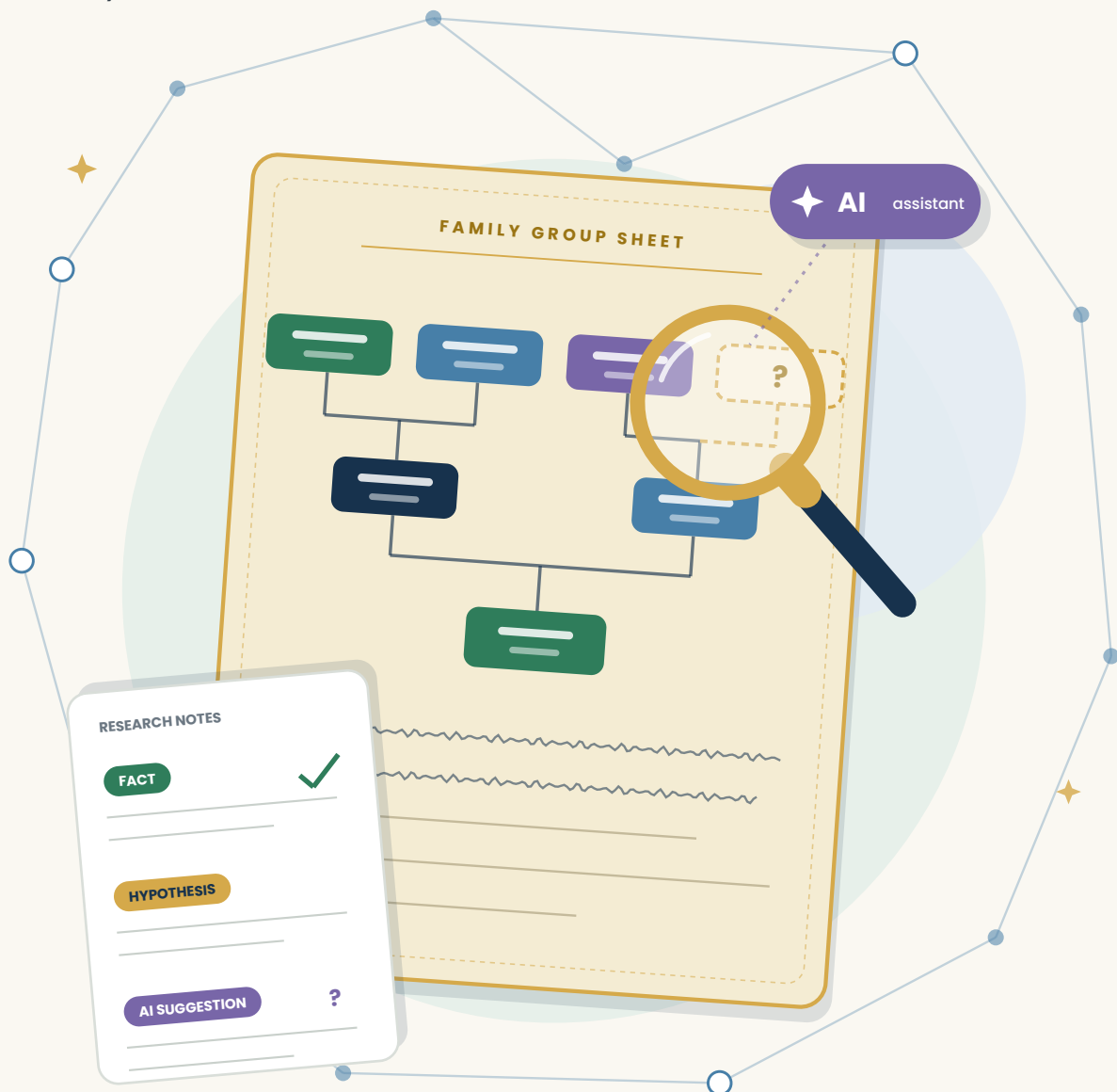


PRACTICAL RESEARCH WORKBOOK

FREE AI GENEALOGY RESEARCH KIT

Practical prompts, worksheets & checklists for using AI in
family history research



START HERE

How to Use This Kit

Think of AI as a **research assistant**, not a researcher. It can help you organise your thinking, suggest ideas you had not considered, tidy messy notes and explain unfamiliar terms. It cannot look inside an archive for you, it does not know your family, and it can be wrong while sounding completely sure.

This kit gives you prompts that ask AI for the right kind of help, and checklists that make you question what comes back. Work through it in order, or jump straight to the page you need.



QUESTION	Decide exactly what you are trying to find out.
CONTEXT	Tell AI what you know, what you suspect and what you do not know.
AI	Ask for help with thinking, organising or exploring. Not for final answers.
CHALLENGE	Ask what could be wrong and what else could explain the evidence.
VERIFY	Go back to original records and reliable sources.
DOCUMENT	Record what you established, what you did not, and how you know.

**Use AI to explore possibilities.
Use evidence to reach conclusions.**

Four labels to keep separate

FACT

Supported by evidence, ideally original records you have examined yourself.

INTERPRETATION

A reasonable explanation of the evidence. It can change when new evidence appears.

HYPOTHESIS

A possibility that still needs testing. Interesting, but not yet established.

AI SUGGESTION

Something generated by AI that may or may not be correct. It stays in this box until you verify it.

WATCH OUT

AI-generated information is not evidence simply because it sounds plausible or confident.

Quick finder

Plan my next research steps	Prompt 1 · p.5	Compare possible explanations	p.10
Check a DNA match	p.11	Read old handwriting	p.8
Translate a foreign-language record	p.9	Test an AI answer	p.12
Spot invented sources	p.13	Log what I did	p.14

THE WORKFLOW

The AI Genealogy Workflow

1

Define the question

What exactly are you trying to establish? One specific question beats a general goal.

2

Gather what you already know

Dates, names, places, relationships, records, DNA evidence. Note where each piece came from.

3

Tell AI what is known and unknown

Label uncertainty clearly: "documented", "assumed", "unknown".

4

Ask AI to help

Use one of the prompts in this kit. Ask for ideas, structure or comparison, not for answers.

5

Challenge the answer

Ask: What could be wrong? What assumptions were made? What alternative explanations exist?

6

Verify

Return to original records and reliable sources. Check that every source AI mentions really exists.

7

Document

Record what was established, what remains uncertain and what you will do next (see the research log, p.14).

My research question

RESEARCH QUESTION

KNOWN FACTS *(with the source for each)*

UNCERTAIN INFORMATION

WHAT I WANT TO ESTABLISH

SECTION 1

Research Question Builder

Vague questions get vague answers. The more precisely you describe the problem, the more useful the response.

TOO VAGUE

"Can you find my ancestor?"

BETTER (FICTIONAL EXAMPLE)

"I am trying to determine whether John Smith, born approximately 1845 in Yorkshire, is the same person who appears in the 1871 and 1881 census records."



Prompt: Turn a problem into a research question

PROMPT · COPY AND PASTE

I am doing genealogy research and need help turning a problem into a clear research question.

My problem: **[describe what you are trying to find out]**

What I know (with sources where I have them): **[list]**

What I am assuming but have not proven: **[list]**

What I do not know: **[list]**

Please:

1. Rewrite my problem as one specific, answerable research question.
2. Separate what I have told you into established facts, assumptions and unknowns.
3. Identify the key information that is missing.
4. Suggest what types of evidence could answer the question.
5. Describe other ways my evidence could be interpreted.

Rules: Use only the information I gave you. Do not invent facts, records, sources or URLs. If you are unsure, say so.

TRY THIS

Green brackets show where to add your own details. Keep the rules at the end of every prompt, they are what stop AI from filling gaps with guesses.

Build your own question

WHO (PERSON OR PEOPLE)

WHERE AND WHEN

EVIDENCE I ALREADY HAVE

ASSUMPTIONS I AM MAKING

MY RESEARCH QUESTION IN ONE SENTENCE

SECTION 2

10 High-Value AI Prompts for Genealogists

Copy the text in the shaded boxes into any general AI chat assistant. Replace the [green brackets] with your details. Start a fresh chat for each research question.

1 Research Planning

Useful for: turning a problem into an ordered plan. **Use when:** you are stuck on where to start or have too many leads.

PROMPT · COPY AND PASTE

Help me build a research plan.

Research question: [your question]

What I know (with sources): [facts]

Place and time period: [place, years]

Records I have already searched: [list]

Create a step-by-step plan in priority order. For each step give: the goal, the type of record to look for, why it might help, and what a negative result would tell me. Only mention record types that plausibly existed for this place and period, and tell me where you are unsure. Do not invent archive names, collection numbers or URLs.

VERIFY Confirm each record type exists for that place and period using the archive's own catalogue or the FamilySearch Research Wiki.

2 Alternative Hypotheses

Useful for: seeing the range of explanations before you commit to one. **Use when:** a theory feels "obvious" but you have not tested it.

PROMPT · COPY AND PASTE

Here is my evidence: [list each item with its source]

Give me at least three different explanations that could fit this evidence, including at least one I may not have considered. Do not rank them or choose a favourite. For each, say what it assumes and which parts of my evidence it explains best and worst. Use only my evidence. Label anything you add yourself as an assumption.

VERIFY Treat every explanation as a hypothesis, not a finding. Add the ones worth testing to the worksheet on p.10.

3 Missing Evidence

Useful for: working out what would tell two explanations apart. **Use when:** you have competing hypotheses and no clear next step.

PROMPT · COPY AND PASTE

I am deciding between these hypotheses: [A, B, C]

Current evidence: [list]

For each pair of hypotheses, what evidence would help tell them apart? Describe the kind of record or information, what each hypothesis predicts it would show, and what result would weaken it. Say "if available" for anything that may not have survived. Do not assume I have already found anything I have not mentioned.

VERIFY Check whether the records you are told to seek existed and survive before you plan around them.

4 Timeline Analysis

Useful for: finding gaps and contradictions in one person's life. **Use when:** you have collected many dates and places for one person.

PROMPT · COPY AND PASTE

Below is a list of events for one person, with sources. Please:

1. Put them in chronological order.
2. Flag gaps longer than [number] years.
3. Flag contradictions or unlikely details (ages at events, overlapping places, events after death).
4. Note where a date is estimated, for example from an age, rather than recorded.

Do not "fix" or harmonise conflicting dates. Show both and explain the conflict. Do not add events I have not listed.

Events (date | place | event | source): [paste]

VERIFY AI can make arithmetic errors. Recalculate ages and intervals yourself.

5 Record Suggestions

Useful for: brainstorming which record types might answer a question. **Use when:** you have run out of obvious sources.

PROMPT · COPY AND PASTE

I want to answer this question: [question]

Person or people: [names, approximate dates] Place: [place] Period: [years]

What types of historical records might contain information that could help? For each type, say what it might record, how likely it is to exist for this place and period (high / medium / low / unsure), and what kind of repository usually holds it. If you are not sure a record type existed here, say so. Do not claim to have searched any database.

VERIFY Record sets differ by country, region and year. Confirm in official archive catalogues and guides.

6 Name Variants

Useful for: exploring spelling, language and naming variations. **Use when:** searches fail and you suspect the name was recorded differently.

PROMPT · COPY AND PASTE

Surname: [surname] First name: [first name]

Place: [place] Period: [years] Language of the records: [language]

Suggest spelling variants, likely transcription errors, phonetic variants and, where relevant, language-based forms or naming customs that could apply. For each, explain why it is plausible. Do not invent variants without a reason, and mark any that are speculative. Do not tell me that variants refer to the same person.

VERIFY A variant is a search idea, not evidence. A matching name in a record does not prove it is your person.

7 Place and Jurisdiction

Useful for: understanding which authority held records, and when. **Use when:** a place name or boundary has changed over time.

PROMPT · COPY AND PASTE

My ancestor lived in [place] around [years]. Explain in general terms which administrative levels (for example parish, county, district) may have applied, what name or boundary changes could affect where records are kept, and what types of archives or record sets I should check. Say clearly what you are sure of and what you are not. Do not invent archive names, reference numbers or URLs. If you are unsure, suggest how I could find the right archive.

VERIFY Boundaries change. Check national or regional archive guides and maps for the exact date.

8 Conflicting Evidence

Useful for: comparing sources that disagree on a date, age, place or relationship. **Use when:** two records tell different stories.

PROMPT · COPY AND PASTE

These sources disagree about [birth year / parents / place]:

Source 1: [details and source]

Source 2: [details and source]

Source 3: [details and source]

For each source, note who probably supplied the information, how close they were to the event, and whether the source looks original or derived. Then explain possible reasons for the disagreement. Do not choose which source is correct. Tell me what additional evidence could help resolve the conflict.

VERIFY These reasons are possibilities. Go back to the original records before deciding anything.

9 Research Notes

Useful for: turning rough notes into a structured summary. **Use when:** your notes are scattered and you need a clear overview.

PROMPT · COPY AND PASTE

Below are my rough research notes. Turn them into a structured summary with these headings: Research question; Established facts (with source); Interpretations; Hypotheses; Conflicts; Open questions; Next steps.

Keep the uncertainty exactly as I wrote it (words like “probably”, “maybe”, “?”). Do not add facts, upgrade possibilities to certainties or fill gaps. If something is unclear, put it under “Needs clarification”.

Notes: [paste]

VERIFY Compare the summary with your originals. Summaries can quietly drop caveats.

10 Research Critique

Useful for: a skeptical review of your own conclusion. **Use when:** you think you have solved it, and before you share or publish.

PROMPT · COPY AND PASTE

Act as a skeptical, experienced genealogy reviewer. Below are my research question, my evidence and my conclusion. Critique them. Identify: weak or missing evidence; assumptions I have not tested; places where I may be treating a possibility as proof; alternative explanations that fit equally well; sources that may be derivative; and the single most important next test.

Do not be agreeable for its own sake. Do not agree with my conclusion unless the evidence I provided supports it. Do not invent evidence.

Question: [question]

Evidence: [list with sources]

Conclusion: [your conclusion]

VERIFY The critique can be wrong too. Treat each flagged weakness as something to check, not something to accept.

RESEARCH TIP

Run Prompt 10 on any conclusion before you add it to a public tree or share it with a DNA match.

SECTION 3

AI for Historical Records

AI can help you read, sort and understand records. Treat everything it produces as a **draft to check**, never as the record itself.

Handwritten records

May help with first-pass transcription; unfamiliar letter forms.

Parish registers

May help with abbreviations and the usual layout of entries.

Census records

May help with organising households; comparing entries across years.

Civil registration

May help with what each certificate type usually records.

Probate documents

May help with legal terms; people and relationships named.

Letters

May help with names, places and dates mentioned; plain summaries.

Newspapers

May help with summarising long articles; extracting events.

Land records

May help with terminology; who held what, and when.

Immigration records

May help with column headings; possible name differences.

Military records

May help with abbreviations and ranks; building a timeline.

The correct workflow



T AI Transcription Prompt

PROMPT · COPY AND PASTE

I am attaching an image of a historical record. Please transcribe exactly what is visible.

- Keep the original spelling, punctuation, abbreviations and line breaks.
- Do not correct, modernise or standardise names, places or dates.
- Mark uncertain readings with a question mark in square brackets, for example Thomsen[?]. Mark unreadable text as [illegible].
- If you are guessing from context, label it "guess:" and say why.
- List any sections you cannot read confidently.
- Do not translate or interpret yet.

Record details (if known): **[type of record, place, year, language]**

TRANSCRIPTION VERIFICATION CHECKLIST

- ☐ I compared the transcription with the original image.
- ☐ Names were checked manually.
- ☐ Dates were checked manually.
- ☐ Place names were checked.
- ☐ Uncertain words were identified.
- ☐ AI did not silently "correct" the record.

WATCH OUT

AI can misread handwriting and still sound certain. It may swap an unusual name for a common one without telling you.

SECTION 4

AI Translation

Translating an old record is three different jobs. Keep them separate, and AI is far less likely to blur them.

TRANSCRIPTION

What the document says, copied in its original language and spelling.

LITERAL TRANSLATION

The same words rendered in your language, staying as close to the original as possible.

INTERPRETATION

What the words meant in their time and place. This needs historical context.

The correct workflow



L

AI Translation Prompt

PROMPT • COPY AND PASTE

Below is a transcription of a record written in [language] from [place], around [period]. Please give me:

1. A literal translation that stays as close to the original wording as possible.
2. A list of words or phrases that are ambiguous, archaic, abbreviated or have no direct modern equivalent, with possible meanings.
3. Separately, any historical context that might help me understand those terms. Mark it clearly as context, not as part of the translation.

Rules: Keep personal names and place names in their original form. Do not modernise or anglicise them unless I ask; you may add a note about equivalent forms. Do not fill in missing words. Mark uncertain translations with [?]. Do not invent sources.

Transcription: [paste]

WATCH OUT

Historical terms may not have a direct modern equivalent. Words for occupations, family relationships, legal status and units of measure can change meaning over time. Ask AI to explain what it is unsure about, then check key words in a period dictionary, an archive glossary or with a speaker of the language.

TRANSLATION CHECKLIST

- ☐ I translated from my checked transcription, not straight from the image.
- ☐ Personal and place names were left in their original form.
- ☐ Ambiguous or archaic terms were listed, not guessed.
- ☐ Historical context is kept separate from the literal translation.
- ☐ Key words were checked in a dictionary, glossary or with a language expert.

TRY THIS

For any phrase you plan to rely on, ask: "Give me two alternative literal translations and explain how they differ."

SECTION 5

AI for Hypotheses

AI is especially good at helping you think through competing explanations. Its job is to expose weak reasoning, not to confirm what you hope is true.

Example (fictional): the unknown father

HYPOTHESIS A
John Smith was the biological father.

HYPOTHESIS B
John Smith was the mother's later husband but not the biological father.

HYPOTHESIS C
The record refers to a different John Smith.

Hypothesis worksheet

HYPOTHESIS	SUPPORTING EVIDENCE	EVIDENCE AGAINST	MISSING EVIDENCE	NEXT TEST
Example: B. Later husband, not father	Mother's marriage to John is recorded in 1871, after the child's birth	1881 census lists the child as "son", not "stepson"	Baptism entry naming the father	Search baptism registers for the exact parish

H

Skeptical comparison prompt

PROMPT · COPY AND PASTE

Act as a skeptical genealogy research assistant. Do not choose the most interesting explanation. Compare these hypotheses based only on the evidence I provide.
Research question: [question]
Hypotheses: A: [...] B: [...] C: [...]
Evidence (with source, and whether it is original or derived, direct or indirect): [list]

For each hypothesis list: evidence that supports it, evidence that argues against it, what would need to be true for it to be correct, and what evidence is missing. Then tell me which items of evidence do not help distinguish between them, and point out any weak reasoning in how I have framed the problem. Do not declare a winner unless the evidence clearly supports one. If the evidence does not distinguish them, say so. Do not add evidence.

TRY THIS

After the comparison, ask: "What evidence would convince you that I am wrong?" If AI only agrees with you, rewrite the prompt or run Prompt 10 on p.7.

SECTION 6

AI + DNA Genealogy

AI can be a useful thinking partner for DNA research, as long as you keep it in that role.

AI CAN HELP YOU

- ✓ Organising DNA match notes
- ✓ Summarising match information you provide
- ✓ Comparing relationship hypotheses
- ✓ Organising cluster observations
- ✓ Identifying questions to investigate
- ✓ Structuring research logs
- ✓ Explaining genetic genealogy concepts
- ✓ Helping you reason through evidence

DO NOT TREAT AI AS DOING THIS

- ✗ Prove a biological relationship
- ✗ Determine an exact relationship from cM alone
- ✗ Identify a common ancestor without sufficient evidence
- ✗ Replace chromosome and segment analysis
- ✗ Replace triangulation
- ✗ Replace documented genealogy
- ✗ Invent family trees

**AI can help you reason about DNA evidence.
It cannot turn a possibility into proof.**

D DNA match hypothesis prompt

PROMPT · COPY AND PASTE

I want help organising hypotheses about a DNA match. I am NOT asking you to determine the relationship.

Total shared cM: [number] Number of segments: [number] Largest segment (cM): [number]

Testing company: [name]

Shared matches, and which side of my tree they seem to belong to: [list]

The match's tree, if they have one: [summary]

What I know about my own tree: [summary]

Possible endogamy or pedigree collapse: [yes / no / unknown]

Please:

1. List the relationship hypotheses that could plausibly fit these numbers, without choosing one.
2. For each, say what it would predict about the tree, the shared matches or other evidence.
3. Say what additional evidence would help tell them apart (for example segment data, triangulation, other matches, documents).
4. List the questions I should investigate next.
5. Mark which statements are DNA-based and which are documentary.

Rules: Do not state a definitive relationship. Do not name a common ancestor unless I have given documented evidence for one. Do not invent trees, matches or statistics. If you mention typical cM ranges, say they are general and that I should check them against a published resource.

DNA NOTE

The same amount of shared DNA can be consistent with several different relationships, and endogamy can inflate sharing. Use a published resource such as the Shared cM Project or the ISOGG Wiki (see p.16) for ranges, and treat AI's numbers as unverified.

WATCH OUT

Raw DNA files and match lists are sensitive. See the privacy checklist on p.13 before you paste anything.

SECTION 7

Before You Believe an AI Answer

Run any AI claim you plan to rely on through these seven checks. Print this page and keep a stack beside you.

SOURCE	Did AI provide a source? Note exactly what it named: a record, a book, a website, or nothing at all.	☐	☐	☐
		YES	NO	UNSURE
EXISTENCE	Does the source actually exist? Look it up yourself in the archive catalogue, library or website.	☐	☐	☐
		YES	NO	UNSURE
CONTENT	Does the source actually say what AI claims? Open it and read the passage or entry. Do not rely on AI's summary.	☐	☐	☐
		YES	NO	UNSURE
ORIGINAL	Can I inspect the original record? Prefer the original image or document over indexes, trees and summaries.	☐	☐	☐
		YES	NO	UNSURE
INDEPENDENT	Is there independent evidence? Online trees that copy each other count as one source, not several.	☐	☐	☐
		YES	NO	UNSURE
ALTERNATIVE	Are there other plausible explanations? Could the same evidence fit another person, place or relationship?	☐	☐	☐
		YES	NO	UNSURE
CONFIDENCE	Is AI expressing confidence without evidence? Fluent, certain wording is not proof. Ask what the claim rests on.	☐	☐	☐
		YES	NO	UNSURE

If any answer is **No** or **Unsure**, the claim is still an AI suggestion or a hypothesis. Label it that way in your notes until you have verified it.

MY VERDICT

☐ Fact
 ☐ Interpretation
 ☐ Hypothesis
 ☐ AI suggestion

CLAIM I AM CHECKING

SECTION 8

AI Hallucinations

A hallucination is when AI produces something that sounds right but is not true. AI writes by predicting likely words, not by looking things up. If a source or fact would *fit* the answer, it may generate one, with names, dates and citations that look convincing.

WHAT AI MIGHT SAY (FICTIONAL)

"According to the 1881 Yorkshire Census, John Smith (born about 1845) was living in a household of six..."

The problem: AI may write this even though it never checked that census. Details may be invented, or real details may be attached to the wrong person.

TRY THIS

Ask this:

"Did you actually access this source, or are you inferring that it exists?"

AI OUTPUT ≠ SOURCE

Never cite an AI answer as your genealogical source. Cite the original record you examined: its title, the repository or website, the date and where you found it.

SECTION 9

Privacy & Family Data

Privacy policies differ between AI providers and change over time. Before you upload sensitive material, read the provider's current terms and settings. When in doubt, leave it out or anonymise it.

THINK BEFORE UPLOADING

- DNA data and raw DNA files
- Health information
- Information about living relatives
- Home addresses
- Private letters and correspondence
- Sensitive family circumstances
- Adoption information
- Other identifying details

BEFORE I UPLOAD THIS INFORMATION

- ☐ Is this about a living person?
- ☐ Is it sensitive?
- ☐ Do I actually need to provide it?
- ☐ Can I anonymise it?
- ☐ Have I checked the AI service's current privacy practices?

TRY THIS

To anonymise, replace names with "Person A" and "Person B", widen exact dates to years, and remove addresses. AI can still help you reason about a structure without knowing who the people are.

SECTION 10

AI Research Log

One page per research question. Fill it in as you go, so you can see later exactly what came from AI and what came from records.

DATE

AI TOOL

RESEARCH QUESTION

WHAT INFORMATION DID I PROVIDE?

PROMPT USED

WHAT DID AI SUGGEST?

WHAT DID I VERIFY?

SOURCES CHECKED

WHAT CHANGED AFTER VERIFICATION?

FINAL CONCLUSION

REMAINING UNCERTAINTY

NEXT STEP

STATUS OF MY CONCLUSION

☐ Fact☐ Interpretation☐ Hypothesis☐ AI suggestion

QUICK REFERENCE

10 Rules for AI Genealogy

- 1 **Start with a question.**
Vague questions get vague answers.
- 2 **Give AI context.**
Tell it what you know, what you suspect and what you do not know.
- 3 **Separate facts from assumptions.**
Label every statement before you paste it in.
- 4 **Ask for alternative explanations.**
One explanation is a guess. Several is a start.
- 5 **Never confuse confidence with evidence.**
Fluent writing is not proof.
- 6 **Verify important claims.**
Especially names, dates, places and relationships.
- 7 **Check original records.**
Indexes, trees and summaries are not originals.
- 8 **Do not trust invented citations.**
Look up every source AI mentions.
- 9 **Protect sensitive family information.**
Think before you upload. Anonymise when you can.
- 10 **Document how you reached your conclusion.**
Future you, and other researchers, will need it.

FACT	INTERPRETATION	HYPOTHESIS	AI SUGGESTION
------	----------------	------------	---------------

Never blur these four.

SIX FOLLOW-UP QUESTIONS TO ASK AFTER ANY AI ANSWER

- ? What could be wrong with this answer?
- ? What other explanations fit the same evidence?
- ? Which parts came from my information, and which did you add?
- ? Did you access this source, or are you inferring it exists?
- ? What assumptions did you make?
- ? What would convince you that I am wrong?

**AI can help you research smarter.
You are still the researcher.**

WHERE NEXT

Continue Your Research

GeneticVoyage.com is an educational website for family historians. It provides practical resources for genealogists and genetic genealogists, including:

DNA Academy

Step-by-step learning for genetic genealogy concepts.

DNA research tools

Tools and templates for working with DNA matches.

Research Hub

Guides to records and archives, by region.

Free genealogy templates

Printable and spreadsheet templates for your research.

Research guides

Practical guidance on research method.

geneticvoyage.com

Further reading

FamilySearch Research Wiki familysearch.org/en/wiki

Free guides to records, places and methods, by country and region.

The National Archives (UK) nationalarchives.gov.uk

Research guides and catalogue for records held in the UK.

U.S. National Archives (NARA) archives.gov/research/genealogy

Guidance for researching U.S. federal records.

Your national or regional archive

For example Riksarkivet in Sweden (riksarkivet.se). Search its guides and catalogue first.

ISOGG Wiki isogg.org/wiki

Reference for genetic genealogy terms and concepts.

The Shared cM Project

Blaine Bettinger's crowd-sourced data on shared cM ranges by relationship.

Board for Certification of Genealogists bcgcertification.org

Genealogy Standards, including the Genealogical Proof Standard.

National Genealogical Society ngsgenealogy.org

Research guidance and educational resources.

Evidence Explained

By Elizabeth Shown Mills. The standard reference for citing genealogical sources.

This workbook is an educational resource. AI tools change quickly, so check each tool's current features and terms. Websites and archives reorganise their pages, so search by name if a link has moved.