OPERATION GRANNY FILES

Shared Tree Field Rules

A pocket guide to merging, undoing, and explaining yourself on a tree that isn't only yours

Field Guide & Quick-Reference

Mission 37: The Shared Tree

Clearance Level: Biscuit-Tin Operative

operationgrannyfiles.substack.com

QUICK-GRAB SUMMARY

FamilySearch's Family Tree is one shared profile per ancestor, worldwide — not your private tree. Before you merge two profiles, check sources and family details on both sides; if you're not sure, don't merge. Undo works only in a short window with no changes since; after that, use Restore Person instead. And every time you change a fact, leave a reason statement — it's the only thing that tells the next researcher why your version should stand.

One Tree, Not Your Tree

On Ancestry or MyHeritage, your tree is yours. Attach the wrong record, and you simply detach it — nobody else is affected.

FamilySearch works differently. There is one public profile per historical person, shared by every researcher who has ever touched that ancestor. You and a third cousin you've never met may both be working the very same profile, at the very same time, without knowing it.

That's a gift and a risk in equal measure. A stranger's careful sourcing can strengthen your line overnight. A careless edit — yours or theirs — can just as easily undo months of someone else's work. Every change you make on FamilySearch travels outward to every other researcher connected to that ancestor. There's no "just my tree" to retreat to.

Keep that fact in mind and the rest of this guide is just mechanics.

The Possible Duplicate Flag

FamilySearch scans continuously for profiles that might represent the same person — matching names, overlapping dates, shared family members. When it finds a likely pair, it marks one profile with a red exclamation mark reading **Possible Duplicate**.

That flag is not an instruction to merge. It's an invitation to look closely. Work the checklist below before you touch the Merge button.

1. **Open Review Merge.** Compare the two profiles side by side — names, dates, places, family members.
2. **Check the sources on both sides.** Don't assume the more complete-looking profile is the correct one; open the attached sources and read them.
3. **Look for red-flag inconsistencies** (see the table below) before deciding either way.
4. **Choose deliberately, field by field.** The merge screen lets you keep the more accurate version of each fact — you are not stuck accepting whatever the surviving profile already had.
5. **When in doubt, don't merge.** Mark **Not a Match** if you're reasonably confident they're different people. If you're genuinely unsure, leave the flag active for a researcher with better evidence.

GRANNY PRO TIP

A gap of five or six years between two birth dates could still be the same person — old recordkeeping wasn't precise. An eighteen-year gap on a common name, like two "John Smiths" born in 1845 and 1863 in the same county, is a strong signal you're looking at two different men. Common surnames deserve extra suspicion, not less.

Three Ways Out of a Merge Review

Choice	What It Does	Use When
Merge	Combines both profiles; the non-surviving profile is deleted	You've checked sources on both sides and they clearly describe the same person
Not a Match	Marks the pair as confirmed-different; suppresses the flag for everyone	You have specific evidence (birthplace, parents, dates) that they are different people
Leave It	Takes no action; the flag stays active	You're genuinely uncertain — better to wait for stronger evidence than guess

Recognizing a Merge Gone Wrong

Bad merges compound — one wrong merge creates inconsistencies that look like new possible duplicates, inviting more bad merges down the line. Catch the warning signs early:

- Multiple spouses shown with no death or divorce between them
- Twenty or more children on one profile
- A child born before the mother could bear children, or more than nine months after the father's death
- A child's birthplace that contradicts the family's documented residence
- Siblings born less than seven months apart, or with improbably large gaps
- A child sharing a name with an older sibling who was still alive
- Life events out of order — christened before birth, married at age two
- Conflicting sources on one profile, such as two census years placing the person in different states

Undo, Merge Analysis, and Restore Person

Undo Merge works only under narrow conditions — know them before you need them.

- **Right after the merge:** an **Undo** button appears on screen. One click reverses it.
- **Shortly after, if nothing else has changed:** open **Latest Changes**, find the merge entry, click **Merge Analysis**, then **Undo Merge**. You'll be asked to write a reason statement explaining the error.
- **If the surviving profile has been edited since the merge:** the Undo Merge button will be grayed out. This is the trap — don't assume undo is always available.

When Undo isn't available, use **Restore Person** instead:

1. Open **Latest Changes** and click the name of the person deleted in the merge.
2. Open their (now-deleted) profile summary and click **Person**.
3. Click **Restore Person** on the black bar at the top.

Restore Person brings the deleted profile back exactly as it stood at the moment of the merge. It does **not** touch the surviving profile — anything added there since the merge stays in place and may need correcting by hand.

BONUS INSIGHT

Merge Analysis isn't only for fixing mistakes. It shows the pre-merge state of both original profiles side by side with the final result, which makes it a genuinely useful tool for auditing a merge someone else made years ago — even one you had nothing to do with.

Reason Statements: Write It Like They're Listening

The instinct to simply retype a wrong fact and move on is exactly what erodes a shared tree. The next researcher who opens that profile has no way to know why you changed it, or whether it's trustworthy. A **reason statement** — a short, permanent note attached to your change in the profile's change log — closes that gap.

A reason statement is not a conversation. For back-and-forth discussion, use the **Discussions** tab instead. Reason statements are one-way notes explaining a change already made.

Use this checklist every time you edit a fact, attach a source, or complete a merge:

- Write in complete sentences, third person — "The 1880 census shows..." not "I found..."
- Keep it under 2,000 characters, professional and neutral in tone
- State exactly what the source supports, and what still needs sourcing
- Attach the actual source, tagged to the specific fact it supports
- If sources conflict, say which one you trust and why
- If a family story contradicts the record, explain why you prefer the record
- If a fact is estimated rather than sourced directly, say so

- If you're deleting information rather than correcting it, explain why deletion was the right call

Ready-to-adapt templates:

- *Merge:* "All vital information and relationships match."
- *Not a Match:* "[ID] is a different person from [ID] because [reason — birthplace, parents, or dates that don't align]."
- *Census source:* "This census return provides evidence of residence, birthplace, approximate birth year, and [other key information]."
- *Marriage record:* "This marriage record provides evidence of marriage date and place and [key information]."

Shared-Tree Etiquette

- **Communicate before major structural changes when there's real doubt.** Post to Discussions rather than acting unilaterally on an ambiguous case.
- **Assume good faith.** Almost every bad edit is an honest mistake, not vandalism. Keep your tone evidence-focused, never accusatory.
- **Attach sources before you make structural changes.** An unsourced correction is just as vulnerable to being reverted as the version it replaced.
- **Reach out directly when something looks wrong.** From the change log, click the contributor's ID, then Message, and ask before you assume.

GRANNY SAYS

"When in doubt, don't merge — and whatever you do change, leave the sentence that tells the next stranger why."

Notes

Use this space for personal notes and discoveries.