TREE HEALTH ASSESSMENT TOOL GUIDE

The *Tree Health Assessment Tool* helps you assess the accuracy and completeness of your family tree.

The tool can be used in research planning, to help you identify which part of your family tree need more work; and it can be used in documenting the evidence for conclusions that you reach. It can also be used in DNA research to record which relationships have been substantiated by DNA evidence.

The key to this tool is to ask yourself:

Do you have sufficient evidence to support each conclusion about the identity of a person in your family tree?

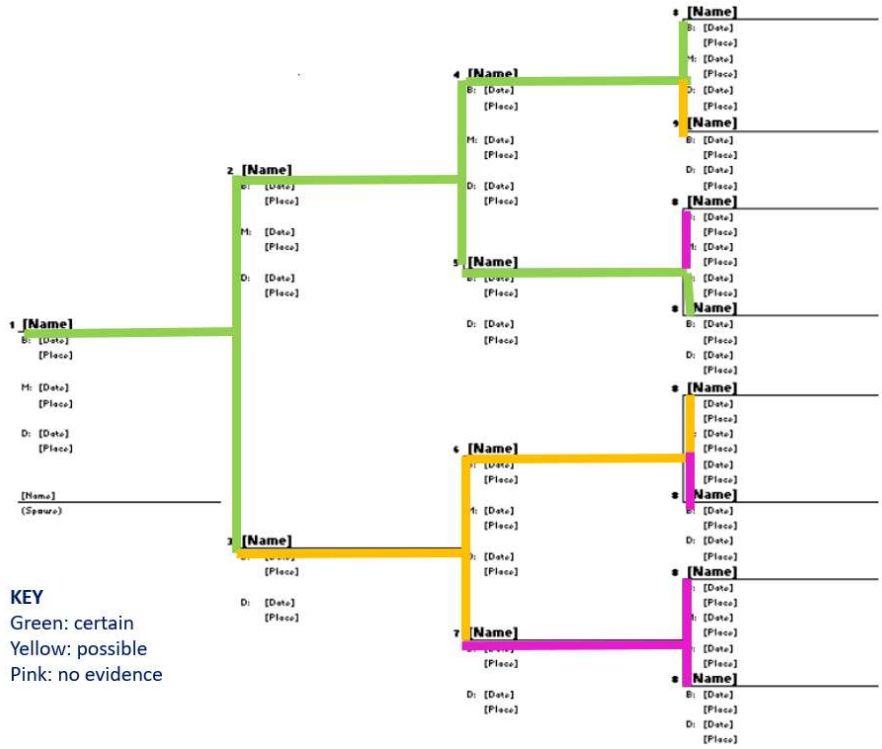
What is sufficient evidence? The standard minimum evidence is often quoted as being two independent sources. However, the answer is not as simple as that. Two sources may be sufficient if they are the best sources, found after conducting a reasonably exhaustive search and resolving any inconsistencies. Note: A combination of documentary and DNA evidence is best for confirming biological relationships.

Begin your Tree Health Assessment

Start with a four-generation ancestry family tree chart of your direct line without siblings shown. Four generations includes yourself, your parents, grandparents and great grandparents. Additional generations and siblings can be added later, or you can have a starting person other than yourself, but you first need to assess the relationships to the core people that form the base of your family tree.

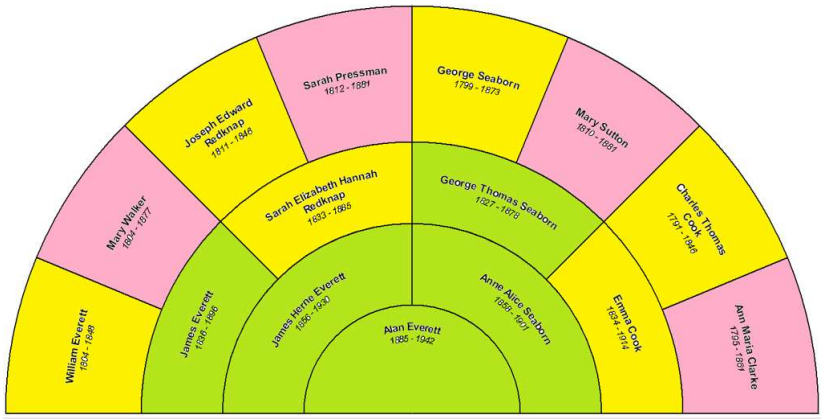
If you have sufficient evidence for the identity of two people and the relationship between them, draw a green line between them. If you have some evidence but do not feel that it is sufficient, draw

a yellow line between them. For example, if have only one source or just indirect evidence. Yellow basically means it could be right but you need to do more work to confirm it. If you have done some research but have no evidence, draw a pink line between them. Pink basically means you have started but cannot reach any conclusions yet.



The Tree Health Assessment can also be created in a fan chart format. In this case, if there is sufficient evidence for a relationship, shade the parent green. If there is some evidence, shade the parent yellow and if there is no evidence shade the parent pink.

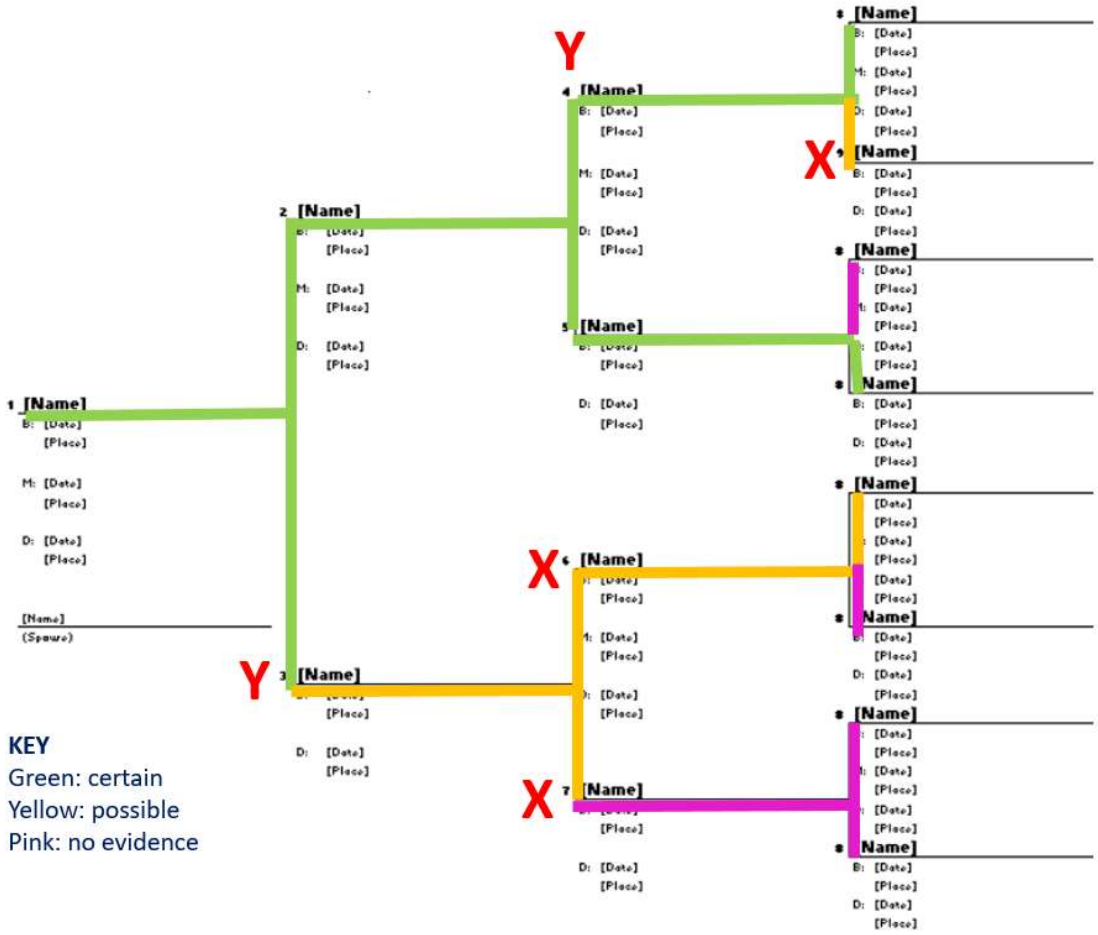
The people in the example below are real people in my family tree, but the status of evidence for each relationship is for the purposes of demonstration only.



Using the Tree Health Assessment Tool in research planning

To ensure that your family history is as accurate as possible, research should always start from a point where you have good evidence. This is any point where the Tree Health Assessment chart turns from green to yellow. On the example chart below that is the relationship between person X and person Y. On the fan chart example (above), it is each person shaded yellow. This technique may provide you with multiple starting points for your research. You should keep the chart updated as you gather more evidence and substantiate more relationships.

Create one or more research questions for each yellow line in the line chart or each yellow person in the fan chart, then turn the questions into hypotheses which you can test through research. This helps you focus your research on the points that are pivotal to generating an accurate family history.



Using the Tree Health Assessment Tool to document evidence

Tree Health Assessment charts provide a visual record for yourself about the strength of evidence that you have for each person and relationship, but they do not provide sufficient documentation if you need to convince others. If you want to use the chart to do this, you can add footnotes to each relationship or person and record the evidence at the end of the chart.

Advanced Tree Health Assessment

After you have assessed the accuracy of who is in your family tree and the relationships between them you can move on to an advanced Tree Health Assessment in table format. The table format allows you to assess whether or not other key bits of information have been sufficiently substantiated.

The unit of assessment in the example table format is the family group, represented by the father and mother. Their surnames and ID references are placed in the left-hand columns (in the example below, RIN is the unique identifier number in Legacy Family Tree software). Each of the remaining columns represents an event or piece of information that you need to substantiate in your family history.

You can either use the same colouring system as in the chart – green (substantiated), yellow (not quite substantiated), pink (not substantiated); or you can use the colouring shown below, solid green (substantiated), pale green (not quite substantiated), white (not substantiated), yellow (not applicable). The intent of the colouring is to give a visual cue to the strength of your evidence for particular family groups and for your family history overall.

If you create your table in Excel, you also have the option of adding a Generation column (column 5 in the example table). You are generation 1, your parents are generation 2, your grandparents are generation 3, and so on. You can use the Filter button on that column to show one or more generations. Start by filtering to show just generation 2. If all the cells for family groups in that generation are solid green, then your research can advance to generation 3. Next, filter out all generations except generation 3. If all the cells for family groups in that generation are solid green, then your research can advance to generation 4. Using this method helps determine if you have substantiated each generation before you move on.

	A	B	D	E	G	H	I	J	K	L	M	N	O	P	Q
1	Surname Male	RIN	Surname Female	RIN	Gen	Death (M)	Death (F)	Marriage	Any other marriages (M)	Any other marriages (F)	They are parents of my direct ancestor	Other children	Any children from other marriages	Migration to Australia (M)	Migration to Australia (F)
17	Dwyer	2996	Flynn	2997	7										
22	Field	88	Mitchell	87	8										
24	Hawkins	2985	Dwyer	2986	6										
25	Hawkins	4412	Hide	4413	7										
26	Hawkins	98	Saywell	341	3										
27	Hawkins	4525	Elizabeth	4526	8										
28	Hen	15	Webb	16	5										
29	Hend	6	Rusten	7	3										
30	Hend	8	Morrison	9	4										
32	Malchow	182	Kiesecker	342	6										
33	Morrison	10	Marzol	11	5										
34	Morrison	1090	Stewart	1091	6										
35	Robley	1944	Bromfield	1945	9										
36	Rope	84	Field	83	7										
37	Rope	86	Pulley	85	8										

To cite this guide:
Lautrec, Danielle, *Tree Health Assessment Guide*, Generations Genealogy, 2024,
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