

Best Practices for Working in FamilySearch's Shared Family Tree

RootsTech 2025
Kathryn Grant

[Link to slide deck for this class](#)

Introduction

Family trees are as old as humankind. Before the digital age, people and organizations kept their own family trees. Sharing them could be difficult and sometimes impossible.

Computers and the internet made it easier to share family trees, but for the most part, people still kept their own individual trees.

Then, in 2012, FamilySearch released Family Tree, promoting it as a “shared” or “collaborative” tree. The approach was revolutionary.

What Is a Shared Tree?

A shared tree is a family tree where all users see the same information about deceased people. Any user can add or change information. The ultimate goal is to create an accurate record of the human family and help people connect with family members, both living and deceased.

The idea of a shared tree is exciting and innovative. We don't have to work alone anymore; we can collaborate with family members from all over the world. We can reduce duplicate research. To share information, we don't need to print paper copies or email files because everyone has access to current information in one public tree.

As exciting as a shared tree is, it's a new paradigm for most people. It requires a new way of thinking about and doing family history.

How Is an Individual Tree Different from a Shared Tree?

Consider how working in an individual tree is different from working in a shared tree:

Individual Tree	Shared Tree
I'm familiar with the people in my tree.	I may not be familiar with the people that others have added to the Family Tree.
I may have important information about my family in my head or in research notes that I haven't put in the tree. This information is available to me when I need it.	If other people have information they haven't put in the shared tree, I may not have access to it.
No one can make changes to my tree without my permission.	Any user can add or change information.

I control the quality of my tree.	I control the quality of my contributions, but not the quality of others' contributions.
I can put partial or questionable information in my tree, and it doesn't have a negative impact on anyone else.	If I put partial or questionable information in the shared tree, it can confuse other users and lead to mistakes.

Working Effectively in a Shared Tree

Especially in a shared endeavor, following best practices gives us the best chance of success. Here are four key best practices for working in the shared tree.

1. Practice intellectual humility

When we are intellectually humble:

- We value truth more than our ego, reputation, or convenience.
- We realize we don't know everything, and we're okay with that. We're willing to learn.
- We do our best to validate our assumptions.
- We admit when we are wrong.
- We welcome correction because it leads us closer to the truth.

How does this look in a shared tree? We realize that we don't "own" our ancestors. We are willing to share information with others. We discuss differences with courtesy and respect. We're patient with the mistakes of others, just as we want others to be patient with us.

2. Understand how a shared tree works

Understanding how a shared tree works helps us avoid frustration and mistakes. Here are three important points to understand:

1. In a shared tree, any user can make additions and changes. If you're used to a shared tree, this sounds obvious, but it can be a shock if you're not expecting it. Realistic expectations help us avoid frustration.
2. All changes should be supported by trustworthy sources. Trustworthy sources are essential to the integrity of a shared tree.
3. Users should understand the concept of *intended identity*. This concept is unique to a shared tree.
 - a. When someone creates a profile in Family Tree, they intend the profile to represent a certain human being. This is the intended identity.

- b. In a personal tree, we take intended identity for granted. We create the profiles, so we know which humans they represent.
- c. However, in a shared tree, many different people create profiles. We know the intended identity of the profiles we create, but we don't automatically know the intended identity of those created by others. The apparent information on a profile can be changed through incorrect additions, bad merges, and so forth.
- d. We can usually determine the intended identity of a profile by looking at the earliest entries in the change log. (Exception: it can be difficult to determine the intended identity if a profile was incorrect in a previous system, such as new.familysearch.org.)
- e. Respecting intended identity is vital to the success of a shared tree.

3. Strive for completeness and accuracy

As mentioned, the basic premise of a shared tree is that we're working together to create a tree of the human family. This approach works well at a family or multi-generational level. But it doesn't work as well if we add partial families or haphazard information and sources. The lack of context often leads to confusion, errors, and duplication.

To avoid this problem, strive for completeness and accuracy by doing the following:

- **Build the tree from the tree.** Do your best to work from someone who is already in the tree. It is rarely necessary or helpful to add a "fragment": that is, a person or family who "floats" in the tree without being connected to anyone else.
 - Because fragments lack context, it's harder for FamilySearch to find duplicates.
 - The lack of context also leads to bad merges and wrong relationships.
 - It's much slower to research a fragment and figure out where it belongs than to add people where they belong in the tree.
- **Work by families.** Research, add, and source an entire family at one time. Find reasonably complete information on each family member and attach relevant sources. This approach significantly improves FamilySearch's ability to find duplicate profiles. It also reduces duplicate work by other users.

4. Slow down.

Sometimes we want to get our family history "done," so we rush and cut corners. But rushing almost always ends up costing more time in the long run, for ourselves and others.

A prime example of counterproductive rushing is making mass additions to Family Tree via GEDCOMs, copies of trees from third-party websites, or other means. People sometimes assume mass additions will save time, but the opposite has proven true.

Mass additions virtually *always* result in many errors and duplicates that take more time to fix than the time saved.

It's worth asking, "If I don't have time to do it right, how will I find time to do it over?" If you want to add a large quantity of names from a GEDCOM file, for example, take the time to verify each name first and be careful of adding duplicates. You'll be glad you did, and so will other users.

When we work carefully and diligently at a relaxed pace, we accomplish much more in the long run.

Conclusion

Working in a collaborative tree invites us to learn a new way of doing family history. It may take time, patience, and adjustments, but the benefits are huge! As we work together, we can honor our deceased family members, connect with our living family members, and ultimately reach our goal of building a shared tree of all humanity.

© 2025 by Intellectual Reserve, Inc. All rights reserved. No part of this document may be reprinted or reproduced in any form for any purpose without prior wri