# Guide for Using the SAR Online System

Version 1.0
25 June 2016

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# Section 1.0

## Setting up an Account on the Online System

To setup a new account, first go to https://www.sar.org.  you will see this screen.  Click on "Compatriot Login".
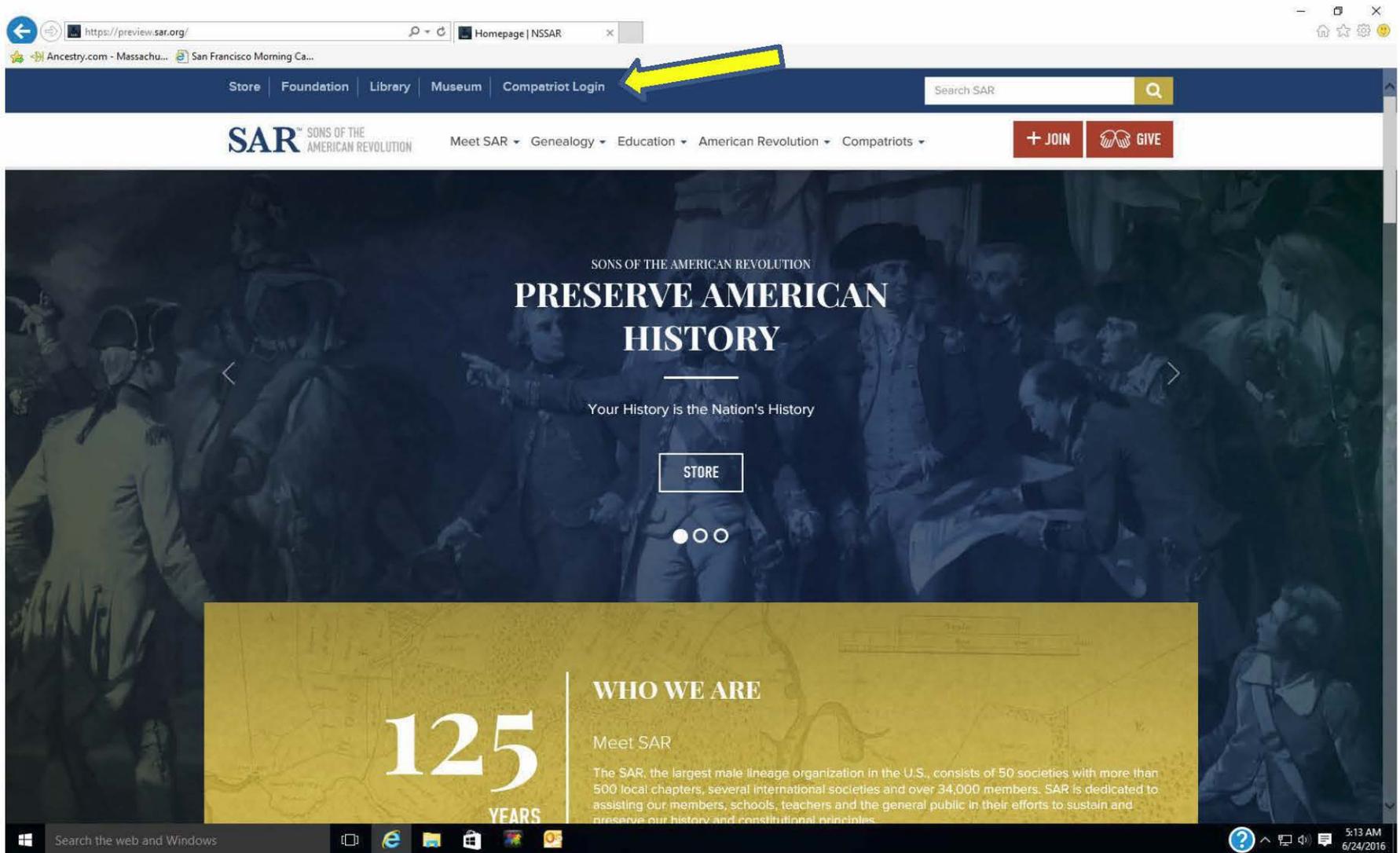
You will be taken to the Log In/Sign Up screen.  If you don't already have an account.  Click on the "Sign Up" tab.

To create a new account so you can prepare membership applications or register for SAR events, you must first sign up. Click on the "Sign Up" tab on the screen above and this screen will appear. Enter you first and last name, your email address, a password and a password confirmation (this password will be needed for all future logins). Then click on the blue "Sign Up" button. Once this is done, logoff and don't log back in until the next step is completed. *NOTE: it is very important that your email address is entered correctly since the address will be used to send back an email from the NSSAR to confirm and complete your registration.*

Once you submit this sign-in information, you will be sent an activation email from the Sons of the American Revolution like the one below. Click on the link "Please click to activate account" link. Wait until this email is received before proceeding. If the activation email is not received within a few minutes, be sure to check your junk or spam mail folders.
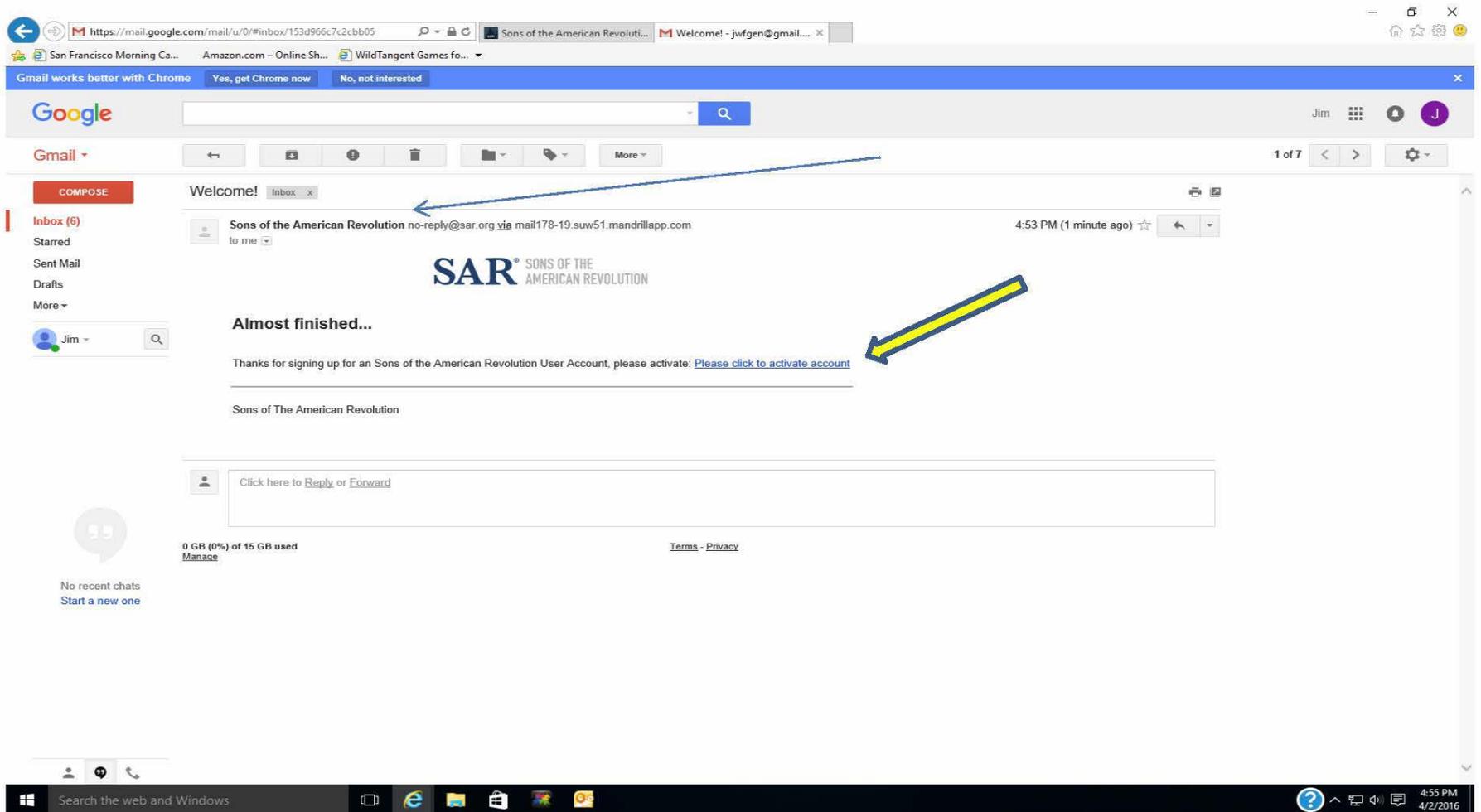
Clicking on the link in the email will returned you to the SAR login page where you now enter your email address and the password you selected and click on the blue "Login" button. Once you've logged in, you will be taken to your personal "dashboard" screen.
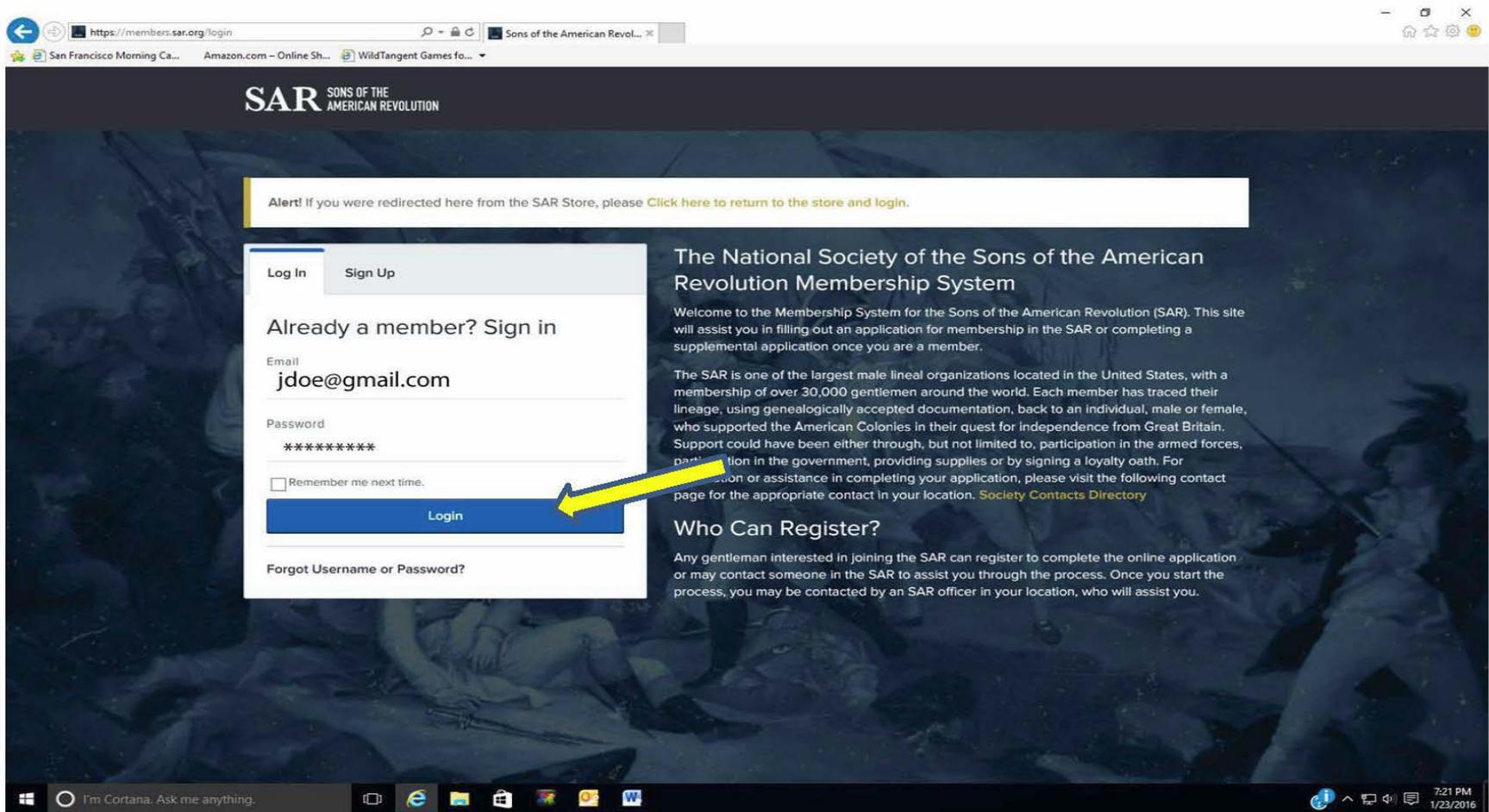
You will be taken to a personal dashboard screen. Note there are three options on the left; SAR Website, My Applications, and Events. On the top right is "View/Change Profile". To complete the initial setup, click on the "View/Change Profile" link.

*Note: If you don't see the three options and only the icons on the left, hold down the "Windows" or "Apple" key and press the minus "-" key to change the webpage resolution.*
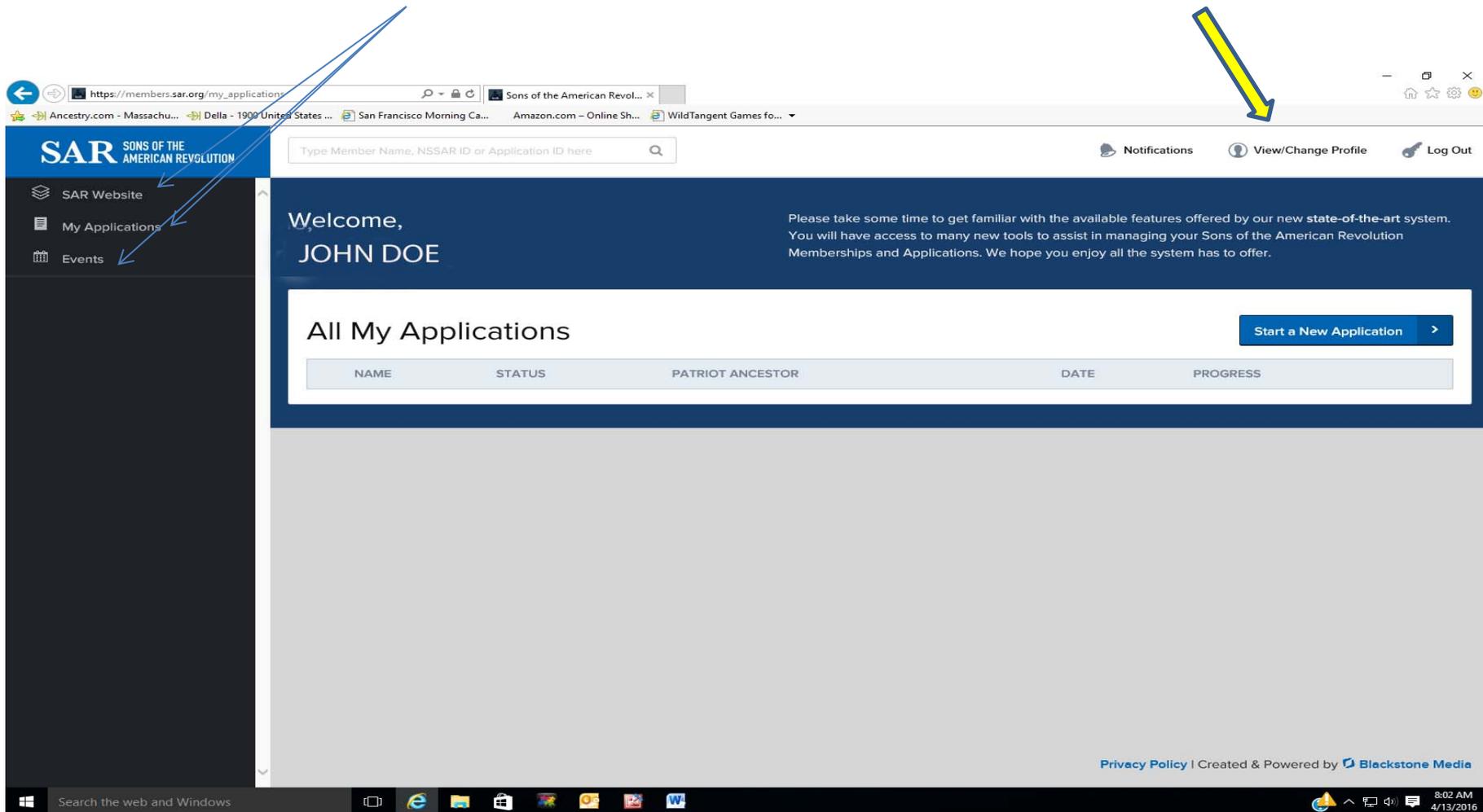
This screen will come up to allow completion of the setup. Click on the "Search for your NSSAR #" button. Do not fill in any other information at this point. A search box for your NSSAR # will be appear (next page). <u>DO NOT</u> fill in any of the other fields.

This screen will appear next.  Enter your National SAR Number.  When you enter your National Number and press "Enter", the next screen will appear (p. 8) to verify your name.
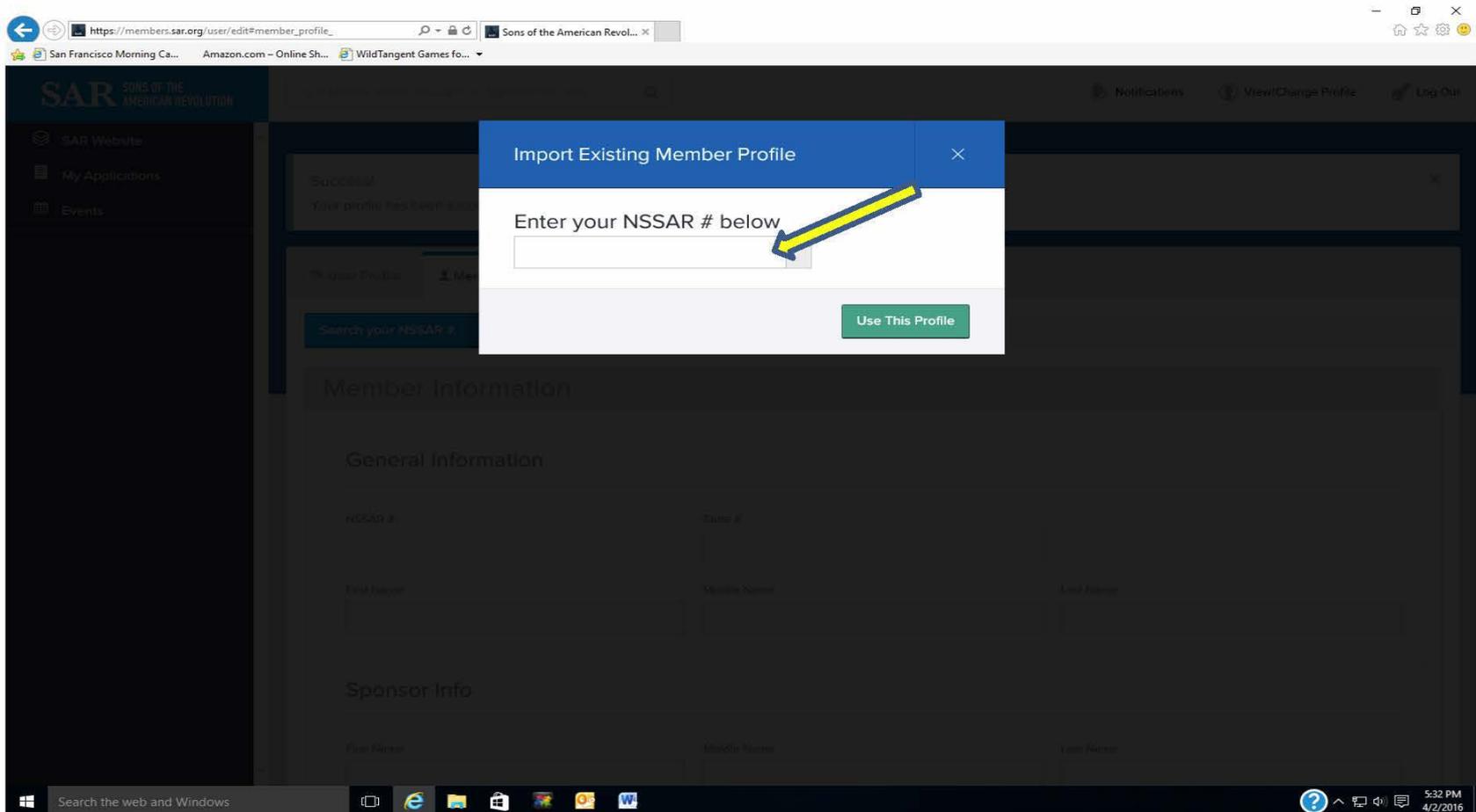
When you enter the NSSAR number on the previous screen, the information from the SAR Member Database will populate this screen. With your name, State Society, and State Number. If this is you, check the acknowledgement box and click the "Use this Profile" button to activate your account

Once the account is activated, whenever you log in, the following screen will appear with the default going to the "My Applications" screen. In the left-hand sidebar are three icons with titles for accessing the new SAR website, "My Applications", and "Events". Click on the "SAR Website" to go to the new website. The "Events" screen is used for registering for SAR events. Registration for all future events (Leadership Meetings, Congress, etc.) can only accomplished via this screen for online registration. To begin a new or supplemental application click on the "Start New Application" button. If you are a State or Chapter President, Secretary, or Registrar, let you State Secretary know since he will have to assign special permissions for your position.

# Section 2.0

## Using the new online Application System

To use the online membership application program, an account with the new SAR system is required. Once you have setup an account, use your web browser to go to https://www.sar.org where you will see the screen below. Enter the email address and password that you used to setup your account, then click on "Login".

Next you will see your personal "Welcome" screen similar to the one below. If this is your first application, nothing will show under "All My Applications". To begin a new application, click on the blue "Start New Application" button. Note on the far left, the icons and titles "SAR Website" where the SAR Store is found, "My Applications", and "Events". Clicking on those icons will take you to either the new SAR website, "My Applications" which is your Welcome screen, or "Events" where you can register for future National Society Events.

This initial screen will then appear. Start by entering the applicant's First and Last Name and then use the down arrow "v" to open the pulldown menu for the "Application Type" (Regular [the default], Junior, Memorial, or Supplemental). The "Load From Existing" pulldown is only for use with a family plan or supplemental and will be discussed later; ignore this field for now. Use the pulldown menu for "State" to select the state society for membership. Once the state society has been selected, a new pulldown menu will appear to select the chapter within that State Society. Once the applicant name has been entered and type, state society, and chapter have been selected from the pulldown menus, click on "Start Application"

For this example, the applicant's name will be John Doe, a regular member for membership in the Delta Chapter of the California Society.
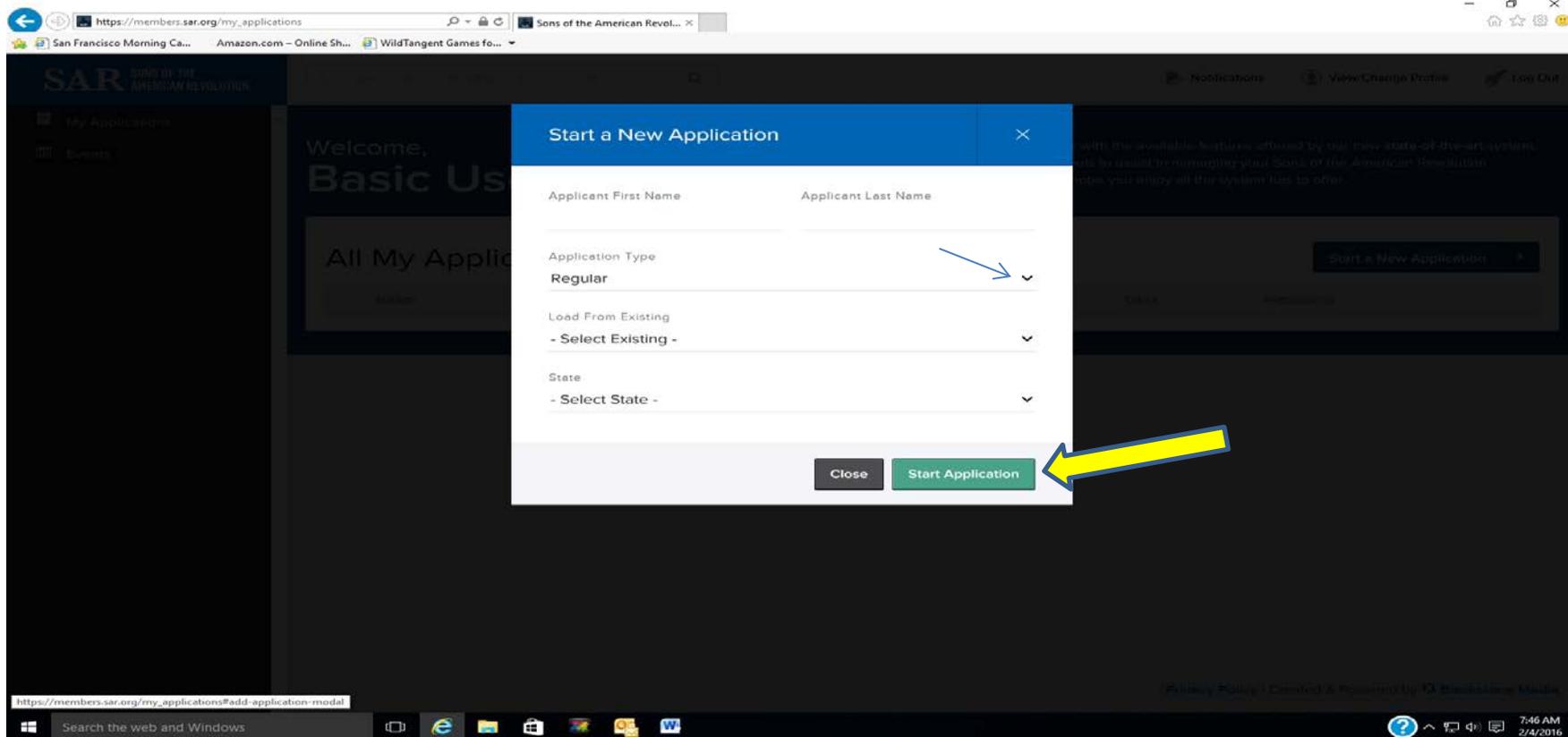
The next screen to appear is for the applicant's personal information. Note that the first and last name, the State of Application, and the Chapter are automatically filled in from the previous screen. Enter the remainder of the fields --- Middle Name, DOB*, street address, city*, State* [by pulldown menu], Zip Code*, email*, and telephone number*. Note that the date of birth (DOB) is entered using the mm/dd/yyyy format so it can calculate the applicant's age. A calendar appears when the DOB field is entered to confirm the date selected. Tab to the next field (using the "enter" key will wipe out the date entered). Those fields marked with "*" are required before you can go on to the Next Section.

Continue filling in the applicant information. Remember, the fields with "*" must be entered to proceed --- a missed field will be highlighted for entry. Once all information has been entered, click on the gray "Next Section" button.

Any information entered may be edited later.

The following screen will appear when "Next Section" is clicked. Note the green status bar under "Basic Info" and "Generations". The four sections listed above the bar (Basic Info, Generations, Children, Finalize) are where information is input. If at a later time, an edit is needed, by clicking on the blue highlighted section names above that bar, you can go directly to that section. The "Generations" section is where the lineage is input. The applicant's name and birth date are populated for first generation based on the information in the previous Basic Info screen and is automatically reformatted into the standard genealogical date format for printing.
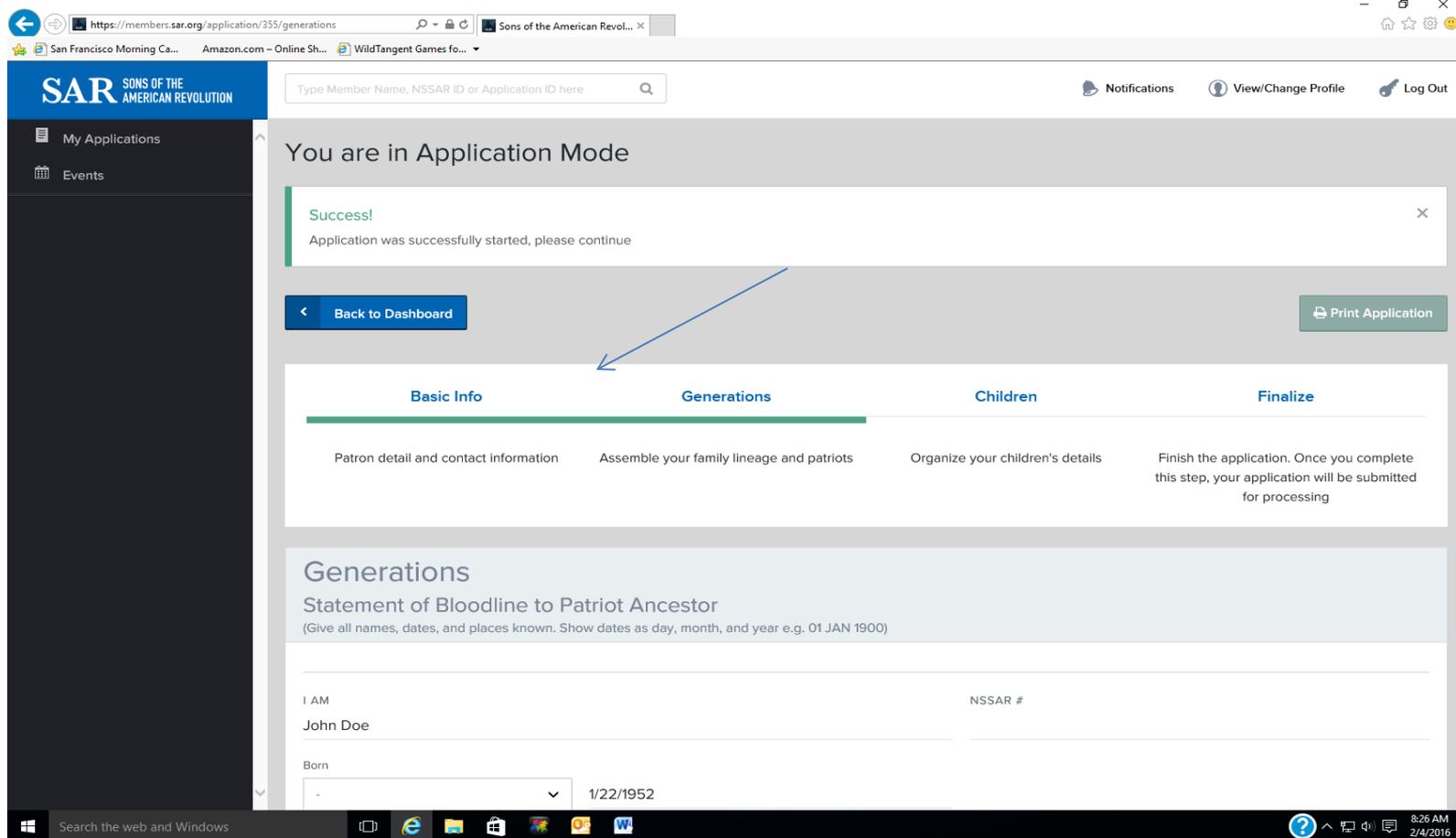
Scroll down on the screen and you will find fields to enter the applicant's place of birth and field to enter information about his wife if applicable. If there is more than one wife, information for another wife can be added by clicking on "Add Wife". Note the arrow "v" pulldown menus. These menus provide a place to put "Abt:", "Bef" or "Aft" if the date information is not precise but based on another document such as a will, deed, or census record.

Once the information about spouses has been entered, continue scrolling down and add references for the applicant's generation. Note that the References box is dynamic and the final output will automatically determine how many lines are needed to list all references listed. The references listed should comply with the requirements listed in the Genealogy Policy Manual as elaborated upon in the Application Preparation Manual.

At this point you can save your work ("Save Generation") or go on and add another generation ("+Add Next Generation").

Clicking on the "+Add Next Generation" extends the entry screen for the entering information for the next generation, in this case, Generation 2. Begin entering information on the applicant's parents. There are two other pull-down menus that can be used if the dates of birth, death, or marriage are not known but can be qualified as "before", "about", or "after" (use the pulldown arrow ("v") to open the menu if a actual date isn't known but it is known to be about, after, or before a given date).

Continue scrolling down to enter the information on the wife. In this example, the lineage goes through the wife. Note that at the after the references section, there is a pull-down arrow ("v") for the "Who is the son/daughter of". Use this to select whether the lineage goes through the husband or wife. When all information has been entered, you should save the information for that generation by clicking on the "Save Generation" button, then click on the "+Add Next Generation" button to proceed to the next generation.

At any time, you can see what the progress on the actual application will look like by saving the generation ("Save Generation") which takes you back to the "Generations" screen. Then click on "Print Application". This button will give you a preview of what the actual application looks like based on the information already submitted.

In this example, only the first two generations have been entered. The actual form which would be printed only shows the information thus far. The entry of children, patriotic service and the proofs of service, and sponsors will take place after all of the generations to the patriot have been entered. If there is no spouse and/or children of the applicant, nothing will show up on the form. This screen shows the form that would actually be printed. The references are highlighted with the sidebar immediately below the generation. If the "Print" button is clicked, the form will be sent to the printer. The default format is letter size but legal SAR watermarked paper is required for the final and can be selected on the print menu. The printout uses dynamic allocation of lines for the reference block thus by adding blank lines (using enter key) spacing for a generational page break for the 2nd page can be made. *NOTE: Be sure your browser supports suppression of headers and footers or the application will be printed with unwanted page numbers in the header and the SAR's URL and date in the footer*.

Continue adding generational information until you have completed the lineage to the patriot ancestor. On the screen for the patriot ancestor's information, mark him/her as the patriot.

Click on "Save All and Continue" so save the work thus far.

This would be a good time to "Print Application" to check for any corrections that might be needed

If corrections are needed, they can be edited by scrolling down and clicking on the generation toggle needed to be edited. That will bring up the input screen for that generation.

Once the lineage data is completed and any edits made, scroll down to the bottom and click on "Next Section".

This will take you to the next section for input information about the applicant's children.  If no information is entered, the final printed form will not show a section for children.  If there were more than one wife, the arrowed pulldown menu would list all wives that were entered in the Basic Info screen, so the child's mother can be selected.

Enter the child's name, relationship (son or daughter), select the wife from the pulldown menu, enter the date of birth (the calendar function will appear), and the place of birth. Additional children can be added using the blue "+" key. The red "-" key can be used to delete a child. When done entering children, click on "Save and Continue".

The "Finalize" section screen now appears. A dropdown menu is provided that lists each generation in the lineage. Use this dropdown menu to select the patriot ancestor.
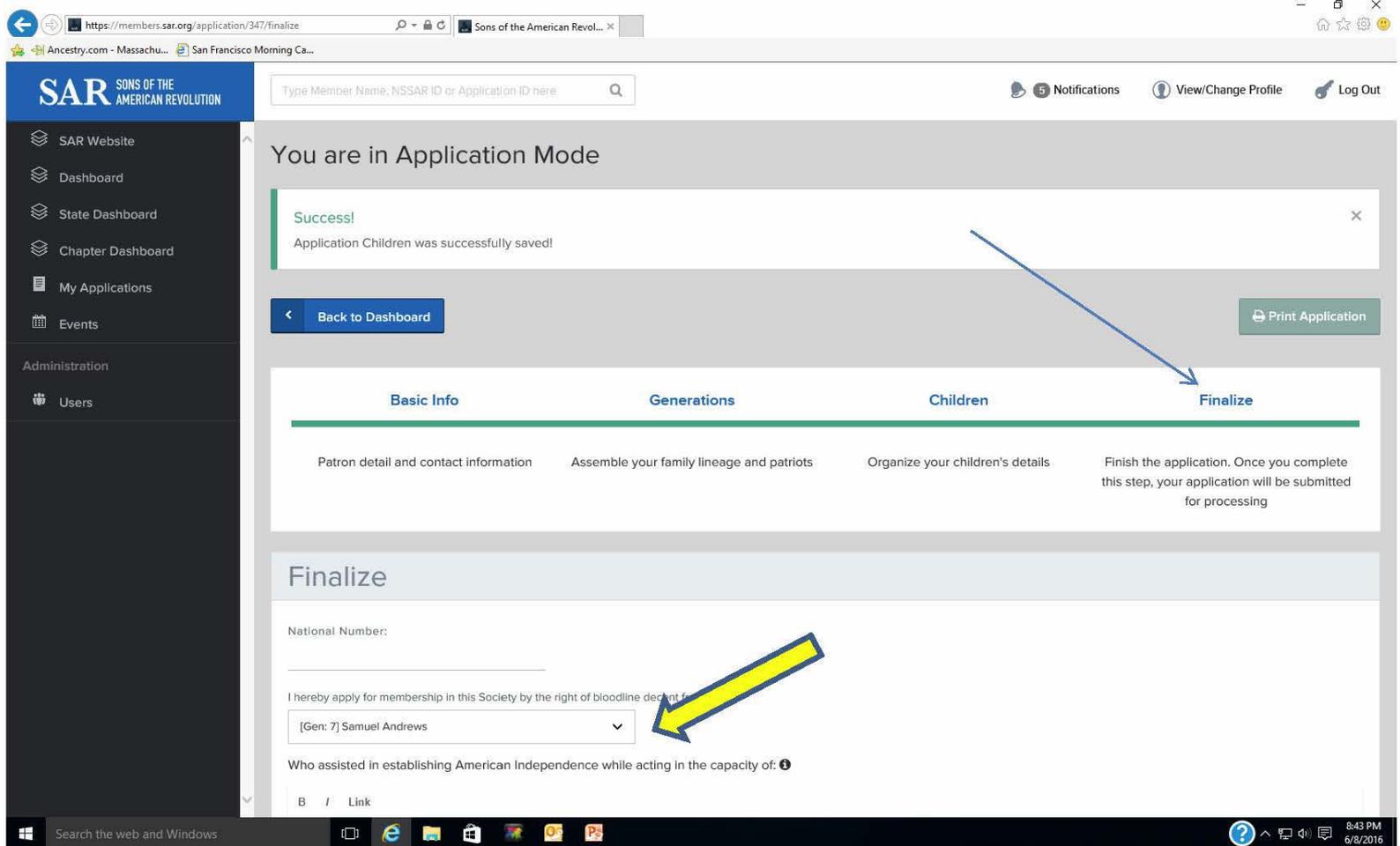
Scroll down to the box for entering the patriot's service.  This is also a dynamic box which will figure out how many lines of text are needed on the final application form.

Continue scrolling down to enter the references for proof of service, and then the sponsor and co-sponsor information.  Don't enter information regarding the Registrar or other officers.

Continue scrolling down and click on "Save Draft and View".

This brings up the "Success" screen. At this point you can print the application draft, go back to edit the information submitted. Once you are satisfied that everything is correct, print the final of the SAR Watermarked legal size paper, get the signatures of the applicant and sponsors, and submit it with the documentation package and application fees to your Chapter Registrar for processing.

**SAR** SONS OF THE AMERICAN REVOLUTION
**APPLICATION FOR MEMBERSHIP**

| | | |
|---|---|---|
| Application Type: Regular | ACN: 1466690673 | National Number: |
| State Society: Kentucky SAR | Chapter: Louisville-Thruston | State Number: |
| NAME OF APPLICANT: John Doe McCrum Smith | | Age: 72 |

Address: 3205 Main road Louisville Kentucky 40299-3000
Phone: (502) 555-1212    Email: jdoe@jdoe.com
Name as you wish it to appear on SAR Certificate: John Doe McCrum Smith

### REVOLUTIONARY PATRIOT ANCESTOR

I hereby apply for membership in this Society by the right of bloodline descent from _____ Gen # _____
who assisted in establishing American Independence while acting in the capacity of:

Captain, Virginia Continental Line

### PROOF OF SERVICE

Military Warrant No 2174 for 3 years service in Continental Line

### PATRIOT RESIDENCE & BURIAL

Burial Location:

Gray

Louisville, KY

### APPLICANT CHILDREN

| Child Given Name | Date/Place of Birth | Spouse Name |
|---|---|---|
| James Smith | 01 Jan 2000 / Kentucky | |
| Mary Smith | 01 Jan 2002 / Kentucky | |
| Anabell | 01 Jan 2004 / Kentucky | |

### STATEMENT OF BLOODLINE TO PATRIOT ANCESTOR

| | | DATE | CITY/COUNTY/STATE |
|---|---|---|---|
| 1 - I am John Doe Smith | born | 16 Jan 1944 | Louisville, Jefferson Co., KY |

References:

B/C John Doe Smith; KY Genealogist, V 13 # 4 p 127; SAR 107100, The Virginia Genealogist, V 50 #2- pp 148 - 151; Military Land Warrant # 2174 & 242SAR 107100, The Virginia Genealogist, V 50 #2- pp 148 - 151; Military Land Warrant # 2174 & 242

| | | DATE | CITY/COUNTY/STATE |
|---|---|---|---|
| 2 - I am the son of Angereau Gray Smith | born | 03 Mar 1904 | Louisville Jefferson Co., KY |
| NSSAR# | died | 10 JAN 1972 | Las Angeles, CA |
| and his wife Eleanor Francis Jones | born | 21 FEB 1909 | Pittsburgh, Allegeny Co., PA |
| NSDAR# | died | 18 APR 1977 | Louisville Jefferson Co., KY |
| Who is the son **X** /daughter ___ of | married | bef 31 OCT 1934 | Jeffersonville, Clark Co., IN |

References:

SAR 107100: SSClaim; KY Death Index; KY Genealogist, V 13 # 4 p 127; M/L Angereau Smith to Eleamora jones; KY Death Index; Social Security Claims Index; SAR 107100, The Virginia Genealogist, V 50 #2- pp 148 - 151; Military Land Warrant # 2174 & 242SAR 107100, The Virginia Genealogist, V 50 #2- pp 148 - 151; Military Land Warrant # 2174 & 242

| | | DATE | CITY/COUNTY/STATE |
|---|---|---|---|
| 3 - Grandson of Angereau Gray Smith | born | 21 Jan 1860 | Louisville Jefferson Co., KY |
| NSSAR# | died | 20 OCT 1930 | Jeffersontown, Jefferson Co., KY |
| and his wife Nell Lee Moore | born | 16 JUL 1883 | Louisville Jefferson Co., KY |
| NSDAR# | died | bef 02 MAY 1967 | Louisville Jefferson Co., KY |
| Who is the son **X** /daughter ___ of | married | 25 SEP 1901 | Louisville Jefferson Co., KY |

References:

SAR 107100; KY Genealogist, V 13 # 4 p 127; D/C Angereau Gray Smith; KY Death Index, Nell Moore; SSDI; KY Marriages 1785 - 1979; Kentucky Opinions, p 159 - 161;

| | | DATE | CITY/COUNTY/STATE |
|---|---|---|---|
| 4 - Great Grandson of Robert James Smith | born | 22 Jan 1822 | Louisville/Jefferson/KY |
| NSSAR# | died | Aft 20 Feb 1879 | Louisville/Jefferson/KY |
| and his wife Eliza Rootes McCrum | born | 28 Feb 1829 | Louisville/Jefferson/KY |
| NSDAR# | died | 27 Jul 1877 | Louisville/Jefferson/KY |
| Who is the son **X** /daughter ___ of | married | 17 Oct 1850 | Louisville/Jefferson/KY |

References:

SAR 107100; KY Genealogist, V 13 # 4 p 127; D/C Angereau Gray Smith; KY Death Index, Nell Moore; SSDI; KY Marriages 1785 - 1979; Kentucky Opinions, p 159 - 161;

5 - Great [2] Grandson of George Gray  born 13 May 1745

NSSAR#  died 02 DEC 1823 Louisville Jefferson Co., KY

and his wife Mildred Thompson  born  1761

NSDAR#  died

Who is the son **X** /daughter ___ of married

References:

SAR 107100, The Virginia Genealogist, V 50 #2- pp 148 - 151; Military Land Warrant # 2174 & 242

## APPLICATION CERTIFICATION

I, John Doe McCrum Smith  the applicant, assert that, I have examined this completed application

and its proofs (documentation) and the facts and statements herein are true and correct to the best of my knowledge and belief.

Signature of Applicant: _____ Date: _____

## SPONSOR CERTIFICATION

SPONSOR (New Member Only)

Printed Name: John Doe Sr NSSAR# _____ Signature: John Doe Sr

CO-SPONSOR (New Member Only)

Printed Name: john Doe Jr. NSSAR# _____ Signature: john Doe Jr.

## STATE SOCIETY CERTIFICATION

State Registrar: _____ Approved: _____

State Secretary: _____ Approved: _____

Accepted by the State Board of Management (optional): Accepted: _____

Sent to National Headquarters: Date: _____

## NATIONAL SOCIETY CERTIFICATION

Received at National Headquarters: Date: _____

Staff Genealogist: _____ Approved: _____

Registrar General: _____ Registered on: _____

# Section 2.1

Creating a "Family Plan" application
using a previous application in your Dashboard

To start an application for the son of the previous applicant, go back to the "Welcome" screen which should now list the application just created under "All My Application". Click the "Start a New Application" button.
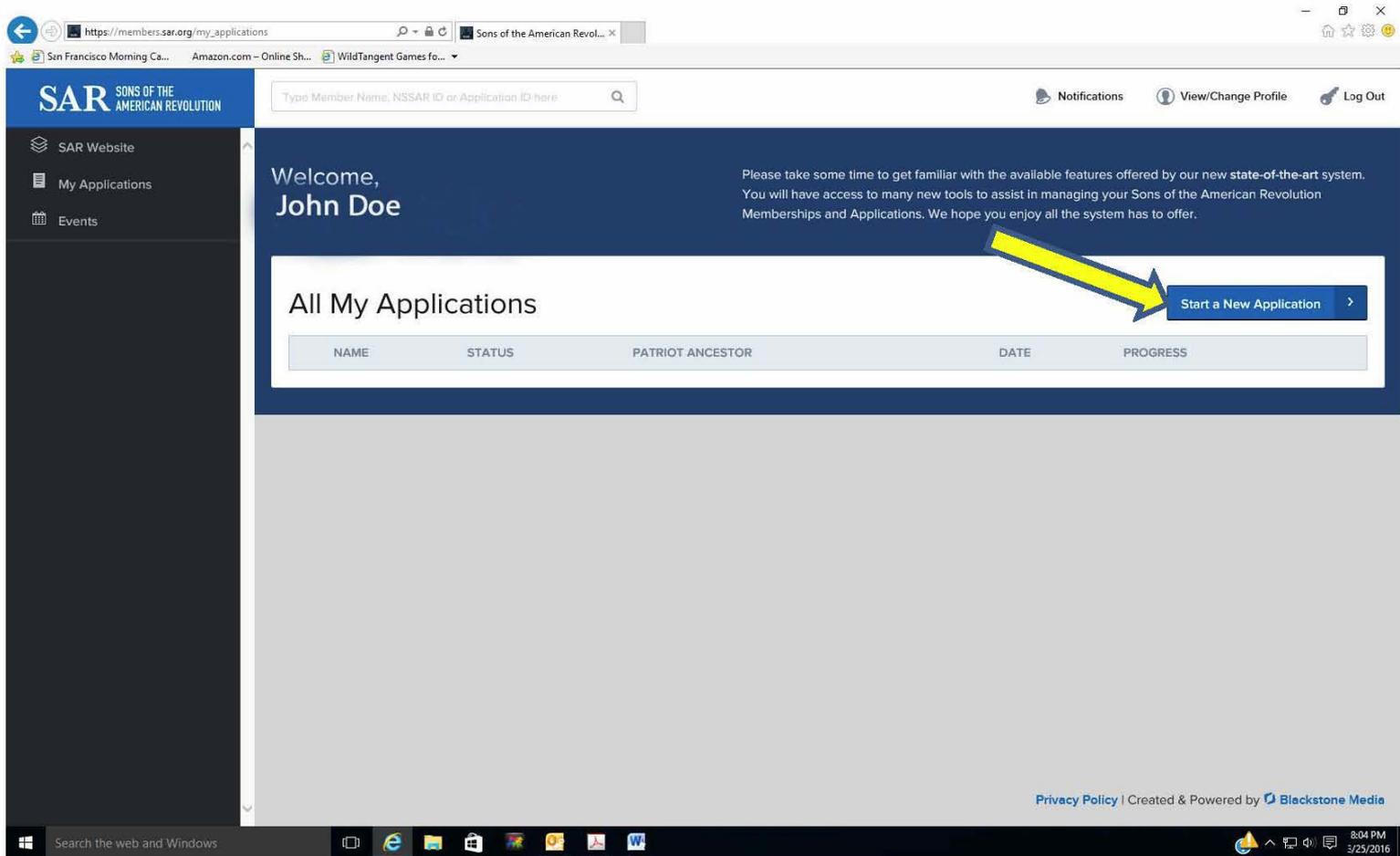
By clicking on the "Start a New Application" button, this screen appears. This is the screen used to enter the name of the new applicant, the type of application, and by using the "Load From Existing" pulldown menu, the previously entered application that contains the lineage in common. The State Society for membership must be selected and a dropdown with the chapters in that Society opens and must be selected. See next page. *NOTE that only applications previously entered in your personal dashboard can be selected for use in loading an existing application*.
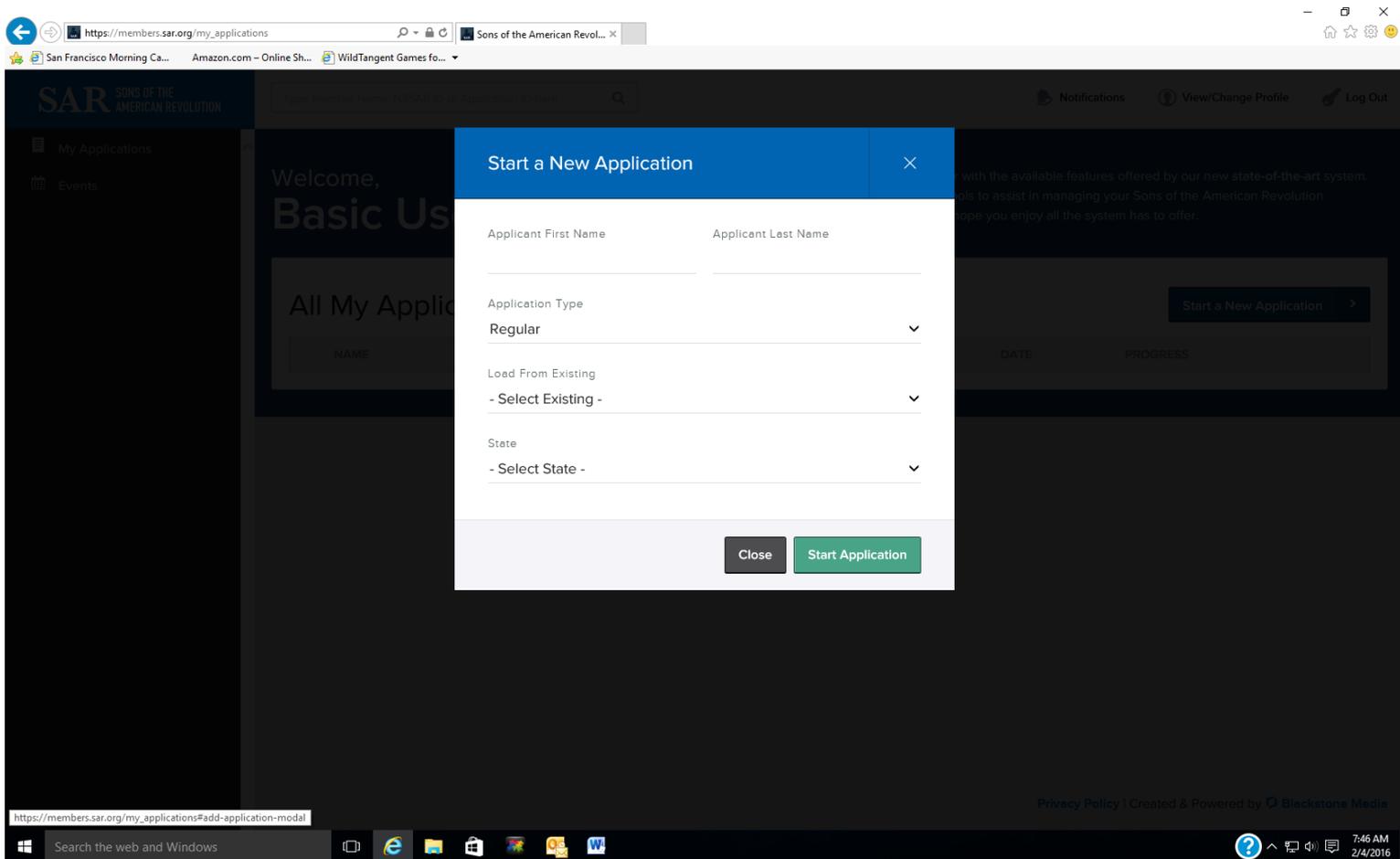
Fill in the initial screen but this time use the "Load From Existing" pulldown menu which will have the application of the father, John Doe, on the list. Select that entry and click on "Start Application".

This time, the basic information screen will appear with the new applicant's name but also with all of the DOB, address, email, and telephone # information for the father. This information will have to be replaced with the correct information for the son including any prefix or suffix to the name. Then click on "Update and Continue".

That will bring up the screen from the father's application. Scroll down to the generation # toggles and click on the toggle to edit generation 1.

On the next screen click on the "Insert Generation Before This".

Now an entry screen for the new applicant as generation #1 appears and the information for him (and spouse(s) if there are any) should be filled in. Scroll down to "Save Generation" and click on that button.

Now you go to the "Children" link and see that the children of the father are listed. Use the red "-" button to delete them and then if there are any children for this applicant, use the blue "+" button to add them as before. When finished click on the "Save and Continue" button to go to the Finalize section.

On this screen, you will have to use the pulldown menu to select the generation that is the patriot ancestor. The patriot's service and proof of service entries from the imported application will automatically be populated but the sponsor information will have to be reentered. When that is done, scroll down to "Save Draft and View". The Success screen will appear and you can either print a draft or edit, or if satisfied, print the final application on the SAR paper.

# Section 2.2

## Creating a supplemental application using a previous application in your Dashboard

To begin a Supplemental application, start by clicking on the "Start New Application" button on the "Welcome" screen and follow the same process as used for the previous application by entering your first and last name. Select "Supplemental" from the pulldown menu for "Application Type". On the "Load from Existing", select a previously created application that contains most of the lineage in common with the supplemental application that you want to create. Enter the State Society and Chapter and then click on "Start Application". This will bring up the same screen as is shown on page 31 (for creating a "family plan" application. Since you have entered your own name for the applicant, all of the information will be populated (name, address, DOB, email, and telephone # from the original application. Make any changes needed if there have been any address, email, or telephone # changes and click on "Update and Continue".

On this screen, starting at the patriot generation and moving up, one-by-one, toggle the generations that will not be part of the supplemental application; in this example only generations 1-4 will be in common.

As each generation is toggled, the data input screen for that generation is opened.  Scroll down and by clicking on the red "Remove Generation" button, that generation is removed from the supplemental lineage.  Continue this process until only the generations in common are remaining.

Now go back and toggle on the earliest generation and common with the supplemental and toggle back to it.

Scroll down and click on the blue "+Add Next Generation" button to open the next generation for the lineage to the new patriot ancestor. Continue adding generations in the same way the original application was created. On the "Children" section, the information on the previously listed children will already be populated so no action is necessary. Click on "Save and Continue" to go to the "Finalize" section. On that page, enter the new patriot's service and proof of service. Since the application type was identified as a Supplemental, the sponsor information will not appear since sponsors are not needed on supplementals. Click on "Save Draft and View" and once again the option to edit, print a draft, or print the final on SAR paper can be used to complete the application.