A- Sign into FamilySearch with your username and password. Under “Get Help” choose “Consultant Planner” from the drop down menu.

B- Click on “Invite Person”. On the box that pops up, put in the person’s name and email address. Ask the person to look for it and respond to your email to give their permission. This could take up to 40 minutes for FS to clear the name. You will see their name appear under the word “Invited”. Click under their name to start helping. They can revoke your access to their tree by going into their settings. It will be under “Connected Accounts”.

C- Or you can click on “Add Person”. Insert the name, username and helper number or birthday of the person you want to help. Include yourself! The helper number is found under your name, under settings. It is the last 5 digits of your membership number which can be found on the phone app “LDS tools”, or the back of your temple recommend.

D- See the person’s recent activity in their tree.

E- View the country of origin fan chart or click on “Show Birth years” to see your ancestors’ year of birth. Recently added are people with memories and people with sources.

F- Running your cursor over each section of the fan chart brings up a black information box. Click on it to see the summary box and go into that person’s FamilySearch page or tree.

G- Go directly into their tree. You can make changes to their tree but not their settings.

H- View temple opportunities, obituaries, Find A Grave, Hints, Duplicate, Featured Records etc.

I- Create lesson plans and print them out (may edit or delete them)

J- Track their progress and shared activities (may edit or delete them)

K- Understand your Family History calling by reading articles or viewing videos.