Guide to Applying for an Accredited Genealogist® Credential

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Introduction

The International Commission for the Accreditation of Professional Genealogists, internationally recognized as ICAPGen℠, is a professional credentialing organization that evaluates an individual's competence in genealogical research and awards the Accredited Genealogist® credential to qualified individuals. A board of Commissioners with extensive experience oversees the organization.

ICAPGen administers examinations to applicants who demonstrate sufficient writing skills and practical research background. Preparation for this exam readies a candidate for excellent client work. ICAPGen offers accreditation regions worldwide, allowing individuals who pass the exams to claim expertise as research professionals in that specific region. For a current list of accreditation regions, please visit the [Testing Regions & Regional Resources](#) page at the ICAPGen website.

There are numerous benefits to becoming an Accredited Genealogist® professional:

- Holding a highly respected credential recognized by the professional genealogical community for over fifty years
- Independent verification of genealogical skills and knowledge
- Specialized expertise in specific regions of the world
- Increased credibility based on adherence to the [ICAPGen Code of Ethics](#)
- Opportunities to serve within the ICAPGen organization
- Ability to testify as an expert witness in estate and kinship matters
- Greater marketability as a practicing professional genealogist

For those who become accredited, ICAPGen will:

- maintain the AG® Registered Trademark and the ICAPGen℠ Service Mark;
- keep records, including the application, written exams, oral review, and subsequent renewal materials for each AG® professional, until each receives emeritus status or resigns;
- provide a certificate for display;
- offer space on the ICAPGen website for a customized biography of the AG® professional, including contact information, research specialties, and other relevant service-related details;
- act as an intermediary to protect the interests of both the consumer and the AG® professional.

Mission Statement

The mission of ICAPGen is to advance the field of family history and genealogy globally by accrediting and promoting genealogy professionals who demonstrate competence, ethics, and reliability and to promote the preservation of genealogical materials.

ICAPGen carries out its mission through:

- encouraging, mentoring, and educating genealogists;
- testing each applicant's competency as a prerequisite for accreditation;
- requiring periodic renewal to ensure up-to-date skills;
- stipulating adherence to ethical standards;
- maintaining a public directory of ICAPGen Accredited Genealogist® researchers;
- educating consumers about the value, process, and complexity of family history and genealogy research while maintaining goodwill by working with clients and AG® professionals if a dispute arises;
- promoting the preservation of genealogical materials for future generations.

Professional Standards

This list summarizes key points from the ICAPGen Professional Ethics Agreement. Accredited Genealogist®
professionals are expected to adhere to high professional standards at all times and agree to the following
standards.

- Conduct themselves in a professional and respectful manner at all times.
- Never cause or permit any action that could harm ICAPGen, its members, its reputation, the goodwill
  associated with its service marks, or its business or other interests.
- Never engage in illegal, deceptive, misleading, or unethical practices or advertise or otherwise represent
  their services or accreditation status in a misleading or deceptive manner.
- Reply promptly to all communications that concern their work and/or conduct as an AG® professional.
- Clearly inform their patrons of their fee schedule, the use of others in the discharge of their work,
  methods of reporting their progress and findings, their areas of accreditation, and their status as an AG®
  professional.
- Regularly keep clients updated on the project's progress.
- Establish and maintain an accounting system to protect and segregate funds deposited by their clients
  until they have performed services corresponding to the amount on deposit.
- Adhere to the ICAPGen Code of Ethics.
- Hold ICAPGen and its representatives harmless from any and all claims, suits, causes of action, losses,
  damages, liabilities, costs, charges, and expenses arising from or related to: (i) their exercise of any of
  their rights and/or obligations under the terms of their agreement; (ii) any actions performed or
  neglected to be performed by any third parties under their direction and/or control; and (iii) any breach
  of this agreement by the accredited researcher.
- Allow ICAPGen to inspect and review any materials they have produced that bear any of the marks of
  ICAPGen to ensure these marks are being used properly and to cooperate with ICAPGen in
  implementing any corrective measures that ICAPGen may require of the accredited researcher.
- Maintain the confidentiality of all information provided to the accredited researcher by ICAPGen,
  including, but not limited to, tests, standards, marks, and business operations, processes, and strategies.
  The accredited professional understands that any such material is the sole property of ICAPGen and
  agrees to never disclose any such material to any third party without the express written consent of
  ICAPGen. They agree to return all such materials to ICAPGen immediately upon request.

Accredited Genealogist® professionals must sign a detailed Professional Ethics Agreement when they first
become accredited and again every five years when they renew their credential(s). AG® professionals found in
violation of the Professional Ethics Agreement will face immediate and permanent revocation of their
Accredited Genealogist® credential. ICAPGen℠ reserves the right to update and modify the Professional Ethics
Agreement as needed.

Plagiarism Warning

ICAPGen emphasizes the paramount importance of upholding the integrity of the accreditation process. We strictly prohibit plagiarism and caution potential applicants against engaging in it. Plagiarism is presenting someone else's work, ideas, or words as one's own without giving proper credit or citation. ICAPGen will summarily and permanently dismiss any applicant who engages in plagiarism during the accreditation process.

Artificial Intelligence

ICAPGen permits applicants to use large language models (LLMs) and generative artificial intelligence (AI) while preparing their Four Generation Projects. ICAPGen emphasizes the importance of using these tools with honesty and integrity in ways that uphold ICAPGen standards and values.

The intent of this policy is to allow the use of AI in the same manner we allow limited human assistance or peer review of Four Generation Reports. For example, it would be inappropriate for another person to re-write the report; therefore, using AI to generate the Four Generation Report would be inappropriate. All LLMs and AI tools consulted must be included in the research log.

Conversely, it is acceptable for a peer to review a report and offer suggestions to improve clarity; therefore, it would be appropriate to use AI to review an already written report to help improve reader comprehension. The applicant is responsible to verify and discern the appropriate use of any suggestions made by AI tools.

During the timed Written Exams, candidates must be prepared to demonstrate their own research and writing skills. For security reasons, ICAPGen prohibits candidates from entering test questions or test documents into any LLMs or AI tools (including search engines like Google) during the Written Exams. Candidates may not be logged into any LLM or AI tools.

This statement is in force as of the publication date of the current Guide to Accreditation. Given the rapidly evolving nature of artificial intelligence, this policy may be subject to revision as deeper reflections are made and in response to advancements in AI capabilities.

Accreditation Process Overview

ICAPGen provides testing for various regions worldwide. Region-specific exams allow ICAPGen to evaluate applicants' understanding of key records, history, geography, and methodologies in their chosen region. For an updated list of accreditation regions, refer to "Testing Regions & Regional Resources" on the ICAPGen website.

The accreditation process consists of two evaluation phases, which assess the applicant's skills and knowledge. The evaluation phases include the Four Generation Project and the Written Exams. The accreditation process then culminates with an Oral Review to ensure the candidate's genealogical expertise and regional knowledge. A minimum score of 90% or higher in all evaluations is required to attain a passing grade. However, if a candidate scores between 85% and 89% on any evaluation phase, or if a subject matter expert deems it necessary, the Testing Committee or Oral Review Panel may assign the candidate an Educational Assignment to address

specific weaknesses identified by raters. All evaluations, including Educational Assignments, are scored using a rubric to ensure proper evaluation.

Four Generation Project
The Four Generation Project assesses applicants' research and writing abilities and their regional knowledge. The submission includes a 25-40 page research report, research log, document file, family group sheets, and pedigree chart.

Written Exams
The examination process comprises three parts: a Document Interpretation Exam, a General Knowledge Exam, and a Final Project. The Document Interpretation Exam assesses the candidate's proficiency in handling documents, planning research, and skills in paleography, transcription, and translation. The General Knowledge Exam measures the candidate's understanding of the history, geography, record types, and methodologies pertinent to their selected region. The Final Project is a four-hour exam designed to assess skills in data analysis, research planning, methodology, time management, and report writing skills.

Oral Review
The accreditation process concludes with an Oral Review lasting 45–60 minutes. A panel of Accredited Genealogist® researchers evaluates the candidate's overall regional knowledge and expertise.

Candidates who successfully complete each accreditation phase receive a congratulatory letter and acknowledgment on the ICAPGen website. Those who pass all phases earn the title of Accredited Genealogist® and are authorized to use the AG® postnominal.

Scheduling & Fees

ICAPGen provides two testing options. Candidates can participate in on-site testing, held three to four times yearly at the FamilySearch Library in Salt Lake City, Utah. For the current exam schedule, fees, and deadlines, please refer to the ICAPGen website.

Candidates who wish to avoid travel to Salt Lake City may arrange a custom-scheduled exam for an additional fee. For the current fee structure and to schedule a custom test, please contact the ICAPGen Testing Secretary at testing.secretary@icapgen.org.

If a candidate cannot pass one of the accreditation phases after two attempts, they must wait twelve months to resubmit or retake it. During this time, they should follow suggestions from the Testing Committee and seek mentoring to address their shortcomings before being eligible for another attempt.

Preparation Resources

The ICAPGen accreditation requirements are rigorous to ensure those awarded the credential can produce professional results. ICAPGen provides several tools and resources to help interested individuals improve their genealogical skills and prepare for accreditation. ICAPGen **does not require** applicants to take advantage of these resources but does suggest researchers seek ways to increase their genealogical skills. Preparatory resources might present varied explanations of the accreditation requirements compared to this official "Guide to Applying

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for an Accredited Genealogist® Credential" (Guide to Accreditation). In such instances, the requirements and explanations outlined in the latest version of the Guide to Accreditation take precedence and hold the highest level of authority. All ratings adhere to the requirements within this guide.

ICAPGen Study Groups

The ICAPGen Education Committee offers two [ICAPGen Study Groups](#) that coincide with the accreditation phases. The Four Generation Study Group and the Test Prep Study Group each run twice a year. ICAPGen does not require study group attendance to apply for accreditation. However, study group participants learn about accreditation requirements in depth, leading to a higher rate of successful accreditation.

ICAPGen YouTube Channel

The [ICAPGen YouTube Channel](#) contains videos to help accreditation applicants understand the process and learn the skills necessary to accredit successfully. The channel also features videos by Accredited Genealogist® presenters who showcase methodology for their region of focus. ICAPGen continues to develop and add more videos focusing on the many accreditation regions worldwide.

Conferences and Institutes

Genealogy conferences provide excellent skill-building opportunities and advanced methodology learning for specific regions. Look for classes taught by credentialed professionals. Institutes provide in-depth learning in specific regions, record types, or methodologies. These learning opportunities take place virtually and in person. In addition, Accredited Genealogist® instructors teach an accreditation course at the Salt Lake Institute of Genealogy every other year.

ICAPGen Accreditation Mentoring Facebook Page

ICAPGen invites applicants to join the [Facebook page](#) dedicated to addressing questions from applicants and candidates. Additionally, it serves as a platform for connecting prospective applicants and candidates, providing guidance and support during the accreditation process.

ICAPGen Publication: Becoming an Excellent Genealogist

 ICAPGen has released a compilation of essays written by Accredited Genealogist® professionals called *Becoming an Excellent Genealogist: Essays on Professional Research Skill* available at [Amazon](#). The publication discusses genealogical research skills, concepts, methodologies, and practices. These essays offer instruction, guidance, and perspectives on skills expected of professional-level genealogists.

Accreditation Readiness Assessment

The [Accreditation Readiness Assessment](#) helps applicants evaluate their skills and experience to determine their readiness for the accreditation process. ICAPGen expects candidates to have the minimum research and writing experience reflected in this assessment before applying. Gaining the listed skills and experience is essential to

successful accreditation. If applicants answer 'no' to any item on the questionnaire, they should acquire further experience and education in that area before applying for accreditation. Applicants must complete this assessment online to fulfill the Four Generation Project requirement.

Although ICAPGen does not mandate that applicants submit evidence of suggested research hours, those with limited research experience often score below the necessary 90% to pass the Four Generation Project successfully. Additionally, they are more likely to face difficulties during the Written Exams.

ICAPGen suggests the following research hours to prepare for accreditation:
- Obtain a minimum of 1000 hours of combined genealogical research experience and genealogical education. More than 500 of those hours should be research experience in the records of the chosen region, as listed in the [Regional Resources Guide](#). ICAPGen suggests that candidates keep a detailed record of their research hours for their own benefit.
  - At least 100 hours of the 500 hours of experience should be researching nationwide record types of their chosen region (such as census records, military records, or other record sets held at the national level).
  - A minimum of 400 combined hours should be spent researching the records of the various administrative divisions of the chosen region (i.e., state in the U.S., province in Canada, län in Sweden, región in Peru, county in England, etc.). Applicants should research throughout the region by exploring records and repositories in many jurisdictions. For example, if applying for accreditation in the Italy region, researchers should be familiar with records and methodologies in both northern and southern Italian administrative divisions.
- Acquire research experience throughout their genealogical journey using at least ten relevant repositories and websites for the chosen region. These must include offline (e.g., archives, libraries, courthouses) and online repositories (e.g., *FamilySearch*, *ScotlandsPeople.gov.uk*, *Filae.com*, etc.)
  - For example, corresponding with two archives, ordering records from one courthouse, performing research in two libraries, and becoming proficient in five internet sites related to the chosen region would meet the requirement of utilizing ten recommended repositories.
  - Applicants are not required to have personally resided, visited, or conducted research on-site in their selected region.
- Dedicate more than 100 hours to reading and using old documents in the chosen region's primary language(s). See the ICAPGen website for [Language Requirements](#) for each testing region.
- Demonstrate proficiency in writing clear, understandable, professional-quality research reports for personal and client research (paid or pro bono). ICAPGen suggests that applicants gain experience before applying by writing several client reports that include evidence analysis, conflict resolution, solid conclusions, consistent footnote citations, and research logs to record findings.
- Participate regularly in professional development activities such as reading books, studying professionally written reports in well-known genealogy publications, attending genealogical conferences and institutes, and watching webinars.

Individuals holding prior AG® or CG® credentials pursuing an additional credential through ICAPGen only need to complete the research experience hours within their chosen region.

Four Generation Project Guidelines

Four Generation Project Overview

The Four Generation Project allows applicants to showcase a wide variety of research skills and methodologies. This project requires establishing generational links across four consecutive generations of a family who had at least one life event within the same geographic region. The Four Generation Project is designed to evaluate the following skills and attributes essential for conducting professional-level genealogical research.

Research Skills: Applicants must demonstrate the ability to plan and conduct genealogical research using appropriate genealogical methodologies based on a well-defined research objective. They should exhibit a level of professional competency that clearly distinguishes them from amateur researchers.

Report Writing: Applicants must craft a professional, clear, organized, and well-structured research report that effectively presents research findings and conclusions as if communicating with a client.

Analytical Ability: Applicants must effectively analyze and correlate genealogical records to establish generational links.

Regional Expertise: Apply in-depth regional knowledge of the following topics:
- Research methodology
- History of the region and surrounding areas
- Geography, migration, and settlement patterns
- Historical and current laws
- Historical and current jurisdictions
- Relevant social customs, including religious practices

Preparing to Submit a Four Generation Project

Before submitting a Four Generation Project, please follow these steps:

STEP #1: Read the "Guide to Applying for an Accredited Genealogist® Credential."
This guide presents all ICAPGen requirements and guidelines for the accreditation process. A careful review will help applicants prepare a successful Four Generation Project and study for ICAPGen Written Exams. Refer to this guide often while researching, organizing, and writing a Four Generation Project.

STEP #2: Choose a region and a family to begin research.
Choose a region and identify a family to research for the Four Generations Project. Find a research family that allows a majority of the research to be in the selected region. The subjects on the pedigree chart must have at least one vital event or documented residence in the accreditation region. Check the ICAPGen YouTube Channel for further help.

STEP #3: Study the "Regional Resources Guide" for the region.
Successful applicants demonstrate extensive familiarity and experience with the records, resources, and strategies outlined in the Regional Resource Guide for their chosen region. Applicants must familiarize themselves with the guide and develop experience using a variety of record types from that document.

STEP #4: Complete the "Accreditation Readiness Assessment."
The Accreditation Readiness Assessment helps applicants evaluate if they possess the necessary experience and skills for ICAPGen accreditation. Meeting these criteria is vital for a successful accreditation journey. While ICAPGen does not require applicants to provide proof of suggested research hours, candidates with limited research experience often score below the 90% threshold needed to pass the Four Generation Project. Furthermore, they are likely to encounter challenges when undertaking the Written Exams.

STEP #5: Write and evaluate the project.
The Four Generation Project Self-Assessment covers the rating rubrics for the Four Generation Project and will help applicants determine if their project meets the extensive requirements before submission. If the self-assessment indicates areas of weakness, please take time to improve and polish the project before submitting it.

STEP #6: Apply and Pay the Four Generation Project fee.
After completing steps 1-4, applicants may pay the fee and begin the submission process. Applicants must be prepared to upload their Four Generation Project before paying their project fee. Pay the required fee at Pay Fees – ICAPGen.

STEP #7: Submit the Four Generation Project.
After the fees are processed, the Testing Secretary will email instructions for submitting the Four Generation Project electronically. Please allow five to seven (5-7) business days for processing and for the secretary to email instructions.

Rating Procedures

Rating: Raters evaluate the Four Generation Project in the following areas—Core Requirements, Writing Requirements, and Methodology Requirements.
- The Four Generation Project must first meet both the Core Requirements and Writing Requirements before evaluators will assess it for Methodology Requirements. These requirements are fundamental elements in producing a professional-level report. Applicants who do not meet the Core Requirements or the Writing Requirements will have six months to submit a revised project. No additional fee will be charged for this resubmission.
- Applicants who do not meet the Methodology Requirements for the Four Generation Project will have one year to revise and resubmit their work for a fee.
- If the Testing Committee recommends an Educational Assignment, applicants will have one month to complete the assignment for a fee.

Four Generation Project Rating Time: We aim to process ratings as soon as possible. However, rating projects is a multi-step process that relies on the volunteer efforts of Accredited Genealogist® professionals. Please allow several months to receive the results.

Four Generation Project Guidelines

General Guidelines for the Four Generation Project

Research Family: Applicants should carefully select the family for the Four Generation Project to highlight advanced research skills, a breadth of sources, and in-depth knowledge of the region, preferably spanning 100 years or more. While applicants may research one of their own family lines for the Four Generation Project, they may choose a family with whom they have no personal connection.

Generational Linkage: A qualifying project should present four connecting generations, each living in the accreditation region for at least a portion of their lives. Ideally, each individual listed on the pedigree chart will have at least one vital event (birth, marriage, and/or death) in the region or documented residence in the accreditation region. All vital events for these individuals must be documented in the report and family group sheets. The majority of the project should focus on research in the region of interest. Most candidates choose a starting birthdate for Generation One between 1880 and 1920. Some difficult projects begin with a family in an earlier or later time period. Others are in an area with scant documentation. ICAPGen encourages pursuing challenging projects. If you believe your project should qualify for an exception based on these circumstances, please contact the Testing Secretary at testing.secretary@icpapgen.org for prior approval before beginning your project.

Original Research: Applicants must conduct original research rather than rely on previously compiled or published materials to support their project. They should only use resources such as FamilySearch Family Tree, user-submitted online trees, or published compiled genealogies as the starting point for research. Furthermore, applicants should not structure their project simply to provide documentation to bolster another researcher's conclusions.

Main Subject: The person of interest in the most recent generation must have been born on or before a birthdate 80 years before the submission of the project. For example, if a project is submitted in 2024, the most recent ancestor must have been born in or before 1944; in 2025, the birthdate cut-off changes to 1945. Generation One (the most recent individual) must be deceased. Although marriage is not a requirement for Generation One, if they were married, their spouse(s) must also be deceased. Please contact the Testing Secretary at testing.secretary@icapgen.org if you have questions about whether a main subject or family qualifies.

Obtaining Records: Applicants must thoroughly research and obtain needed documents. Where appropriate and necessary for the accreditation region, applicants should contact archives, libraries, government clerks, religious repositories, genealogical and historical societies, among others, to acquire needed documents.

Extensive Research Through Time: Although not a strict requirement, if Generation One (the most recent individual) was born in the 20th century, ideally, the focus family's birth years should extend over 100 years or more. For example, if Generation One was born in 1943, Generation Four should be born in or before 1843. This extended research time frame allows researchers to showcase advanced research skills by consulting a wide range of sources, utilizing multiple research methodologies, and considering the broader historical context relevant to the research objective.

Wide Variety of Records: The presentation of four connecting generations in the project should represent the applicant's knowledge of a wide range of records. The regional focus allows for hands-on practice in records that may be included in the Written Exams. ICAPGen requires applicants to incorporate most record types specified in the [Regional Resources Guide](#) into their Four Generation Project. This practice helps applicants gain experience with a wide variety of record types. The research log and written report should reflect the utilization or searches for all major regional record types. If major record types are not located during research, the search attempts must be documented in the research log.

Format: Submit all elements of the Four Generation Project in PDF format. If desired, submit the project in several PDF files: written report, research log(s), key documents, pedigree chart, and family group sheets. Please be aware that some word processing programs may alter the spacing when converting documents to PDF. Applicants should carefully review the PDFs before submission.

Software: Applicants should create the pedigree chart and family group sheets using personal genealogical software (e.g., RootsMagic, Legacy Family Tree, Reunion, Family Tree Maker, Ancestral Quest, etc.). Family group sheets must include footnote citations. Forms from online family tree platforms such as FamilySearch Family Tree, MyHeritage Family Tree, or Ancestry Member Trees are not acceptable because these online family trees lack citation functionality. ICAPGen does not accept GEDCOM files or databases.

Language: ICAPGen is an international organization. Applicants who wish to submit their project in a language other than English, such as Spanish, German, or Norwegian, should contact the Testing Secretary at testing.secretary@icapgen.org for permission.

> For example, applicants fluent in Spanish seeking accreditation in Chile may submit their Four Generation Project in Spanish. Applicants fluent in Norwegian seeking accreditation in Norway may submit their Four Generation Project in Norwegian.

Identifying Information: ICAPGen practices blind rating and assigns applicants an ID number. Applicants must remove all identifying information, such as name, logo, and other identifiers from each Four Generation Project element, i.e., the written report, research log, all document images, the pedigree chart, and all family group sheets of the submission.

DNA: Genealogists increasingly use DNA as a tool in their research. Applicants who wish to include DNA in their project should keep the following in mind:
- In conjunction with documentary evidence, DNA is a source to prove genetic relationships and can be used to add additional evidence to a generational linkage. If there is sufficient documentary evidence, applicants are not required to include DNA evidence in their Four Generation Project. DNA is most beneficial when bolstering documentary evidence.
- Because adding DNA evidence may be lengthy, include it only when necessary. DNA evidence should not overshadow research in important document types.
- If DNA is included, provide the relevant scientific context. This could consist of DNA inheritance paths, definitions of genetic terminology, and explanations of how the DNA confirms a genetic relationship. Citations should be included for contextual information and DNA evidence.
- Appropriate diagrams and tables should accompany the DNA section.

- Applicants may include their own DNA test results and the results of testers who have given their written consent. DNA matches should be anonymized.
- Consider using DNA as a future recommendation.

Core Requirements

The primary goal of a Four Generation Project is for the applicant to present original research with compelling evidence linking four generations within a family line. The applicant must connect the parent-child relationships among four consecutive generations of a family who resided in the same geographic region for at least a portion of their lives. Additionally, the majority of the project should focus on research in the region of interest.

To meet Core Requirements, applicants must submit:
- a **written report** between 25-40 pages long;
- a well-organized research log;
- images of **key documents** (documents providing evidence of generational links)—No more than 40 documents are allowed;
- a **pedigree chart** with only seven individuals, including Generation One without their spouse, and the other three couples.
- at least **three family group sheets** (one for each couple on the pedigree chart);
  - Generation One (the most recent individual) as a child with parents (Generation Two and spouse) and siblings
  - Generation Two as a child with parents (Generation Three and spouse) and siblings
  - Generation Three as a child with parents (Generation Four and spouse) and siblings

If anyone presented on the pedigree chart was married more than once, submit additional family group sheets documenting those family units.

Generational Links:
- The written report, presented in an ascending format, should clearly establish the **generational links** to both parents in each generation. Specifically, the written report should present evidence of the relationship between:
  - **Generation One** (the most recent individual) and their mother AND father;
  - **Generation Two** and their mother AND father;
  - **Generation Three** and their mother AND father.
- There is no requirement to prove the generational link between **Generation Four** (the most remote generation) and their mother and father. However, including future research suggestions to discover or document this link is appropriate.
- The Four Generation Project may follow the male line, the female line, or a combination of both, as in the example below.
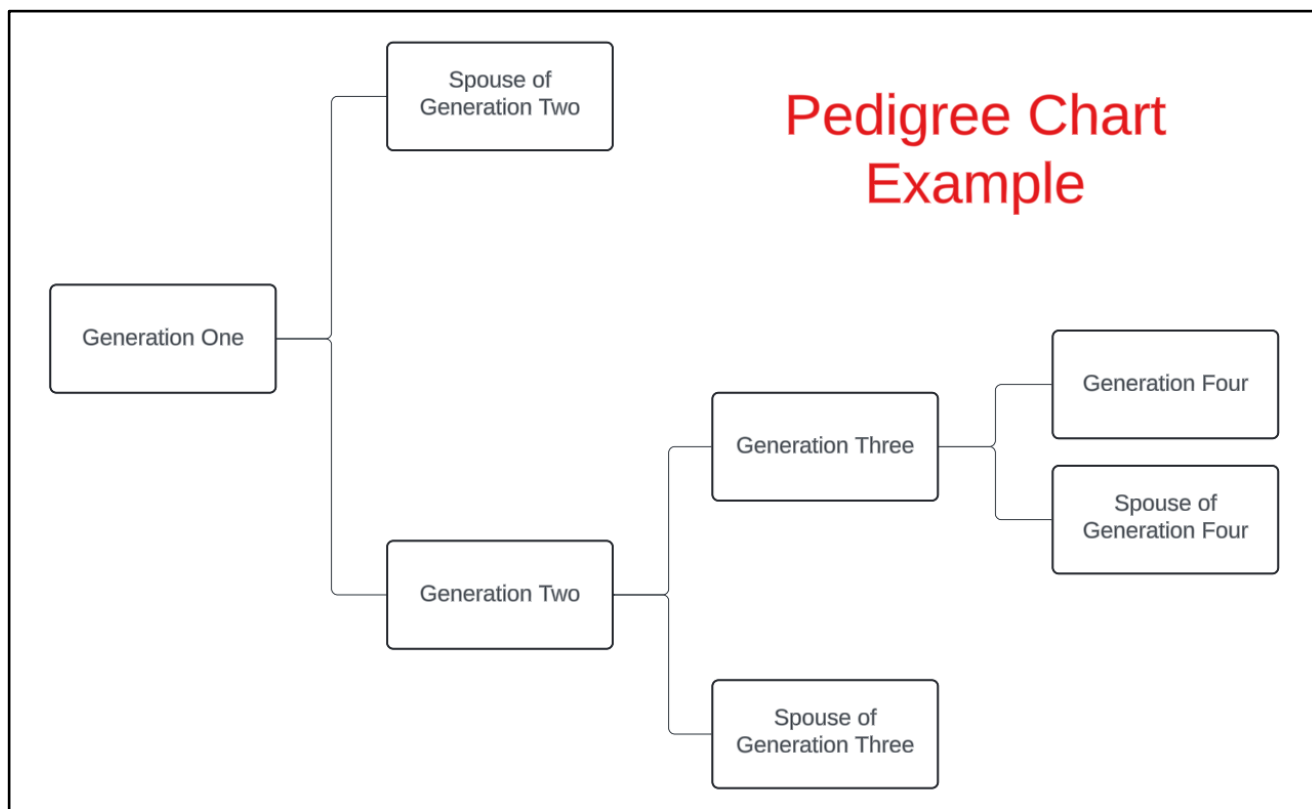
Relationships and Events to Prove:

In addition to proving the generational links, the applicant must **present proof of birth, marriage, and death** within the written report for each of the **seven individuals listed on the pedigree chart.** Proof may be in the form of a certificate, but when non-extant, other sources should be used.

- **Exception:** Proving the spouse of Generation One (the most recent individual) is unnecessary. The spouse's name, birthdate, and death date should be omitted from the pedigree chart and family group sheet.

- **Document other family members:** The applicant should document the following individuals in the research log and family group sheets:
  - The siblings of Generation One (the most recent individual), Generation Two, and Generation Three
  - Additional spouses of Generation Two, Generation Three, or Generation Four

  Applicants should research the other family members thoroughly enough to document birth, marriage, and death information in the research log and family group sheets. It is only necessary to discuss information about the vital events of these individuals within the written report if it provides pertinent evidence of generational links or showcases an important research methodology.

- **Estimations:** Certain vital information may be unattainable, but the research log should reflect a reasonable effort to gather such information. Estimations are acceptable and should be reflected on the pedigree chart and family group sheets.

Writing Requirements

Writing Requirements verify that applicants have the writing and organizational skills to produce a neat, organized, error-free client report. The written report should be professional, with appropriate formatting and fonts suitable for client distribution.

Applicants should:
- ensure there are no spelling, typographical, or grammatical errors;
- consistently write from the third person point of view;
- avoid passive voice where possible;
- craft well-constructed sentences and paragraphs;
- create clear divisions of topics and subtopics;
- utilize transitional phrases to facilitate the flow of thought from one section to another;
- ensure consistent spacing between sentences, paragraphs, and sections;
- use consistent fonts and font sizes in the report body, headers, footers, and footnote citations;
    > The body of the report should be in 11 or 12-point font, and the footnotes should be in 9 or 10-point font.
- avoid the use of romanticized or flowery language such as, "John was born on a beautiful Tuesday morning," "His opinion was sought by all his grateful and humbled neighbors," or "Mary was beloved by all who met her."

Methodology Requirements

Methodology Requirements ensure that candidates can conduct research effectively and efficiently within the region. This includes documenting individuals in the records and analyzing the records themselves. Applicants must demonstrate comprehensive knowledge of their chosen region, including its key record sets, geography, laws, customs, historical context, jurisdictions, and typical record access for the accreditation area.

Applicants should meet the following requirements:

- Use original sources consistently when available. When original records are unavailable, applicants should explain in the report the rationale for using alternative and derivative sources, such as indexes and compiled sources.
- Delve into the interpretation and significance of the evidence. Analyzing the records involves identifying patterns, drawing connections, evaluating discrepancies, and making solid conclusions based on the evidence presented. State the relevant contents of the documents and thoroughly analyze the evidence within the record.

The following are examples of methodology and techniques experienced professional genealogists use in their research and, when applicable, applicants might use within their Four Generation Project.

- Discuss the context of the time period and the location where the original source was created, and explain how this context influences the interpretation of the evidence.

For example: At what age could young people marry without consent? How were surnames developed within the region? Was the ecclesiastical tradition to baptize infants close to the time of birth, or did individuals join congregations as adults?

- Correlate information from different records to prove generational links and vital events.
- Discuss settlement patterns, regional migration, national immigration and emigration, industry, religious traditions, occupations, etc., within the region that may have impacted the focus family.
- Address regional record loss through war, fire, or environmental damage and the techniques used to overcome those challenges.
- Research collateral family members, the civil and religious community, and allied families to strengthen proof and provide context.

ICAPGen suggests applicants study writing samples in peer-reviewed genealogical publications such as the *National Genealogical Society Quarterly*, *The Genealogist*, and other historical society and genealogical society publications. Such articles help genealogists learn methodology, analysis, clear writing, and logical presentation of research findings.

Four Generation Project Elements

The Four Generation Project should include the following five components:
1. Written Report
2. Research Log
3. Key Document File
4. Pedigree Chart
5. Family Group Sheets

Written Report

The written report should present research findings and conclusions **as if to a client.** In other words, it should be easily understandable for an individual without specialized knowledge of genealogical research in the region. It should demonstrate appropriate research strategies and methodology for the region, incorporating the area's laws, customs, historical background, jurisdictions, migration patterns, and typical record access for the accreditation area. The applicant should prioritize using original sources.

Page limit: The written report should be a minimum of 25 pages and a maximum of 40 pages. The page count only includes the body of the written report, with its footnotes, tables, maps, etc. The page count does not include separate elements, such as the research log, pedigree chart, family group sheets, and key documents. **Written reports under 25 and over 40 pages will not be accepted.**

Report organization: ICAPGen requires applicants to adopt an ascending format for the Four Generation Project written report; i.e., begin with the most recent individual (Generation One) and work back to the remote individual (Generation Four). If the applicant conducted the research in a descending format, they must present it in an ascending format to meet ICAPGen requirements.

The written report should include eight essential components:

    1. Research objective or goal

    2. Background information

    3. Complete and consistently written source citations

    4. Transcripts, abstracts, extracts, and translations (as applicable)

    5. Evidence analysis

    6. Solid conclusions

    7. Summary of results

    8. Future research recommendations

    Applicants may vary the organization and order of these components.

Research Objective or Goal: A well-defined research objective should be presented at the outset of the written report. This objective should clearly state the purpose of the research and include all four generations.

- The complete name of the most recent individual (Generation One) and key identifying information, such as birthdate, birthplace, and relationships, should be included in the research objective or the background section near the beginning of the written report.
- The written report should consistently focus on the research objective of connecting generational links while avoiding unrelated topics. For example, extensive information about the town where the focus individual resided should only be included if directly relevant to the research objective.

Background information: Near the beginning of the written report, include a brief summary of the known information about the family before the current research began. For example, include an overview of an unsourced oral history, previous research on the family, or information provided by the client as the starting point for research.

Source citations: Consistently cite each fact or information item with a complete and well-placed footnote citation.

- For easy readability, endnotes are not acceptable for the report.
- Applicants should craft their own citations. Many websites offer suggested citations for documents hosted on their sites. However, applicants should not rely on or reuse those citations.
- ICAPGen does not require any specific citation style as long as the applicant consistently applies their chosen style throughout the project (written report, research log, key documents, etc.)
- The written report must include complete source citations. A complete source citation includes applicable elements, allowing the client to easily locate online and offline documents. As needed, include elements such as author, creator, record type, source title, dates and places, publication information, database title, URL and date accessed, and other descriptive details.
- Identify **key documents** by including **boldface document numbers** at the end of their citations. For example, use **Document 5** or **Doc 5**.
- Applicants may use truncated or shortened citations in the written report after the initial use of the full citation, but this is not required. Using "ibid" appropriately for repeated citations meets the requirements. ("Ibid." is an abbreviation for "ibidem" and refers to the same source cited in the preceding footnote.) Use a consistent system in either instance.

Transcripts, abstracts, extracts, and translations: Applicants should use their best judgment to incorporate necessary transcripts, abstracts, extracts, and translations within the written report.

- **Transcript:** A transcript is a faithful, word-for-word reproduction of the entire document, including all spelling, grammar, line breaks, and page breaks.
- **Extract:** An extract comprises selected portions (quotes) from a document or writing.
- **Abstract:** An abstract summarizes the most important genealogical information within a document.
- **Translations:** A translation is a written rendition of a document that transfers meaning from one language to another.

In the report, when discussing documents written in a different language than the report, include short, relevant portions of the translation in the narrative as needed for clarity. Use a consistent style when including translations. For full translations of lengthy records, applicants should include the translation in the document file instead of the report. Please see the ICAPGen Language Requirements for a list of these requirements for each region.

Evidence analysis: Clearly explain how the supporting evidence proves the generational linkage (familial relationships) and the vital events (birth, marriage, and death) of each individual listed on the pedigree chart. Present sources and information explaining how the evidence supports the conclusions. Applicants should demonstrate sound reasoning to link the generations effectively.

The applicant should describe sources, information, and evidence using language the client will understand. Use genealogical terminology correctly, such as direct and indirect evidence, primary and secondary information, etc. If using these terminologies, be sure to define them for the client. A well-written report should avoid repeating the same genealogical terminology. Instead, the applicant should explain analysis concepts in terms the client will understand.

> **While preparing the report, keep the following evidence analysis suggestions in mind.**
> - **Obtain Original Sources:** Use original sources consistently whenever possible.
> - **Present Sources:** Present and explain the research findings in a logical order.
> - **State Reasons for Searching:** Provide reasons and explanations for searching specific records or record types. Describe the valuable information the applicant expected to find within those records. This context helps justify the selection of certain records, demonstrates a clear research strategy, and provides a basis for evaluating the relevance and significance of the information discovered during the research process. Explain if the records proved, disproved, or supported the research objective.
> - **Correlate Records:** Concisely discuss the contents of the documents. Show how one source supports another and draw connections to prove generational links and vital events. Explain if the records prove, disprove, or support the research objective.
> - **Evaluate Sources:** Discuss the credibility and reliability of one record compared to another. Further elaborate on the context of the time period and the location where the original source was created, explaining how this context influences the interpretation of the evidence.
> - **Analyze Key Evidence:** Analyze and explain the significance of evidence in context to the research objective.

o **Develop Indirect Evidence:** If there is no direct evidence, logically build the supporting indirect evidence to form the conclusion.
o **Resolve Conflicts:** Whenever applicable, evaluate discrepancies and include analysis of conflicting evidence or information. Include a discussion about any findings contradictory to the researcher's purpose. Discuss how the conflicts were resolved or addressed. If the conflict remains unresolved, provide strategies or suggestions to address and potentially resolve the conflict in future research.

Solid Conclusions: The applicant must use sound reasoning to draw solid conclusions about the evidence presented throughout the report. Conclusions should include the key findings uncovered during the research process related to the **Core Requirements** of the written report. Avoid jumping to premature conclusions; instead, let the evidence lead to sound conclusions. Clearly restate the results of each research finding before moving to the next topic.

Summary of Results: Every written report must summarize research results.
- The summary should recapitulate the research objective and restate the conclusions made throughout the report.
- The summary is a synopsis of findings and should not introduce new evidence or include citations.
- Applicants decide the placement of summaries, ensuring clarity and ease of understanding for the reader. For example, summaries may be placed:
  o near the beginning of the report as a preview of the research results for all four generations;
  o at the end of each generation to conclude the section;
  o at the end of the written report, as a collective summary of all four generations.
- Solid writing includes a final summation. Regardless of summary placement, there must be a concluding statement or paragraph at the end of the report.

Future Research Recommendations: Applicants should provide new or continuing research suggestions. Include recommendations at the end of each generation or at the end of the entire report for all four generations. The suggestions should be specific and applicable to the stated research objective or related to a new research objective corresponding to the focus family. Each recommendation should address the following.
- The name of the individual(s) of focus
- The type of record(s)
- The reason for each proposed search, including what information the applicant expects to find within the record
- The locations and methods for accessing these records
- Any restrictions on accessing the records

Research Log

- ICAPGen requires a research log as an element of the Four Generation Project. A research log contains an entry for each document and source examined or obtained during the research project. It includes findings (both positive and negative), analysis, source citations, and correlation of sources. The research log is the place to show the basic research conducted for the siblings in Generations One, Two, and Three.

The research log should:
- include the name of the individual(s) searched for;
- contain a complete citation for all sources examined;
  > If desired, applicants may include a separate source title/description column in their research log in addition to the title or description listed in the citation. For example, a "Description" column could include: 1931 Canada census, or, Registri ecclesiastici di Botto (Terni) 1810-1861, etc.
- define the purpose of the search or what they anticipated finding in the record;
- incorporate brief extracts or abstracts of information or evidence;
- catalog key documents in the citation using boldface document numbers;
  > For example, use **Document 5** or **Doc 5**
- include all documents reviewed in the research process, whether submitted as a key document or not;
- feature both positive and negative search results.

Research logs may be extensive, and applicants may submit a log for each generation OR a comprehensive log encompassing all generations. Organize the research log logically to ensure easy navigation. Applicants who submit a single comprehensive log should incorporate distinct labels and divisions for each generation.

Key Document File

The Four Generation Project requires the submission of key documents. Include images of essential documents that provide evidence of genealogical links.

The requirements for documents are as follows:
- Key documents provide important evidence of generational links and/or vital events such as birth, baptism, marriage, death, burial, etc. Applicants should only submit the most relevant documents discussed within the research report.
- **No more than 40 key documents will be accepted**. If the applicant submits more than 40 documents, they will be asked to remove the excess documents from the project folder *before* the project is rated.
- ICAPGen acknowledges that some focus families will have more than 40 documents that contain evidence of generational links. The purpose of the 40-document limit is for the applicant to provide the **most relevant** documents.
- Limit the number of pages within the key document file to less than 125. When dealing with key documents that span multiple pages, select and submit only the most relevant pages. For instance, if the applicant discovers evidence of a generational link within a 73-page Civil War Pension file, but the generational link can be demonstrated in a two-page affidavit, submit only the two-page affidavit.
- Label each key document with a number and a source citation for proper organization and reference. These labels must be typed, not handwritten. Document numbers are not required on other sources in the research log.
  - Document numbers and source citations should be consistent across the written report, research log, and family group sheets.
  - Key documents do not need to appear in sequential order within the written report but should be organized sequentially in the document file.

- Include document numbers at the end of key document citations in **boldface** font**.** This only applies to citations on key documents, in the report, and in the research log.
- Provide transcriptions for documents that are particularly difficult to read.
- Add a translation of the relevant information as part of the document file when records are in a language other than the language of the report.
- Images should be high resolution and readable without adjustments.
  - Readers should not have to rotate or enlarge images to read them.
  - Items within images may be highlighted, marked with icons, or otherwise emphasized for clarity.
- Applicants may include enlarged sections of key documents as long as they do not obscure any part of the document. Consider adding a clearly labeled enlargement below the full document.

Pedigree Chart

A pedigree chart showing the four generations in the project is required as part of the Four Generation Project.

The pedigree chart should reflect the following requirements:
- Generation One (the most recent individual) was born in or before the rolling birth year, 80 years before the submission of the project. For example, if a project is submitted in 2024, the most recent ancestor must have been born in or before 1944; in 2025, the birthdate cut-off changes to 1945. This person must be listed in the first position on the pedigree chart submitted with the project.
- Only display seven individuals on the pedigree chart, including Generation One without their spouse, and the other three couples.
- The pedigree chart should not include citations, nor should it include the creator's name.
- Dates and places provided on the chart (i.e., birth, baptism, marriage date, marriage place, death date, death place) are complete with exact or approximated information for all individuals.
- The dates and places on the pedigree chart align with the information on the family group sheets and maintain consistent spelling and format throughout.
  - Applicants should use a consistent date format throughout the project. For example, a date of 7 March 1872 on the pedigree should not appear as March 7, 1872, on the family group sheets.
  - Include consistent place names throughout all elements of the project. For example, a birthplace recorded on the pedigree chart as San Nicolò di Comelico, Province of Belluno, Italy, should not appear in the written report or on the family group sheet as San Nicolò, Bell. Prov., IT.
  - Place names may change over time. The name of the geographic location should be consistent with the source proving the event.
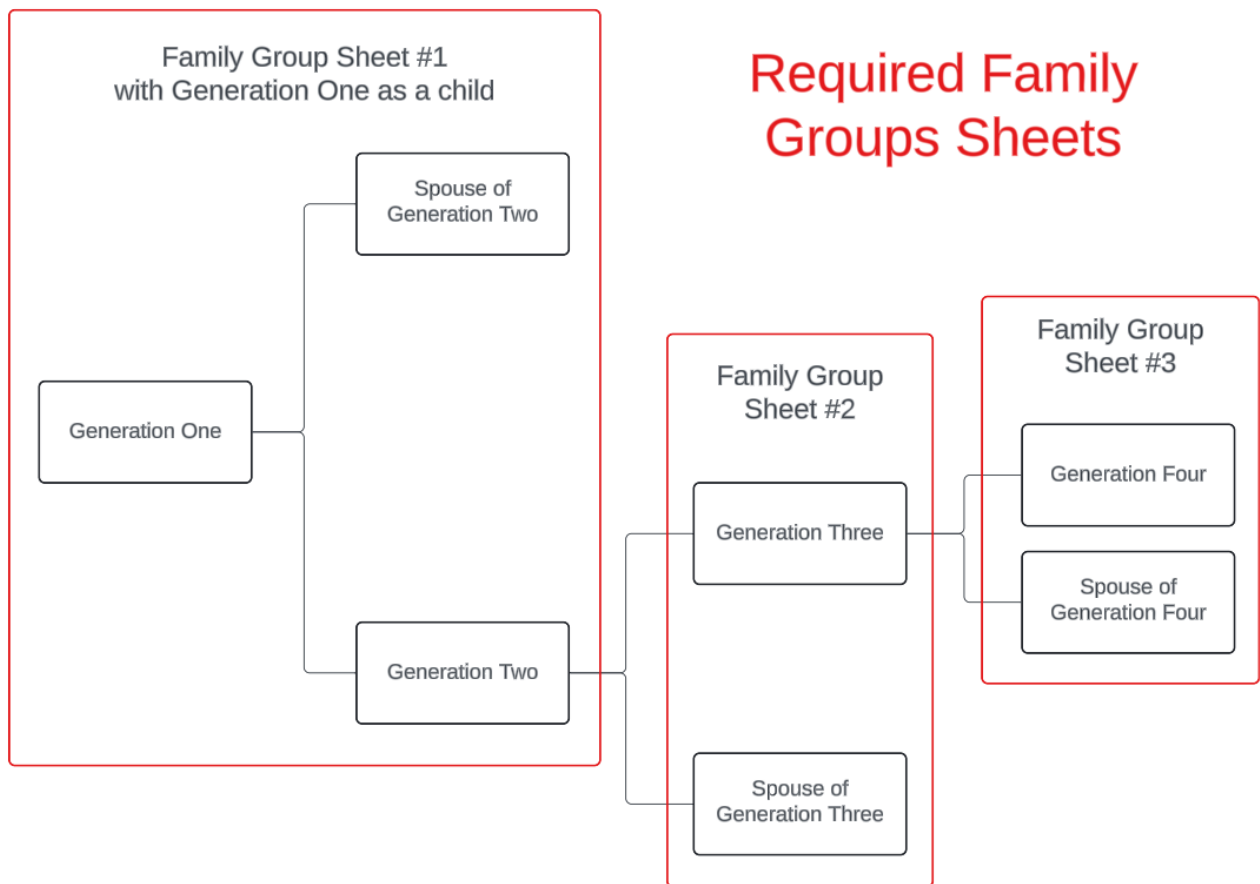
Family Group Sheets

Generation One should only appear on the family group sheet with their parent(s). One family group sheet is required for each subsequent generation. If anyone presented on the pedigree chart was married more than once, submit additional family group sheets reflecting those family units. Only address additional marriages in the written report if the relationship is pivotal to proving the generational links within the focus family.

All family group sheets should contain the following:
- The Generation One subject (the most recent individual) should be listed as a child on the Generation Two family group sheet (additional pages may be required for large families).

- To meet requirements, applicants should create family group sheets containing all family members' names, including parents and their children, and complete event dates and places.
- When vital information is unattainable, a reasonable effort to gather such information should be reflected in the research log or estimated based on analysis of the available evidence. Clearly label dates with "approximated" or "about," if needed.
- If living individuals are included on the family group sheet, their names should be replaced with the term "LIVING." To protect their privacy, no other personal information should be provided in any portion of the project.
- Support all events with consistently formatted source citations. ICAPGen does not require any specific citation style as long as the chosen style is consistent throughout the project (written report, research log, key documents, etc.).
- The information on family group sheets should match the information on the pedigree chart and in the written report.

Required Family Groups Sheets

Family Group Sheet #1 with Generation One as a child

Spouse of Generation Two

Generation One

Generation Two

Family Group Sheet #2

Generation Three

Spouse of Generation Three

Family Group Sheet #3

Generation Four

Spouse of Generation Four

Written Exams:
Document Interpretation Exam,
General Knowledge Exam,
&
Final Project

Written Exams Overview

The Written Exams include:
- Document Interpretation Exam
- General Knowledge Exam
- Final Project

The ICAPGen Document Interpretation and General Knowledge exams assess a candidate's paleography skills and ability to plan research. Additionally, the exams evaluate the candidate's in-depth regional knowledge of records and expertise in using those records through short answers and short essay questions. The exams also test the ability to transcribe, abstract, analyze documents, and translate when needed. The Final Project recreates a real-world experience to assess the candidate's ability to produce high-quality research in a limited time.

Upon successfully fulfilling the Four Generation Project requirements, candidates have a twelve-month window to schedule and participate in the Written Exams. Candidates should submit the testing fee two to three weeks before the exam dates. The Testing Secretary will confirm receipt and furnish additional exam details after payment. In extreme cases, a six-month extension may be granted with an additional fee.

Candidates who score:
- 90% or better on the three Written Exams will proceed to the Oral Review;
- 85%-89% on an exam will receive an Educational Assignment and be given one month to complete the assignment with a fee;
- 84% or below on an exam will be asked to retake that exam and will have six months from the date of the results letter to schedule and complete the retest with a fee.

Test Rating Timeline

The Testing Committee aims to process ratings as soon as possible. However, exam rating is a multi-step process that relies on volunteer efforts. Please allow several months to receive the exam results.

Language Availability

ICAPGen is an international organization. All exam questions and instructions are written in English. However, candidates who wish to write their answers in a language other than English, such as Spanish, German, or Norwegian, should contact the Testing Secretary at testing.secretary@icapgen.org.

ICAPGen Written Exams Content

During the Document Interpretation and General Knowledge exams, candidates should be ready to answer questions about records spanning from 1600 AD or the advent of available records in the region to the present day. The research questions for the Final Project will focus on individuals born after 1600 AD or the beginning of available records in the region up to the rolling year 80 years preceding the current date. For instance, if the candidate takes the Final Project in 2024, the 80-year rolling date is 1944.

Test Security

ICAPGen reserves the right to uphold the integrity of its regional tests. ICAPGen gives candidates a pass-fail score but does not disclose specific test questions or the rater comments for the Written Exams.

Personal Reference Guide

A Personal Reference Guide (PRG) is a collection of information gathered by the candidate to assist in everyday research in their region. It is particularly helpful during the Document Interpretation and General Knowledge exams. Candidates are encouraged to review the Regional Resources Guide on the website and build upon the information provided for their region. Include items in the PRG that directly relate to the accreditation region. For example, include dates of jurisdictional changes, available census records, key online resources, dates when civil registration or when vital records began, migration trails, military conflicts, methodology strategies, translation helps, word lists, etc. Candidates may bring a printed or a digital PRG, or both, to use during the exams.

Candidates are not allowed to log into any personal cloud-based accounts during the exam. They must download all reference materials to the exam computer before the exam begins. For the Final Project, candidates are encouraged to include templates as part of their PRG to initiate their report and research log and to create their source citations.

Candidates may not use electronic devices, other than the facility computer, during the exams. Before the exam, the candidate must download electronic copies of materials from other devices to their PRG on their flash drive. Depending on the facility's policies, candidates may bring portable monitors, personal keyboards, wrist rests, etc.

Testing Facilities Procedures

The exams are open book, including the use of internet resources. Candidates must use a facility computer for the exams. The candidate will transfer their digital Personal Reference Guide to the facility computer before the exam begins and delete it from that computer at the end of the exam sessions. Candidates are not allowed to log into personal cloud or Large Language Model accounts during the exams.

Testing Session Time Length

The Document Interpretation and General Knowledge exams each last two hours and are typically administered on the same day. Candidates should plan a minimum five-hour window for these exams if taken on the same day or a minimum three-hour window for exams taken on separate days.

The Final Project is four hours long; candidates should plan a minimum five-hour window to complete this exam.

Custom Scheduled Testing

For a fee, ICAPGen provides custom testing at a place, date, and time convenient to the candidate. Candidates are responsible for choosing a proctor and a qualified facility. Please contact the Testing Secretary at testing.secretary@icapgen.org for additional details and requirements.

Accommodations

ICAPGen is committed to providing equal access and opportunity to individuals with disabilities throughout the exam process. We strive to ensure that all individuals, regardless of their disabilities, can equitably participate in testing activities. Candidates needing accommodations should contact the Testing Secretary at testing.secretary@icapgen.org and ask to contact our Special Circumstance Coordinator to discuss how ICAPGen can meet their needs.

Document Interpretation Exam

The Document Interpretation Exam assesses the candidate's paleography skills and ability to analyze documents. Candidates will be given documents of genealogical value and asked to perform tasks based on those documents.

- **Identify**: Indicate the type of document provided, such as a baptismal record, marriage certificate, or will, and the language it is written in, if applicable.
- **Transcribe**: Transcribe several brief texts, each typically consisting of 8-15 lines. The transcript must faithfully reproduce the entire document word for word, preserving the original spelling, grammar, line breaks, sentence breaks, and page breaks.
- **Translate:** Translate a document from the regional language into the candidate's primary language. For example, a candidate fluent in Spanish would translate a Latin marriage record from Latin into Spanish.
- **Abstract:** Abstract the genealogical information from a document. An abstract is a summary of the most important genealogical information found in the document. For regions with multiple languages, candidates must abstract information of genealogical value (names, dates, places, events) from documents in those languages into the candidate's primary language.
- **Develop a research plan:** Create a research plan for a family based on the provided document. Candidates do not conduct actual research during the Document Interpretation Exam.
- **State expectation**: Explain what information a researcher would expect to find in the document type.
- **Locate a document**: Locate the provided document online and paste the URL into the exam. Alternatively, find a document online using the information provided and paste the URL into the exam.

Candidates should be prepared to transcribe, abstract, and answer questions about handwritten documents dating from 1600 AD or the advent of available records in the region, encompassing various script styles from the testing area.

Refer to the ICAPGen website for up-to-date Language Requirements and a list of languages tested in each region. This page outlines the extent to which each language is assessed, including recognition, abstraction, transcription, and translation.

General Knowledge Exam

The General Knowledge Exam assesses the candidate's ability to comprehend and apply knowledge of facts about their region's history, geography, research methodologies, and records. Questions are a mix of short answers and short essays. Candidates do not conduct actual research during the General Knowledge Exam.

Topics include:
- History and geography of the region
- Research methodology
- Record types in the region–content, availability, and coverage of time and place
- Content of online sources and electronic databases
- Content of offline sources and repositories
- Research planning questions

Final Project

The Final Project provides a practical genealogical problem at the beginning of the exam. The exam assesses the candidate's abilities to plan research, analyze evidence, implement appropriate research methodologies, manage time, and write reports. The candidate should be prepared to create a research plan, conduct research, and write a report as if for a client within a four-hour time limit.

While reviewing the requirements for the Final Project, candidates should recognize that this project requires the same project elements and professional-level research skills as the Four Generation Project, albeit on a much smaller scale.

The Final Project focuses on the candidate's ability to organize a research project, discover new information, and formulate a cohesive client project. Candidates typically dedicate only a fraction (approximately one-third to one-half) of the allocated time to actual research. They use the remaining time to organize, write the report, and compile the other project components.

ICAPGen highly recommends that candidates complete several practice four-hour research projects on their own before attempting the Final Project exam.

The following elements must be submitted at the end of the Final Project:
1. Written Report
2. Research Log
3. Key Document File
4. Pedigree Chart
5. Family Group Sheets

The Written Report

The Testing Committee recognizes that creating a polished client report within the specified four-hour time limit is impractical. The committee expects a well-crafted preliminary version of a high-quality research project, also referred to as a first draft or rough draft. Candidates should write the report using complete sentences and well-structured paragraphs. Simply using bullet points is not acceptable. Typically, candidates generate written reports ranging from two to ten pages.

Candidates should manage the four-hour time limit by addressing every document collected during the research phase. Move any identified records not discussed in the report to the report's future research recommendation section. Leave sufficient time—typically one and a half to two hours—to compose a clean rough draft that is easy to follow. In the draft, analyze and correlate the sources, cite the sources, and correct misspellings and grammatical errors.

The written report should include the following elements:
Research Objective:
- Include a well-crafted research objective that includes all identifying information supplied by the research problem.
- Maintain a focus on the research objective throughout the report.
- A background section is optional.

Detailed Analysis:
Please note that ICAPGen acknowledges all items below may not be relevant or feasible within the given timeframe. Candidates should use this list as a guide during their Final Project.
- Provide reasons and explanations for searching specific records or record types.
- Analyze the validity of the sources, including the reliability of the informant.
- Report on details gleaned from each source and discuss how the information aligns with other evidence.
- Elaborate on the historical context in which the original source was created and how this context impacts the interpretation of the evidence.
- Prioritize analysis and evidence of the generational links.
- Include analysis of conflicting evidence in the written report.
- Based on the evidence presented, correlate information to come to a solid conclusion.
- Refrain from making baseless assumptions such as, "The widow was the mother of all the children named in a man's will."

Research Conclusions:
- The applicant must use sound reasoning to draw solid conclusions about the evidence presented throughout the report. Conclusions should include key findings uncovered during the research process.
- Clearly restate the results of each research finding before moving on to the next topic.
- Avoid tailoring the evaluation to suit the researcher's purposes.

Footnote Citations:
- Cite each fact or information item from each source with a properly placed footnote superscript number.
- Place complete source citations in the research log.

- To save time, a candidate may refer to the reference citations with their assigned number as a "footnote placeholder." See the "Documents" section below.

Summary of Results:
- Include a summary of key research findings and an assessment of whether the research objective was met.
- Place the summary of the research findings at the beginning or end of the written report.

Future Research Suggestions:
- Include the name of the focus individuals.
- List the type of suggested records.
- State the reason for each proposed search, including what information the candidate expects to find within the record.
- Indicate the locations and methods for accessing the suggested records.
- Add any unfinished research items addressed during the session to this section.

Research Log

Candidates must create a research log during the exam. They may bring digital research log templates as part of their Personal Reference Guide.

Research logs should include the items listed below:
- The name of the individual(s) searched for
- Complete citations for all sources
    - A complete source citation includes applicable elements that allow the reader to locate online and offline documents easily. Include needed elements such as author, creator, record type, title, dates and places, publication information, database title, URL and date accessed, file and other descriptive details.
    - Source citations must be crafted by the candidate and not copied from genealogical websites.
    - For ease of rating, include a document number with each source citation for key documents. Add the document numbers in bold at the end of the citation.
        For example, use **DOCUMENT 5** or **Doc 5**
- The type of source used
        For example, use 1931 Canada census, or, Registri ecclesiastici di Botto (Terni) 1810-1861.
- The purpose of the search and what the candidate anticipated finding in the record
- Research findings with abstracted information and analysis of information
- Negative search results

Pedigree Chart

Candidates will complete a pedigree chart reflecting the research findings. Most candidates choose to create a pedigree chart on a paper form, but they may use a genealogical software program or another digital format.

The pedigree chart should include the following:
- Names, dates, and place names discovered during the research process

- Standard genealogical date formats featuring day, month, and year (e.g., 31 December 2024)
- Standard genealogical place name formats, such as (city, county, state) or (parish, region, country)
- Footnote citations are not required on the pedigree chart.

Family Group Sheet(s)

Candidates will provide completed family group sheets for each family unit researched. A family unit is defined as one or more adults, with or without children, who consider themselves a family. The Final Project may require more than one family group sheet.

- Most candidates choose to create family group sheets on a paper form, but they may use a genealogical software program or another digital format.
- To save time, a candidate may refer to the reference citations with their assigned number as a "footnote placeholder." See the "Documents" section below.

Documents

Candidates will include digital images of documents found during research.

- Included images of documents that helped solve the research problem.
- Assign each document a number and consistently use the number throughout the project.
    For example, **DOC 3**
- Label documents with the document number in the digital file name.
- Number and cross-reference documents in the research log and written report.
- Due to time constraints, candidates are not required to add citations or descriptions to the images.
- Place complete source citations for each document in a research log entry.
- The candidate may use the assigned document number from the research log as a placeholder for the citation in the report or on the family group sheet(s).

Oral Review

The Testing Secretary schedules an Oral Review after the candidate passes ICAPGen Written Exams with 90% or better. The Oral Review aims to assess candidates based on their knowledge and expertise in the region.

Oral Reviews typically last between 45-60 minutes. An Oral Review Panel conducts each interview via Zoom video service. During the interview, members of the panel, composed of at least three AG® professionals, will ask questions to determine the candidate's overall readiness for accreditation. Candidates should review their Four Generation Project, the Regional Resources Guide for their region, and their Personal Reference Guide in preparation for the Oral Review.

Members of the Oral Review Panel will ask a variety of questions regarding the following topics:
- The candidate's journey to accreditation and experiences during the accreditation process
- The candidate's Four Generation Project's focus family, research process, records discovered, and methodology
- Specific record types from the appropriate Regional Resources Guide

Candidates should be able to expound on the contents of the records, record access, and their experience using them. They may also describe methods they use to locate information and ways they educate themselves about different types of records.

- Methodologies or challenges specific to the region
- Subjects identified by raters as needing improvement
- ICAPGen volunteer positions that interest the candidate

Candidates may ask the Oral Review Panel questions about the following:
- Topics from the regional test
- Questions about researching in the region of interest
- Advice from the review committee
- Networking or volunteer opportunities

The main goal of the Oral Review is to recognize a candidate's strengths. However, if the panel identifies minor areas for improvement, the candidate may receive an Educational Assignment with a fee. The candidate will have one month to complete the assignment.

After the Oral Review:

To finalize the accreditation process, the candidate will sign an ethics agreement. Upon accreditation, AG® professionals will receive a packet containing an ICAPGen pin, a certificate suitable for framing, and details concerning professional responsibilities, yearly maintenance fees, and five-year renewal policies and requirements.

From experience, we know the growth and challenges of the accreditation process are well worth the effort. We look forward to helping you on your journey to becoming an Accredited Genealogist® professional, and invite you to begin the process!