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**JAN**

**MONTHLY WEBCAST SERIES**

**EXECUTIVE FUNCTIONING ACCOMMODATIONS IN SELF-EMPLOYMENT**

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>> BETH LOY: Hello everyone and welcome to the Job Accommodation Network's accommodation and compliance audio and Web Training Series I'm Beth Loy and I'll be the moderator for today's program called "Executive Functioning Accommodations in Self-Employment" featuring Melanie Whetzel Lead Consultant for the cognitive team and Kim Cordingly who is the head of our Entrepreneurship Team. Before we start the program I want to go over just a few housekeeping items first if any of you experience technical difficulties during the webcast call us at 800-526-7234 for voice and hit button 5 or for TTY call 877-781-9403 also we plan to answer as many questions as we can please send your questions in the email account questions@askJAN.org or you can use the question and answer pod located at the bottom of your screen to use the pod type your question and submit it to the question queue. Also on the bottom of your screen you'll notice the FileShare pod you can use if you have difficulty viewing the slides or would like to download them and finally I want to remind you that at the end of the webcast, if you don't have your popups blocked, an evaluation form will automatically come up on your screen in another window. We really appreciate your feedback so please stay logged onto fill out the evaluation form now let's get started with today's program, Kim take us away.

>> KIM CORDINGLY: Thanks Beth for today's webcast we'll be discussing accommodations involving executive functioning in the context of self-employment. Many aspects of becoming self-employment or starting a small business involve processes we would describe as executive functioning and Melanie will discuss what this involves in more detail in a moment but we begin to notice how these type of accommodation questions came up over and over again in self-employment situations so we decided this might be a useful topic to address more specifically in a webcast.

Before we focus on the accommodation part, I would like to talk first about how JAN can assist with self-employment and why it can be an important employment option for people with disabilities my team is available the Entrepreneurship Team in the typical ways you would access JAN services by phone TTY and email and we have a special part for self-employment. Self-employment small business development and entrepreneurship are not synonomous they default to self-employment most of the time to cover this array of options and we'll talk in a minute about the types of calls we get that fall under this umbrella when you contact JAN about self-employment we go through a detailed intake process from this we put together a comprehensive packet of materials based on the caller's individual needs, questions and we put the materials in accessible format we provide local, state and national resources both disability and business related and while we aren't doing case management following someone from beginning to the end of the business development process individuals can contact us as many times as they feel would be helpful as they move through the process.

And the scope and type of inquiries we receive are very diverse. From a tourism business focusing on cave exploration to an estate sales agent to a food truck.

So let's look at some of the benefits of self-employment one of the important benefits is it's a customized approach meaning you can control various factors in the design of a business to meet your specific needs this is particularly true in terms of accommodation opportunities. For many who contact us choosing self-employment is part of their accommodation strategy integrating accommodations into their business. For example being able to start a home-based business to resolve challenges in transportation. So some other benefits include advantages with Social Security and work incentives and the ability to accumulate assets. That it's a very integrated employment approach and it can be a way to create a livelihood that works best for that individual. Our callers often say they like the idea of entrepreneurship because of the ownership factors and the flexibility in the design of their business and that it can fulfill a dream and lifelong interest and many individuals who contact us are artisans as Griffin Hammis writes while many training programs focus on business management skills in reality most small business owners are artisans concentrating on making their products or delivering their services.

And there are challenges of course. So what are some of these? And we can provide information and resources to address almost any of these. Being self-employed and starting a business is not immediate it takes time, support and planning there's a lot of misinformation out there about free money, free grants and we can help clarify this. There are financial concerns that people have when they are receiving or participating in different benefit programs and how self-employment income will affect that and then we get questions about funding, funding, funding, funding. And we provide a lot of information about that.

Also questions about healthcare coverage and how that will be affected by the increase in income. How to get the proper supports in place and agencies to cooperate with one another both disability related and business related. Then there are health challenges we have individuals who might have a chronic illness like frequent migraines they need to build in these kind of accommodations for good and bad days or ways to anticipate possible future challenges for example a woman with MS likes running her business out a co-working space away from her home but also set up a home office so she could eliminate the commute which depleted her limited energy on bad days and then the No. 1 important factor is the lack of supports.

But many of these challenges can be overcome with proper planning and support.

So looking at entrepreneurial strategies I just wanted to give an overview of what we're talking about when we're listing these various options. So we often say self-employment which is basically a person working for themselves that it could be a small business whether the individual has employees it could be a very, very small business which would be called a microenterprise. It could be customized self-employment. Which is a strategy which unites person-centered planning with the development of a business plan and a planning process which is very individualized and profitable and sustainable but also meets those individual needs.

We get a lot of individuals who are interested in independent contracting it could be a business within another business, a family business a lot of times these have to do with agricultural businesses and we get questions about starting a nonprofit or a social enterprise which would have a for-profit component to them and I wanted to list some of the keys for success and this comes out of the research literature and also our experiences at JAN but just to kind of hone in on these three things it needs to be a good business idea meaning it fills a niche, something that somebody is really good at, they are an artisan, they perform a service that they are very good at. It's an individualized and customized approach meaning it meets the individual needs and goals and there's appropriate support available for that person and I just wanted to give an idea of the type of businesses that we get called about. Just to give an idea of the variety it could be anyone from a financial planner to a mobile detailing business. It could be -- we pretty much say there hasn't been a business that we haven't gotten a call about since I've been working at JAN. And then I just wanted to talk about the team collaboration. So one of the great things about contacting JAN is we can assist with both the business development process and with accommodation questions. We truly work together across teams now I'll turn it over to Melanie to talk specifically about executive functioning and then we'll move on to some specific situations and accommodations.

>> MELANIE WHETZEL: Okay. So let's talk a little bit about executive functioning. As the name suggests executive functions are high-level abilities that influence more basic abilities like attention and memory. The term executive function also describes a set of cognitive abilities to control and regulate other specific behaviors and abilities they are necessary for goal directed behavior that's braver directed towards colleagues of a task executive functioning includes thinking, paying attention, remembering, planning and organizing.

We know that multi-tasking is the ability to execute or complete one task at a time. Executive functions are necessary for us to be able to successfully carry out these tasks for example people with executive functioning deficits may perform well on tasks with basic attention such as answering the phone but will have trouble with tasks that require alternating attention like answering the phones and taking messages while working on a report and checking the identification badges of individuals who come into the office at the same time. Okay. So executive functions are important for successful adaptation and performance in the daily situations in our lives. They allow us to begin and complete tasks and to persist when we're faced with challenges. We need to be able to recognize unexpected situations and adjust our plans quickly when unusual or sudden events crop up and interfere with our regular routine they help us to filter out distractions and prioritize tasks. Executive functions are also what keep us from behaving in inappropriate ways. People with impaired executive functions often had difficulty interacting with other people. They may say or do things that seem strange and maybe even offensive to others. Most of us experience impulses to do or say things that could get us in trouble but we're able to suppress those impulses, individuals with impairments in these areas may not be able to keep these impulses in check and as a result may have difficulty fitting in socially. We need to be able to resist impulsive actions and responses. So here is an example. You arrive at work and your supervisor greets you and states that he would like to meet with you today at 1:00 o'clock about the Smith account. On your way to your office where you'll make note of the appointment and the account you run into several co-workers and join in a conversation about the severe storms that occurred over the weekend. After several minutes of conversation you take off your coat, hang it on the coat tree and get yourself a cup of coffee. Executive functioning, particularly working memory, enables you to retain the information about the meeting throughout these unrelated tasks.

So let's look at some more specific areas where executive functions help direct us all day every day executive functions allow us to make plans, initiate activities or tasks, generate ideas independently, keep track of time, meet deadlines, keep track of more than one thing at a time, retain information while doing something with it. For instance, remembering the phone number while dialing a phone.

It also includes past knowledge in current situations. Evaluating ideas and reflecting on our work. Changing our minds and making mid course corrections while thinking, reading and writing, asking for help and knowing where and when to get the information. Engaging effectively in groups and using self-control.

>> KIM CORDINGLY: Okay we're going to look at some examples so we're going to start with Angela. She contacted JAN with an interest in starting a wellness coaching business she had worked in this field for many years as an employee but felt being self-employment would be a better option for her she describes her disability with a trauma history and severe anxiety the anxiety and it's cognitive effects were making it difficult when moving forward with the tasks she needed to get her business started while she was very talented and creative with the actual work of her business the coaching and training, she found there were certain areas where accommodations would help herb more successful. She stated that putting together a training curriculum or business plan draft she would edit them over and over again and could not let them go and she was very anxious about sharing her work with others so she felt stuck in in this never ending process she procrastinated about making phone calls and put them off slowing down her progress when she was working with the business development or vocational rehab counselor she tended to get more nervous than normal and felt she had difficulty in meetings expressing herself she described the experience as feeling very overwhelmed even when she had made a lot of progress with her business planning she was not demonstrating this effectively in those meetings. And she also left the meetings feeling like not remembering exactly what had happened and that she couldn't actually bring forward the information that was shared in the meeting for her to complete -- to improve on what she had already done.

The other issue was that she had a home office and she anticipated from her experience struggling with some organizational tasks such as scheduling appointments, keeping case notes, billing issues and so on and in her most anxious moments she found she would skip from one thing to the next without completing things and also become distracted and lose track of the task at hand so Melanie these are some of the issues she brought up and the main things we originally talked about was preparing the training and business plan drafts. She edited excessively and all of these issues were causing her to procrastinate and not move forward with her business.

>> MELANIE WHETZEL: And so I would say here she needs to perfect it and pass it on and she would be the one to determine how perfect the draft has to be before showing it to someone else then go through with it, make the necessary changes and pass it on. Be back -- feedback from someone else may be way more efficient and effective than repeatedly going over it herself we also don't see errors thinking and writing no matter how many times we review it.

>> KIM CORDINGLY: Okay she also mentioned that she was having difficulty in stressful situations like meeting with the V.R. Counselor or business development counselor. Articulating her ideas and challenges with organization and completing tasks.

>> MELANIE WHETZEL: Okay so I say keep a notebook with the notes and the questions for meetings. Angela could keep a notebook with the notes and questions that she needs to discuss with the counselor. She could also use the notes section on the device to record the same thing. She could break her plan into segments so it's easier to discuss and ask questions about. Section by section may be more manageable than the entire plan.

Writing down the questions as she thinks of them, too, and then organizing them later by subject will help. Color coding could really be effective here. For instance, green for insurance items and then other subjects go in other colors.

Also recording meetings. She could use an app on a device or carry a pocket recorder to record the actual meeting so she can go over it later as many times as she needs to some people find a three-ring binder or spiral notebook with colored tabs or pockets is helpful to place information in by color for instance insurance information goes in the green other subjects would go into other colors.

And then color coded checklists, highlighters, sticky notes and even paper clips can help.

Making a checklist of things that she needs to do and checking the items off when completed would be beneficial. Color coding the checklists for easy identification may help, again, green for insurance matters, other subjects in other colors. But consistent to be easily recognized.

Laminated learning disabilities to check off and wipe clean or paper copies for one-time use and toss can also be helpful.

You know, I keep talking about color coding here. And we can't stress color coding enough. It can help make a huge difference and make things organized almost instantly when the colors are recognized. It may take effort in the beginning as organizational systems do. But it will pay off. The use of highlighters, sticky notes and paper clips will help with the colors.

>> KIM CORDINGLY: All right thanks Melanie so next we'll look at Edith who was interested in starting a home-based accounting practice.

She has a background in accounting and has worked in various corporate settings she was diagnosed in her early 30s as having Asperger's syndrome or Autism Spectrum Disorder and she prefers to work alone and easily distracted by noise or visual cues when working in a large office with cubicles it was difficult to tune out what was going on around her and she struggles with the politics of the office she felt self-employment as an accountant would allow her to incorporate some accommodations into her business by simply working independently however as she thought this through she stated she had some concerns possible accommodations she would need as a self-employed person. She planned to create a home office in a spare bedroom in her condo and she shares her living space with an aging parent who would be present during the day she was concerned that although better than cubicles she would need to also create a way to stay on task and tune up --

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>> KIM CORDINGLY: Such as a dog barking. The schedule was set in stone and she liked the structure and routine she wasn't sure how to create and balance the structure versus flexibility in a home environment and create a more productive work space. So the main issues here had to do with past difficulties in her corporate work setting and how not to reproduce them in her home environment having to do with distractions and ways to manage those things so Melanie?

>> MELANIE WHETZEL: Okay. Well, let's talk -- first of all let's talk about products she can use to help with noise distraction such as white noise or environmental sound machines if those aren't too distracting to her some people also use a fan soft musing in the background might be enough to mask the noise, noise abatement products such as sound absorption panels and rugs and heavier lined curtains and quilts hanging on the walls can help with sound that she finds distracting weather stripping the interior doors may be helpful maybe adding the products to the TV room will help especially with an elderly parent who has hearing difficulties and turns the volume of the TV way up.

>> KIM CORDINGLY: So how about separation of home and worklife in a home-based business? I think that often gets not thought through a lot when people are thinking about a home-based business and creating a positive work routine.

>> MELANIE WHETZEL: I think setting up the office that, who best for the work that you do or in this case the work Edith does from working at home you have that ability to make your own schedule and carry it on as if it were set in stone as well scheduling around the household or parental things that need to be done but stick to a set schedule just as if going to the office. Look at the placement of office furniture did the office where she worked have a good layout that could be copied the beauty is she can set her home office up anyway she chooses I would recommend sitting in the room to get a feel for sound, garbage trucks, neighborhood routines to see what would work best placing a desk where you can see in the neighborhood might work fine but for others connect side -- it can sideline concentration or productivity so having your back to the window or placing heavy curtains on the windows could help with visual disruptions think about the workflow how you would use the items, furniture, equipment, et cetera so their placement in the work areas makes the most sense.

I think keeping your office your office and your home your home is really an important part. Make sure that the office items stay in the office and the household items don't migrate there do the work in the office not in front of the TV for instance.

>> KIM CORDINGLY: We have next Jeff and Claire this is a customized self-employment example so JAN was contacted by parent Claire on behalf of her son Jeff with an Autism Spectrum Disorder Jeff has high functioning in terms of understanding technology for example but struggled with communication, keeping attention to tasks and maintaining motivation when he wasn't interested in something.

He was in the process of transitioning from school to work and he became involved in a summer program where he learned photography skills including the technical aspects of using the equipment, setting adjustments and taking photos in the community. His mother described his interests as bringing him out of his shell photography projects got him active with people in the community, encouraging conversations in social situations and this became his career goal.

His parents saw these as very positive developments and to encourage this they provided him with photography equipment and other items needed to do this business such as a laptop they had begun identifying organizations in their area that could provide additional business and disabilities for them. We helped a lot with that. Their goal was to have Jeff to be as independent as possible in operating this business so the early issues that they identified were that she was motivated by parts of the photography business that he enjoyed but would avoid the parts he was less interested in he liked getting the camera equipment out but didn't like putting it back he relied heavily on his parents making calls and talking to people on his behalf they had done this often throughout his life and felt he was capable of doing it more on his own and would be motivated since connected to his own business they wanted to know what strategies could we suggest to support this increased responsibility.

And they had built some customized supports in for Jeff in terms of who would be done with the financial and advising parts of the business but they wanted to integrate inasmuch as possible so were there any suggestions to help him with the basic system to help keep track of reporting the amounts of photographs he sold and particularly interested in something he could carry with him such as a cell phone app.

So this individual is just entering into doing this business. Participation, how to help with the less desirable more desirable kind of integrate all of those parts. Melanie, any ideas?

>> MELANIE WHETZEL: Sure. Yeah, I think a flowchart of the required steps would be really important. All of the steps should be documented in order for Jeff to see what it takes to make a success of this business. A thorough understanding of why his business needs to be successful both personally and financially and not just fun and interesting can help him see the big picture. Does he have a car? Does he want a car, an apartment? Does he understand it takes money in order to purchase or rent it's important he sees why he needs funds color coding the task in the flowchart might be helpful to see how the tasks are essential and how they build on each other. Different tasks or categories of tasks could be represented in separate colors. Maybe even breaking down the tasks into more manageable steps would help, as well.

>> KIM CORDINGLY: Okay. And there are also various -- they were very interested in fostering greater responsibility, autonomy and involvement in the process and assisting him so he became even though some of this was going to be customized people they had -- customized they had people helping him with the financial pieces but ways to integrate him in all aspects of the business.

>> MELANIE WHETZEL: So looking at a mentor or job coach, I think obtaining a mentor or job coach could be vital in training Jeff not only to make the calls but to understand the need to make the calls for his business. Jeff will probably take more direction from a mentor or a coach than a parent.

Maybe a flowchart or visual of how the business would work from unpacking, taking the photos, cleaning, packing the camera back up to the final step of receiving money or doing a show like a craft fair, something like that. And how the different types of tasks, including the phone calls, fit into his plan.

I also think about apps for small business. There are apps that include budgeting, accounting, banking. Inventory. Making payments. Managing staff, managing customers planning. Time management. There was a Website called 57 Small Business Apps That Every Entrepreneur Should Try. And that would be really helpful for Jeff. He would have to look at those and determine which ones might work best for him and some of the apps are free. And some of them have a small fee.

>> KIM CORDINGLY: Thank you. So we would like to move on to Eric. Eric contacted JAN with an interesting in starting a recycling business he had worked in the energy sector prior to his stroke and was good at fixing things and had an interest in not throwing things away but reusing them in different ways. Because of health issues he felt that working independently and doing a business on his own would be the best option. He also experienced headaches and fatigue. He wanted to be able to work flexibly when he was best able. After the stroke he struggled with memory issues including losing track of what he was working on, identifying the sequencing of tasks, organizing his daily routine and completing one thing at a time. The recycling business required him to many -- organize many items into categories based on where they would go next, some for sale some for reuse and so on and it required him to keep track what was on his property while he had a system of files he felt confused and couldn't rely on his memory to know what items he had JAN provided him with small business and disability resources to assist with these aspects of being self-employed but he want accommodation suggestions about a system or set of skills to help him remember and memorize these items and preferred to do things on paper versus on the computer he needed a way to cue himself to stay on track once he was physically working with items to be recycled he got away from the paper and business parts and meaning he just got caught up in the recycling parts but the business parts were kind of falling away. So Melanie, he has a recycling business he wants a flexible schedule, manage good and bad days and struggles with memory issues and staying on tasks.

>> MELANIE WHETZEL: Okay let's first look at setting up a stamina schedule and what I mean by that is set up a schedule that needs -- the tasks with the most mental stamina when he has the most mental stamina to do those or capable doing hard things and fill in the other schedule with things not as demanding he can schedule in rest periods exercise and lunch breaks and set a timer to assist him in adhering to his schedule and then also posted and laminated key ring checklists. Posted checklists that he can follow in doing different tasks he has the most difficulty with will help such as even the sequencing of the tasks. Then a laminated key ring version can also be carried along with him when he's on the move.

>> KIM CORDINGLY: And he needs a system for managing the recycled materials and categories and prefers that it be a mobile and paper-based system versus sitting in front of a computer.

>> MELANIE WHETZEL: Okay so I think keeping a notebook with various colored tabs would be helpful to keep track of items he has for sale the ones he's going to reuse whatever he's going to do with those would be helpful making a colored key in front of the notebook alerts him to where each section is located. Listing the items in alphabetical order so they can be easily located on the list might be crucial it might take a while for catchup but I would have a strict rule for adding items as soon as possible so they don't get lost in time maybe planning to take so many minutes a day in order to catalog what he already has in piles would be helpful too you know that old saying about how to eat an elephant do it one bite at a time also a strict rule or habit of marking things off once they are gone would be important for inventory control labeling the piles as he called them as they are labeled in the notebook so that everything matches up would also be helpful. Labels or signs can be color coded, as well.

And just like I talked about earlier with the insurance things being green Eric can use color coding can make sure that the things for resale are colored green for instance like for cash or any color that makes sense to him. The important be thing is to use the same colors for instant recognition we do stress color coding it can make a huge difference in things you're organizing and can become instantly recognizable while the colors are in view and it may take some time to set that up as any organizational system would but it will pay off in the long run. Then for timers, watches and reminder apps one watch that we can talk about that would be helpful it's called a WatchMinder and also in an app form it's a timer system that can be set up with 30 daily recurring alarms such as reminders every 20 minutes to pay attention or to get back to the paperwork or whatever task Eric is performing it can be used to schedule lunch, rest periods and reminders to take medication. The Time Timer watch it's a clock and also an app shows elapsed time in order to help manage time for tasks as an example he could set the timer to allow 45 minutes for one task with not only a reminder when it's gone but also the red feature shows how much time you have left it helps pace yourself so you don't get lost in one task and leave the others go and once again color coding by priority this is a system that works well for some people for instance using red, yellow and green for the layers of urgency if there are due dates or deadlines he wants to keep track of. He would just have to determine what color system makes the most sense to him.

>> KIM CORDINGLY: Thanks Melanie so now we would like to look at Alexis. She's a self-employed grant writer she contacted JAN and she's recently transitioned to being a self-employed grant writer she had worked in the nonprofit sector for many years but felt that often appreciated environment of these organizations increased her anxiety, made her less productive. She described herself as having a mild head injury and mental health impairment particularly anxiety over the years she had experienced difficult interaction with co-workers and found it hard to restrain her comments pressure of these situations and distractions she felt caused her to be less productive. She was someone who always wanted to do an excellent job so she triple checked things and described herself as a bit of a perfectionist when she felt she was unable to do her best work she became more anxious and depressed she knew that writing tended to take her longer than some and worked better when no one was around she was an excellent grant writer and confident about this she described herself being self-employed made sense to her she began to work as an independent contractor from her home office but then ran into some problems even though she was self-employed she needed to develop plans with various organizations and encountered similar issues she had to rely on individuals in a variety of organizations she didn't know well and sometimes did not meet their commitments in a timely fashion while being self-employed were very positive in other ways self-employment only restructured these relationships and things started to surface when personality conflicts occurred she became less productive while trying to build up a consistent client base she got a rep -- she worried about having a reputation of being difficult to work with she wanted everyone to have the same work ethic as she did being an independent contractor made her encounter more people from a variety of places she found more challenging this created new stress for her and problems in her productivity she worried this was going to affect her business and potential success.

So we have someone who is working independently in the nonprofit sector as a grant writer and difficulty interacting with co-workers meeting expectations and being able to work productively in those situations.

>> MELANIE WHETZEL: Okay first I would say she would want to communicate in writing as much as possible. Emails, letters, et cetera in order to eliminate anxiety from personal conversations and that provides documentation of the conversations she's had moving on there to standard operating procedures she could have a standard set of questions or guidelines to go by as much as possible to make the interactions more uniform and routine and people would know what was expected and I think stressing deadlines and timeframes would be crucial in -- would be crucial in getting those put in writing as well so others would be more aware of them and that provides documentation about what was agreed upon.

>> KIM CORDINGLY: The other issues included managing social anxiety and frustration developing better customer service skills and in fact thinking about being an independent contractor as being -- as meeting a customers needs reframing that relationship and then managing anxiety when having to collaborate with others.

>> MELANIE WHETZEL: I think helping to manage social anxiety and frustration a good thing would be to work with a coach on social and communication skills. And that could help reduce some of the anxiety that she experiences in the social interactions that are necessary in her line of employment. I think it would give her more self-confidence as well for stress management techniques those can be used to help eliminate and reduce stress and anxiety through the days techniques including flexible breaks, exercise, apps for stress and anxiety and a personal support contact and she can build these in her schedule if she felt she needed regular intervals of breaks or schedule a break that comes up when she needs to if she has some sort of particularly stressing interaction with somebody or conversation. I think a coach would also work we pointed out that could help her with social and communication skills and reduce some of the anxiety but I think a coach might also be effective for instruction in business etiquette. Helping her feel more confident dealing with the very people she interacts with. And then for repeat clients I think she can work to determine if some clients are worth working with again if stress is too high for her or she could keep a list of preferred clients who are easier to work with and who aren't as detrimental to her productivity. Again stress management techniques those could be beneficial to help eliminate or reduce stress and anxiety throughout the day. And like I just mentioned a minute ago, flexible breaks are really helpful. Exercise. That can even be done standing in place. There are all kinds of different ways to exercise that can be done very quickly in the moment.

And there are lots of different apps too. We can give information about that if someone is interested we have different apps for stress management and anxiety and then a support person also that she could have -- that she could contact when she's feeling particularly stressed.

>> KIM CORDINGLY: Thanks Melanie. Okay, now we would like to look at Leonard a self-employed musician JAN gets calls from lots of different artists and musicians interested in self-employment. So Leonard contacted us with an interest in being a musician he was a musician and composer and he had formal music training and wanted to focus on performance. He talked about his love of music and that was something he excelled at. As an adult he was diagnosed with bipolar disorder but prior to this diagnosis had self-medicated with drugs and alcohol. Due to the side effects of the prescribed medication as well as the residual effects of past drug and alcohol use he experienced a number of cognitive memory issues he had difficulty remembering things unless they were written down and often forgot appointments with his music Leonard found it bypassed many cognitive issues however in performance settings he needed to have his set planned out ahead of time or when on stage he would get lost. In order to arrange performance states he needed to be very organized, arrange meetings and arrange phone calls and keep careful tracks of these conversations he often had to call people back more than once and leave messages Leonard said sometimes he forgot who he had spoken to and it was confusing while his current medication was very helpful in terms of mood regulation he still struggled with big ideas in terms of creative process it was difficult to balance excitement about a new idea such as new musicians or a record label with the day-to-day activities of managing a business step by step he still had concerns with the way to handle day-to-day activities in a conscientious way which he felt could make a difference in developing a successful music career.

So he was dealing with some of these cognitive and memory issues as a result of past drug use and current medications that he was taking that were very helpful to him in allowing him to consider self-employment as an option.

And playing music seems to bypass all of these issues it was more with running the business that he had the issues.

So some of the issues came up regarding arranging performance dates, tracking phone calls and emails, reminders, callbacks and keeping track of conversations.

>> MELANIE WHETZEL: Okay I think for running record of contacts Leonard needs to have a process for keeping a running record of the contacts he made, when he made them what was discussed and next steps that need to be taken instead of relying on impaired memory he might consider the use of a custom designed sheet for the pertinent information where categories of information can be printed as it makes the most sense to him so there's less writing for him and it's organized for him while he's actually on the phone it could be like an advanced organizer that's just another name and it's designed in a way to capture the most information for his needs.

Now the use of one location for organization and focus if possible he should make calls from home or office location where he would have his organizational tools and the ability to focus. You would be surprised at the people I've called back just here at JAN who answer their phone no matter where they are and what they are doing in no way are they able to concentrate and organize their thoughts or even hear due to background noises or other things going on so being prepared for gathering information and confirming dates and returning calls would not only be more helpful for Leonard but it would be much more professional, as well.

So a color coded large calendar this is a really good idea I love this and there are people who still use paper planners and calendars. So recording the information on a large calendar where the dates would already be available would make it easy for Leonard to document the time, who he spoke to and the subject of the call in a brief way. Color coding could be extremely helpful here in regards to the status of the information on the calendar. Colored stickers could be used that could be removed or another color placed over the first one in order for him to see at a glance where he was with each caller or performance. He could color code by type of call or type of contact. So that he could see with a minimum of memory he could also use the call log of his phone to help record information into the calendar later using the notes section on the phone for specific information he could also use a calendar system to sync across devices and that would be a digital calendar that he could have at his fingertips wherever he was wherever it's needed he would have that but I think the most important thing would be to choose what works and stick with it he needs to choose like one means of organization and stick with it. Whatever system makes the most sense to him but he needs to make it routine.

And then lastly there, managing his big ideas, I call that prioritizing the mundane. I think a music business mentor to assist him in the day-to-day less interesting tasks may be helpful. It works for some folks to do the things they like the least first so that the less favored tasks are out of the way leaving the things that they love to do.

It can create a smoother day and the good feeling that results feels like a reward. It's always good to build rewards into your day. He could be strategic by setting a specific time each day or evening to do the big idea thing once he has completed the more mundane tasks while he has the mental energy for those.

For some that's early in the day for others it's later in the afternoon or evening. We talked about this with Eric it could be just as helpful for Leonard to set up a stamina schedule for the tasks that are the most taxing for him are done at the times of day when he has the most mental and physical stamina.

>> KIM CORDINGLY: That's interesting because one of the things that's happened in the music industry lately is they have offered courses called the business of music so there's a lot more mentorship kind of programs that's something we were able to pass onto Leonard.

So that's the end of our examples. For different accommodations. Executive functioning accommodations in terms of self-employment. So we can take some questions.

>> BETH LOY: All right the first question has to do with the case involving Edith. And Melanie, someone wanted you to expand on the accommodation needs for Edith. Do you have anything else in your notes.

>> MELANIE WHETZEL: I do I think I skipped a little section here so this is a good opportunity to go back. I think one of the things is really important is to make a schedule and stick to a routine talk about that with Leonard talk about that with Eric and it would work for Edith it works for everyone really. If she liked the schedule she had at work she could duplicate that at home as much as possible if there were things that didn't work she could change those to what does work and just because you set it in stone the first week doesn't mean that that can't change if you find that that really isn't helpful for you because of things going on in the neighborhood or things that were going on with her parents. We have a publication called: What's in a routine. And that can be very helpful for Edith, for Eric, for Leonard and I think mostly for all of us and here are some points from that. Keep a strict morning schedule. Just as if you're going to the office. You know you're working from home. It's not like you just have all morning to sit around in your pajamas and drink coffee and watch TV. You would get in a routine to get started at work just like you would if you were leaving home.

Be aware of time-sensitive tasks. Make sure that you know when the tasks have to be done in a certain time are due. Then you can plug in other tasks around those.

Factor in how long tasks should take and pace yourself.

Clutter -- cluster -- I'm sorry. Cluster tames that are similar so you can complete them while you're in the zone. Assess your day as to when you have the most mental energy and stamina to do the most difficult tasks.

Using checklists, I mean, we all use checklists, don't we? There are various kinds of checklists with different functions that can help you work more effectively. A checklist of tasks to be done or one that involves steps in a procedure are just two examples. A list of what needs to be done tomorrow maybe before you leave work today can help limit the time you spend in the morning spinning your wheels make use of calendars or planners whether they are paper or electronic plan regular meetings with a mentor or coach to set goals and help stay on task. 5 to 10 minutes daily at the ends of your day or your shift to clean up your desk or your work area this can alleviate the need to spend more massive amounts of time later for a thorough cleanup we all work more efficiently without the distraction of clutter inner corporate an evening routine at home to save time in the morning just as if you were leaving the home and going to the workplace and some of those things might involve having your clothes ready, having your food ready. If you take a lunch break, you know, do you need food prepared ahead of time. And all of these could certainly differ from day-to-day but a formal schedule that's set in stone would allow Edith the confidence she needs to know what she needs day-to-day to get the work done and just because her office is in her home doesn't mean she won't have trouble getting to work on time. There are many distractions in the home that can tie a person up when they are working from home as when they are heading out to an office and that's just a few points here having a routine of putting and keeping things in their place such as your keys, your phone, your glasses.

Prepare for the next day's work the night before. Create a checklist for yourself and others in your home that might need to be organized, as well. Place sticky notes on the door, mirror, fridge or wherever you'll see them. Turn off distractions and that can include your cell phone and the Today Show. And then also you can set a timer or a programable watch to help pace yourself in the morning.

>> BETH LOY: Great, Melanie. We actually had a question about where to find that article before you mentioned it. It's a blog correct one of our blogs.

>> MELANIE WHETZEL: Yes.

>> BETH LOY: From 2016. So you can get that off of our Website.

>> MELANIE WHETZEL: Uh-huh.

>> BETH LOY: Okay. Here is a question about -- people want to know more about the apps. So where can we direct them? Small business apps, organization apps all of the apps.

>> KIM CORDINGLY: There are just tons and tons of apps. And I think Melanie found on article that just talks specifically about small business apps.

>> MELANIE WHETZEL: Yes this one was called the 57 Small Business Apps That Every Entrepreneur Should Try and there were 57 of them.

>> KIM CORDINGLY: Yeah. A lot of those kind of business support apps, we can provide some of that. But we also are encouraging people to link up with the small business counselors in their areas -- area or Women's Business Centers. They often have a lot of that information in their offices, in their libraries, that people can access to try out and depending on what that person's particular needs are. It's like anything if you search for small business apps you're going to come up with like 10,000 hits so you really want to find out specifically what your needs are and we can help kind of sort those needs out and get you the resources where you can find that information.

>> BETH LOY: Okay. Let's see. Do we have tools to help individuals learn Microsoft Office suite apps or Excel or things like that that might benefit individuals.

>> KIM CORDINGLY: Yeah we can find those programs usually in peoples' local area if there's an accommodation piece to it in terms of accessibility we can get that information to them, as well, through JAN.

>> BETH LOY: Okay. This individual is looking for how to keep track of phone calls received on the road. This person says requires extensive travel and there are times I have to take calls while driving or away from the office and knowing you two, I know you usually don't take calls when you're driving.

>> KIM CORDINGLY: Never take a call when you're driving.

>> MELANIE WHETZEL: Pull off. Or what I would say there about Leonard is when you take calls, just out of the blue, you may not be prepared, you may not be organized. You may be going through a stop sign or whatever if you're driving. Pull off. Or wait until you take a break and then look back at your phone log at the messages left, look to make those calls all at one time so you can have your materials with you. If you have a notebook that you keep those in or however you're organized, a planner. And that way you can have -- your attention and focus can be on those phone calls and not something else. I mean we get calls from people who just call at the spur of the moment they are going through the drive-thru because I've actually heard them do you want cheese on that? So I know they are not really listening to what I'm saying and then the person you're talking to might hear those sounds, too and it's not that professional.

So I would say you want -- if you need to pull off and take a break several times a day to do the phone calls, do that pull off at a rest stop or coffee shop or something and organize yourself to make those calls at that time.

And then take notes.

>> KIM CORDINGLY: Yeah and I would just say that a lot of times individuals have been trying to reach people repeatedly so when they get that call, they are going to take it in the process of where they are and then the thing is just as soon as you have the opportunity to recount -- take down what happened in that call, what time it came in, who you spoke with, what the gist of it was and keeping track of that information and being able to go back to it is invaluable.

>> BETH LOY: I'll tell you what helped me was I changed my message and I reminded people that they needed to leave their name and also leave a phone number because my phone if I'm out of service and a lot of times in West Virginia you're out of service, it doesn't record the number automatically. And that can make it really confusing when you take a lot of calls related to your work. So I changed my message to say please leave -- always leave your number when you contact me. Because some people will think, hey, Beth got my message when I have no record of the telephone number that the person called from.

>> KIM CORDINGLY: Right.

>> BETH LOY: I think that helps and also a reminder let people know if I don't get back to you in 24 hours or 48 hours, call me again. Or else there might be some reason I didn't get your message.

>> MELANIE WHETZEL: Right you could also have on there what would be the best time for you to contact that person back and that might help you be able to reach them when you try.

>> BETH LOY: Yeah.

>> KIM CORDINGLY: I just wand to add that with all of this, it really is a matter of trying things out to see what works best and making adjustments like any accommodation process.

>> BETH LOY: Okay. We have a couple of questions about let's see people needing specific help related to interventions or accommodations. Like accessing a screen reared, reading web pages and articles, again the different kinds of apps. Where can people go to get this information and can they contact JAN to do that.

>> KIM CORDINGLY: Certainly on the accessibility screen reader information. And again when we do self-employment intake we get real specific information about what they are needing or what they think they might need and then we'll put that individualized material together for whoever contacts us and if we don't have that information we'll get them to the organizations that we think will best be able to do that.

>> BETH LOY: So I think for people who have specific accommodation questions today rather than us trying to cram it in here, it would be good to contact us.

>> MELANIE WHETZEL: Uh-huh.

>> KIM CORDINGLY: Yeah.

>> BETH LOY: Then we can refer them to the specific apps or refer them to the screen reader information that they need.

Here is a suggestion from one of our attendees today the person says something that I found that helps me is when working on long projects when you have to stop, leave at a spot you're really excited about. This makes it easier to get back in the groove.

>> MELANIE WHETZEL: Oh that is a good idea.

>> KIM CORDINGLY: Very good idea.

>> MELANIE WHETZEL: Yeah because if you leave at a bad point you're just going to put that off and put that off.

>> KIM CORDINGLY: Right.

>> BETH LOY: Okay, let's see. So I had some questions about farmers and Veterans and the three of us have talked about this a lot. You guys -- can you guys give context for the Veterans that are coming back with certain limitations and they are getting into starting their small businesses related to farming and it takes a lot of their skills, a lot of farming and engineering skills biology, chemistry skills. What's your take on that Kim.

>> KIM CORDINGLY: Well there's a lot of good resources out there to help with that because some programs are developed specifically for Veterans interested in agriculture and also you have a lot of Veterans returning to very rural spaces where agriculture is a major industry. So there's also been I think research that's shown that just the skills that they are bringing to that really are an advantage if they are looking at careers in farming and again it's the ability to make accommodations as part of the process and AgrAbility works with some of the modifications with tools but also some programs have worked specifically with Veterans with PTSD and being outside and moving around all of those things have proven to be very beneficial.

>> MELANIE WHETZEL: I was just going to say they are found to be very therapeutic for farming, there are programs for beekeeping that's very beneficial.

>> KIM CORDINGLY: And we do get quite a few callers who are interested who are Veterans who are interested in agriculture and wanting to go back to the communities that they left. So self-employment makes a lot of sense to them.

>> BETH LOY: Someone is asking where can we get more information on accommodations for executive functioning, limits. And I had one person ask exactly what do you mean by executive functioning Melanie can you elaborate on that?

>> MELANIE WHETZEL: Right. Sure. That's kind of like what we talked about in the beginning. Those are high-level abilities that influence and direct other abilities that we have mainly attention and memory. Because most of what we have -- do, most of our abilities build on that. And so it's basically thinking, paying attention, remembering, planning and organizing. I guess that's probably the easiest most basic way to define it. And we do have information on executive functioning on our Website. If you go to the homepage and the menu at the top of the page, the A to Z, and then you can go to by limitation and there's a section there on executive functioning deficits. And then we also have that same information included in publications we have on ADHD, brain injury, learning disabilities and intellectual disabilities, mental health impairments, autism.

>> BETH LOY: And those are under our A to Z by disability right.

>> KIM CORDINGLY: Yes.

>> BETH LOY: Good info in there.

So both of you talked about working in cubical environments. I know for some of the new types of self-employment have the shared workspaces in the communities. And how does that work? Do you have any experience with accommodations in those situations?

>> KIM CORDINGLY: Usually people who choose to work in a co-working space which is basically like an office space that's shared by a number of self-employed individuals and they share certain things like a copier it cuts down on the startup costs because you have an address and a copier and some of these programs they actually have a mentor that's right onsite and you pay a monthly fee to be able to be there and it's an office space, too, if you want to meet with clients.

And so some people work really great in collaborative situations and that actually -- having that camaraderie and other people kind of going through that development process is really very beneficial. But you know and then there are others that just prefer -- that need it very quiet, that prefer -- that need that ability to concentrate and that's a major factor in their productivity. So it's really individualized. And like the example where the person liked being in a co-working space some of the time and some of the points wanted to be able to work from home so it really depends on what works best for that individual.

>> MELANIE WHETZEL: And I would say looking at each individual space too because there may be times during the day when people are scheduled and there's not as many people there or people who are meeting with clients or who are causing more distraction may not be there. So there may be optimal times throughout the day when there are less period there.

>> BETH LOY: We have a couple of people who made comments on the collaborative workspaces someone says there's one in Springfield that's very cool. And a couple other people said that those are really good ideas. So it gives you more flexibility.

>> KIM CORDINGLY: Yeah.

>> MELANIE WHETZEL: Uh-huh.

>> KIM CORDINGLY: Yeah and they actually have some of those spaces that are incubator spaces too like if you're starting a food business and we provide information about all of those kinds of spaces in a particular area if someone is interested in that so we can provide that referral.

>> BETH LOY: All right so we had some people who are asking about what types of skills assessments might be out there to help people narrow their skills for what types of businesses they might be good at. And then we had some questions about funding resources because some people have said that voc rehab funding of course is limited. And that's especially true depending on time of the year and order of selection.

So for those types of questions, self-employment assessments and funding, where can people go, Kim?

>> KIM CORDINGLY: I would say they should call me or contact me. However they prefer to get in touch with us however it's difficult to get an overview answer to that because things vary a lot depending on location and type of business on the amount of money to start up the business and we certainly provide information about how vocational rehabilitation and those services can help, ways to use Social Security work incentives can be really beneficial to provide supports in the startup of the business and we'll get people hooked up with that information but we also put them in touch with local you know -- every community I'll pick one randomly Milwaukee I was assisting someone in Milwaukee and there were a whole array of different types of programs based in economic development, neighborhood, business development that may have been beneficial to that person so we'll get very specific in terms of funding resources that might be available to that person. But also we provide a lot of consumer protection supports because there's a lot of misinformation out there about funding resources and we want people to have that information because they are always targeting people who are interested in starting businesses but I'll put that together for anybody who contacts us.

>> BETH LOY: Great so I just want to thank Melanie and Kim today. It was great information. So that is all of the time that we have. If you need additional information or you want to discuss an accommodation or ADA issue please feel free to contact us we thank you for attending thank you also to Alternative Communication Services for providing the net captioning. We hope the program was useful and as mentioned earlier an evaluation form will automatically pop up in the screen in another window as soon as we're finished. We do appreciate your feedback so we hope to take a minute to complete the form. This concludes today's webcast.

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