1-Sign into Family Search with your username and password. Under the “Help” menu, choose “Consultant Resources”
2- Consultant Planner opens up with your contact information and recent activity and fan chart (see back) When you help others, by inviting them, it will default to theirs.
3-To invite a person to help, click on “Invite” and choose either your ward or stake. Scroll down till you find the person’s name. Click “select” on the name you desire. It will bring up their email. Click on send. That person will get a prescripted email from you asking for permission to view their tree. Once they give permission, their name goes on your list under “Accepted or Added”. Click on their name under the “Accepted or Added” heading to bring up their tree. To “Add” a person, you have to know their user name and helper number or birthday. Once you enter this, you can start helping them immediately. (Helper number can be found by clicking under your name in FS. Go to settings, it will be under the account tab. It is the last 5 digits of your membership number found on temple recommend or LDS tools.)
4- Tells you the person you are helping. Be sure to click on the X at the top of the green bar when you stop helping them.
5- Clicking on “Tips” gives you tips on how to work in the Consultant Planner.
6- “Your Calling” tab gives lots of articles and videos on how to effectively help others.
Click here to see your fan chart by Birth Years, Memories or Sources. Click a section of your fan chart to bring up a name or see their summary card.

Go directly to their tree

See names ready to reserve on your tree or those that need more information or those that need a source etc. All these headings make for exciting discoveries about your tree.

Create a lesson plan and print it out or track your progress with the person you are helping.

Judy Sharp  July 2018