

Policy and Procedure vs. Doctrine: Policy and procedure changes. Doctrine does not. NFS is policy and procedure.

## **I. Before the FOR - Technical Issues**

### **A. Data Safety and Security Issues**

1. Always have a patron work from a file on a jump drive or other storage medium.
2. Never allow patrons to leave data files on the FHC Computers.

### **B. Information on the Living**

1. Don't add information on living posterity to NFS. Posterity = children, grandchildren, etc.
2. Always maintain a personal database with NFS syncing capability. [25+ reasons]

### **C. Adding Living Generations to My NFS Pedigree to reach my "Submittable" dead. How does that work?**

**Document ID: 110396 Adding Living People, Document ID: 1016440 Adding Information about Living LDS Members; Reference Information located in the NFS Help Center.**

1. Process is now the same for adding LDS and non-LDS living ancestral generations
  - a. Add an individual by name only.
  - b. Do not add dates and places or other personal information.
2. For LDS Persons: You will be creating an additional entity in NFS that will one day need combining! Do not add dates, or places as they may conflict with official LDS membership records. See Ward Clerk to correct your record.

### **D. FS Name Predators**

1. Do your research and clean up using your personal database program. Then synchronize and submit.
2. Any name you upload or add to NFS should be reserved immediately.
3. **NOTE:** Reserved records/individuals can still be edited, combined, have notes added, etc.

### **E. Using Help Center - 2 ways to access, 2 versions - Try them!**

1. Original version - Locate through NFS home page link - *Learning to Use FamilySearch*
2. 2011 Version - Locate through NFS home page link - *Help Center*

### **F. Before the FOR - Consider what happens After the FOR is printed.**

1. Consider the number of ordinances involved.
  - a. How many of the ordinances can you accomplish?
  - b. Consider the amount of ordinance work you and your family personally can/will do.
2. Exactly who will do the ordinances? Investigate the options for obtaining help and supplying names.
  - a. Will you need to give FORs or Cards to other family members or friends? Send FOR via email or fax.
    - Legacy, Roots Magic, Ancestral Quest and Family Insight will save your FOR as a .pdf
    - Attach that to an email and send. The FOR can then be printed at any temple.
    - NFS does not save FORs in any format. Print to paper only. The PDF Printer is not built in. You can download freeware and make it possible.
  - b. Temple Queue vs. Temple File
    - Some Temples will give help on a limited basis. Some abuse this situation until Temple changes policy.
    - Temple File - Decide before creating FOR which ordinances to send to the Temple File -- Your new help team!

### **G. Why am I getting Temple cards with information that does not match what is on my database?? I am the submitter!!**

1. Editing snafus
  - a. Using NFS: Usually you edit ancestor info through *Details* screen but do not how that affected the *Summary* page.
    - Go to Summary page.
    - Make sure your preferred version of the information is in the number one, top of the list position. 50/50
  - b. Using database program: Watch for display of what card info will look like.
    - Most programs have a screen showing what card information will look like.
    - Some programs give the option to adjust *Summary* page information right then and there.

2. You have a christening date, but no birthdate or a burial date but do death date. Info does not show on temple card.
  - a. Birth info supersedes Christening info even if you only have a birth place. Death info supersedes Burial info.
  - b. Baptism - Endowment ordinances have been cleared for a deceased infant because of this.

#### H. Creating FORs [Family Ordinance Requests]

1. Guidelines
  - a. Save your names to the "Individuals I have Reserved for Temple Ordinances" section of your NFS account. Do NOT hit the print button every time you have a name ready. FOR Maximum Capacity = 50 cards, NOT 50 people.
  - b. Print FORs as close to the day you will take them to the temple as possible.
2. Create FORs according to your plan for getting names done.
  - a. The FORs you will email or fax to others.
  - b. The FORs for you -- containing just the ordinances you will actually do.
  - c. Return to NFS Temple List and Reassign or Unreserve and Reassign the rest.

### II DURING -- Printing FORs at the Temple through completing the FOR

#### A. FORs that Need Corrections

1. If after printing an FOR and before you take it to the Temple for cards, you discover needed corrections:
  - a. Do needed edits, discard original FOR and make a new FOR.
  - b. If you make edits but do not print a new FOR, cards for the edited individuals will not print. Live system.
2. FORs at the Temple - Problems and Concerns
  - a. The older they are the less likely they are to print. Changes can affect ordinance clearance. Live system.
  - b. Sometimes only part of an FOR will Print.
  - c. If an FOR fails to print completely, scanning it again will not help. Same results.
  - d. Always compare cards received against FOR to be sure what cards you did or did not receive. Bugs!
  - e. Print ahead of need. If the Internet at the Temple is down, an FOR will not print.

#### B. Family Ordinance Card Issues

1. Shoddy Work: "About 1800, of USA"
2. Are all Ordinances really "Ready?" Not every "missing" ordinance needs doing. Some dates are currently missing in action but do exist. Reserve and hold.
3. All cards will not necessarily print. An online system is "On Line." Alterations may change eligibility status.
4. Lost Cards -- Reprint by selecting person on your Temple Reservation list and creating a new FOR.
  - a. If the individuals have the same PID numbers - same person.
  - b. Reprint will have same PID, will contain the dates of any ordinances done and properly recorded on original card.
  - c. If you have 2 cards for same person but PID numbers are different, do more combining, and see what happens. Print new card for remaining ordinances if PID changes.
5. Once ordinances are complete - card will not reprint.

#### C. Card/Record Corrections

1. Most everything must be handled by the Patron through their own NFS account. This can be done at home or at the FHC. Phone, email, or via live online chat feature at Help Center. Select *Contact Us*.
2. Anything involving the living must be done through the Ward Clerk or through the Membership Department.
3. Edits including: names, places, dates, etc. are done through the system, to the extent they can be done.

**NOTE:** Remember that any such change necessitates a recheck for the ancestor in the NFS data to avoid duplication.

4. Consult *NFS Users Guide, Section 4, Correcting Information That Is Already in the System*, for a list of what can and cannot be done and by whom.

#### D. I need HELP! After printing the cards and beginning - you realize there are more ordinances that you can do. Now what?

1. NFS Procedures for obtaining Temple File help.
  - *Reassign* - If the word reassign is available click on that and select ordinances to be assigned to the Temple.
  - *Unreserve* - If some ordinances have been completed, the only option is to Unreserve remaining ordinances, then re-reserve. You will then be able to Reassign them to the Temple.

- *On Hold*- When you have assigned or reassigned some ordinances to the temple, other ordinances may be on hold.  
EX: If you reassigned the endowments to the temple the Sealing to Spouse will be *On Hold* until the Endowment is completed.
2. Take cards to the Temple and ask that they be released to the Temple File.  
**NOTE:** You will not receive the cards back in this case. Good idea to scan or photo copy them for your records.

**III AFTER** -- Recording Issues and Completion Concerns after the FOR or Tracking Sheet, is completed.

#### **A. When things go wrong in NFS Recording**

1. In NFS, when ordinances are completed, the entry simply disappears from your list of reserved temple names.
  - a. No dates are transferred to your personal database.
  - b. Some personal database programs will do this for you. Dates are transferred without typing.
2. Recording Questions
  - a. If you have a card with all of the date stamps and red checks, but it is still on the reserved list -- recording issue.
  - b. Current NFS recording issues must be handled by the temple where the ordinance occurred, if possible.

#### **B. Anomalies**

1. If your ancestor's work was started in Temple Ready but finished under NFS:
  - a. Your work may not all show up in the Temple Ordinances Section of NFS.
  - b. You may have difficulties reprinting a card. You may not.
2. Many ordinance dates have not been uploaded to NFS. If you have cards with completed, stamped ordinance dates which are not showing on NFS, do not toss them out. You may need to scan them and send images to Salt Lake.
3. I have a number of cards from Provo Temple circa late 1980's - early 1990's with ordinances that do not show. Do some checking. Are they in the IGI? Have you combined everything?

#### **C. Problems from the Past - Inferred Ordinances in NFS Document ID: 103897**

***The following changes in temple policies impact the way that ordinances show in the new FamilySearch.***

- *Before 1960, the initiatory ordinance was always completed on the same day, at the same temple, and by the same proxy as the endowment ordinance. After that date they may have been done on different days and in different temples.*
- *Before 1990, the confirmation ordinance was always completed on the same day, at the same temple, and by the same proxy as the baptism ordinance. After that date they may have been done on different days and in different temples.*
- *Prior to 1997, confirmation and initiatory ordinances were not stored in the ordinance database, even though the official temple record contained the dates. Because the new FamilySearch required these dates in order to prevent the ordinances from being duplicated, a process was created to imply that the ordinance was completed.*

***You might see the following as a result:***

1. *The confirmation and initiatory show "Completed" and the baptism and endowment show with dates. These ordinances have been completed and **do not** need to be done again.*
2. *A duplicate confirmation or initiatory date will replace the word "Completed," and it will appear as if the ordinances were done out of order. The original ordinance date was completed correctly but is just not showing the date.*
3. *Ordinances may show as being done on different days and in different temples, depending on the time frame in which they were completed and the temple policy at that time for that temple.*

#### **D. What do I do about resolving recording Issues?**

1. If the card has a barcode, i.e. [from mid-1996 and beyond]:
  - a. Take it to the temple of origin for recording corrections.
  - b. If you do not live near said temple call them and ask if a photo-copy of your card will be sufficient or if you could email or fax a scanned image. [Be sure to obtain the preferred email address or fax number while on the phone!].
2. If you have a card without a barcode [pre -1996] or a card with a barcode that will not record:
  - a. Make sure you have done all combining.
  - b. Check the IGI to see if it ever showed up there.
  - c. Send scanned copy of the card to: Support@FamilySearch.org Reference the Doc. ID #104823 *Missing Ordinances*
3. Should I throw away my completed Temple Cards? Document ID: 108531 Answer: NEVER

## IV. FYI

### A. Are the original NFS mandates being met?

The mandates for NFS according to President Gordon B. Hinckley were two-fold:

1. Reduce Duplication
2. Release the Captives faster
3. Progress? How is that going? Comments :
  - "NFS is just another way to create duplication." Just because you can, doesn't mean you should. Computer systems can always be manipulated and misused.
  - "You cannot legislate a commitment to quality." Why? People have agency!

**B. Duplication Myth** -- "Five times is better than none." No. Once is better than none. 5 times means 4 people lose out.

### C. Likely Causes of Duplication or How can duplication be avoided?

1. Cause: Shoddy Work "About 1800, of USA" - How likely is that to be a duplicate or be duplicated?  
Solution: Sufficient research to uniquely identify ancestor. Need to do better research to locate the next generation.
2. Cause: More than one version of an ancestor in NFS.  
Solution: Use NFS features to search for possible duplicates.
  - a. Combine until you have one instance only.
  - b. If you are not comfortable enough to combine - research until you are sure who is whom.

## V. Assuring Best Practices

**A. Avoid showing "5 minute miracle video" or telling "no brainer" stories.** FH deserves respect.

### B. Be a Role Model for the Gold Standard

1. Our temples are made from the best materials by the finest craftsman available.
2. Our FH work should be worthy of being presented to the Lord in His Holy House.
3. This is not a game to see how fast and with what little work we can "get some names."
4. You are the assistant or the accomplice depending on whether your work is worthwhile or a crime.
5. Does the work you are assisting bring the Spirit or make you cringe?
6. Would you be embarrassed to take the FOR to the Temple yourself?

### C. Your Patron needs some BASIC TRAINING and a Testimony

1. Basic Genealogy Background
  - Terminology - Main Archives [MA], Temple Index Bureau [TIB], Temple Ready [TR], IGI [International Genealogical Index], Ancestral File [AF, AFN], Pedigree Resource File [PRF], BESP
  - Forms - Pedigree Chart, Family Group Sheet [FGS], Research Log, Time Line
  - Record Analysis - How to know understand records and get the most information from them. How to analyze and prioritize the information contained.
  - Each ancestor must be "uniquely identified" with actual source material to really prevent duplication.
  - Reasonable and Thorough.
2. New Family Search Background - See User's Guide 328 Pages
  - Glossary - For terms
  - Icons Used in the System - See Appendix D
  - Ordinance Statuses - See Appendix F
  - What does Terminology really mean? - Make sure they really understand terms such as Search for Duplicates, Combine, Reserve, Reassign, Family Ordinance Request [FOR], FamilySearch, New FamilySearch.
3. Teach and Demonstrate How to Reduce Duplication - Agency vs. Satan's Plan
  - a. "Ready" Just because you can, doesn't mean you should.
  - b. Insist upon correct use of system features for reducing duplication:
    - First check for "Possible Duplicates." Let the system look for you. Combine as needed.
    - Next: Click on "Advanced Possible Duplicate Search" You will need to remove or change\* some information from the boxes, otherwise the initial search will be repeated exactly. "Less is More" with many search engines.

\*NOTE: **Think through possible variants** -- Given name spelling and order; surname spelling; date range; location possibilities. Search using those possibilities. Search without the spouse or parents names. Individual work may have been done without connection to other family members.

#### **D. NFS Training Opportunities for Everyone -- You and/or your Patron**

1. Training and Information available at New Family Search site [www.new.FamilySearch.org](http://www.new.FamilySearch.org)
  - a. *Learn How to Use FamilySearch* [referring to New FamilySearch website] Tutorials, Guides
  - b. Help Center **Document ID: 108510 Using the Help Center in the new FamilySearch**
2. Regular FamilySearch Site [www.FamilySearch.org](http://www.FamilySearch.org) See bottom of page "Ask a Question" will take you to Help Center  
NOTE: Must log in as an LDS member or you will only be able to see what non-LDS members see. See also *Learn*.
3. LDS.org at [www.lds.org](http://www.lds.org) >Serving in the Church> Family History for links to Manuals, Videos, Leader Resources  
See also *Serving in Family History* at [www.FamilySearch.org/serve](http://www.FamilySearch.org/serve) Includes Core Training , FH Consultant training.
4. BYU FHL Sunday Program 2nd and 4th Sundays 10:30 a.m. - 7:30 p.m. See Sunday Class List at <http://lib.byu.edu/sites/familyhistory/>
5. FHL Salt Lake - Daily Classes, Free Online Classes, Saturday Seminars, etc.
6. Utah South Area Training Center in Orem
7. Riverton FamilySearch Library

#### **E. NFS - Best Practices and Suggestions**

1. Maintain a personal database using a program that has NFS Sync Up capabilities.
  - a. Only way to keep your records cleaned up is on a private database.
  - b. Documenting, Sourcing.
2. Combining: Don't be casual or encourage guessing. "Looks right" is not enough. Decisions should be source based.
3. "I Accept the Terms." Have you/patron read the Temple Submission directives? Are you obeying?
4. The Patron should be the one in the "driver's seat" with hands on the keyboard and mouse.
5. Encourage patron to do descendency research in the post 1850 period to give them research experience in an era when research is easier to do and handwriting is easier to read.
6. NFS is not the be all and end all. Search vs. Research. NFS is a Search site. Research is needed.
7. Focus -- A Patron does not need to sync up their entire database before submitting names. Sync up the line which is currently being researched.
8. Encourage common sense and responsibility. Do not check your brain at the door!

Always remember -- If Patron is getting sloppy -- you can and should encourage proper respect for the work. You can and should refuse to be a party to shoddy work that creates duplication. You will account for what you do. So have some thought provoking quotes, scriptures and questions ready to encourage responsible work.

See you in the trenches!  
Laurie