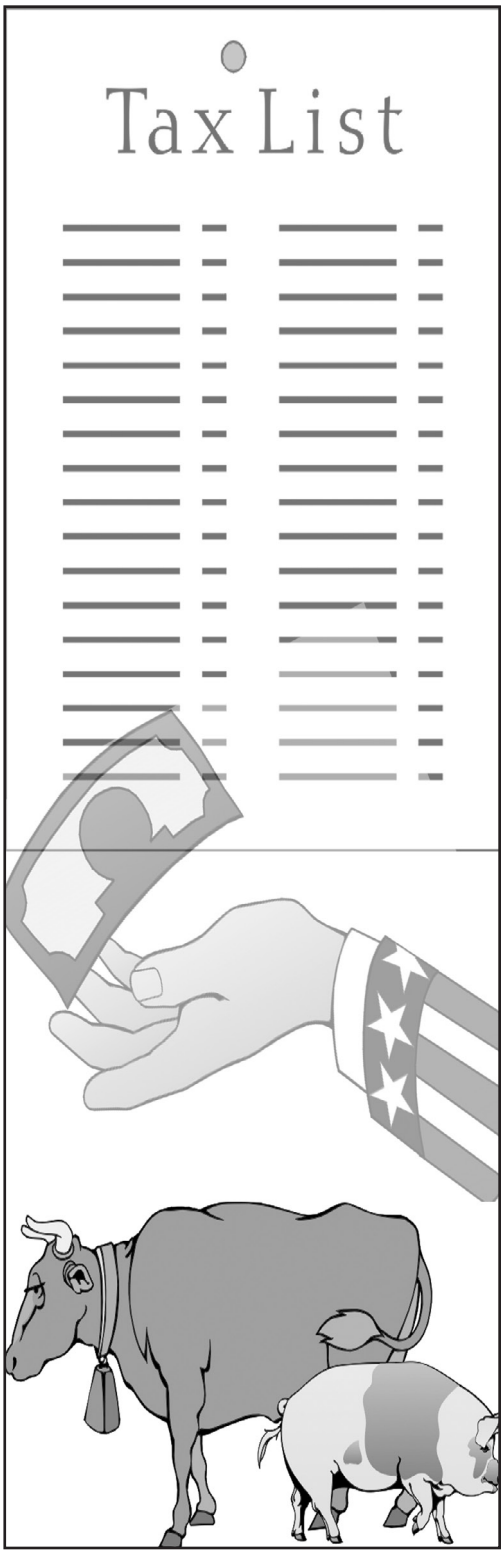


Figure 1. An historical map (such as the one above) can lead to other record groups. This is because researchers can use other jurisdictional names of locations nearby to locate records in repositories that use different filing systems for their records. In South Carolina, for example, prior to the Civil War, records were not filed by county names as is other states, but were centrally located in Charleston. People living in the backgrounds would be found using the name of a river course, tax district, or township listed on a pre-1850 South Carolina census record.



Chapter 3

Census Substitutes-Tax Records

You will learn the following concepts in this chapter:

- Why Tax Lists Substitute for Census Records
- How Tax Lists Help Genealogists
- Types of Tax Lists
- Genealogical Clues from Tax Lists
- Methodology for Studying Tax Records.

Why Tax Lists Substitute for Census Records

Taxes were consistently collected from free males or females who were heads of households. They were usually collected every year and were reconstructed if any were destroyed because people did not want to pay a tax twice. For these reasons, they make a good substitute census record. However, they were not the only substitute record for lost censuses.

Any collection of records that are indexed — such as land or property records, vital, court, or probate records could be used when a census was lost to identify a person in a locality. The problem with using these other records is that they could take much more work to locate an individual, compare that individual with others over several years, data enter the facts for analysis, and write conclusions.

However, due to the abundance of tax records (there were several types), and because they were brief and to the point, they would often take the place of census records in aiding the genealogist to locate resident counties of hard-to-find ancestors so that other county record sources might be explored on an individual basis.

When an entire year of tax records are indexed for one state (such as the 1787 tax records of Virginia), they can be extremely helpful in placing an ancestor in a specific local community where likely other records could be found.

How Tax Lists Help Genealogists

Tax lists are important to genealogists during the time periods they have been indexed and collected, because they indicate when an individual came into a locality during a time of great immigration and migration in this country. They also infer when an individual died or left the area. They can also indicate when sons come of age. They can also provide surname spelling variations, and pick up the names of men who did not own land (but who paid taxes on personal property alone).

Types of Tax Lists

There are three main types of tax records normally used in the nineteenth century. These include:

- real property tax (land),
- personal property (livestock & slaves), and
- a combination of real and personal tax.

Real Property Tax

Tax lists in the United States at the federal level are called direct

Chapter 4

Surname/Locality Approach

You will learn the following concepts in this chapter:

- Review of the Research Cycle
- Common Names for Research Approaches
- The Surname/Locality Approach
- Using Large Databases and Record Collections
- Building a Research Database

Review of the Research Cycle

According to the genealogy research cycle explained in *The Complete Beginner's Guide to Genealogy, the Internet, and Your Genealogy Computer Program*, the budding researcher should:

1. Set a goal.
2. Decide which source to use.
3. Locate that source.
4. Search that source.
5. Copy the information.
6. Evaluate the information.
7. Use the results, and then,
8. Organize and reorganize their new results and repeat the cycle with a new goal.

Sometimes a research goal, such as locating the parents for an individual, appears impossible because of the following problems:

- A surname search yields too many results when searching electronic databases.
- The specific locality (such as a town or county) has not been identified for the principle person so that locality resources can add substance to the person.

During times like this, it is likely that enough information about the principle person is lacking. To illustrate this point a case study will be used along with a research approach for obtaining more evidence.

Solidify the Principle Person

Successful genealogy research requires knowing three key elements before new research begins:

1. A name for the principle person.
2. The date of an event in that person's life.
3. The proper name of the locality in which a key event in that person's life occurred.

If the research statement supporting the goal does not contain all three of these elements, the first step should be to find those three elements before attempting to do further research.

Review Standard Research Forms

Begin by studying the pedigree chart to determine if it contains any general informational clues that will help you find evidence of the above key elements. Consider the case of Simeon Smith, who has no known parents or information about his parents recorded on his pedigree chart. It merely states:

Simeon Smith
Born: 1773
Place: New York
Died: 1851
Place: Parke County, Indiana

What ***is*** known about Simeon is that he was born in the state of New York in 1773 and he died in Parke County, Indiana in 1851. This is a

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