



ICAPGenTM

The International Commission for the Accreditation of Professional Genealogists

Guide to Applying for an Accredited Genealogist® Credential

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- Each title in the “Table of Contents” is hyperlinked to its corresponding page.
- Entries that appear as obvious hyperlinks are linked to pages on the ICAPGen webpage.

INTRODUCTION

The International Commission for the Accreditation of Professional Genealogists, internationally recognized as ICAPGen, is a professional credentialing organization dedicated to testing an individual's competence in genealogical research. The organization is administered by a board of qualified Commissioners with many years of experience.

Examinations are given to applicants demonstrating sufficient theoretical and practical research backgrounds. A different exam is given for each geographical region, so individuals who pass an exam are rightfully designated as research experts in that region. Exams may also include subjects of specialization, discussed on page 8.

There are many benefits to becoming an Accredited Genealogist professional. Some of these include:

- Holding a highly-respected credential that has been 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 ICAPGen's Code of Ethics;
- Greater marketability as a practicing professional genealogist;
- Opportunities to serve within the ICAPGen organization; and
- Holding a credential accepted by most courts for expert witness testimony in estate and kinship matters.

In addition, ICAPGen will

- Provide an AG identification card and a certificate for display;
- Provide space on the ICAPGen website for a customized bio of the AG professional that can include contact information, research specialties, and other relevant service related information;
- Upon request, provide a letter of introduction for the AG professional;
- Defend the AG credential and certification marks; and
- Act as an intermediary in protecting interests of both the consumer and the AG professional.

HISTORY

To learn about the history of ICAPGen and the accreditation program, refer to Jill N. Crandell, AG, "Chapter 23: A Brief History of the Accreditation Program," in *Becoming an Excellent Genealogist: Essays on Professional Research Skills* (2012).

Mission Statement

To see our mission statement, click [here](#).

SECTION 1: ACCREDITATION PROCESS OVERVIEW

ICAPGen currently provides testing services for over 40 regions of the world. Region-specific testing enables ICAPGen to assess an applicant's knowledge of the key records, history, geography, methodologies, and language of the region of interest.

The accreditation process involves three levels of testing of the applicant's skills and knowledge. Separate fees apply to each level.

Level 1:

Includes completion of a questionnaire, a contact information form, a signed confidentiality agreement, and submission of a four-generation research project.

Level 2:

Includes four sections of the written exam which test general knowledge of history, geography, methodology, records, etc. It also includes questions specific to the applicant's chosen region.

Level 3:

Includes two sections of the written exam which test skills in data analysis, research planning, methodology, and report writing. Level three concludes with an oral interview.

Candidates receive recognition—a congratulatory letter and acknowledgment on the ICAPGen website—for each level successfully completed. Applicants who successfully pass all three levels are recognized as Accredited Genealogist professionals.

Paying Fees

To pay fees click [here](#). Applicable fees must be paid for each testing level from the fee schedule shown below:

| | Application Submission | On-site Testing on Quarterly Test Day (Family History Library, Salt Lake City, Utah) | Custom On-site Testing Not on Quarterly Test Day (Family History Library, Salt Lake City, Utah) | Off-site Testing (Outside of Salt Lake City, Utah, near your residence) |
|---------|-------------------------------|--|---|---|
| Level 1 | \$100 | | | |
| Level 2 | | \$100 | \$200 | \$200 |
| Level 3 | | \$100 | \$200 | \$200 |

• The full testing fee is required to retest any failed level.

• At any level, if a project is assigned in lieu of retesting, an additional \$20 fee is required.

• All fee payments are good for one calendar year.

○ If the four-generation project is not submitted within one calendar year of the Level 1 payment date, the submission fee must be paid again in full. The same one-year rule applies to Levels 2 and 3. If Level 2 and Level 3 tests are not taken within one year of the payment date, the amount paid is forfeited and another full fee payment will be required.

Scheduling

- Effective 1 October 2017, the testing schedule includes four dates per quarter for testing activities as follows:
 - Application Deadline remains the first Saturday of each quarter.
 - Oral Reviews will be given during the first month of each quarter generally on the third Saturday.
 - Level 2 exams and retakes of Level 2 will be given during the second month of each quarter generally on the third Saturday.
 - Level 3 exams and retakes of Level 3 will be given during the third month of each quarter generally on the third Saturday.
 - Off-site testing is scheduled on an individual basis.
 - Custom on-site testing available for special circumstances. (Email the testing secretary for permission at testing.secretary@icapgen.org before paying fees.)

Additional charges apply for both off-site and custom on-site testing. See [Fee Schedule](#) for details.

- Fees are good for one year. This applies to all levels. Applicants have one year to submit their four-generation project after paying the Level 1 fee. Level 2 & Level 3 candidates should pay their fees two weeks before taking the exam.
- Applicants who do not apply for Level 2 or Level 3 within three years of passing their current level must retake the current level exam and pay the applicable fee before proceeding.
- If an applicant/candidate does not successfully pass a level after three attempts, they will be required to wait twelve months and address their deficiencies as described by the Testing Committee before making another attempt.
- For those that cannot travel to Salt Lake City, Utah, to take the exam, arrangements can be made to take the written exam somewhere closer to where they live. (Additional charges apply.) Indicate on the "Contact Information Form" the desire to test elsewhere.
- The oral review section of Level 3 can be administered via a video calling service such as Google Hangouts or Skype.

Renewal

Accredited Genealogist professionals renew their credentials every five years after they pass the exam to assure that they are keeping current with available sources and research techniques. A renewal must be performed on each credential awarded.

Testing Regions

This list is not current. We are in the process of updating this list. To see the current list click [here](#).

| Asia | Latin America | United States |
|--|---|--|
| <ul style="list-style-type: none"> • Philippines | <ul style="list-style-type: none"> • Mexico | <ul style="list-style-type: none"> • Great Plains States Region- Kansas, Nebraska, North Dakota, Oklahoma, South Dakota, Texas |
| British Isles <ul style="list-style-type: none"> • England • Ireland • Isle of Man • Scotland • Wales | <ul style="list-style-type: none"> • Central America – Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua • Brazil • Caribbean English – Bermuda, Bahamas, Jamaica, Trinidad & Tobago, Windward Islands • Caribbean Spanish – Cuba, Dominican Republic, Puerto Rico • South America Atlantic – Columbia, Panama, Venezuela • South America Pacific – Bolivia, Chile, Ecuador, Peru • South America South – Argentina, Chile, Paraguay, Uruguay | <ul style="list-style-type: none"> • Gulf-South States Region- Alabama, Arkansas, Georgia, Florida, Mississippi, Louisiana, Texas • Mid-Atlantic States Region – Delaware, Maryland, New Jersey, New York, Pennsylvania • Mid-South States Region – Kentucky, Missouri, North Carolina, South Carolina, Tennessee, Virginia, West Virginia • Midwest States Region – Illinois, Indiana, Iowa, Michigan, Minnesota, Missouri, Ohio, Wisconsin • Mountain West States Region – Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming • New England States Region – Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont • Pacific States Region – Alaska, California, Hawaii, Oregon, Washington |
| Canada <ul style="list-style-type: none"> • Canada (General) • French Canada | | |
| Continental Europe <ul style="list-style-type: none"> • Austria • Belgium • Czech Republic • France • Germany • Italy • Netherlands • Poland • Portugal & Azores • Slovakia • Spain • Switzerland | Pacific Area <ul style="list-style-type: none"> • Australia Scandinavia <ul style="list-style-type: none"> • Denmark • Finland • Norway • Sweden | |

An African American or a Native American Specialty can be added to select United States regions.

Research Specialties

ICAPGen offers African American and Native American specialties. The applicant must indicate their desire to test for this research specialty when they apply for accreditation in their region. The application project must reflect experience in the research specialty. The applicant will be required to take an additional exam about the research specialty lasting 2-3 hours. Their experience must also reflect a significant amount of time working with the records from the specialty.

Current AG professionals who wish to add a specialty to their region of accreditation will take the same exam. The application for current AG professionals will include a three-generation client research report reflecting research in the specialty area. Their experience must also reflect a significant amount of time working with the records from the specialty.

Availability:

Both specialties are under development.

- The African American specialty is expected to be ready by the end of 2017.
- The Native American specialty is not expected to be available until the end of 2018.

SECTION 2: THE LEVELS PROGRAM

LEVEL 1 – Application and Four-Generation Project

Level 1 status is attained after the following:

- Successful completion of the Level 1 Questionnaire. It evaluates the applicant's genealogical training and research experience for ICAPGen's minimum requirements.
- Attaining 90% or above on the four-generation project, which is scored on a rubric to ensure it is properly evaluated.

Genealogical Research Experience Requirements

Below outlines the experience an applicant must have before applying for Level 1.

Experience Hours

An applicant must have a minimum of 1000 hours of combined genealogical research and genealogical education experience before submitting an application.

It is expected that of the required 1000 hours more than 500 hours of it will be combined genealogical research experience and genealogical education in the records of the chosen region. This research should also include the following:

- For International accreditation regions: Of the hours described above an applicant is required to have a minimum of 80 hours of combined genealogical research experience and genealogical education in five or more state-type (provinces/counties/shires etc.) divisions in the chosen region.
- For U.S. accreditation regions: Of the hours described above an applicant is required to have a minimum of 80 hours of combined genealogical research experience and genealogical education in each state in the chosen region
- For All accreditation regions: In addition to the 80 hours detailed above, an applicant is expected to have at least 80 hours of research experience and education using nationwide genealogical records for the region of interest.

ICAPGen recognizes that a person with a genealogy credential has demonstrated a high level of genealogical research ability. ICAPGen offers to genealogists with an existing credential (e.g. Accredited Genealogist professional or Certified Genealogist the opportunity to apply with half the required experience hours.

Education and Training

It can be very beneficial to have genealogical education and training, but formal training is not required. Your genealogical education and training could include the following:

- College level genealogical degrees, certificates or coursework.
- Attendance at genealogical conferences and/or institutes.
- Self-directed personal genealogical study

Record Types

Experience has proven that candidates with experience using a variety of record types do well on the written exams. Go to the "["Resources, Record Types & Strategies"](#)" to learn about the record types for your chosen region.

Repositories and Sources

Use of records must include at least 10 of the most relevant repositories—including both offline (e.g. archives, libraries, courthouses) and online repositories (e.g. FamilySearch.org). It is expected that the project will consist primarily of research in original records when available, with derivatives used as appropriate. The records cited from these repositories should represent the best sources to answer the project's objective.

Interpreting Documents

An Accredited Genealogist professional is required to read and understand a variety of old documents written in the primary language of their chosen region. Before submitting your application, you should have spent 100 hours or more reading and using old documents in the primary language of the chosen region.

Four-Generation Project

The purpose of the ICAPGen Four-Generation (Application) Project is to test an applicant's ability to:

- Conduct research based on a well-defined objective
- Report all research findings, analysis of evidence, and conclusions based on that evidence, as if to a client
- Properly apply the following relevant context to the research objective
 - Historical
 - Geographical
 - Legal
 - Methodological
 - Social

For help with any of the above, see "Mentoring Video" links available in the section, "["Our Website Tools."](#)"

The project should present four connecting generations who lived within the same geographic region. The presentation of four connecting generations in the project should represent the applicant's knowledge of a variety of records useful at different times in the chosen region. The regional focus allows for practice in records that might be included in the written exams.

The research project requires a treatment of four couples in a direct lineal ancestry, e.g., child, parent, grandparent, and great-grandparent. It may follow the male or female ancestral lines or it can be a combination of both. The person of interest on the most recent generation must have been born on or before 1900, have a spouse and children. Each generation of the families submitted must have lived in the region of interest.

The project should include the following components:

Research Report

The four-generation research report should present research findings and conclusions as if to a client. It should demonstrate research strategies and methodology appropriate for the region. Consistent use of original sources (when available) should be reflected in the report. Report formats may vary; however, every report should include the basic components listed below:

- *Research Objective:* The research objective should be stated at the beginning of the report. It should include the complete name of the beginning ancestor and key identifying information such as birth date, birth place, and relationship. (If this information is given in a background section it is acceptable.)
- *Background Information:* A brief summary of the factual history of the ancestor or family relevant to the research problem is needed at the beginning of the report. Background information includes the full name of the ancestor(s) or family of interest; all pertinent dates, birth, marriage, and/or death dates (if not known, approximated); event localities (known or approximated); known family relationships, and a summary of previous evidence that relates to the research problem.
- *Evidence Analysis:* The information presented in the report needs to be properly analyzed and support the conclusions discussed in the report. Explanations of how the evidence supports conclusions may differ according to the applicant's preferred writing style. The important thing is not how the evidence is explained, but that the writing style is consistent and the explanations display sound reasoning and prove the applicant's conclusions. The report narrative must also clearly show how supporting evidence proves any generational or familial relationships. See "[Incorporating Evidence Analysis, in a Research Report](#)" for additional suggestions.
- *Source Citations:* Each fact or piece of information should be consistently cited with a complete and well-placed source citation. ICAPGen does not require any particular citation style as long as it is consistently used. The citations should include enough information for the source used to be easily located.
- *Transcriptions, Abstractions, and/or Translations* (if in a foreign language): Transcriptions, abstracts, or translations of key records that identify or link generations need to be within the body of the report. (Large documents should be abstracted.)
- *Summary:* A summary of research results is required in every four-generation report. It should include a recapitulation of the research objective with conclusions made during the research process that are based on solid evidence and sound research methodology. Researchers decide placement of summaries according to individual preference. For example, summaries can be placed:
 - after the statement of the research objective as a preview of research results.
 - at the end of each individual generation to conclude the section.
 - at the end of the report as a discussion that includes all four generations.
- *Future Research Recommendations:* Should be specific and applicable to the stated goal or related to a new goal. They should also include the reason for each search. These recommendations set the direction for future work.

An average size four-generation project research report is between 25-40 pages. Only the body of the report is included in the page count. (No other pieces of the project are counted.) Projects with reports over 40 pages will not be accepted.

ICAPGen requires that applicants adopt an ascending format for the four-generation research report (begin with the most recent ancestor and work back to the remote ancestor). [Descending format accepted under special circumstances with prior approval of the testing committee.]

Report Writing Tips:

- Consider how the content of the report will be understood by the reader.
- Include explanations of research methodology on the experience level of the reader. (For the purpose of the four-generation project report, assume the reader is a beginner researcher.)
- Include documentation that supports the facts and conclusions of the report.
- Cite documents in footnotes using full source citations.
- Include charts, maps, timelines, and tables for clarification and easier understanding of complex evidence.
- Review the written report for consistency in logic and thought.
- Check for typographical errors. Use good grammar.
- Focus on brevity and clarity of thought. Avoid unnecessary verbiage and trite phrases.
- Avoid “travelogues”, e.g., I checked here first, and then I checked here next....”
- Be consistent with 1st, 2nd, or 3rd “person” writing.
- Emphasize active voice, not passive, where possible in the report.

For additional help with writing a report refer to section on “Records and Reporting” in [Becoming an Excellent Genealogist, Essays on Professional Research Skills](#) (2012) discussed on the home page of our website.

Pedigree Chart

A pedigree chart showing the four generations in the study is required as part of the four-generation project. (This means the four families in the study.) The pedigree should reflect the following:

- The individual in the most recent generation was born in 1900 or before and was married with children.
- The pedigree chart displays only the four generations (families) in the study.
- All dates and places designated on the chart (i.e., born, baptism, marriage date, marriage place, death, death place) for each couple is complete with either exact or approximated information from sources.
- Items on the pedigree chart match items on the family group records.

Family Group Records

At least four family group records are required (one for each couple represented on the pedigree chart). If anyone on the pedigree was married more than once, you must also submit family group records for those additional marriages. Those marriages do not need to be fully discussed in the report unless that family is

key to proving the generational links. Instead, refer the reader to the family group record. The family group records should contain the following:

- Complete event dates and places on each individual listed on the record (dates and places may be approximated). [It is understood that some vital information might not be attainable. However, a reasonable effort to find such information should be reflected in the research calendar or report.]
- Information on all children in the family is included. (Details on living people may be left off and referenced on the family group record using the word "living.")
- All events should be sourced with consistent citations.
- Information on family group records should match information on the pedigree chart and in the report.

The pedigree and family group records should be submitted in PDF format created from personal genealogical software (e. g. Ancestral Quest, Legacy, RootsMagic, etc.). ICAPGen does not accept GEDCOM files or databases. No forms from online family trees like FamilySearch Family Tree or Ancestry.com Trees are allowed. Online family trees do not allow the same features that ICAPGen measures as part of the application.

Documents

Key documents referred to in the four-generation project need to be submitted with your project. Below outline requirements for documents:

- Digital copies (images) of key documents discussed at length in the research report and proving generational links need to be submitted with the four-generation project. No more than 40 images will be accepted. If more than 40 images are submitted, applicant will be asked to remove excess images from the project folder before project will be rated.
- Documents submitted should provide generational linking evidence. The documents should be properly referenced in the report, research calendars, and family group sheets.
- The images should be readable without adjustments. (For instance, raters, should not have to rotate images to read them.)
- Images should be labeled with a document number and a citation on the front of them so that someone can easily tell which image belongs to which record referenced in the report, research calendar, and family group records.

Research Calendar

It is required that research calendars or logs be submitted as part of the four-generation project. Your research calendars will be evaluated based on the following criteria and should include:

- Names of persons, events, or records searched.
- The repository or website where the item was found.
- A description of the source used, i.e. type of record, time-period covered, etc.
- A call number, film number, or URL (include the date accessed) of each record searched.
- Document numbers for all documents located.
- Positive and negative search results.
- Complete citations for all sources.

Application process for Level 1

There are six steps in the process of applying for Level 1 and they are outlined below.

Step 1: View the video [“Thinking about becoming an AG professional?”](#)

This video gives a good overview of the accreditation process.

Step 2: Read ICAPGen Guide to Applying for an Accredited Genealogist Credential (this document)

This guide presents all ICAPGen requirements and guidelines for the accreditation process. Careful study of this complete guide will facilitate preparation of a successful Level 1 four-generation project and passing Level 2 and Level 3 testing.

Step 3: Become Familiar with the “Important Record Types List” for Your Chosen Region.

Experience has shown that successful AG candidates have a high degree of familiarity in the use of records from the “Important Record Types List” for their chosen region. It is required that you review the list for your chosen region and that you have experience with a wide variety of record types from that list. A list for each region is available from the in tables located on the [“Resources, Record Types, and Strategies” page](#).

Step 4: Take Level 1 Questionnaire

The [Level 1 Questionnaire](#) is part of the Level 1 test and required. The applicant is allowed to take it before paying their fees to self-assess whether their experience meets the minimum requirements.

Step 5: Pay Fees and Complete “Contact Information Form”.

Fees must be paid before completing the “Contact Information Form.” Because fees are only good for one year they should not be paid until the four-generation project is ready to submit.

[Note: Level 2 & Level 3 fees should be paid two weeks prior to taking the exams.]

The [“Contact Information Form”](#) is used to gather information needed to process your fees and assign you an application number. The form is completed online. The following information is needed to complete the “Contact Information Form”:

- Questionnaire Code (Instructions for creating a questionnaire code are given at end of the Level 1 Questionnaire, after it is successfully completed.)
- Your Name
- Phone (both day and night time)
- Email Address (Used by the testing secretary to send instructions for uploading your four-generation project. Be sure it is entered correctly.)
- Mailing Address
- Region for which applicant is applying.
- Testing quarter, applicant wishes to test.

- If applicant wishes to test somewhere other than Salt Lake City, Utah, enter the locality where applicant wishes to take the test. (Additional charges apply. See Fee Schedule for details.)
- The order number (confirmation code) given you after paying fees.

We practice blind rating. The testing committee secretary assigns an application number by which the applicant is identified throughout the testing process.

Step 6: Submit Your Four-generation project.

After fees are paid online and the “Contact Information Form” is processed, the testing committee secretary will email the applicant instructions on how to submit their Four-Generation Project electronically. Allow three-five (3-5) business days processing time for instructions to be emailed.

LEVEL 2 – Written Exam

Overview

When Level 1 recognition has been attained the candidate may take up to three years to apply for the next level of testing.

On-site Level 2 exams and retakes of Level 2 are given during the second month of each quarter generally on the third Saturday of the month. All off-site exams are scheduled on an individual basis. Custom on-site testing is available for special circumstances, but requires approval of the testing committee. See "[Testing Dates & Deadlines](#)" on the ICAPGen website for specific dates. Both off-site and custom on-site testing require additional fees. See "[Fee Schedule](#)" for details.

The Level 2 exam lasts over four hours, including breaks. The exams are open book (this includes the Internet). The candidate will be allowed to use a facility computer for research and a separate computer for testing. The candidate's quick reference guide can be copied to the computer designated for testing and will be deleted from that computer at the end of the test session.

Level 2 status achieved by attaining a score of 90% or better on sections 1-4 of the written exam. The Level 2 exam includes the following the following sections.

General Knowledge

This section tests the candidate's general knowledge of facts pertaining to the history, geography, research methodologies, and records of the region being tested. Questions about historical events that affect research in the candidate's region of interest may be asked, along with questions about types of records available in the region of interest – their content, availability, and coverage.

Preparation Tip: The [FamilySearch Family History Research Wiki](#) has many resources and articles regarding records and how to use them, methodology and information about different localities.

Handwriting

The candidate's ability to read a genealogical document (or documents) relative to the region and time-period are tested in this section. Be prepared to transcribe and answer questions about a handwritten document from an early time-period from the chosen testing region.

If the candidate is accrediting in a region which the native language is a language other than English, he/she will be expected to accurately translate documents of genealogical significance written in that language into English. The [Language Ability Table](#) allows the candidate to self-assess their foreign-language skills and help them improve their skills if needed.

Preparation Tip: The [FamilySearch Family History Research Wiki](#) also provides a list of handwriting resources and other online links for understanding early handwriting for various languages to help you prepare for this portion of the test.

Document Recognition

Potential clients sometimes provide documents with insufficient citations, or no citations at all which a professional genealogist needs to know. The candidate will be tested on their ability to identify a variety of important types of documents and reference sources for their chosen region.

Preparation Tip: For suggestions about genealogical record types, see the “Important Record Types List” for your chosen region shown in tables available from [“Resources, Record Types, and Strategies”](#) on our website.

Internet Sources and Electronic Databases

The candidate will be tested on their knowledge of the content of Internet sources and electronic databases created by non-profit groups and commercial organizations relating to their chosen region.

Preparation Tip: The [FamilySearch Family History Research Wiki](#) offers many suggestions of Internet sources and collections for worldwide locations.

Quick Reference Guide

The test is open book, meaning Internet resources, reference books and personal note files for the written portion of the exam may be consulted. Candidates are encouraged to create a personal quick reference guide as there will not be enough time during the exam to consult the original references.

For suggestions for developing a personal quick reference guide use the link below:

[Quick Reference Guide Tips](#)

LEVEL 3 – Written Exam and Oral Review

Overview

When Level 2 recognition has been attained the candidate may take up to three years to apply for the next level of testing.

On-site Level 3 exams and retakes of Level 3 are given during the third month of each quarter generally on the third Saturday of the month. All off-site exams are scheduled on an individual basis. Custom on-site testing is available for special circumstances, but requires approval of the testing committee. See "[Testing Dates & Deadlines](#)" on the ICAPGen website for specific dates. Both off-site and custom on-site testing require additional fees. See "[Fee Schedule](#)" for details.

The written portion of Level 3 exams lasts over four hours, including breaks. The exams are open book (this includes the Internet). The candidate will be allowed to use a facility computer for research and a separate computer for testing. The candidate's quick reference guide can be copied to the computer designated for testing and will be deleted from that computer at the end of the test session.

After passing the Level 3 written tests, an Oral Review will be scheduled at a later date. You will attain Level 3 status by achieving a score of 90% or better on sections 5-6 of the written exam and by passing the Oral Review.

Level 3 sections cover the following material:

Research Planning

This section tests the candidate's ability to analyze a research problem and plan effective research. Candidates will be asked to list the sources they would search to research each problem and explain what they would expect to find in those sources. This exercise does not include any actual research.

Candidates will need to use localities and dates from the provided question, basic pedigree or document presented on the exam to develop a proper research plan. An understanding of the importance of name variations and the ability to recognize date inconsistencies (e.g. the child's birth date listed as before that of a parent) are needed to do well on this section of the exams.

Candidates may consult their own resources, Internet resources such as: library catalogs, wikis, or search engines for possible records and availability.

Preparation Tip: Practice developing a research plan under a time constraint. Select a research question. Then set a timer for 15 minutes. Write down between five and ten resources you would consult to answer your question. Include what you hope to learn from the resources. The resources should be different record types.

Research Exercise

The candidate's abilities in data analysis, research planning, methodology, and report writing is tested through a practical genealogical problem. The candidate needs to conduct research and write a report as if to a client within a three-hour time limit. The report needs to detail the results of the candidate's research and make recommendations about work that needs to be done in the future.

This exam section is not only about finding new information but also about the research process. In addition to the completed report, the candidate will need to turn in a research log, a pedigree chart, family group record sheet(s), and photocopied or electronic documents.

Preparation Tip: To prepare for this portion of the test practice researching a limited, three-hour project in the region of interest. Focus on research beyond browsing online family trees. It is not unusual for only one third of this time to be used for the actual research. Allow sufficient time for planning, documentation, and report writing. (Some researchers write as the research progresses.) It important to include in the report suggestions for future research.

Oral Review

Oral reviews will be given during the first month of each quarter generally on the third Saturday of the month. Candidates are scheduled for an oral review after passing the written exams at 90% or better for Level 2 and 3. The Oral review is considered part of Level 3, so no separate fee is required. Oral reviews last about two hours. Oral reviews for candidates who tested off-site will be done via a video chat service such as Skype or Google Hangout and scheduled during a quarterly oral review day. During this interview, a few AG professionals in the region of interest will ask questions to determine the candidates overall readiness for accreditation. Questions may include the following topics:

- The four-generation project submitted with the initial application.
- Questions the candidate missed on the written portion of the exam.
- Questions related to the region of interest along with questions on general genealogical principles.

Candidates may also ask questions concerning the test or the testing process.

Professional Ethics

AG Professionals are expected to adhere to high professional ethics at all times. They are required to sign a Professional Ethics Agreement when they first become accredited and again every five years when they renew their credential(s). By signing the Professional Ethics Agreement, an AG professional agrees:

- To conduct himself in a professional and respectful manner at all times.
- To never cause or permit any action that could harm ICAPGen, ICAPGen members, the reputation of ICAPGen, the goodwill associated with the marks and/or with ICAPGen, or the business or other interests of ICAPGen.
- To never engage in illegal, deceptive, misleading, or unethical practices; or advertise or otherwise represent his services or accreditation status in a misleading or deceptive manner.
- To reply promptly to all communications that concern his work and/or conduct as an AG professional.
- To clearly inform his patrons of his fee schedule, the use of others in the discharge of his work, methods of reporting his progress and findings, his areas of accreditation, and his status as an AG professional.
- To make regular written reports to his clients.
- To establish and maintain an accounting system to protect and segregate funds deposited by his clients until he has performed services corresponding to the amount on deposit.
- To adhere to ICAPGen's code of ethics.
- To 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) his exercise of any of his rights and/or obligations under the terms of this agreement; (ii) any actions performed or neglected to be performed by any third parties under his direction and/or control; and (iii) any breach of this agreement by him.
- To allow ICAPGen to inspect and review any materials he has produced that bear any of ICAPGen's marks to ensure these marks are being used properly and to cooperate with ICAPGen in implementing any corrective measures that ICAPGen may require of him.
- To maintain the confidentiality of all information provided to him by ICAPGen including, but not limited to, tests, standards, marks, and business operations, processes, and strategies. He 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. He agrees to return all such materials to ICAPGen immediately upon request.

This list summarizes key points found in ICAPGen's official Professional Ethics Agreement but does not represent the complete agreement. ICAPGen reserves the right to update and modify the Professional Ethics Agreement as needed.

SECTION 3: PREPARATION SUGGESTIONS

Use the table below to self-assess your paleography skills and language ability.

| Paleography Language Ability Self-Assessment The Journeyman Level is necessary for ICAPGen Exams | |
|---|--|
| Apprentice Level: Has the following seven skills | |
| 1. Extract key words – names, dates, places, occupations | |
| 2. Understands the meaning of description labels used in the FamilySearch Catalog | |
| 3. Use finding aids with language assistance Reads records in an expected or common format | |
| 4. Able to read portions of a document containing clear script Able to transcribe a document containing clear script | |
| 5. Regularly uses a genealogical word list | |
| 6. May be able to write a letter requesting information with unlimited time | |
| 7. Understands main ideas of a block of text | |
| Journeyman Level: Has apprentice level skills, plus the following fourteen skills | |
| 1. Writes an understandable letter requesting information, within a limited time-period | |
| 2. Understands a written response to a letter giving further instructions on where to locate a desired record | |
| 3. Accurately transcribes and translates documents within a timed period | |
| 4. Transcribes documents from a variety of time-periods and with a variety of script styles | |
| 5. Reads a block of text and understands the content, context, relationships and events | |
| 6. Proficient reading an unfamiliar block of text | |
| 7. Reads the introductory paragraphs of a record/book giving an explanation of the content of the record/book | |
| 8. Understands abbreviations used within documents | |
| 9. Understands that the words found in the documents may include spelling variations. For example, in Spanish v/b, h/j/x, s/z, etc. | |
| 10. Understands the meaning of symbols found in the documents | |
| 11. Occasionally uses the genealogical word list and/or language dictionaries | |
| 12. Knows where to find the meaning of historical words necessary to determine the meaning or intent of the author of the document | |
| 13. May be required to read phrases or paragraphs written in Latin | |
| 14. Understands the meaning of Roman Numerals | |
| Master Level: Has apprentice & journeyman level skills plus the following two skills | |
| 1. Able to read and understand all script styles within a language | |
| 2. Understands all content and historic meaning within the written language | |

If your paleography or language skills need improving refer to [“Paleography Classes”](#) on our website.

Quick Reference Guide Tips

Candidates own resources can be consulted for the written portions of the exam. Prepare a file folder(s) on a flash drive (from which information will be transferred to the computer on which the test is administered) or in files available online (stored in a Cloud site such as Dropbox, Google Drive, or OneDrive etc.) which can be accessed from the computer used for research. Alternately, resources can be compiled into a physical binder. Candidates should design this guide based on their personal needs. A few suggestions of key items include:

- Maps & gazetteers (Finding aids)
- Word lists (Latin, Swedish, etc.)
- Paleography (handwriting) samples
- Historical background
- Timelines
- Websites
- Articles
- Unique sources
- List of archives, libraries, genealogical and historical societies
- Customs and laws
- Migration trails
- Periodicals
- Methodologies
- Research guides
- List of key reference material
- Document samples

Create a quick reference sheet(s) for each state (province or similar political subdivision). It could include the following:

- Year of independence or year became a state
- Years civil registration or vital records began
- Years of available census or population schedules (federal, state, territorial)
- Historical timeline
- Major archives
- Major genealogical publications
- Major genealogical or historical societies
- Unique items
- Maps – country, state and counties or other jurisdictions
- Key records available online

ICAPGen Study Groups

What is an ICAPGen Study Group?

It is a study group that meets via the Internet to provide support for ICAPGen project submission and preparation for the ICAPGen exam. These groups cap at 6 people.

What is needed to participate in one of the ICAPGen Study Groups?

The participant:

- Has watched the video "[Thinking about becoming an Accredited Genealogist?](#)"
- Is able to answer affirmatively to the [Practice Questionnaire](#) on pages 26-27.
- Wants to submit ICAPGen application and project within the next 3 to 6 months.
- Commits to attending all bi-monthly meetings via internet.
- Commits to completing all study group assignments on time.
- Is prepared to pay the Level 1 testing Fee during the next 3 to 6 months. Fees are only good for one year. Therefore, fees should not be paid until the four-generation project is ready to be submitted.

How to Register?

If you are interested in participating in a Study Group, complete the form accessed through the link below:

[Study Group Interest Form](#)

ICAPGen Exam Proctoring

What is an ICAPGen Exam Proctoring?

ICAPGen regularly needs volunteers to proctor exams on-site at the Family History Library in Salt Lake City. Exams are administered on a quarterly schedule. Proctors do not need to be AG professionals. This is a great opportunity for prospective AG professionals to become familiar with the process. Testing starts at 9:15 am and takes approximately 5 hours. To see scheduled testing dates, click [here](#).

What are the responsibilities of a proctor?

- Support
 - Remain with the examinee during the duration of the exam (4 hours, plus breaks)
 - If examinee has questions, pause the time and speak to an ICAPGen testing committee member
 - Ensure the examinee is not interrupted
- Timing
 - Time each section of the examinee's exam
 - Politely remind the examinee when time is running out
- Integrity
 - Ensure that all copies, notes, or materials created during testing are returned with the exam
 - Hold the examinee's electronics during the exam

Proctors will receive a document with additional details after they register and are selected to proctor an exam.

How to register?

If interested complete the “Volunteer Proctor Availability” form to be placed into a database which is used to assign proctors as needed. Prospective AG professionals will be assigned to proctor a test for a region other than their chosen region of accreditation. To access the form, use the link below:

[Volunteer Proctor Availability Form](#)

Our Website Tools

Listed below are a variety of tools found on the ICAPGen website to help make the journey to ICAPGen Accreditation more successful. These options will help the applicant prepare for the accreditation process and for continued success as a professional genealogist.

[Accreditation Prep Course](#) – This free course will help you prepare your four-generation project.

[ICAPGen Mentoring Online Classes](#) Although the application process has changed since these videos were developed they still have valuable material that can improve your skills. The current application process is outlined in this PDF. Please note: The mentoring videos require the plug-in [Microsoft Silverlight](#). This plug-in may not work if you are using the browser Google Chrome or Microsoft Edge. It is recommended you use [Mozilla Firefox](#) or [Safari](#).

[Incorporating Evidence Analysis in a Research Report](#) – Especially necessary when building a case that uses multiple pieces of indirect evidence to prove a relationship

[Paleography Classes](#) -- Links to online classes and sample documents in various languages which is helpful in improving language skills.

[“Resources, Record Types, and Strategies”](#) where the “Important Record Types List” are discussed that an applicant should be familiar with before applying for accreditation.

[Samples:](#) Links to examples of family group records, pedigrees, research calendars, and Level 1 Four-generation project reports.

Level 1 Practice Questionnaire

Step 4 in the application process is to complete the Level 1 Questionnaire online. If the response to any item on the questionnaire is no, get more experience with that item before applying.

Practice Questionnaire

1. It is required that you review the video "Thinking about becoming an Accredited Genealogist?" Have you reviewed the video?

YES NO

2. It is required that all applicants review and apply the guidelines within the "Guide to Applying for an AG credential" (the guide you are currently viewing). Have you adhered to the standards within the guide?

YES NO

3. List your chosen region? Unsure of how to answer, see "[Testing Regions](#)" for regions currently available for testing.

4. An applicant must have a minimum of 1000 hours of combined genealogical research experience and genealogical education before submitting an application. (Someone with a CG or an AG in another region may reduce this requirement by half of the number of hours.) Do you have 1000 hours or more of this kind of experience?

YES NO

5. It is required of the 1000 hours of combined genealogical research experience and genealogical education that more than 500 hours of that should be research experience in the records of your chosen region. (Someone with a CG or an AG in another region may reduce this requirement by half of the number of hours.) Do you have 500 hours or more of this kind of experience?

YES NO

6. An applicant is expected to have at least 80 hours of experience researching in nationwide record types of their chosen region. (Someone with a CG or an AG in another region may reduce this requirement by half of the number of hours.) Do you have 80 hours of experience using nationwide record types from your chosen region?

YES NO

7. It is expected that a minimum of 80 hours be spent researching in the records of each state division for US regions or five (5) state-type divisions for international regions. (Someone with a CG or an AG in another region may reduce this requirement by half of the number of hours.) Do you 80 hours of this kind of research experience?

YES NO

8. It is required that you review the "[Resources, Record Types and Strategies](#)" page for your chosen region of accreditation. Have you reviewed this page?

YES NO

9. It is expected that you have experience using a variety of record types from the "Important Record Types List" found on the "[Resources, Record Types and Strategies](#)" page for your chosen region. Have you used a variety of record types from the list for your chosen region?

YES NO

10. Use of records must include at least 10 of the most relevant repositories—including both offline (e.g. archives, libraries, courthouses) and online repositories (e.g. FamilySearch.org). For example, 2 archives, 1 courthouse, 2 libraries, and 5 Internet sites would count as 10 repositories. Have you used the most relevant repositories for your chosen region? Were both offline and online repositories used?

YES NO

11. 100 hours or more reading and using old documents in the primary language of the region of interest are required. Have you met this requirement?

YES NO

12. Questionnaire Code

You will need to enter this code on the "Contact Information Form" to verify you successfully completed the Level 1 Questionnaire. (Instructions on how to create your personal questionnaire code are given after successful questionnaires are submitted.)

Enter your questionnaire code into the field provided.

(Tip: Have a copy of your responses emailed to yourself for a record of your questionnaire code.)

Level 1 Four-Generation Project Check List

Use this check list to determine if your four-generation project is ready to submit. Any item you cannot check off as completed needs done before you submit your project. Any item you are unsure about, learn more about that item before submitting your project.

Methodology

- 1. Did your research consist mainly of original sources in your accreditation area of interest and is it discussed in your report?
- 2. Did you use the expected records for the time-period and area covered in the project?
- 3. Did you demonstrate your knowledge of local customs or naming patterns that were common to your search area? (Naming patterns may not be applicable for all reports.)
- 4. Did you apply appropriate research strategies for your area and time-period?
- 5. Did you support all stated facts with quality sources and did you cite those sources?
- 6. Did your report clearly explain the significance of key findings provided in the documents?
- 7. Did you provide good suggestions for future research to solve the stated research objective, or to support a new research objective?

Evidence Analysis

- 1. Did you properly introduce each piece of evidence used to address the genealogical problem?
- 2. Did you present your research findings clearly and in a logical order?
- 3. Did you properly analyze and explain the evidence presented in your report by doing in the following?
 - a. showing the evidence
 - b. explaining how it's evidence
 - c. discussing how the evidence connects the people (families)
- 4. Did the evidence presented fully support the stated conclusions discussed in the report?
- 5. Did you refrain from making unjustified conclusions, hasty generalizations, or tailoring your findings to fit a pre-conceived notion?
- 6. Did you properly address all conflicting information in the report and resolve the conflicts when possible?

Research Objective, Summary, and Conclusion

- 1. Did you include a research objective in your report? Does your objective (or a background section) contain the complete name of the starting ancestor with key identifying information, such as birth date, birth place, and relationship?

- 2. Did your report maintain its focus on the research objective?
- 3. Did you provide a summary of the research results in your report in one of the following?
 - after the statement of the research objective as a preview of research results
 - at the end of each individual generation to conclude the section
 - at the end of the report as a discussion that includes all four generations
- 4. Did you address the research objective in your summaries or in a concluding section at the end of your report?

Report Writing Style and Presentation

- 1. Did you discuss all four generations in the written report?
- 2. Did you differentiate all generations clearly from each other? Did you give each generation its own careful treatment?
- 3. Did you include headings and subheadings to clearly divide topics and subtopics?
- 4. Did you use 1st, 2nd, and 3rd person consistently throughout the report?
- 5. Did you check the report for typographical or grammatical errors?
- 6. Did you use good transitional statements to facilitate the flow of thought from one section to the next?
- 7. Did you consistently format the source citations throughout the report?
- 8. Did you correctly transcribe or abstract key documents into your report? (or translate if needed)

Pedigree Charts

- 1. Did you display only the four generations (four couples) of the study on the pedigree chart?
- 2. Did you include all dates and places (i.e., b, bp, m, mp, d, dp) on the chart for each couple, complete with either exact or approximated information from sources?
- 3. Did you compare the information on family group records with information on the pedigree chart and in the report to insure they matched?
- 4. Was the starting individual on the pedigree chart born in 1900 or before? Did he/she have a spouse and children?
- 5. Did someone from each generation live for some time in the chosen region? Was it evidenced on the pedigree chart or was it discussed in the report?

Family Group Records

- 1. Did you include four or more family group records? If an individual on the pedigree had multiple

marriages, did you include a family group record on them with all their spouses?

- 2. Did each family group record contain complete event dates and places on each individual listed on the record? (Information may be estimated.) [It is understood that some vital information might not be attainable. However, a reasonable effort to find such information should be reflected in the research calendar or report.]
- 3. Did you include information on all children in the family? (Information on living people may be left off. When living, individuals are left off, reference them as living.)
- 4. Did you support each fact on all family group records with an appropriate source?

Research Calendars (Logs)

- 1. Did you list the names of persons, events, or records searched on the research calendars?
- 2. Did you include the repository or website for each source searched on the research calendars?
- 3. Did you list descriptions of sources used on the research calendar? i.e. type of record, time-period covered, etc.
- 4. Did you include call numbers, film numbers, or URLs (including date accessed) of each record searched on the research calendar?
- 5. Did you include document numbers for all documents located on the research calendars?
- 6. Did you list both positive and negative search results on the research calendars?
- 7. Did you include complete citations for all sources listed on the research calendar?

Technology

- 1. Did you include only images of key documents (maximum of 40) discussed in the report with your project? Are the images readable without adjustments? (Rater's should not have to rotate images to read them.)
- 2. Did you properly reference the documents in the report?
- 3. Did you label documents so that someone could easily tell which image belongs to which record referenced in the report? (Label should be on front of document not just in file name.)
- 4. Did your project show a variety of applicable websites were used? Has information from those websites been integrated with other sources into the report?

ICAPGen practices blind rating.

- Did you remove your name off everything associated with your project? i.e. the pedigree chart, all family group records, all document images, and the report pages of your submission.