

## **Family History Training Steps For Temple and Family History Consultants and Patrons**

04 Nov 2025- Start with prayer, to invite the Holy Spirit! 1.67 billion people tree. 20.5 billion Records. Family Search: A One World Tree. Focus on Person's Tree. Focus on their skill level.

1. Review **Fan Chart**- and legends available. Highlight Sources and Temple Ordinances.
  2. Two Main Screens: **Tree Screen** and **Person Screen**, all others are support screens.
  3. Review Temple and Record Hints. Do Hints Attachment.
  4. Review Ordinances Ready. Remember we need to keep adding people to FS for this to work.
  5. Review **3 MAIN Steps for EVERY Person you seek info for!** Do over and over again!
    - Search for missing Dates and places, BIRTH, MARRIAGE, DEATH and Census etc.
    - First, look in FamilySearch for sources you know apply and add them to your person.
    - Second, Look in Ancestry etc. Trees and add sources and info that apply to your person.
    - Third, Look in Ancestry etc. Records and add any sources and info that apply to your person.
  6. Review Attaching Sources: (include in Source Title: Name, year, event, and place of event).
    - From FamilySearch, Hints and Records (always add event date, for sorting events sequentially).
    - From Outside of FamilySearch, Premier Family History Websites, Web, etc. (using Source Box).
  7. Review Merging Duplicates (if needed for patron at this point) (Also Finding Similar People).
  8. Review Correcting and Editing Errors (if needed for patron at this point).
  9. Review Access to Premier Family History Websites set up. (If necessary), (Free for Members).
  10. Keep it SIMPLE. Don't Overwhelm. Limit sessions to under an hour. Schedule a follow up session if necessary to go through the 8 or 10 Steps, depending on skill level of person.
    - Doing a Free 40 Min Zoom Session seems most effective and is available for anyone to use.
    - Direct person to do all steps on their own Tree. - Can work with anyone in any skill level situation.
- Encourage taking "Your Ancestors" to the Temple! Use "HELP" "?" To get answers to questions.  
Review "Helper Resources" and "Planner" on FamilySearch for more tools. (For Consultants)

**RESOURCES AVAILABLE** for when you want to dive deeper into learning your calling.

### **•Quick Start Learning Lessons Table of Contents (Click on, or copy and paste URL link.**

#### **•Leader Temple and Family History resources (New Link)**

[.https://www.familysearch.org/en/united-states-canada/member\\_resources](https://www.familysearch.org/en/united-states-canada/member_resources)

#### **•My Calling: Temple and Family History Consultant <https://www.familysearch.org/en/consultant/>**

#### **Quick Start Learning Lessons, Table of Contents:**

<https://www.familysearch.org/en/fieldops/quick-start-learning-lessons-table-of-contents>

#### **•Quick Start Lesson Videos**

<https://www.familysearch.org/en/fieldops/quick-start-lesson-videos>

#### **•Helper Resources for my calling as a temple and family history consultant**

<https://www.familysearch.org/en/help/helpcenter/article/how-do-i-learn-to-be-a-helper-or-about-my-calling-as-a-temple-and-family-history-consultant>

Learning Resources <https://www.familysearch.org/en/library/learning-resources>