

Rule #1: Type What You See. Remember, you are making an index to help individuals find their ancestors. The individual can review the information about their ancestor on the record image to form their own interpretation and make their own conclusions about an ancestor.

Upper and Lowercase Letters

Type information using uppercase and lowercase letters. Do **not** use all capital letters.

Diacritics or Other Characters

- If a name or place is written with letters or characters that are not used in the English alphabet, if possible, use “Symbols” to add the character.
- For example, if the name is José, use MSWord Symbols to add the accented e (é). Each international letter is listed twice: in uppercase (for example, Ü and in lowercase ü. Be sure to select the letter that has the case you need.

Interpreting Difficult Handwriting

Before you begin indexing a project, try to become familiar with the handwriting style used on the document. This will help you to more correctly interpret names, dates, and places. To do this, try the following:

- Compare how similar letters and numbers were written. If one or two letters are difficult to read, look for the same letters in familiar words that can be read.
- Compare the principal’s name to the names of the father, mother, spouse, or other names in the record.
- If an index exists for the record, check to see if it will help clarify the entry. Or compare the name to supplementary documentation with the record, such as a certificate of correction.
- If you still cannot read the handwriting, type as many letters as possible for each name, then use a question mark (?) to replace each missing letter, e.g. Th???son.

Marking Blank Fields

Use the term “**Unknown or UNK**” for all blank fields. See instructions below for missing parts of names, places, and dates.

Abbreviations

- Names
 - Do **not** spell out a name that was abbreviated.
 - Type names as they were written.
 - Include punctuation when typing names.
- Places
 - If the name of a place was misspelled, type (**sic**) after the misspelling and then if you can

determine the correct spelling, type a correction to the mistake. Exceptions will be noted in each record set, if appropriate.

- If the name of a place was abbreviated and you can determine what the abbreviation stands for, type the complete name instead of the abbreviation, except for U.S. state names. Use the USPS two-letter abbreviation for all U.S. states. Exceptions will be noted in each record set.
- If you are not sure what an abbreviation stands for, type what was written.
- Type punctuation, if included.

Corrected and Crossed-Out Information

If information was crossed out and replaced, type the replacement information. For example, if the person’s name is listed as “Sphina Klabber,” and the name “Klabber” was crossed out and replaced with “Klapper,” you should type the following:

Given Name: Sophina
Surname: Klapper

- If information was crossed out and not replaced but the original information can be read, type the crossed-out information.
- If information was crossed out and not replaced and the original information cannot be read, type **Unreadable**.

Ditto Marks

- If a record has the word “Ditto” or a ditto mark (“) or other sign of repetition, type the corresponding information from the previous record or field. For example, if the first field says Ashton, Thomas and the next two records below says “Ditto,” you would type Ashton, Thomas for the first, second, and third entries.
- Do not type the word “ditto” or the ditto mark itself. Other signs of repetition include the abbreviation “Do” or a vertical or horizontal line under a surname or other information intended to be repeated. Do not use any of these notations. Type out the entry.

Unreadable Information

- If you are unable to read one letter or number, use a question mark (?) to replace the unreadable letter or number. Example: H?ndley

- For consecutive unreadable letters or numbers, use additional question marks for each unreadable letter or number. Example: **Di??on**
- When all information for an indexing field is unreadable, click in the field and type **Unreadable** not Unknown.

Overlays

Overlays are handwritten or typed notes that cover part of another document. Any overlay should be included in the description of the record set.

Punctuation

- Some punctuation is indexed, and some is not. If punctuation, such as a hyphen (-) or an apostrophe ('), is normally part of a name, type it. If not, do not include it. For example, if an individual's name is listed as "William H. O'Rourke," you would type the following:
 - Given Name: William H.
 - Surname: O'Rourke
- Do include the following.
 - Hyphens when they are used in a name, such as "Wilson-Gaston."
 - Apostrophes when they are used in a name, such as "Robert's Farm."

Specific fields

Names

- If the name of an individual was recorded more than once on the same document, review the entire document to locate all occurrences of the name, and type the name one time with the most complete form of the name as it was written. For example, the name of a person recorded as both Wm Millett and William Millett on the same document would be typed as follows:
 - Given Names: **William**
 - Surname: **Millett**
- If you cannot determine whether a name is a given name or a surname, type it in the Given Names field.
- Sometimes it is difficult to tell from the way surnames with prefixes are written on the original record whether there is a space between the prefix and the surname. Either way is correct. Example, McIntyre vs. Mc Intyre. Type what you see.
- If a given name is not indicated or marked with a line, the Given Name field should be marked **Unknown or UNK**.

Surnames

- Use the surname a person was born with (maiden name) before married names in the Surname field.
- Do not assume the surname of an individual based on the surname of someone else, such as a parent or spouse.
- The same rules and exceptions apply to ancestors.

Titles or Terms

- If "Mrs" was used before a name typically used for males, such as in Mrs. Jason Jones, type **Mrs.** in the Title or Terms field if there is one. In this example, **Jason** would be typed in the Given Names field and **Jones** in the Surname field.
- If no Titles or Terms field is available, ignore the "Mrs," and type the name in the corresponding name fields for the woman.
- For the example above, **Jason** would still be typed in the Given Names field and **Jones** in the Surname field.
- Names of Catholic Nuns and Fathers should be Indexed with the name in the Given Name and Surname fields. The terms "Sister" and "Father" should be listed in the Titles field.
- When "stillborn," "baby," or a similar term was recorded for a name in a document, the word should be typed in the Titles or Terms field, if one is available.
- If no Titles or Terms field is available, do not type "stillborn," "baby," or similar term in the Given Names or Surname fields.

Aliases or Name Variations

- A document can include different spellings of a name for one person.
- A nickname or alias name can also be in some documents. If alias names were included or if an individual's name was written with various spellings, type all variants, separating them with the word **Or**.
- If the records you are indexing are in another language, type the equivalent of the word "or" in the primary language of the project. For example, the name of a person recorded as "Joseph (Jozef) Broski AKA Brozowski AKA Brzozowski" would be typed as follows:
 - Given Names: **Joseph or Jozef**
 - Surname: **Broski or Brozowski or Brzozowski**
 - Do not use AKA.

Spouses

- If multiple spouses were listed for a single individual, type information only for the present or current spouse, unless the project instructions direct otherwise.
- If you are not sure which was the current spouse, type information for the first one mentioned.
- If you need to record all spouses, enter the person separately each time with the new spouse indicated.

Places

- Generally, type only the name of the place (for example, type London, not “city of London”).
- Do not include terms such as “county of,” “resided in,” “rural,” “of,” and so on.
- If you cannot determine the correct spelling, type what is recorded on the document.
- Do not include information that does not appear on the record.
- A province may be indexed in the State field.
- When typing a place-name, do not include identifying descriptions or terms, such as “near,” “about,” “around,” with the place-name unless the term is normally used as part of the name.
- If you do not know whether a place-name on a document refers to a city, state, country, or other locality, type the place-name in the geographically smallest locality field that is available.
- Do not type a nationality as a place-name.
- When setting up a record set index, do not set the state field up with a two-letter limit.

Dates

- The original order of recorded dates (such as day–month–year or month–day–year) varies depending on where the documents were created.
- To avoid any confusion, all dates should be typed by year (four digits), month (three letters) day (two digits), e.g. March 3, 1956 would be **1956Mar03**.
- If multiple dates were given for a birth, type the earliest date.
- If multiple dates were given for other events, type the most recent or latest date.
- For events that include a date range, such as “between February 2 and March 9, 1937,” type the most recent or latest date in the range, e.g. **1937Feb02**.

Ages

- Round ages down to the nearest full year, not up. For example:

- If a child was listed as “5 years and 8 months old,” type the age as **5**.
- If a child was listed as less than one year old, type the age as **0** (zero).
- If an age was given as a range, such as 65–67, type the first age that was recorded, which is **65** in this example.
- If an age was recorded as an approximate number, such as “age 14 at next birthday,” “about 14,” “near 14,” or “close to 14,” drop the description, and type the number alone. For these examples, the age would be typed as **14**.
- If an age was recorded as an uncertain number, such as “over 21” or “over 18,” type the number alone.
- If “stillborn” was recorded for an individual, type the age as **0** (zero).
- If a specific age was not given, do not calculate an age from other information, such as dates.
- If the age was not given or if the word “infant” or something similar was written for the age, mark it as **Undetermined**.

Sex

- Do not assume the sex of a person based on given names.
- However, you can use relationship terms or other indications in the language to determine the person's sex, such as the words “daughter,” “son,” “Mrs.,” “she,” “he,” and so on.

Marital Status

- Individuals who were separated or who were married by common law should be indexed as being married.
- Widows should be marked as “**Widowed**.”
- If the image indicates Divorced, you should indicate **Divorced**.

Additional Info:

SYLLABUS Creating an Indexing Project

<https://www.facebook.com/download/283625798859123/SYLLABUS%20Creating%20an%20Indexing%20Project.pdf?hash=AcqOhtpW1Ne4xH4b>

Indexing Project Tasks

<https://www.facebook.com/download/506690763072795/Indexing%20Project%20Tasks.xls?hash=Acq4EbJFFi2EbyME>

Crowd Source Indexing (CSI):

<https://csindexing.com/?fbclid=IwAR0E3tdq9FnW9lWe7c-1Jliw4KIwmlf-Ni2HaeV44dxAkzYdUcyOMWeYfew>