

For Volunteers

Use this sheet to track your progress as you learn or review Family Tree basics. Check off each individual activity as you feel confident in your ability to complete the activity.

Name _____ Zone _____

Skill	Activities	Section Review
SECTION 1 Navigate	<input type="checkbox"/> Knows how to sign in <input type="checkbox"/> Can expand and contract family lines <input type="checkbox"/> Customize your view <input type="checkbox"/> Understand privacy rules for living people	SECTION 1
Managing Account Settings	<input type="checkbox"/> Create an account <input type="checkbox"/> Recover a username and password <input type="checkbox"/> Change your settings	
View Details	<input type="checkbox"/> Familiar with the features of the Person page <input type="checkbox"/> Use the View My Relationship option <input type="checkbox"/> Place an ancestor as the first person in the Family Tree View <input type="checkbox"/> Print charts and forms	
Children, Spouses	<input type="checkbox"/> Family Members Section: View children of a couple, view all the spouses of an ancestor.	
Find, Recents	<input type="checkbox"/> Use the Find menu to find ancestors in Family Tree <input type="checkbox"/> Use the Recents menu to locate ancestors in Family Tree	
Alternate Views	<input type="checkbox"/> Use the Landscape view <input type="checkbox"/> Use the Portrait view to see photos of your direct-line ancestors <input type="checkbox"/> Display and print a Fan chart <input type="checkbox"/> Use the Descendancy view to see multiple generations	
<p>The Section 2 activities worksheet is to be completed in the practice site Beta.FamilySearch.org. You will need the Activities Worksheet (click on the link to download it) to complete the activity. Be sure to read the instructions before you begin the activities worksheet. Please send an email to dsgurtler@familysearch.org when you are ready to start Section 2 of the Family Tree Basics and we will provide you with the needed PID numbers to complete the activities.</p>		

<p>SECTION 2</p> <p>Changing Info</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Enter names, dates and places in Family Tree <input type="checkbox"/> Edit information <input type="checkbox"/> Know how to write reason statements <input type="checkbox"/> Add or remove someone from your Watch list <input type="checkbox"/> Correct relationships <input type="checkbox"/> Viewing recent changes made to an ancestor <input type="checkbox"/> Identify a contributor of information 	<p>SECTION 2</p>
<p>Add Ancestors</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Add a missing spouse in Landscape view <input type="checkbox"/> Add a missing child <input type="checkbox"/> Add unconnected persons to Family Tree 	
<p>Merging Duplicates</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Search for possible duplicates <input type="checkbox"/> Merge duplicates <input type="checkbox"/> Merge by ID <input type="checkbox"/> Undoing a merge 	
<p>Section 2 Review</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Click here to complete the Section 2 Activities Worksheet. 	
<p>SECTION 3</p> <p>Add Sources</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Why add sources? <input type="checkbox"/> Browse and add sources in your family tree <input type="checkbox"/> Add, edit, tag, or detach sources for an ancestor <input type="checkbox"/> Use the Source Box to keep track of your sources for ancestors. <input type="checkbox"/> Print sources on a Family Group Record <input type="checkbox"/> Record the PID number of someone for whom you have attached sources <hr/>	<p>SECTION 3</p>
<p>Record Hints, Attach Sources</p>	<ul style="list-style-type: none"> <input type="checkbox"/> View record hints <input type="checkbox"/> Attach a source from a record hint <input type="checkbox"/> Attach an image as a source <input type="checkbox"/> Record the PID number of someone for whom you have attached a record hint. <hr/>	
<p>Notes</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Add a note <input type="checkbox"/> Know how to participate in User discussions <input type="checkbox"/> Know how to use FamilySearch messaging feature 	

	<input type="checkbox"/> Record the PID number of someone for whom you have written a note. <hr/>	
<p>For section 4, if you do not have any of these items to add to your own family tree, you may use the sample files (attached in your welcome email) and upload them to anyone on your Family Tree on Beta.FamilySearch.org.</p>		
<p>SECTION 4</p> <p>Memories Photos</p>	<input type="checkbox"/> Upload a photo <input type="checkbox"/> Add or delete a tag to a photo <input type="checkbox"/> Add information to a photo <input type="checkbox"/> Delete a photo <input type="checkbox"/> Record the PID number of someone for whom you have uploaded and tagged in a photo. <hr/>	<p>SECTION 4</p>
<p>Documents</p>	<input type="checkbox"/> Upload a document <input type="checkbox"/> Add or delete a tag to a document <input type="checkbox"/> Add information to a document <input type="checkbox"/> Delete a document <input type="checkbox"/> Record the PID number of someone for whom you have uploaded a document. <hr/>	
<p>Stories</p>	<input type="checkbox"/> Upload a story <input type="checkbox"/> Tags – adding and deleting <input type="checkbox"/> Add information to a story <input type="checkbox"/> Delete a story <input type="checkbox"/> Record the PID number of someone for whom you have uploaded a story. <hr/>	
<p>Life sketch</p>	<input type="checkbox"/> Add a life sketch <input type="checkbox"/> Understand the limitations <input type="checkbox"/> Record the PID number of someone for whom you have added a life sketch. <hr/>	
<p>Audio</p>	<input type="checkbox"/> Recording audio <input type="checkbox"/> Upload a recording <input type="checkbox"/> Tags – adding and deleting <input type="checkbox"/> Adding information to an audio recording <input type="checkbox"/> Delete an audio file <input type="checkbox"/> Record the PID number of someone for whom you have uploaded audio. <hr/>	

Tier 2 FamilySearch Basics Family Tree Basics Review Checklist

<p>SECTION 5</p> <p>Sharing information from Ancestry to FamilySearch</p>	<p>Only for members of the Church of Jesus Christ of Latter-day Saints at this time.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Knows how to share sources from an Ancestry tree to FamilySearch Family Tree <input type="checkbox"/> Click on this link to complete the lesson 	<p>SECTION 5</p>
<p>Temple ordinances Ordinances ready</p> <p>You may practice and complete any of these exercises in Beta.FamilySearch.org, if desired.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Print Family Ordinance Request (FOR) <input type="checkbox"/> Print Temple Cards <input type="checkbox"/> Reserve an ordinance <input type="checkbox"/> Share an ordinance with the temple <input type="checkbox"/> Share an ordinance with a family member or friend <input type="checkbox"/> Reserve an ordinance using Ordinances Ready <input type="checkbox"/> Click on this link to complete the lesson 	
<p>Escalation</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Click here to read instructions for creating an escalation case. <input type="checkbox"/> Click on this link to complete the lesson 	
<p>SECTION 6</p> <p>Custom Charts</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Printing Pedigree charts using TreeSeek.com <input type="checkbox"/> Print a large fan chart on the Main floor of the Family History Library. 	<p>SECTION 6</p>
<p>Solutions Gallery</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Learn about apps and websites in the Solutions Gallery <input type="checkbox"/> Download and use the FamilySearch Family Tree Mobile App <input type="checkbox"/> Download and use the FamilySearch Memories Mobile App 	

Once you have completed all the lessons and feel confident with the concepts on this checklist, turn this sheet in to your zone leader or supervisor.

Date Completed _____ **Supervisor Initials** _____

*Supervisors: turn in completed sheets to Debbie Gurtler.