

The Consultant Planner

A FamilySearch Tool for Helping Others



USING THE CONSULTANT PLANNER

The Consultant Planner makes it easier for you to help others with their family history. Follow these steps to access and use the planner:

1. Log in to [FamilySearch.org](https://www.familysearch.org) with your LDS Account username and password.
2. At the top right corner of FamilySearch, go to the [Get Help](#)¹ menu, and select [Help Others](#)².
(This feature is only available to members of the LDS church.)
3. To help someone, you need to request access to his or her family tree with one of the following options:

- To send an email invitation, click [Invite Person](#)³.
- To manually add someone to your list using his or her helper number, user name, or birth date, click [Add Person](#)⁴.

Note: The member's name will appear in the Invited list until he or she reads the email and authorizes access. Once approved, the member's name will move to the Accepted or Added list.

CONSULTANT PLANNER HOME PAGE

FamilySearch Family Tree Memories Search Indexing Temple

Help Others

- [Invite Person](#) ³
- [Add Person](#) ⁴

► **Invited** (0) ³

► **Accepted or Added** (1) ⁴

Consultant Planner

Help consultants prepare successful family history experiences

Always seek to be led by the Spirit, and focus on the needs of individuals.

This planner assists you, as a consultant, to prepare personal, spiritual family history experiences for others by allowing you to:

1. **Request** access to their family tree.
 - [Invite Person](#)—Send an email message.
 - [Add Person](#)—Ask for the patron's helper number, and the username or birth date.
2. **Evaluate** current level of activity.
3. **Research** and find ancestors and cousins.
4. **Prepare** simple 30-minute lesson plans.
5. **Record** notes and progress.

◀ General steps to consider

◀ Training Resources for Consultants

Start with a Personal Family History Experience

Have your own personal experience with family history, and help others do the same.

Helping Others Love Family History

Learn to apply a set of proven principles to create heart-turning experiences for those you help.

Technical Training

Access valuable training resources as you help others have meaningful experiences finding their ancestors.

Messages Volunteer **Get Help** ¹

What can we help you with?

- [Help Center](#)
- [Getting Started](#)
- [Contact Us](#)
- [Learning Center](#)
- [My Cases](#)
- [Research Wiki](#)
- [What's New](#)
- [Help Others](#) ²

4. To see some relevant data from the member's account, in the Accepted or Added list, select a member's name.

5. Use the member's family history information to prepare a personalized lesson.

a. Patron's Experience¹

This option shows you experiences the member has had with FamilySearch. This will help you understand the user's recent experience on the site.

b. Fan Chart²

This option lets you scan the member's family tree or click on an ancestor to see detailed information from FamilySearch. You can review by date and location of birth to help you know where to begin in the member's tree. Clicking on a family member from the fan chart will take you to the ancestor's person page in the tree of the member you are helping.

c. Possible Opportunities³

This option helps you investigate how to help the member experience quick success.

These leads should be carefully reviewed and verified before sharing with the member.

d. Lesson Plans⁴

This option allows you to document the steps in the member's personalized lesson plan. You can save, edit, and print multiple lesson plans.

e. Notes and Progress Record⁵

This option enables you to track the progress of the members in your teaching pool.

Most members need more than one visit to become self-sufficient in doing family history.

We need your feedback!

To help improve this *Consultant Planner*, please share your feedback about what's working, what's not working, what you liked, what you didn't like, or anything else you would like to share. You can provide a comment by clicking the **Feedback** button on the right side of the planner.