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

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- 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

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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

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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.

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