

The Genealogy Do-Over: A Year of Learning From My Mistakes

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Why a Do-Over?

“Starting in 2015, I planned on setting my years of genealogy research aside and starting over. From scratch.”

Thomas MacEntee created the Genealogy Do-Over after 35+ years of research left him frustrated with unsourced names, unproven facts, and old habits that no longer served him. This handout distills the method so you can apply it to your own research—whether you start fresh or review what you already have.

What Goes Wrong in Genealogy Research

Before we fix anything, let’s be honest about the habits that get us into trouble. If any of these sound familiar, you’re in good company—and you’re in the right place.

The Mistake	The Do-Over Fix
Name collecting without proof	Track every data point; enter nothing into your tree until it’s supported by evidence
Grabbing data from other people’s online trees	Research from a place of “I don’t know” and verify every claim with original records
Never citing sources	Cite sources from day one—even a basic “what, where, when” note is better than nothing
Researching at 2 a.m. while half-asleep	Prepare your workspace and mind; use warm-up and wrap-up routines
Chasing every “bright shiny object” (BSO)	Capture new leads on a to-do list and follow them only when your focus is strong
Skipping evidence evaluation	Rank each source by type, clarity, information quality, and evidence type before concluding
No backup plan for research data	Follow the 3-2-1 rule: 3 copies, 2 media types, 1 offsite

The Golden Rules of Genealogy

Thomas MacEntee developed these guiding principles as the foundation for the entire Do-Over. Think of them as the research standards you’d share with a new genealogist—and then follow them yourself.

- 1. There Is No Easy Button.** Genealogy requires skills, smarts, and dedication. Don’t believe the hype of instant hints and shaky leaves.
- 2. Research from a Place of “I Don’t Know.”** Let go of cherished family stories and preconceived notions. Research with an open mind.

3. **Track Your Work and Cite Your Sources.** Use a research log, track every search (even dead ends), and cite sources so you can retrace your steps.
4. **Ask for Help.** The genealogy community is generous. Post queries, attend webinars, email your questions—there are no stupid questions.
5. **You Can't Edit a Blank Page.** Start today. A year from now, you'll wish you had.
6. **Work and Think Like Your Ancestors.** Be resourceful. Have a plan and a network, just like they did.
7. **You Do Not Own Your Ancestors.** Share your research. A 3rd great-grandparent is likely the ancestor of hundreds of people.
8. **Be Nice.** The genealogy community is small. Kindness offered is often returned tenfold.
9. **Give and Be Abundant.** Exchange information freely. An open hand is ready to receive the next good thing coming your way.

Your Turn

What are YOUR golden rules? Divide them into Required, Important, and Optional. Keep this list at the front of your research log.

The 12-Step Do-Over Framework

The Do-Over is structured as 12 progressive steps. You can pace yourself, skip steps you've mastered, or adapt the order to your needs. The key is building a strong foundation before diving into research.

Step	Topics	Key Takeaway
1	Setting Previous Research Aside; Preparing to Research	Box up (or move to a HOLD folder) old files. Prepare your workspace and mindset.
2	Establishing Base Practices; Setting Research Goals	Write down your golden rules. Set specific, provable goals—not vague wishes.
3	Self-Interview; Family Interviews	Start with yourself. Then interview relatives for dates, places, and stories.
4	Tracking Research; Conducting Research	Use a research log. Enter goals, track every search, and capture source details.
5	Citing Sources; Building a Research Toolbox	Cite even in a basic format. Curate a toolbox of calculators, maps, and reference sites.
6	Evaluating Evidence; Online Education	Rank each source (original/derivative, primary/secondary, direct/indirect). Keep learning.
7	Database Software; Digitizing Photos & Documents	Choose software that supports sources and media. Scan at high resolution; preserve originals.
8	Collateral Research; Offline Education	Research the in-laws and siblings. Attend conferences, institutes, and society meetings.
9	Cluster (FAN) Research; Organizing Physical Materials	Investigate friends, associates, and neighbors. Create an archival-quality filing system.
10	DNA Testing Options; Organizing Digital Materials	Learn DNA basics. Name files consistently, add metadata, and follow the 3-2-1 backup rule.
11	Social Media; Research Networks; Travel	Join genealogy groups. Build a network. Plan research trips to archives and repositories.
12	Sharing Research; Securing Data	Share generously with attribution. Future-proof your work with backups and estate planning.

Do-Over vs. Go-Over

Not ready to start from scratch? You can do a "Go-Over" instead—a structured review of your existing research using the same 12-step topics as a guide. Each step includes a separate to-do list for Go-Over participants. Start with your own data and verify each fact: can you prove it? Do you have a source citation?

Taming the Bright Shiny Object (BSO)

A BSO is anything that derails your research focus: a shaky leaf, a newly digitized record set, a free-access weekend, a box of photos from a relative. BSOs are the single biggest threat to productive research sessions.

Your BSO Defense System

- Keep a to-do list open during every research session. When a new lead appears, write it down immediately—then keep working on your current task.
- For free-access offers, ask: Do I already have access? Can I get these records elsewhere (FamilySearch, Internet Archive)? Would a focused one-month subscription later be more productive?
- For new discoveries in a record, create proof-point entries (e.g., “Determine name of wife of AUSTIN John Ralph”) and note how you came across the lead.
- Remember: very few BSOs are so fleeting that they need to be followed right away. Put the item on your list and follow it when your mental focus is strong.

Evidence Evaluation at a Glance

One of the most commonly skipped steps in genealogy is evaluating the quality of your evidence. Here’s the framework from the workbook, based on Elizabeth Shown Mills’ Evidence Analysis Process Map:

Element	Categories	What It Means
Source Type	Original vs. Derivative	Is this the original record or a copy/abstract/transcription?
Clarity	Clear vs. Ambiguous	Can you read and understand the information without guessing?
Information	Primary vs. Secondary	Was the informant close in time to the event, or reporting secondhand?
Evidence	Direct vs. Indirect	Does the record explicitly state the fact, or must you infer it?

A certified birth certificate, for example, would be Derivative (it’s a copy), Clear, Primary (filed near the time of the event), and Direct (birth date is explicitly stated). A newspaper birth announcement with an unknown informant would rank lower on reliability.

Actionable Checklists

Research Session Routine

Before you research:

- Review your to-do list and choose ONE proof point to work on
- Open your research log and have it ready to record finds
- Set a timer or end time so you don't burn out
- Have your toolbox bookmarks, citation templates, and capture tools ready

During research:

- Save record images RIGHT AWAY (never rely on finding them again)
- Log every search—including negative results and dead ends
- Capture BSOs on your to-do list instead of following them
- Note the repository, collection name, and locator for every record

After research:

- Write a brief “what I learned” summary so you can pick up next time
- Update your to-do list with next actions
- Name and file any downloaded images using your naming convention
- Back up new files according to your 3-2-1 plan

Source Citation Quick Reference

A basic citation uses this formula: Author, Title, Publisher, Locator. For online sources, add the access date. Here's a practical example from the workbook:

Example – Census Record:

1850 U.S. Federal Census, Lewis County, New York, population schedule, Leyden, p. 84, dwelling 1254, family 1282, line 36, Clarinda PARSONS, digital images, Ancestry (<https://www.ancestry.com>: accessed 16 October 2011); from National Archives microfilm publication M432, roll 523, image 168.

File naming convention from the workbook: SURNAME GivenName bYEAR RecordType (e.g., SLATTERY John Vincent b1888 WWI Draft Reg Card).

Using AI as a Research Buddy

The 2026 edition of the *Genealogy Do-Over Workbook* introduces AI Assist sections throughout the 12 steps. The core principle: AI is a helper, not a source. Records beat robots.

What AI Can Help With

- Drafting and formatting source citations (always verify against the actual record)
- Generating surname spelling variants and search strings for different databases
- Transcribing and translating records in other languages
- Creating interview questions for family members
- Organizing notes into research logs, timelines, and to-do lists
- Drafting family narrative summaries from your proven facts

AI Integrity Checklist

- Do I have a record image or database entry that supports each fact?
- Did I capture exact repository, collection, and locator info for my citation?
- Are AI-generated guesses labeled as hypotheses, not conclusions?
- Did I protect private data about living people?
- Did I save my AI prompt and response in my research notes?

Resources from the Workbook

The following resources are drawn directly from The Genealogy Do-Over Workbook (2026). Bookmark the ones relevant to your research.

Research Tools & Templates

- Genealogy Research Log (Excel): genealogybargains.com/genreslog3
- Building a Research Toolbox Syllabus: genealogybargains.com/genrestoolbox
- Source Citation Format Templates: genealogybargains.com/citeformats
- Metadata for Digital Images Cheat Sheet: genealogybargains.com/metadata-digital-images
- Genealogy Research Toolbox (example): genealogytoolbox.weebly.com

Evidence & Methodology

- Evidence Explained (Elizabeth Shown Mills): evidenceexplained.com
- QuickLesson 11 – The FAN Principle: evidenceexplained.com/content/quicklesson-11...
- QuickLesson 17 – Evidence Analysis Process Map: evidenceexplained.com/content/quicklesson-17...

AI & Technology for Genealogy

- FamilySearch Full-Text Search: familysearch.org/rootstech
- Ancestry Document Transcription: ancestry.com/c/ancestry-blog
- MyHeritage Photo Enhancer: myheritage.com/photo-enhancer
- Transkribus (historical handwriting): transkribus.org/genealogy

DNA Research

- ISOGG Wiki (DNA terminology & vendors): isogg.org/wiki
- GEDmatch: gedmatch.com
- DNAeXplained – Genetic Genealogy: dna-explained.com

Organization & Preservation

- The Organized Genealogist (Facebook): facebook.com/groups/organizedgenealogist
- Organize Your Family History: organizeyourfamilyhistory.com
- Cyndi's List – Organizing: cyndislist.com/organizing
- A Genealogist in the Archives (Melissa Barker): agenealogistinthearchives.blogspot.com

- Larsen Digital (scanning services): larsendigital.com

Education & Networking

- Conference Keeper (events calendar): conferencekeeper.org
- National Genealogical Society Tours: conference.ngsgenealogy.org/tours
- American Ancestors Heritage Tours: americanancestors.org/heritage-tours
- Family Tree Tours (Germany research): familytreetours.com
- Genealogy on Facebook List: socialmediagenealogy.com
- Technology for Genealogy (Facebook): facebook.com/groups/techgen
- Genealogy – Cite Your Sources (Facebook): facebook.com/groups/Citesources

Reference & Lookup Tools

- Spelling Substitution Tables (FamilySearch): familysearch.org/wiki
- Street Name Changes (Steve Morse): stevemorse.org/census/changes.html
- Archaic Medical Terms Glossary: archaicmedicalterms.com
- Genealogy Software Comparison (Wikipedia): en.wikipedia.org
- GenSoftReviews: gensoftreviews.com

Printed References

- ***Evidence Explained: Citing History Sources from Artifacts to Cyberspace*** by Elizabeth Shown Mills
- ***How to Archive Family Photos*** by Denise Levenick

Your Next Steps

The Genealogy Do-Over isn't a one-time event—it's a framework for continual improvement. Here's how to keep the momentum going after this webinar:

1. Pick your path: Full Do-Over (start from scratch) or Go-Over (review existing research). Neither is better; both improve your skills.
2. Write your Golden Rules and post them where you'll see them every time you research.
3. Download the Genealogy Research Log and set up your tracking system before your next research session.
4. Choose ONE step from the 12-step framework to focus on this month. Don't try to do everything at once.

5. Join the community: connect with The Genealogy Do-Over group and other genealogists online for support, accountability, and collaboration.
6. Schedule regular “maintenance time”—one to two hours per month—for organizing, backing up, and reviewing your progress.

Remember

"You can't make up with speed what you lack in direction." Slow down. Follow the process. Enjoy the journey. Your ancestors are waiting, and this time, you'll find them on solid ground.