132nd Continental Congress
News You Can Use
27 June 2023

ELECTRONIC APPLICATIONS AND MID-LEVEL REVIEWS

A quick overview of eApps and MLRs

ELECTRONIC APPLICATIONS

Electronic Applications, or eApps, were originally introduced circa June 2016.

Why an eApp?

Same steps as a paper app? YES!! And then some….

OVERVIEW OF THE EAPP PROCESS

1. When a prospective member expresses interest in the DAR, she will be connected to a particular DAR Chapter. This connection might be made personally or electronically through the Membership Interest Form or the Prospective Member Database.

2. The Electronic Application Process can only be used for Ancestors that are already established with the DAR. If applying through a new ancestor (not in the Ancestor Database), or the notation "Treat as New Ancestor" is displayed on your Ancestor's record, please use the traditional paper application available on the Members' website.

3. If the lineage requires an analysis (compiling indirect evidence to show a relationship), or a service study, please use the traditional paper application available on the Members' website.

4. The Chapter Registrar will begin the Electronic Application process by entering the member's contact information.

5. The prospective member will receive an email with instructions for creating an account.

6. Once the prospective member has created her account, she can begin filling out the Electronic Application Form.

7. At any time during the process of completing the Electronic Application, the Chapter Registrar and/or other qualified volunteers may assist the applicant with the application.

8. Once the applicant has completed the Electronic Application form by entering her information, adding her lineage, and uploading her supporting documentation, she will submit her application for review by the Chapter officers.***

9. Two chapter officers will review and endorse the Electronic Application.***

10. The application will be forwarded to the Volunteer Electronic Application Reviewers (EARs).***

11. The Electronic Application Reviewers (EARs) will ensure that the Electronic Application was correctly completed.***

12. Once the application has been approved by the Electronic Application Reviewers (EARs), payment will be submitted by the applicant.***

13. Once payment has been received, the application will be forward for review by the DAR Staff Genealogists.

14. The DAR Staff Genealogists will ensure that all names, dates, places and relationships have been proven with acceptable forms of supporting documentation. The Revolutionary War service of the ancestor will also be reviewed.

15. If additional information is needed at any point during this process, the applicant will be given instructions regarding any additions or modifications that might be required.

16. When the DAR Staff Genealogists have verified the lineage and service on the Electronic Application, it will be forwarded for acceptance at the next vote of the National Board of Management.

17. Following acceptance by the National Board of Management, the applicant will be become a member and will receive her membership certificate and welcome packet.

18. The Chapter Registrar will be provided with a digital copy of the verified application for their chapter records.

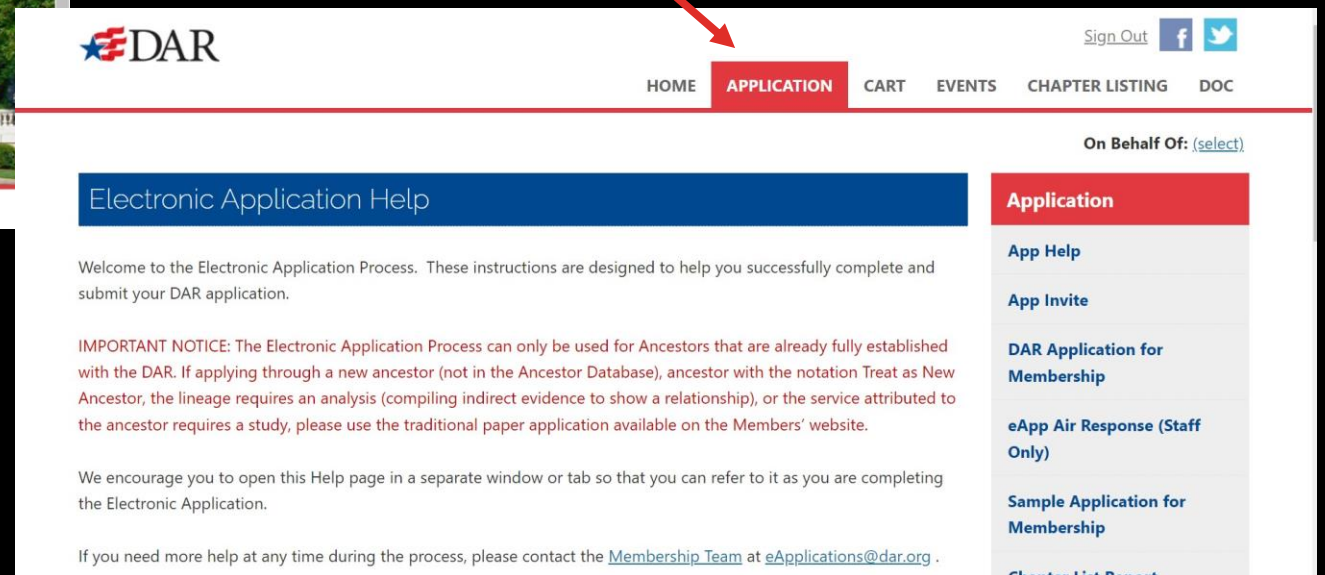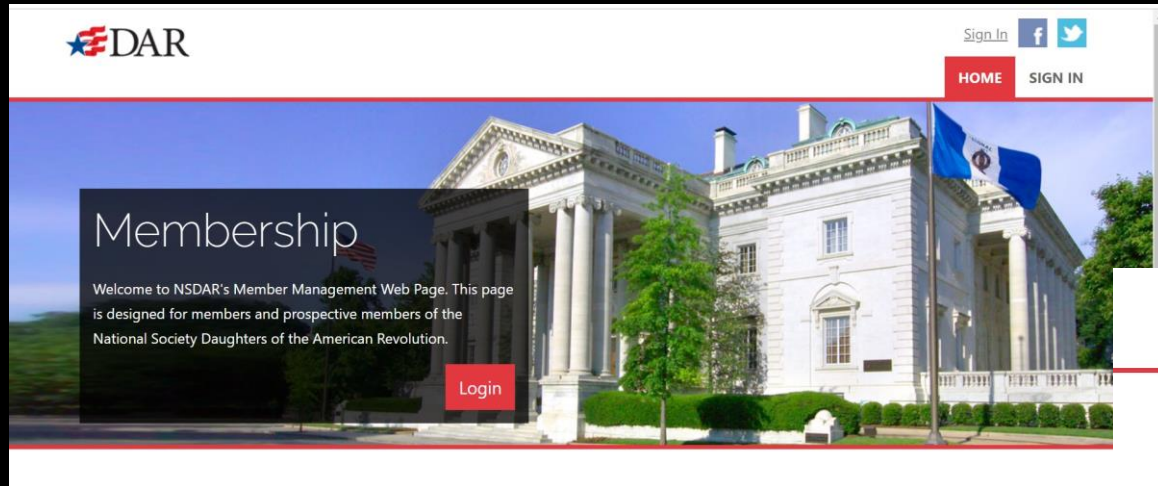# RESOURCES WHEN FILLING OUT AN ELECTRONIC APPLICATION/EAPP

**Members Website – Electronic Applications (eApp) – The website has information and links to resources to help you successfully use the technology and fill out and submit an Electronic Appliation - https://www.dar.org/members/applications-supplementals/electronic-applications-eapp

**Genie Clips - Welcome to Electronic Applications! These videos have been created to provide our applicants and members the tools for a successful submission. Please review them in the order listed for the best learning experience. https://www.dar.org/national-society/genealogy/genie-clips-eapps

**GEP - Course 5 is the eApps course - The Beginner's Guide to Electronic Applications and can answer many questions that you may have as you work with Electronic Applications. The cost of this course is $25. - Visit nsdar.myshopify.com to purchase. https://www.dar.org/members/applications-supplementals/gep-5-eapps-beginner%E2%80%99s-guide-electronic-applications

MEMBERS WEBSITE – ELECTRONIC APPLICATIONS (EAPPS)

We encourage you to open this Help page in a separate window or tab so that you can refer to it as you are completing the Electronic Application.

If you need more help at any time during the process, please contact the Membership Team at eApplications@dar.org .

- Overview of the Electronic Application Process
- Terminology
- Step-by-Step Instructions for Completing the Application
- Applicant Checklist for Filling Out Electronic Application 📄
- Chapter Review Checklist for Electronic Applications 📄
- Guidelines: Completing the Application and Proving the Lineage 📄
- Guidelines: Service 📄
- Frequently Asked Questions
- Instructions for Chapter Officers

Video Tutorial

DAR Electronic Application Tutorial

Share

Electronic Application
Tutorial Video

Watch on YouTube

Step-by-Step Instructions

- Creating an Account
- General Site Navigation
- The Application Form
    - Contact Information
    - Applicant Information
    - Marriage Details Of Applicant
    - Lineage Information
    - Ancestor Information and Service
    - Ancestor's Marriages
    - Ancestor's Children
    - Supporting Documentation
    - Complete Application and Submit
- Final Steps

GENIE CLIPS

Genie Clips: eApps

Welcome to Electronic Applications! These videos have been created to provide our applicants and members the tools for a successful submission. Please review them in the order listed for the best learning experience.

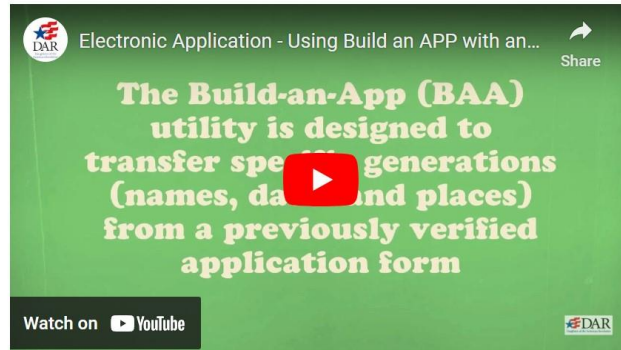If you have any questions about the Electronic Application process, please email us at eApplications@dar.org ✉.

Electronic Applications - Getting Started

No application to print, no signatures with black ink, no going to the post office!

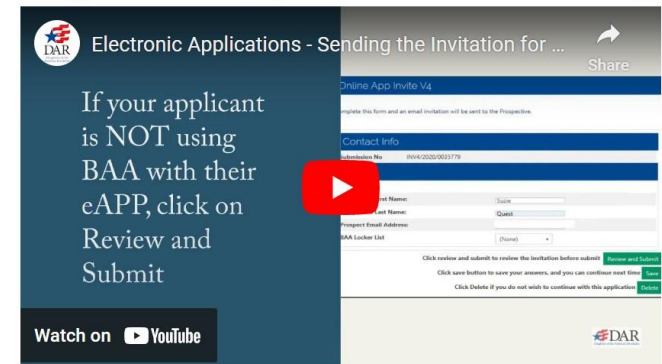**Electronic Applications - Using Build an APP with an Electronic Application**

The Build-an-App (BAA) utility is designed to transfer specific generations (names, dates and places) from a previously verified application form

Electronic Applications - Sending the Invitation for an Electronic Application

If your applicant is NOT using BAA with their eAPP, click on Review and Submit

Electronic Applications - Creating An Account

Electronic Applications - Creating an Account

Share

Please review Genie Clips: "Electronic Applications- Getting Started", "Using Build-an-App with an Electronic Application", and "Sending an Invitation for an Electronic Application" before viewing this video

Electronic Applications - Editing and Filling Out the Electronic Application

Electronic Applications - Editing and Filling out the ...

Share

Editing and Filling out the Electronic Application

Watch on YouTube

Electronic Applications - Uploading Documents and Submitting the eAPP

Electronic Applications - Uploading Documentation...

Share

Please utilize the Applicant Checklist for Electronic Applications while filling out your eAPP

Watch on YouTube

Electronic Applications - The Review Process: Part One

Electronic Applications - The Review Process

The review cannot be "assigned" to another chapter member by one of these officers

Watch on YouTube

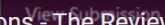**Electronic Applications - The Review Process: Part Two**

Electronic Applications - The Review Process: Part ...

You will now review each document uploaded as proof for the eAPP by going to the File Upload section

Watch on YouTube

Electronic Applications - The Review Process: Part Three

Electonic Applications - The Review Process: Part ...

Two chapter officers must review and approve an electronic application, in two separate reviews. Do not APPROVE without reviewing the eAPP using the Chapter Review Checklist For Electronic Applications. *No chapter officer should use this review process for the SOLE purpose of endorsing the applicant and providing an electronic signature.*

GEP EAPPS COURSE

Genealogy Education Programs (GEP)

The NSDAR Genealogy Department has created and maintains seven Genealogical Education Programs (GEP 1-7). The GEP courses provide the most complete and up-to-date information on the proper completion and documentation standards required by the DAR for the verification of applications. GEP 1-5 and 7 are available to all DAR members. The member is responsible for the cost of each course.

NSDAR Genealogy Department provides a Registrar Training Course (GEP 6) at no charge to anyone who actively holds the position of Chapter or State Registrar

After enrolling in a Genealogical Education Program course, you have up to 90 days to complete the course. Lessons consist of videos, handouts, transcripts, and quizzes. Five attempts are available for each quiz, with a passing grade required to proceed to the next quiz.

For questions, issues, or concerns, please contact the GEP inbox at onlineclasses@dar.org ✉.

NOTE: If you are conducting Volunteer Field Genealogist workshops, you may use any of the handouts, charts or checklists that are included with the course. You may NOT use the slides from the lesson presentations or verbatim text from the transcripts of the lessons.

For information about becoming a Volunteer Genealogist or to purchase the pins associated with these courses, please visit the Volunteer Genealogists Committee page on the member's website.

Visit the Genealogy Education Program Website. ⌐

Don't have a GEP account? Click here to register!

GEP 1 - Introduction to Genealogy Research for DAR Applications

GEP 2 - Applying Genealogy Research Techniques to DAR Applications

GEP 3 - Advanced Techniques for Resolving Problems with Lineage and Service on DAR Records

GEP 4 - DNA and the DAR: Using DNA as a Piece of the Evidence for a DAR Application

Registrar Training Course

GEP 5 - eApps: The Beginner's Guide to Electronic Applications

Mid-Level Review Training Program

Pins

MID-LEVEL REVIEWERS

Who, why and what do they do?

MID-LEVEL REVIEWERS – OR MLRS

*MLRs are volunteer members

*MLRs complete the GEP MLR course.

*Mid-Level Review Manual – review often

*Emails with continued training/new procedures

*MLRs are anonymous!

*MLRs do not review eApps from their home state

*Have anywhere from 12 to 20 MLRs at any given time

*Have had over 200 requests to be an MLR
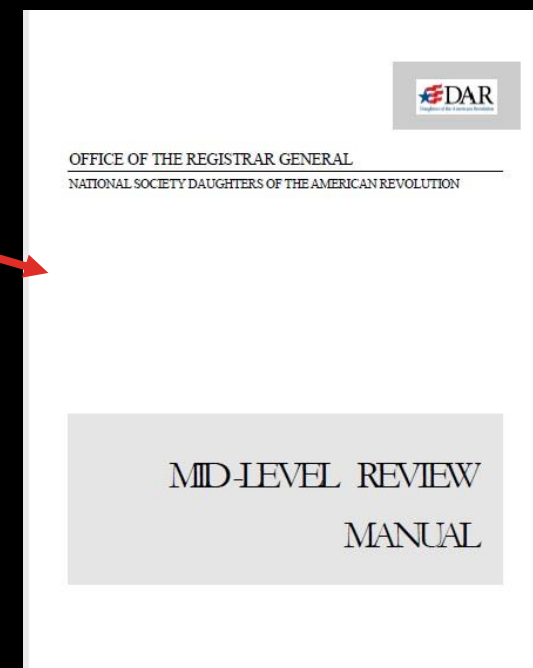
THE JOB OF THE MID-LEVEL REVIEWER (MLR)

Make sure the eApp is complete, meets the criteria for electronic submission and meets the minimum standards for all applications.

The MLR is not verifying the application, only reviewing to ensure that the above criteria has been met and that the Guidelines have been followed.

The MLR should not perform independent research to help the applicant.

CHECKLIST FOR REVIEW

- ✓ Applicants name and address – nothing to review
- ✓ Applicant Information – all fields complete? Including date of birth? Complete place of birth? City and state?
- ✓ Marriage – This is optional but if marriage and spouse are added, is the information complete? with documentation?
- ✓ Lineage Section – each generation reviewed for complete information, citations added for each generation

CHECKLIST FOR REVIEW

✓ Source Citations – While a few incorrect citations alone are not reason enough for a return, they can be mentioned if it is returned for other reasons. Excessive problems with citations can be a cause for a return.

✓ Excessive Docs?

✓ #1 issue mentioned in returns!

✓ Why??

✓ Links!!

CHECKLIST FOR REVIEW

✓ Ancestor Residence and Service – does the information match the GRS?

Ancestor #?

Spelling?

Suffixes if any?

State served?

Military rank, PS, CS, Signer?

Service Source?

Residences?
Multiple Residences?

Service Description?

PERRY, AMOS   Ancestor #: A214206

Service: MASSACHUSETTS   Rank(s): CIVIL SERVICE, CAPTAIN

Birth: 2-19-1740   SHERBORN MIDDLESEX CO MASSACHUSETTS

Death: POST 1789   SHERBORN MIDDLESEX CO MASSACHUSETTS

Service Source:

MA SOLS & SAILS, VOL 12, P 193; MADAR, TOWN OFFICIALS 1775-1783, GRC S1, VOL 34, PP 314, 315, 322, 323, 324, 326

Service Description:

1) ALSO SGT, 2ND LT, CAPTS BENJAMIN BULLARD, JOSEPH BACON, HEZEKIAH BROAD, COLS PEIRCE, JONATHAN BREWER,

2) SAMUEL THATCHER, SAMUEL BULLARD, HAWS, ABNER PERRY, LEXINGTON ALARM; SURVEYOR OF HIGHWAYS, SELECTMAN, MODERATOR, FENCE VIEWER

RESIDENCE

1) **City:** SHERBORN - **County:** MIDDLESEX CO - **State:** MASSACHUSETTS

SPOUSE

Number	Name
1)	PATIENCE EAMES

CHECKLIST FOR REVIEW

- ✓ Ancestor Spouse and Children – optional and do not require review
- ✓ Supporting documentation – "Each new person, date, and place listed in the lineage must be supported by acceptable documentation."

- o All docs needed to prove lineage uploaded?
- o Were the docs cited uploaded? Remember **"Cite what you send and send what you cite!"**
- o Number of docs appear to be adequate and appropriate to verify lineage?
- o Excessive number of docs? (multiple docs for the same info, DC, TS, Obit, etc)
- o Possible analysis?
- o Are all docs legible?
- o Pertinent facts <u>underlined in red</u>?

CRITERIA FOR AUTOMATIC RETURN:

o   eApp is Attempting to Establish a New Ancestor

o   Patriot is Coded FAMPCS or TRNWAN. If the patriot is coded FAMP/C, and the code applies to the lineage of the applicant, this also qualifies as an automatic return.

o   Applicant is Using DNA

o   Applicant is Using Analysis

o   Applicant Submitted a Service Study

o   Multiple Duplicate Documents Were Submitted

o   No Documentation Underlined in Red

o   Missing Generations/Errors in Lineage

o   Illegible Documents

AUTOMATIC RETURNS

OTHER REASONS FOR RETURNS
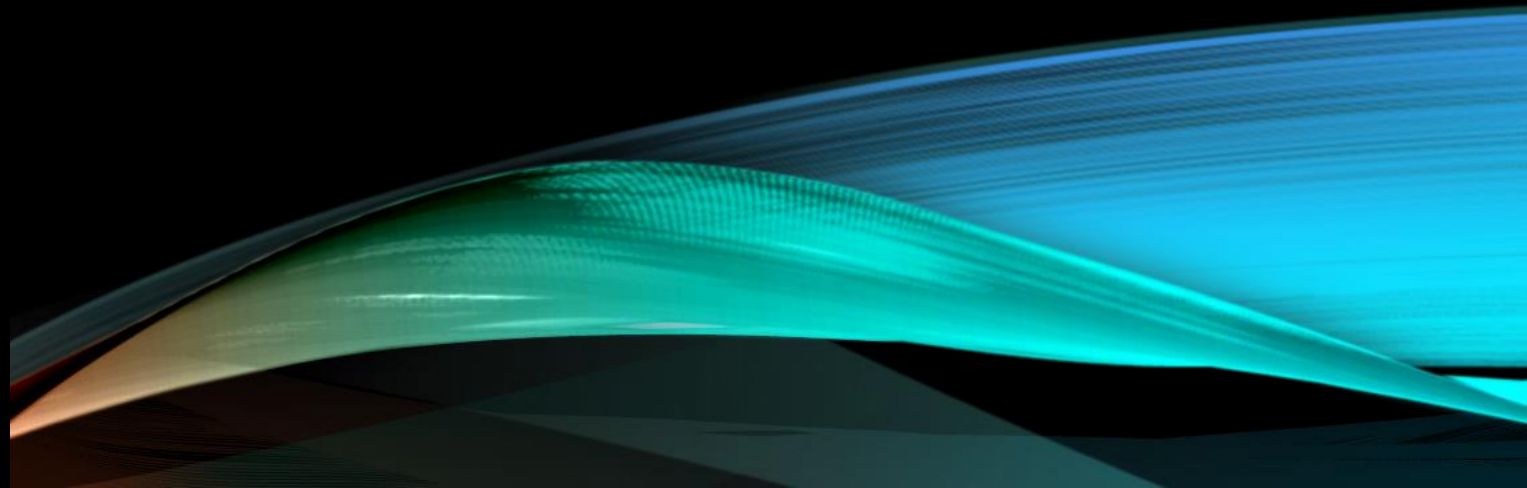
OTHER POSSIBLE REASONS FOR RETURNS

- Excessive docs
- Docs not .jpeg format
- Citations
- Missing links
- No Source of Service
- No Residence
- Included Husband and marriage but no documentation
- Gens 1 – 3 missing information or documentation
- Gens 4 to patriot missing at least one date and place for birth or death for each person
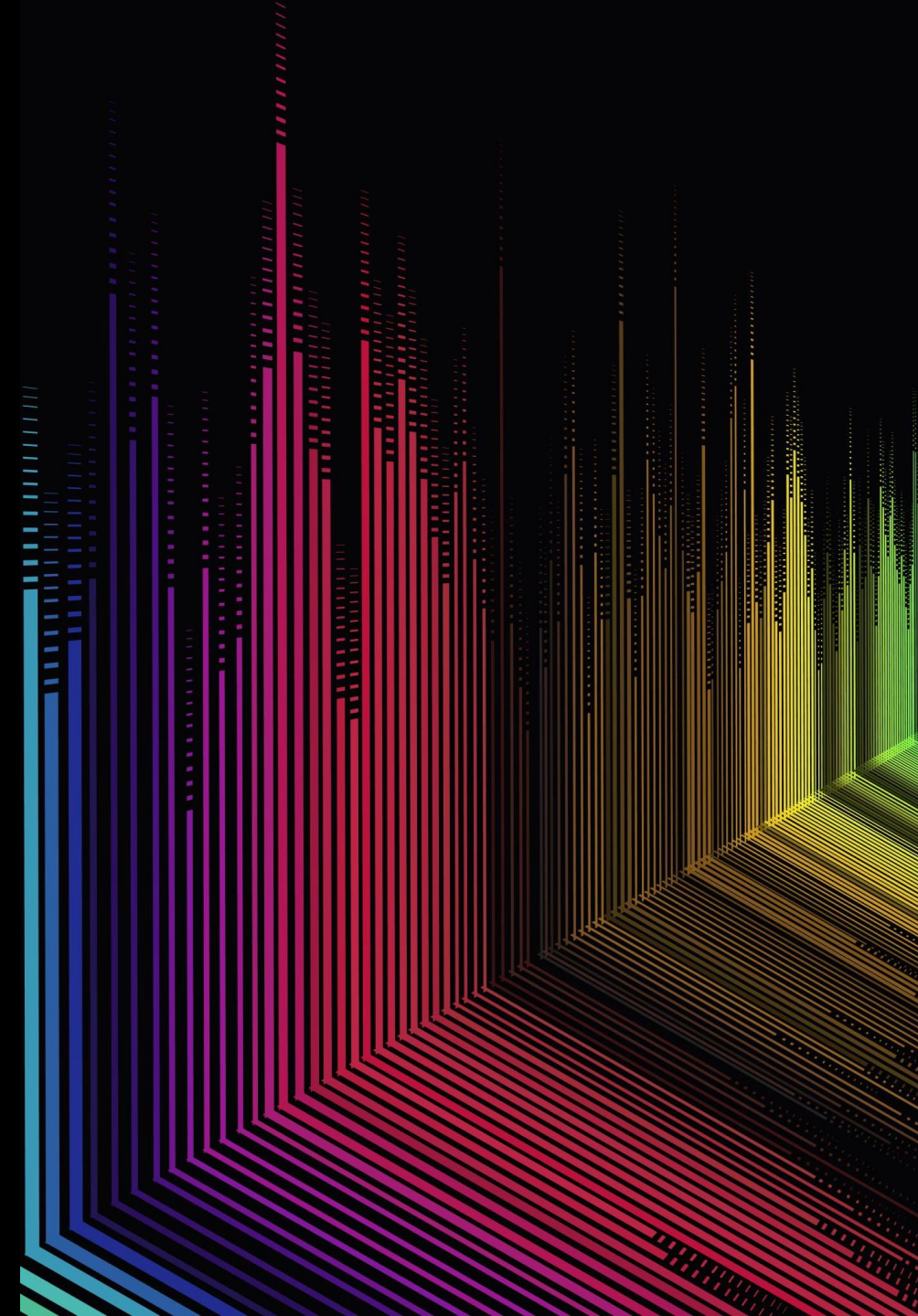
✓ Final step – accept the eApp and send it on to Genealogy for verifying or return to the prospective member for further work.

REMEMBER – OUR MLR VOLUNTEERS ARE MEMBERS LIKE YOU, DOING THEIR BEST, AND TRYING TO HELP YOU GET YOUR APPLICATION PROCESSED, REVIEWED AND VERIFIED AS QUICKLY AS POSSIBLE!