

# How to Teach New Family Search to the Members

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## I. In the Beginning . . . . A Basic Assessment and Preparation

### A. Assessment/Survey: Verbal -- Take notes or not.

#### 1. Technical Stuff

- Database program in use? Y/N
- Which program?
- Does it support LDS data?
- Do they feel comfortable with it?
- Does it have the functionality they need?
- Does it have a new FamilySearch interface capability?
- Do they know how to use the interface?
- Over all CCL [CCL = Computer Comfort LEVEL]
- Do they have the Internet at home??\*

#### 2. Family

- Generations in Church
- Heritage - Locations
- Where does information they have come from?

#### 3. Overall FH Experience/participation in LDS programs - level in LDS FH

- AF?
- PRF?
- Temple Submissions

#### 4. Data

- What do they have?
- What format is it in? Paper, GEDCOM, etc.
- Where/who did it come from?
- Verified?
- Would they email you their database or get you a paper copy of the pedigree chart to preview?

#### 5. Search/Research skills

- Internet – FamilySearch, other databases.
- FHC/FHL experience Yes/No How recent?
- On site experience; In person/phone visits with key relatives.

#### 6. Goals

- What do they feel impressed about?
- What do they want to do next?
- Halt & CU vs. Progress

#### 7. Empower: Emphasize – THEY will do it. You will help.

#### 8. Obtain/Explain Helper Info: Helper Info # + Full Name + Birth Date

- Helper # = Last 5 digits of membership number.
- You will be previewing their data.
- You will be able to see some personal information.
- Ask for a copy of the file or pedigree chart in advance, if possible.

## **B. Preparing for the Member Consultation**

### **1. Consider Survey Info - Answers from the Member FH assessment above.**

- Technology Skill Level
- FH Skill Level
- Commitment to Quality Level

### **2. Pretest to make sure the Helper Info is working to permit access.**

- Avoid technical snafus
- Have time to get proper info if needed.

### **3. Data Preview - Purposes**

- Avoid surprises! Bro. R
- How much is there? Generations.
- Is it an LDS pioneer line?
- Possible matches - Check for possible matches on some ancestors to see how many come up.
- Follow Up – Make note of questions you have for ward member.

## **II First Meeting/Consultation Appointment**

### **A. Location**

- 1. Internet Access – Mandatory!** Where to we need to be to have access.
- 2. Atmosphere:** Quiet, Comfort and Propriety
- 3. Room to Work:** Some room to spread out info if needed.

### **B. Database Use and Philosophy**

#### **1. Personal database – Optional but needed in many ways. How do they feel?**

- Internet Foibles – Does user have the Internet or go to FHC or other location.
- NFS foibles – printing issues, sources and notes
- Working with non-member family and others. Posting to other sites.

#### **2. NFS Interface – Briefly demo one if possible.**

- What is it?
- Why use one? Ease, retaining your own database, sourcing, MAC, media
- Current Options: Family Insight, Ancestral Quest, Roots Magic
- Choosing – Go to classes, websites, demos – Which is intuitive for you?
- Temple Submission – More options. More Control

**C. NFS Home Page – Start by showing yours to the Member/Patron  
The 9 choices on the NFS home page and Helper Page. Explain Submitter/Contributor.**

**1. Help Me Get Started with Family History – Ppt with sound at your own pace.**

**2. Learn How to Use FamilySearch – List of Links. Notice “Member’s Guide”**

**3. See Me and My Ancestors – see below.**

**4. Search For Ancestors – Like searching the IGI for completed ordinances**

**5. Add information**

- Add a Family or Individual That Is Connected to My Family Tree on NFS
- Add a Family That Is Not Connected to My Family Tree
- Add an Individual That is Not Connected to My Family Tree
- Contribute a GEDCOM File \*\*

\*\* This is what can be done at present with out access to NFS to create a temple submission from home. You can work on NFS in real time at an FHC.

**6. Temple Ordinances Select Individuals or Families from My Reserved List**

- Reprint Family Ordinance Requests and Family Ordinance Cards -- New system cards only. They will only reprint if all ordinances are not yet completed.  
Note: If they have Cards from the TR System that are lost, reprints can be requested at the Temple. They cannot be re printed in NFS.
- See Temple Information – Handy schedules and driving directions!
- Make names available for others to do. Temple File. Do not make a TR and bring it to the temple. Do it through NFS at the FHC or with a Ward Consultant..
- Sign in to Help Someone Else – Demo it while you do it!

**7a. NFS: Sign in to Help Someone Else**

- Full name, birth date, Helper access number [First 5 digits of membership #]
- Some tabs are different. Note: member with out NFS access has no User Profile.

**7b. Add a TempleReady Submission File:** Process to add records to NFS via a old-style TR Submission and still get a printable FOR.

**8a. Update My User Profile – 2 tabs**

Default Tab = User Profile – allows updates to name, contact info, etc.

Preferences – Has several options including language.

**8b. NFS-Helper Mode: Quit Helping - Closes a Helper session.**

**Member has no accessible User Profile under Helper mode.**

**9. Help Center – Lessons and helps for using NFS and doing FH. Printable PDFs**

- Member’s Guide – Save a copy of PDF that you can give to people if necessary.  
Pg s 24-26, Chapter 7 pgs 36-40 Providing Temple Ordinances
- How to Submit names for the Temple Using NFS - 6 pages
- Policies For Preparing Names For Temple Work
- Contributing a GEDCOM to NFS

### III New FamilySearch® - A Practical Approach to the Realities

#### A. Foster and Attitude of Responsibility and a Desire to do Good Work

1. We are more responsible than ever.
2. We can submit with no dates and places – duplication?? See LEC Pafology Articles.
3. Caution Member about care required. Don't sell a sacred work short.
4. Encourage actual research -share simple experience where research made the difference.

#### B. Technology Philosophy

1. Everyone needs a personal database: PAF, AQ, Legacy, Roots Magic, Reunion, etc.
2. Everyone needs a NFS interface. Current Options are: Roots Magic, Ancestral Quest, Family Insight. Note: Legacy will not have one for another few months.

#### C. Me and My Ancestors – How to Begin. Member preference. Suggest choices:

1. **One specific Line:** Start with member and go back on one specific line.
2. **Ahnentafel Style** - Go generation by generation – Parents, G Par, GG Par, etc.
3. **Style:** Explain colors, symbols as necessary, especially the various temple symbols.
4. **Possible Procedures:** Combining, and clean up, disputes, reserving names, etc.

#### D. Temple Submission

1. **Avoid being a “magician.”** Do not say:
  - “This so easy.” or “We will submit a name today.”
  - “You don't need a \_\_\_\_\_ [ fill in the blank --date, place, surname].”
  - “Done” the first time NFS says “No Matches.”
2. **Be a Responsible Mentor** – Do Say:
  - “Just because NFS says an ordinance is “Ready” doesn't make it so.”
  - “Let's look for “more possible matches.”
  - “What other ways could this name have been listed, other locals, dates?”
  - “Let's find a full birth date/birth place/more accurate marriage info, etc.”
  - “Temple time and your time is valuable – let's be sure.”
  - “This name is fairly common. Let's make sure we are really on your ggfather.”
3. **Reserving names** in question while problems are resolved.
  - When you know the work is done but cannot find it on NFS.
  - When there is a question regarding whether two entries are same person.
4. **Where/How to make Temple Submissions:** NFS vs. Interface Temple File vs. Me.

#### C. Goals: Set some and outline the steps to success!

1. **Establish:** Help Member choose realistic short term and long term goals.
2. **Facilitate:** Outline necessary steps to achieve goals! Empower and Encourage.