

GENERAL DNA GENEALOGY RESEARCH CHECKLIST

The complete master workflow, start to finish

The full workflow from a fresh DNA test result to a documented, source-backed family tree. Use this as your master checklist and dip into the specialist checklists as each stage requires.

Phase 1 — Foundations

- ☐ Take or upload your DNA test to all four major databases — AncestryDNA, MyHeritage, FamilyTreeDNA, GEDmatch — see the Unknown Parentage Checklist Step 1 for details
- ☐ Build out your known tree as far back as records allow — aim for at least 4-5 generations before relying heavily on DNA evidence
- ☐ Attach documentary sources to every generation you can — birth, marriage, death, census, and church records — a name alone in a tree is not evidence
- ☐ Identify your four grandparents' surnames and origin regions — write these down explicitly — they become your reference points for sorting every future match

Phase 2 — Working the matches

- ☐ Review new matches on a regular, written-down schedule — weekly or bi-weekly is realistic for most people — put it on your actual calendar, not just "when I have time"
- ☐ Run the DNA Match Research Checklist on every match above roughly 90 cM — smaller matches are usually too distant to be worth full individual investigation
- ☐ Re-run the Leeds Method or an AutoCluster tool every few months as your match list grows — clusters shift and sharpen as more of your matches test over time
- ☐ Keep your master match spreadsheet up to date after every session — a spreadsheet that's a month behind is far less useful than one updated in real time

Phase 3 — Building evidence

- ☐ Triangulate key segments before drawing conclusions — see the DNA Triangulation Checklist — require 3+ mutually-matching people, not just 2
- ☐ Maintain a chromosome map alongside your tree — see the Chromosome Mapping Checklist
- ☐ Cross-check DNA findings against paper-trail records — census, church, civil registration, and immigration records for the relevant country/period
- ☐ Note conflicting evidence explicitly rather than discarding it — write down what doesn't fit — it often becomes the key to solving a later puzzle

Phase 4 — Special cases

- ☐ Apply the Unknown Parentage Checklist for any unresolved parent or grandparent
- ☐ Apply the Unknown Father No-Match Checklist specifically if you have no direct match to that side at all — cluster-based and probability-scoring methods (WATO, BanyanDNA) apply here
- ☐ Watch for endogamy or pedigree collapse in tightly-knit regions — if your Leeds Method clusters won't separate cleanly, this is often why — see the Leeds Method Checklist's pro tip
- ☐ Consider Y-DNA testing (males only, direct paternal line) or mtDNA testing (all people, direct maternal line) for deep single-line questions — these are separate tests from standard autosomal DNA and are ordered directly through FamilyTreeDNA

Phase 5 — Preserve and share

- ☐ Back up your tree, spreadsheet, and chromosome map on a fixed schedule — monthly is a reasonable minimum; store a copy outside the platform itself (e.g. a downloaded GEDCOM file plus spreadsheet exports)
- ☐ Cite your sources for every DNA-based conclusion — record which specific matches and segments support each claim in your tree, not just "DNA confirms this"

- ☐ Share findings with matches who contributed evidence — *a short thank-you with the conclusion you reached is good practice and often opens further collaboration*
- ☐ Revisit "unsolved" branches every few months as new matches appear — *set a recurring reminder — problems that seemed unsolvable often resolve once enough new testers appear*

Pro tip: Treat every DNA-based conclusion the way a genealogist treats a documentary one: write down the evidence, note the confidence level, and be willing to revise it. The best DNA researchers change their minds when better matches arrive.

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