

# Designing for Cognitive and Emotional Sustainability: A UX Research Study of Documentation Systems in Mental Healthcare

Meryl Harden  
Department of Media and Information,  
Michigan State University  
UX 800 User Research and Design  
Professor Mallory Anderson  
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# Healthcare

## Social Work

Social workers are trained professionals dedicated to enhancing human well-being, promoting social welfare, and helping individuals, families, and communities overcome challenges such as poverty, discrimination, abuse, and illness. They operate across various levels of society – **micro** (individuals/families), **mezzo** (groups/communities), and **macro** (policy/administration – to provide counseling, advocacy, and resource coordination).

## Medical Social Work

Medical social workers are essential healthcare professionals who provide non-medical support, counseling, and logistical advocacy for patients and their families within hospitals, clinics, and long-term care facilities. They bridge the gap between medical treatment and a patient's psychosocial needs, addressing issues like anxiety, financial strain, and safe discharge planning.

## CPS Social Work

A Child Protective Services (CPS) Social Worker is a specialized professional responsible for investigating allegations of child abuse, neglect, and exploitation to ensure the safety, security, and well-being of children. They work within state, county, or local government agencies, acting as advocates for children while often aiming to support and keep families together whenever safely possible.

The background is a dark blue field filled with various abstract geometric elements. In the top left, there is a 5x5 grid of small white dots, with a red circle partially overlapping its right edge. Below the dots are two vertical, rounded rectangular bars: a taller one in medium blue and a shorter one in a lighter cyan. On the right side, there are large, soft-edged shapes in medium blue, a thick white curved line, and another thick white curved line below it. The text 'User Persona' is centered in a white, bold, sans-serif font.

# User Persona

# Meet Sam the Social Worker



*"I want to serve patients with dignity, but the system makes it hard to sustain myself."*

# Sam the Social Worker

## DEMOGRAPHICS

**Age:** 34

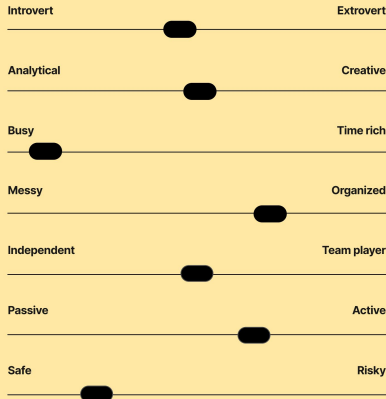
**Location:** Oakland, CA

**Education:** Graduate-educated social worker

**Family:** Lives with long-term partner; no children

**Occupation:** Social Worker

### Personality



### Bio

Sam is a justice-oriented social worker committed to equity and collective care. He finds purpose in supporting people during crisis, but heavy caseloads, emotional labor, and administrative demands leave him overextended. He values balance, integrity, and meaningful community connection.

### Goals

- Support clients with empathy and dignity
- Maintain sustainable work-life balance
- Advocate for systemic justice
- Preserve long-term emotional well-being

### Frustrations

- Chronic caseload pressure
- Excessive documentation demands
- Limited institutional mental health support
- Risk of burnout from sustained trauma exposure

### Motivations

- Advancing social justice
- Direct, meaningful impact
- Being competent and trusted
- Living in alignment with his values



The background is a dark navy blue. It features several abstract elements: a 5x5 grid of small white dots in the upper left; a solid red circle overlapping the right side of the dot grid; two vertical rounded rectangles on the left, one in a medium blue and the other in a light cyan; and various large, soft-edged shapes in medium blue and white on the right side, including a large blue circle and two white curved lines.

# Journey Map

# Journey Map

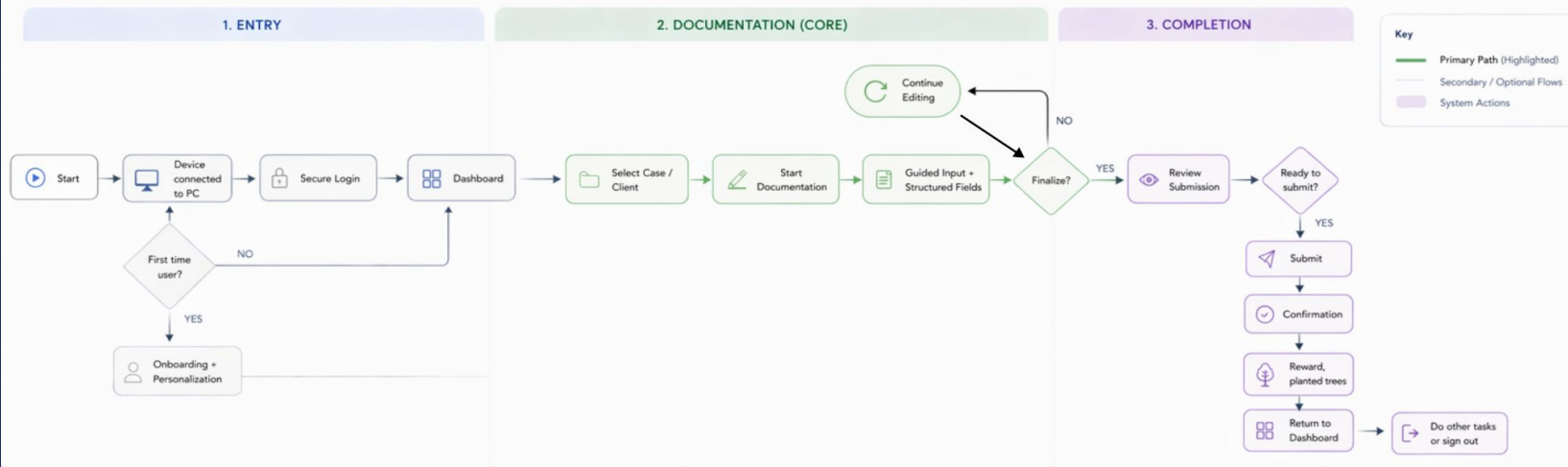
|  | Steward Journey Map for Social Workers                                                                                                                                                                        |                                                                                                                                                                                                         |                                                                                                                                                                                 |                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                       |                                                                                                                                                                                               |
|----------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Phases                                                                           | Baseline Documentation                                                                                                                                                                                        | Friction & Strain Recognition                                                                                                                                                                           | Pilot: STEWARD software                                                                                                                                                         | Measurable Shift                                                                                                                                                                                                                                            | Comparative Analysis                                                                                                                                                                                                                  | Reform Decision                                                                                                                                                                               |
| Actions                                                                          | Completes case notes manually across multiple systems. Re-enters duplicate data. Works after hours.                                                                                                           | Falls behind on notes. Receives supervisor reminders. Tries to "work faster."                                                                                                                           | Uses structured templates, auto-fill, dashboard visibility, and caseload visualization.                                                                                         | Completes notes during work hours. Uses overload alerts. Tracks progress.                                                                                                                                                                                   | Data aggregated across 3 months. Baseline vs pilot metrics reviewed.                                                                                                                                                                  | Leadership evaluates structural changes based on documented outcomes.                                                                                                                         |
| Thoughts                                                                         | "I don't have time."<br>"This is just part of the job."                                                                                                                                                       | "I'm falling behind." "Maybe I'm not efficient enough."                                                                                                                                                 | "This feels clearer." "I'm not rewriting everything twice."                                                                                                                     | "I can actually keep up."<br>"This isn't just a personal failure."                                                                                                                                                                                          | "The system design was part of the problem."                                                                                                                                                                                          | "If design changes helped, what would staffing reform do?"                                                                                                                                    |
| Feelings                                                                         | Overwhelmed<br>Guilty<br>Exhausted                                                                                                                                                                            | Anxious<br>Ashamed<br>Defensive                                                                                                                                                                         | Cautious optimism<br>Relief                                                                                                                                                     | Competent<br>Validated                                                                                                                                                                                                                                      | Empowered<br>Curious                                                                                                                                                                                                                  | Collective responsibility<br>Strategic urgency                                                                                                                                                |
| Metrics                                                                          | -Average documentation time per case<br>-% after-hours documentation<br>-Backlog size<br>-Revision/error rate<br>-Turnover intention survey                                                                   | -Number of overdue notes<br>-Frequency of supervisor reminders<br>-Average days notes remain incomplete<br>-Self-reported stress pulse check<br>-Caseload-to-worker ratio at time of backlog            | -Time per case note<br>-Reduction in after-hours work<br>-Completeness score<br>-Reduced error rate<br>-Self-reported stress check-ins                                          | -% reduction in overdue notes<br>-% decrease in after-hours documentation<br>-Average time per case note compared to baseline<br>-Reduction in revision requests<br>-Change in self-reported stress score<br>-Documentation completion within policy window | -% time saved<br>-Burnout risk reduction<br>-Retention likelihood<br>-Compliance improvement                                                                                                                                          | -Caseload capacity modeling<br>-Cost of turnover vs cost of hiring<br>Projected savings from retention<br>-Quality-of-care impact metrics                                                     |
| Opportunities                                                                    | surface hidden labor through passive time tracking, identify duplicate workflows, reveal the mismatch between caseload and documentation capacity, and document emotional strain alongside compliance metrics | normalize early overload reporting, introduce micro pulse wellbeing check-ins, flag inequitable caseload distribution, and shift performance conversations away from blame and toward workload analysis | reduce friction through structured templates, introduce workload visualization dashboards, automate repetitive fields, and make documentation effort transparent to supervisors | compare time savings across caseload sizes, identify the threshold where efficiency gains plateau, correlate documentation time with stress reduction, and model sustainable documentation capacity per worker                                              | quantify the cost of burnout versus the cost of hiring, demonstrate retention impact tied to workload redistribution, show compliance improvement through design, and frame redesign as a risk mitigation and sustainability strategy | -Hire more workers<br>-Increase compensation<br>-Redesign workload expectations<br>-Normalize early overload reporting and redesign performance evaluations to include sustainability metrics |

# Influencer Matrix

| Meryl Harden | MOTIVATION                                                                                                                                      |                                       |                                                                                                                                                                                                                                   |                                                  | ABILITY                                                                                                                                                                                                                                                                                                                       |                                                       |                                                                                                                              |                                                  |
|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|
| "STEWARDS"   | MEDIA                                                                                                                                           | ADJECTIVE                             | OUTCOME GOALS                                                                                                                                                                                                                     | AUDIENCE                                         | MEDIA                                                                                                                                                                                                                                                                                                                         | ADJECTIVE                                             | OUTCOME GOALS                                                                                                                | AUDIENCE                                         |
| PERSONAL     | Immediate visual feedback:<br>-Submission Badges<br>-Progress Bars<br>-Awards                                                                   | Victorious, Productive                | Extrinsic reward activation for meeting task deadlines                                                                                                                                                                            | Social Workers                                   | Case Management Dashboard:<br>-Pre-filled documentation templates<br>-Voice-to-text note capture<br>-Auto-segmented note builder (visit summary, risk factors, services, next steps)<br>-Deadline auto-reminders with time estimates<br>-Minimum viable note guided workflow                                                  | Consistent, Empowered, Celebratory, Relieving         | Reduce documentation friction so meeting deadlines is realistic. Creating work/life balance by reducing after-hours workload | Social Workers                                   |
|              | Custom avatar animation that can express emotions                                                                                               | Uplifting, Humored                    | Mood and empathy enhancing, helps psychologically detach from job, promotes attitude shift                                                                                                                                        | Social Workers                                   | Avatar Interaction Options:<br>-Emotional check-in slider before and after documentation<br>-Guided 2-minute decompression exercise with sound bowls<br>-Quick-access reflection prompts<br>-Short cognitive reframing scripts                                                                                                | Affirming, Grounding, Calming                         | Improving behavioral regulation skills, mood expression, reflection                                                          | Social Workers                                   |
|              | -Task Completion Streak Counter<br>-Encouraging daily quotes, uplifting reminders, mental reframes, clarity and assertiveness rehearsal prompts | Enduring, Agentic                     | Increases in job satisfaction, develops self efficacy, activates intrinsic reward system                                                                                                                                          | Social Workers                                   | Assertiveness Checklist:<br>-Script library for difficult conversations<br>-Scenario-based micro simulations<br>-Boundary-setting template emails<br>-Supervisor meeting preparation checklist<br>-Structured decision aid<br><br>Dashboard adds a Day to the user's Streak if any of the tasks on the checklist are complete | Principled, Brave, Articulate, Composed, Professional | Build competence and confidence in confrontation and decision-making                                                         | Social Workers                                   |
| SOCIAL       | Collective Goal Tracker (Team-Based)                                                                                                            | Collective, Accountable               | Reinforcing cooperation through shared rewards                                                                                                                                                                                    | Social Workers                                   | -Transparent team dashboard with workload distribution<br>-Contribution logging tool<br>-Clear redistribution protocol when threshold exceeded<br>-Shared team calendar with protected collaboration time                                                                                                                     | Interdependent, Aligned, Connected                    | Make cooperation visible and procedurally supported                                                                          | Social Workers                                   |
|              | Skill Exchange Sessions                                                                                                                         | Collaborative, Supportive             | Workers teach each other tactics Short, practical sessions Builds professional pride                                                                                                                                              | Social Workers                                   | -Facilitating guide<br>-Rotating presenter sign-up form<br>-Case-type topic submission tool<br>-Protected monthly calendar block<br>-Digital resource archive of shared tactics                                                                                                                                               | Enriching, Developmental, Insightful, Applied         | Reduce coordination friction and formalize knowledge sharing                                                                 | Social Workers                                   |
|              | Recognition Wall (Digital or Physical)                                                                                                          | Collegial, Thoughtful                 | -Peer-nominated acknowledgments<br>-Above and beyond moments<br>-Gratitude posts                                                                                                                                                  | Social Workers and Supervisors                   | -Simple peer nomination submission form<br>-Clear recognition criteria guidelines<br>-Moderation process<br>-Anonymous gratitude option                                                                                                                                                                                       | Recognized, Validated, Honored                        | Prevent favoritism and ensure equitable participation                                                                        | Social Workers and Supervisors                   |
| STRUCTURAL   | Policy-Embedded Communication Template form that standardizes case load reporting                                                               | Procedural, Preventative, Considerate | Normalize early escalation before crisis or burnout by requiring supervisors to respond within 48 hours to a capacity limit flag, early communication becomes institutionally reinforced                                          | Social Workers and Supervisors                   | Case Overload Reporting:<br>-Built-in caseload calculator<br>-Auto-trigger supervisor alert<br>-Mandatory 48-hour response field<br>-Redistribution workflow tool<br>-Supervisor response script training<br>-Support needed manual emergency alert                                                                           | Documented, Formalized, Operational, Verifiable       | Ensure early reporting results in action                                                                                     | Social Workers and Supervisors                   |
|              | -Caseload capacity visualizations<br>-Retention metrics<br>-Documentation timeliness all on user dashboard                                      | Informative, Transparent, Measurable  | Behavior shift from leadership due to their evaluations now depending partly on team sustainability metrics, not just worker output metrics. Leadership is now incentivized to protect Social workers time and case load capacity | Supervisors                                      | Visual Caseload Capacity Dashboard<br>Traffic-light system (Green / Yellow / Red):<br>-Defined overload threshold indicators<br>-Automatic redistribution suggestions<br>-Supervisor evaluation metric integration<br>-Historical caseload trend tracking<br>-Protected seasonal under-capacity allowance policy              | Preventative, Monitored, Structured                   | Make sustainability measurable and enforceable and identifies imbalance early                                                | Supervisors                                      |
|              | Grant or Budget Reporting Media that posts quarterly public-facing reports                                                                      | Efficient, Strategic, Viable          | Generates additional financial support due to evidence of sustainable caseload models. Addressing burnout is linked to reduced liability. Improved court outcomes and budget stability                                            | Government officials, Policy makers, Supervisors | Grant / Budget Reporting Media:<br>-Turnover cost calculator<br>-Recruitment vs retention cost comparison tool<br>-Burnout correlation dashboard<br>-Court outcome quality metrics<br>-Quarterly exportable report generator                                                                                                  | Evidence-Based, Justified, Informed                   | Translate sustainability and worker success into fiscal language                                                             | Government officials, Policy makers, Supervisors |

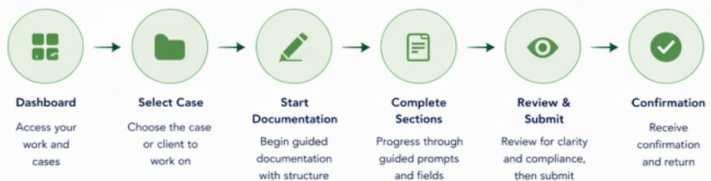
# User Flow

This diagram shows the full system. The highlighted path represents the primary documentation flow.



## PRIMARY DOCUMENTATION FLOW (HERO PATH)

The highest value path users take most often.



## OTHER FLOWS – REWARD LOOP THROUGH ECOSIA'S GAMIFICATION



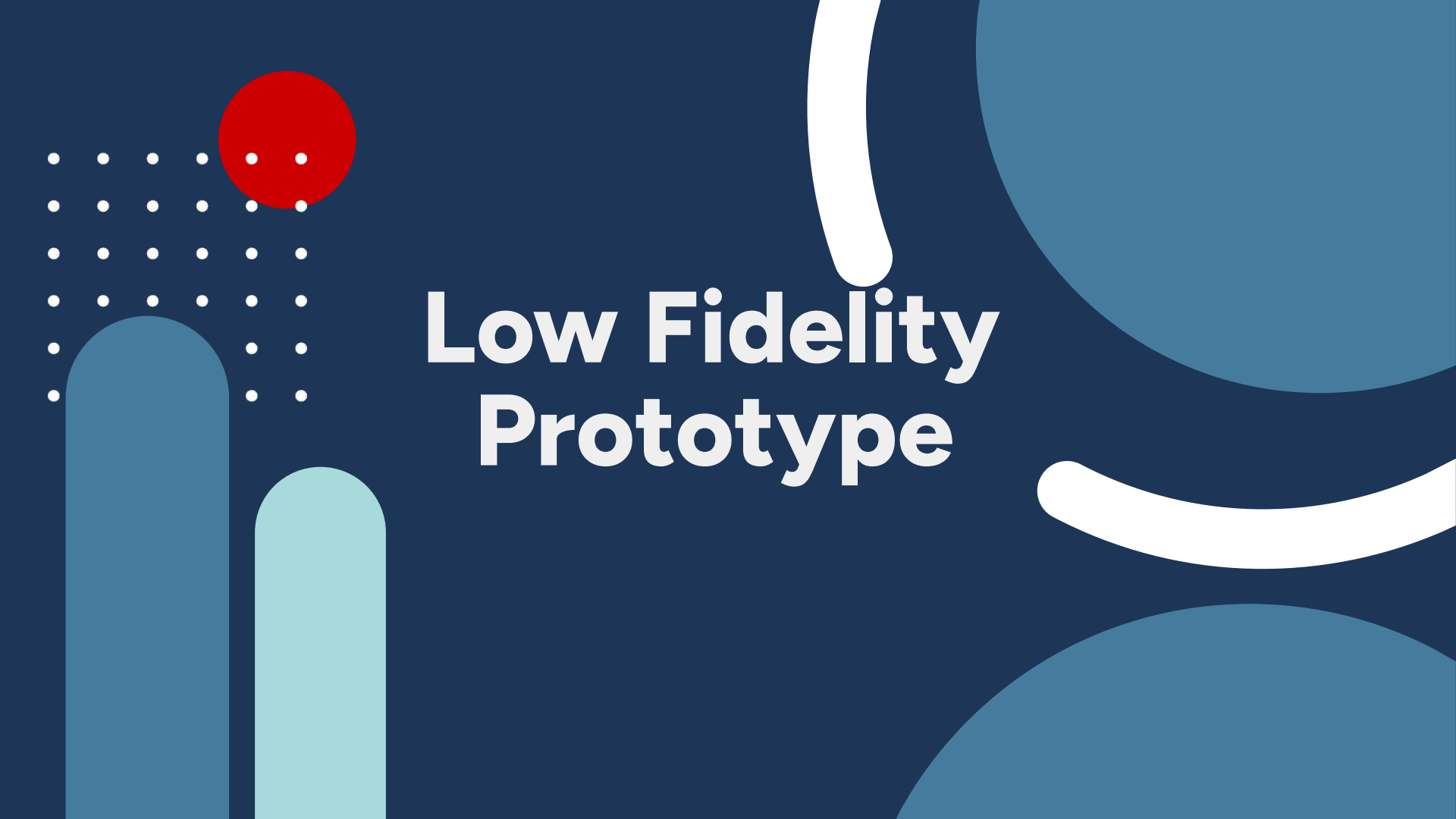
## GAME LOOP – STEWARD

A positive reinforcement loop that supports clarity, progress, and emotional sustainability.



### Behavioral Outcomes

- Reduce Overwhelm
- Build Momentum
- Support Emotional Sustainability
- Create Meaning & Impact

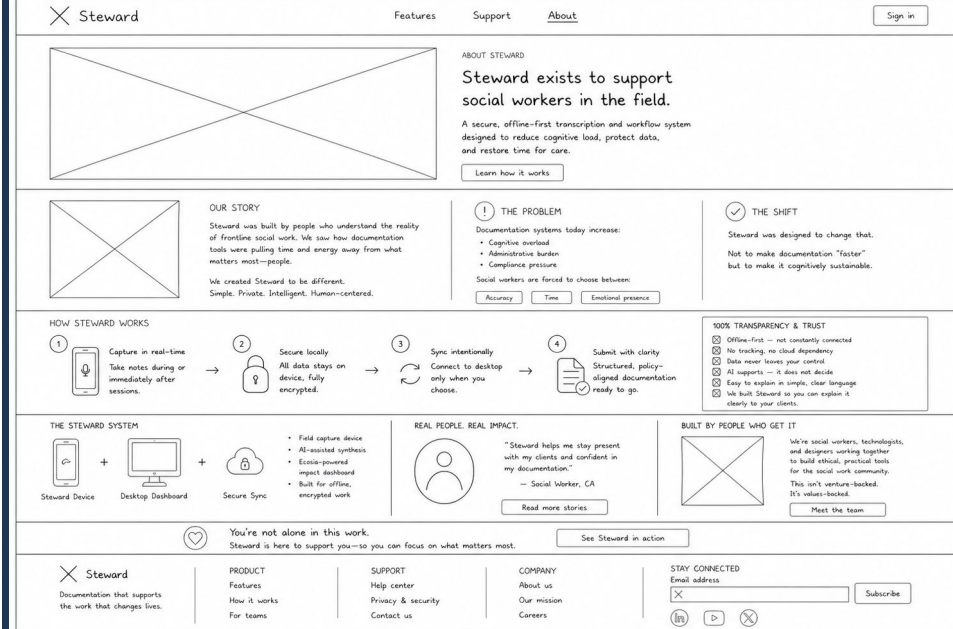
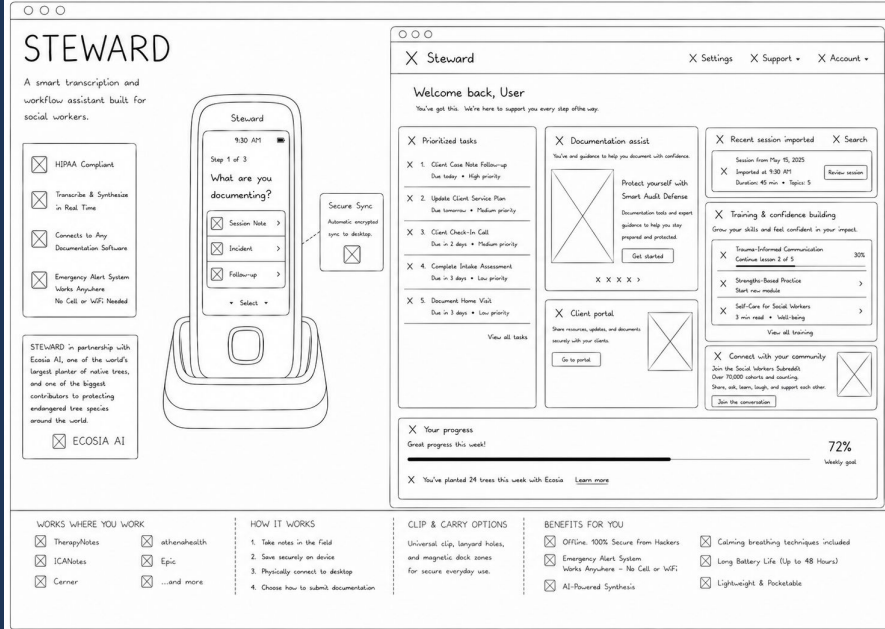
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# Low Fidelity Prototype

# Wireframes

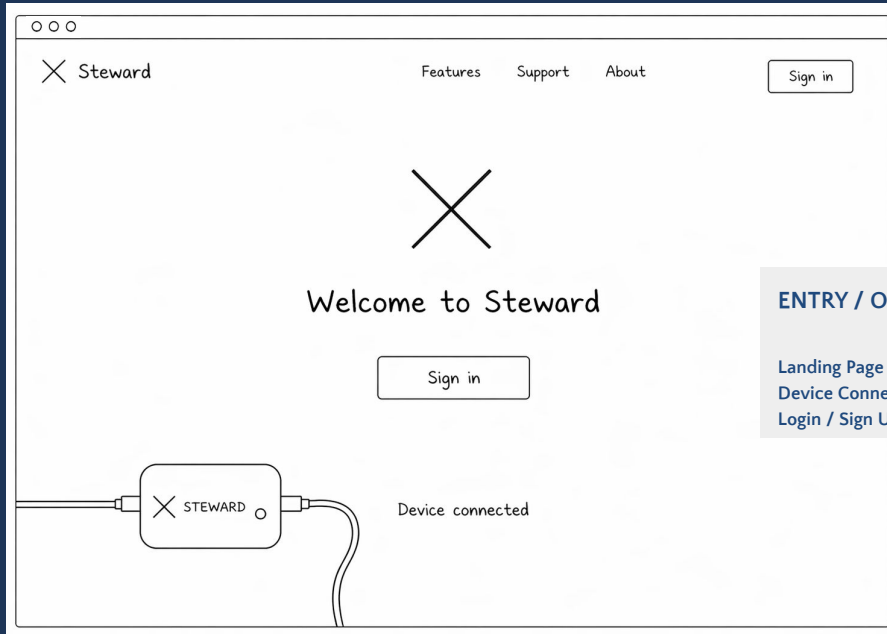
Figma Lo fi Prototype

Figma Design Link



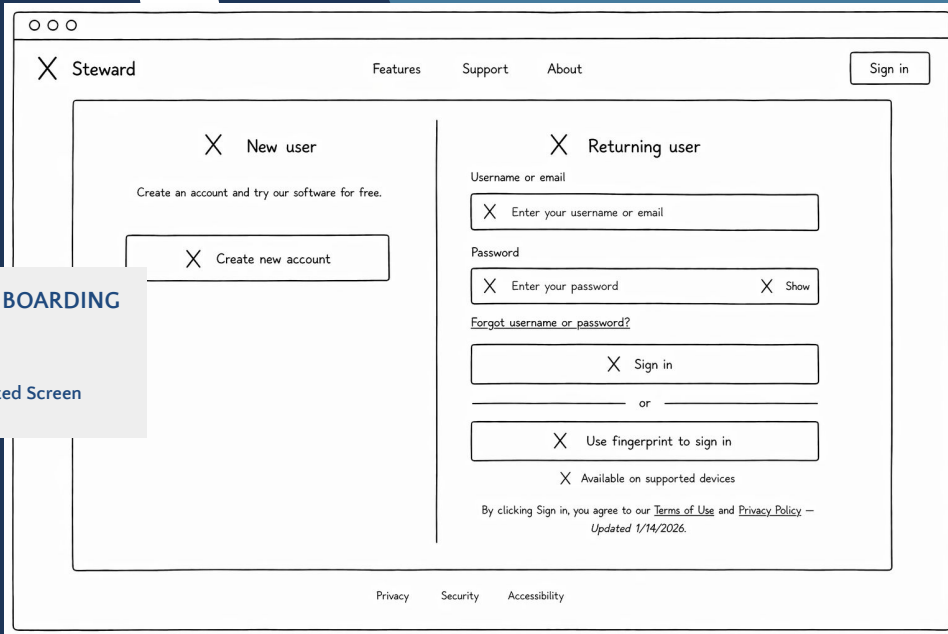
Device and  
Dashboard spec  
sheet

About STEWARD



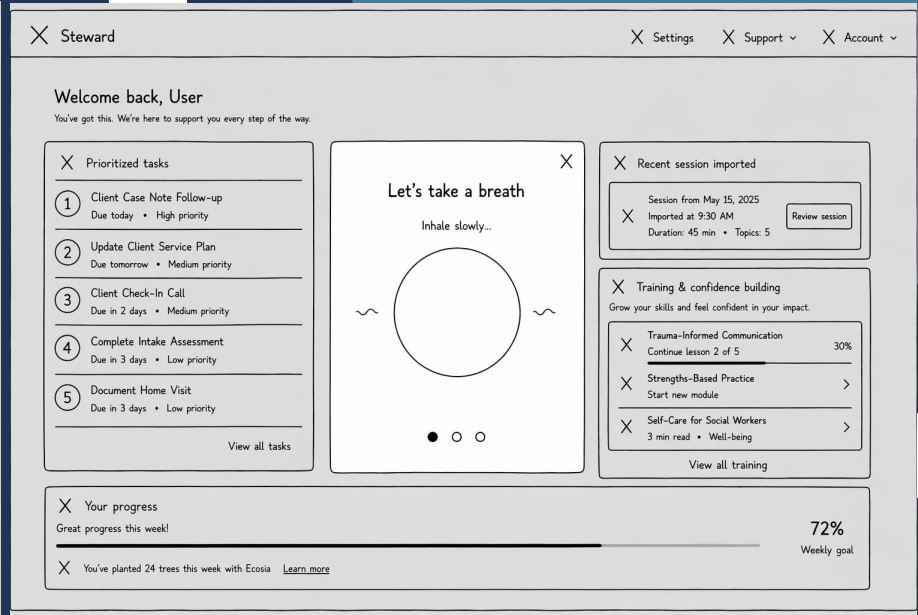
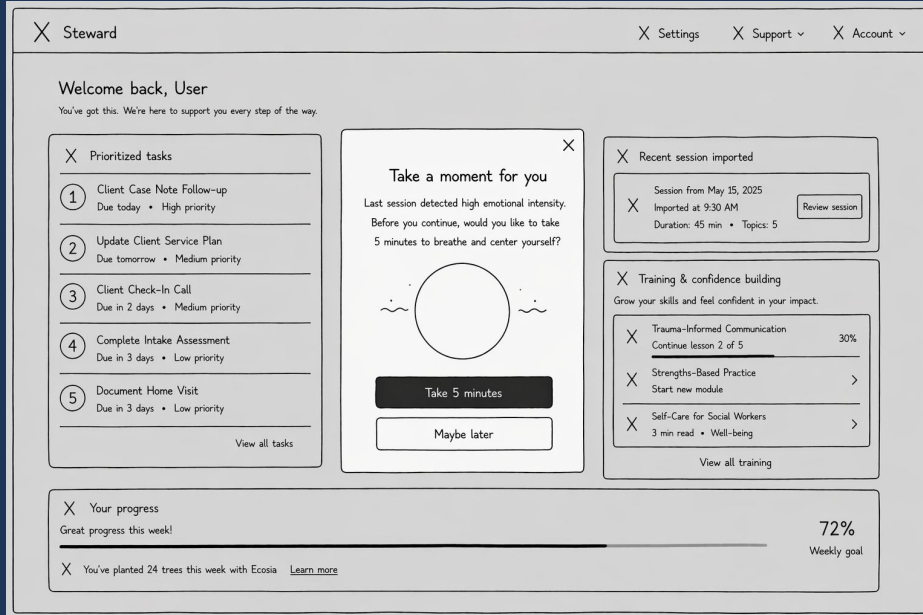
## ENTRY / ONBOARDING

Landing Page  
Device Connected Screen  
Login / Sign Up



FIRST EXPERIENCE / STATE  
SETTING  
Breathing Prompt (optional  
interruption)

Breathing – Inhale State  
Guided Breathing Support



## Breathing – Exhale State Reset and Refocus

✕ Steward

✕ Settings ✕ Support ✕ Account

Welcome back, User  
You've got this. We're here to support you every step of the way.

✕ Prioritized tasks

1 Client Case Note Follow-up  
Due today • High priority

2 Update Client Service Plan  
Due tomorrow • Medium priority

3 Client Check-In Call  
Due in 2 days • Medium priority

4 Complete Intake Assessment  
Due in 3 days • Low priority

5 Document Home Visit  
Due in 3 days • Low priority

View all tasks

Let's take a breath

Exhale...two, three, four...

✕ Recent session imported

Session from May 15, 2025  
Imported at 9:30 AM  
Duration: 45 min • Topics: 5

Review session

✕ Training & confidence building  
Grow your skills and feel confident in your impact.

✕ Trauma-Informed Communication  
Continue lesson 2 of 5 30%

✕ Strengths-Based Practice  
Start new module >

✕ Self-Care for Social Workers  
3 min read • Well-being >

View all training

✕ Your progress  
Great progress this week!

72%  
Weekly goal

✕ You've planted 24 trees this week with Ecosia [Learn more](#)

## Breathing Complete – Ready to Continue

✕ Steward

✕ Settings ✕ Support ✕ Account

Welcome back, User  
You've got this. We're here to support you every step of the way.

✕ Prioritized tasks

1 Client Case Note Follow-up  
Due today • High priority

2 Update Client Service Plan  
Due tomorrow • Medium priority

3 Client Check-In Call  
Due in 2 days • Medium priority

4 Complete Intake Assessment  
Due in 3 days • Low priority

5 Document Home Visit  
Due in 3 days • Low priority

View all tasks

Well done

You've taken a moment for yourself.  
Take this calm with you.

Continue

✕ Recent session imported

Session from May 15, 2025  
Imported at 9:30 AM  
Duration: 45 min • Topics: 5

Review session

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3 min read • Well-being >

View all training

✕ Your progress  
Great progress this week!

72%  
Weekly goal

✕ You've planted 24 trees this week with Ecosia [Learn more](#)

## SYSTEM LOADING / TRANSITION Preparing Dashboard

 Steward

SettingsSupportAccount

Welcome back, User

You've got this. We're here to support you every step the way.

1

Client Case Note Follow-up

Due today • High priority

2

Update Client Service Plan

Due tomorrow • Medium priority

3

Client Check-In Call

Due in 2 days • Medium priority

4

Complete Intake Assessment

Due in 3 days • Low priority

5

Document Home Visit

Due in 3 days • Low priority

View all tasks

Preparing your dashboard...

Recent session imported

Session from May 15, 2025  
Imported at 9:30 AM  
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Review session

Training & confidence building

Grow your skills and feel confident in your impact.

Trauma-Informed Communication

Continue lesson 2 of 530%

Strengths-Based Practice

Start new module>

Self-Care for Social Workers

3 min read • Well-being>

View all training

Your progress

Great progress this week!

You've planted 24 trees this week with Ecosia

Learn more

72%

Weekly goal

## DASHBOARD (CORE HUB)

Main Dashboard (final version)  
Dashboard with Documentation Assist

 Steward

SettingsSupportAccount

Welcome back, User

You've got this. We're here to support you every step the way.

Prioritized tasks

1. Client Case Note Follow-up

Due today • High priority

2. Update Client Service Plan

Due tomorrow • Medium priority

3. Client Check-In Call

Due in 2 days • Medium priority

4. Complete Intake Assessment

Due in 3 days • Low priority

5. Document Home Visit

Due in 3 days • Low priority

View all tasks

Documentation assist

Tools and guidance to help you document with confidence.

Protect yourself with Smart Audit Defense

Documentation tools and expert guidance to help you stay prepared and protected.

Get started

Recent session imported

Session from May 15, 2025  
Imported at 9:30 AM  
Duration: 45 min • Topics: 5

Review session

Training & confidence building

Grow your skills and feel confident in your impact.

Trauma-Informed Communication

Continue lesson 2 of 530%

Strengths-Based Practice

Start new module>

Self-Care for Social Workers

3 min read • Well-being>

View all training

Client portal

Share resources, updates, and documents securely with your clients.

Go to portal

Your progress

Great progress this week!

You've planted 24 trees this week with Ecosia

Learn more

72%

Weekly goal

## DOCUMENTATION FLOW (CORE EXPERIENCE)

Documentation Page (AI Report + Transcript)

## COMPLETION + REWARD

End of Documentation (confirmation + impact)  
Documentation Complete

Steward

SettingsSupportAccount

Back to dashboard

Smart documentation

Review the AI-generated report below. Check for accuracy and make any edits before finalizing.

Session summary

Client  
Jane Doe

Session date  
May 15, 2025

Duration  
45 minutes

Topics  
5

Source  
Imported transcription

Transcription preview

00:00:12 Client: I've been feeling really overwhelmed lately. It's hard to keep up with everything.

00:01:45 Worker: What feels most overwhelming right now?

00:02:03 Client: My housing situation and finances. I'm worried about falling behind again.

00:03:22 Worker: Let's talk more about your housing. Is it safe where you're staying now?

00:04:10 Client: It's safe, but temporary. I'm staying with my sister and it's crowded.

View full transcription

AI-generated report

Generated from transcription

Session overview

Client presented with feelings of overwhelm related to housing instability, financial stress, and difficulty managing daily responsibilities. Client is currently in a safe but temporary living situation and expresses motivation for change and willingness to engage in services.

Key topics discussed

- Housing instability - staying with sister temporarily; seeking stable housing options
- Financial stress - difficulty keeping up with expenses; need budgeting support
- Daily living - overwhelmed by responsibilities; struggles with organization and time management
- Support system - limited support; sister is primary support right now
- Goals - secure stable housing, improve financial stability, build routine and structure

Client strengths

- Insightful and self-aware
- Open and honest communication
- Motivated to make positive changes
- Willing to engage in support services

Communication recommendations

|             |                                                                               |
|-------------|-------------------------------------------------------------------------------|
| Approach    | Use a calm, validating tone. Acknowledge feelings before problem-solving.     |
| Focus       | Break information into smaller steps. Check for understanding frequently.     |
| Language    | Use clear, simple language. Avoid jargon and overwhelming details.            |
| Empowerment | Highlight client's strengths and progress. Encourage small, achievable goals. |

Edit & add notes

Finalize report

Last updated: May 15, 2025 at 10:15 AM

Steward

SettingsSupportAccount

Documentation complete

Through your dedication to your client, you've helped make the world a greener place!

Your impact grows with every report

This report was processed using Ecosia AI, helping turn your work into real climate action.

250,070,697

trees planted by Ecosia

€100,804,532

dedicated to climate action

Your personal contribution

User

Level 4 - Seeding supporter

36

trees planted

2,450 kg

CO<sub>2</sub> offset

What is Ecosia AI?

Ecosia AI is a climate-focused technology that powers ethical search and AI solutions. Their profits fund tree planting and climate action worldwide. Together, we're creating a better future.

Visit my Ecosia dashboard

See your full impact and stats

Return to dashboard

Go back to your tasks

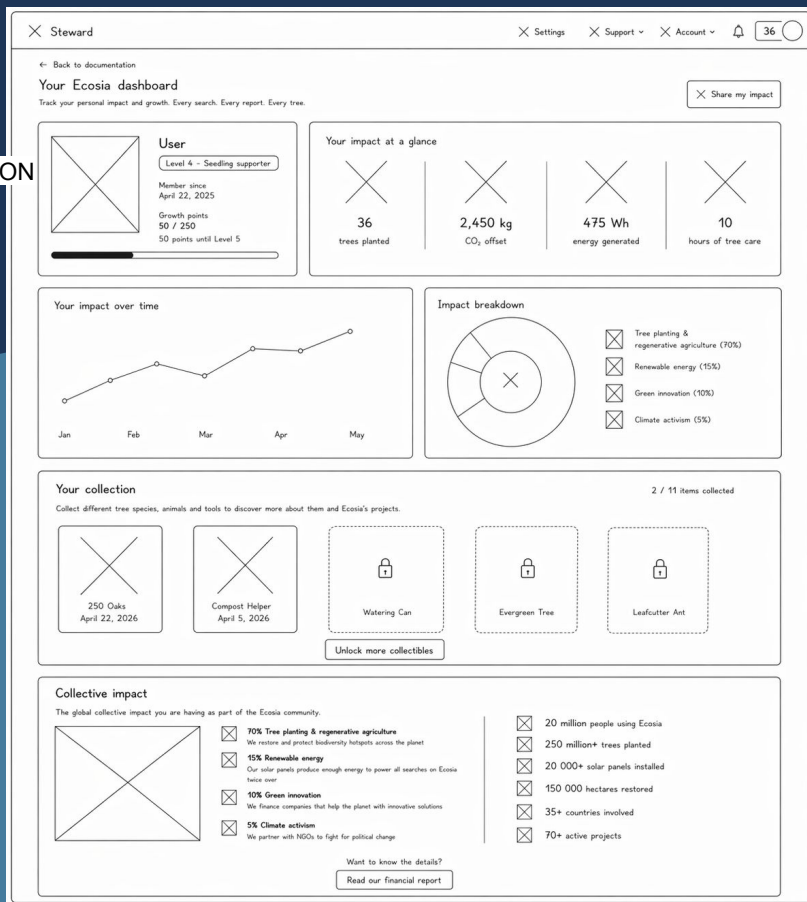
Learn more about Ecosia AI

Discover their mission and impact

More information about our imaginary partnership with [Ecosia.org](#), the provider of our AI and gamification elements

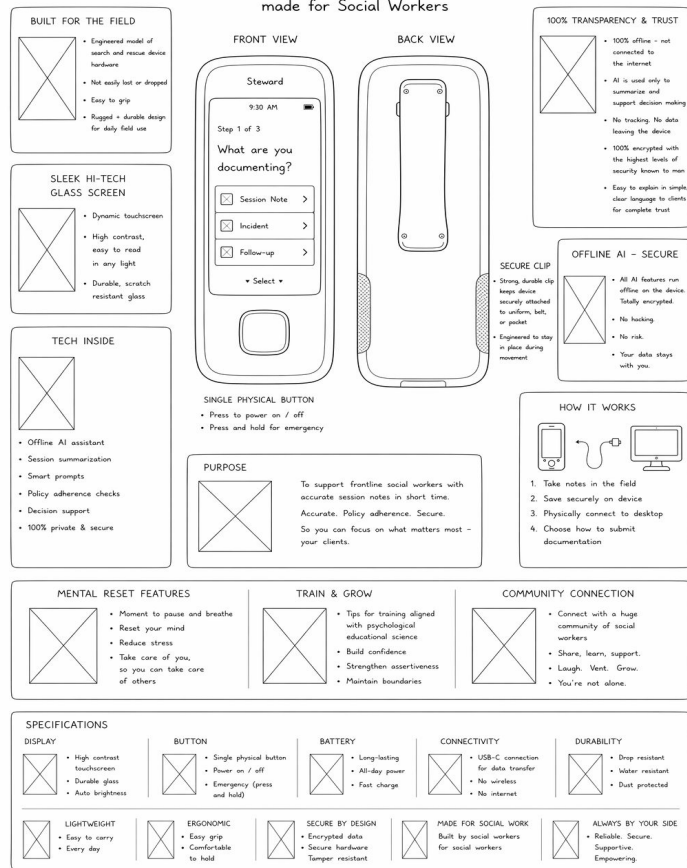
## IMPACT / GAMIFICATION (ECOSIA)

## Ecosia Dashboard



# STEWARD

The Transcription Device  
made for Social Workers



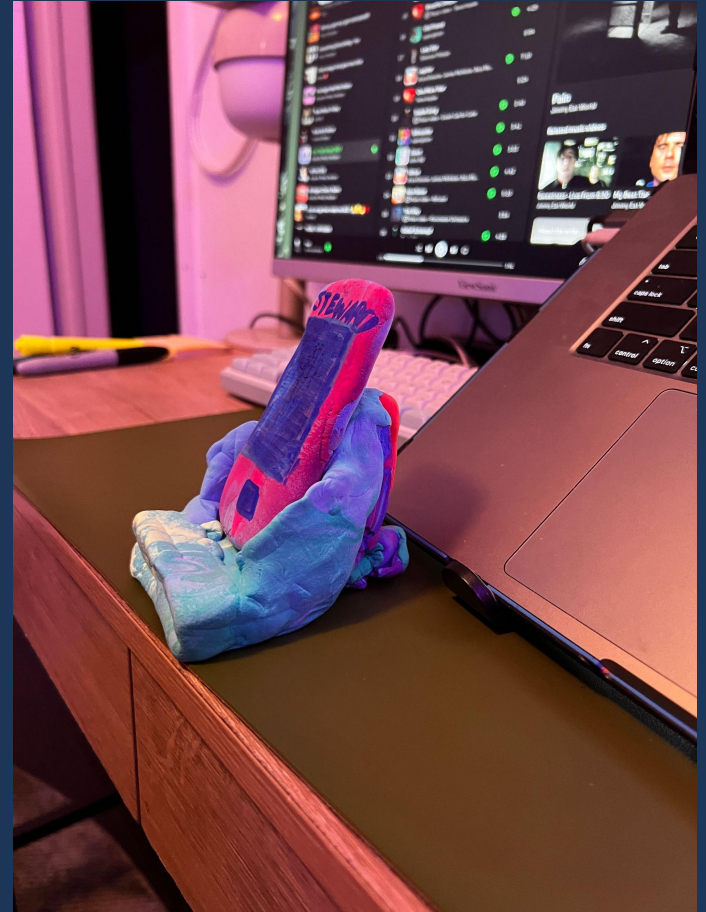
## Steward Device Specifications Sheet

Molding putty used to imagine device size, hardware and ergonomics



Images taken by me

Molding putty used to imagine device size, hardware and ergonomics



Images taken by me

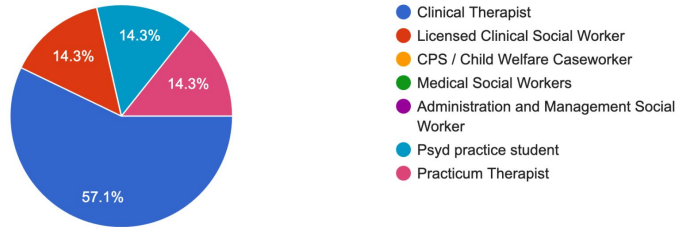
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# User Research & Testing

# Research Survey (Quantitative)

## 1. Which best describes your current role?

7 responses



A structured survey was conducted using Google Forms with 7 participants (21 questions: 4 screening, 17 core) to identify patterns in documentation workflows, workload, and cognitive and emotional impact. Due to the small sample size, findings are directional and used to inform deeper qualitative research.

## Findings:

- Documentation requires significant time (1 - 4+ hours/day) and often extends beyond work hours
- Participants frequently delay tasks, primarily due to emotional exhaustion and workload pressure
- High cognitive and emotional demand indicates documentation is mentally taxing
- Key friction points include repetitive data entry, writing burden, and unclear requirements

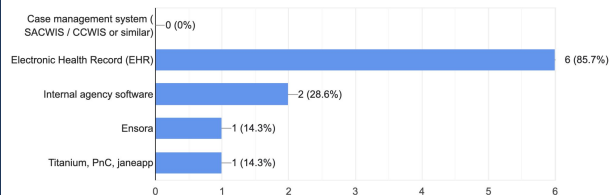
## Insight:

- Documentation challenges are driven by both system inefficiencies and cognitive/emotional strain, not usability alone

# Research Survey Highlights

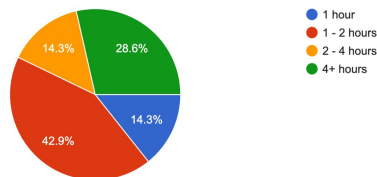
## 2. What type(s) of documentation systems do you use? (Select all that apply)

7 responses



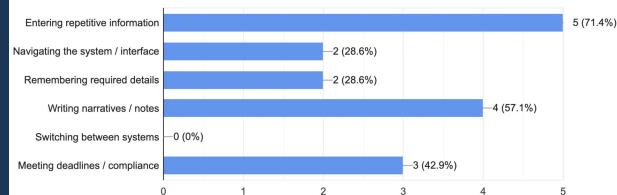
## 4. On average, how much time do you spend on documentation per day?

7 responses



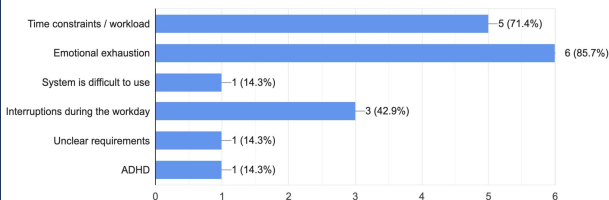
## 12. Which parts of documentation feel most difficult or frustrating? (Select up to 3)

7 responses



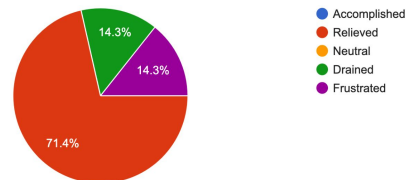
## 7. What are the main reasons you delay documentation? (Select all that apply)

7 responses



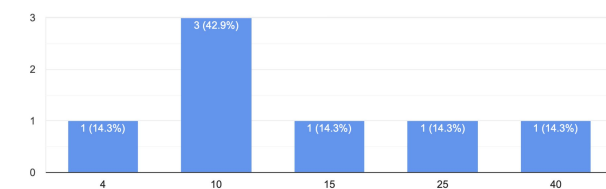
## 10. After completing documentation, how do you typically feel?

7 responses

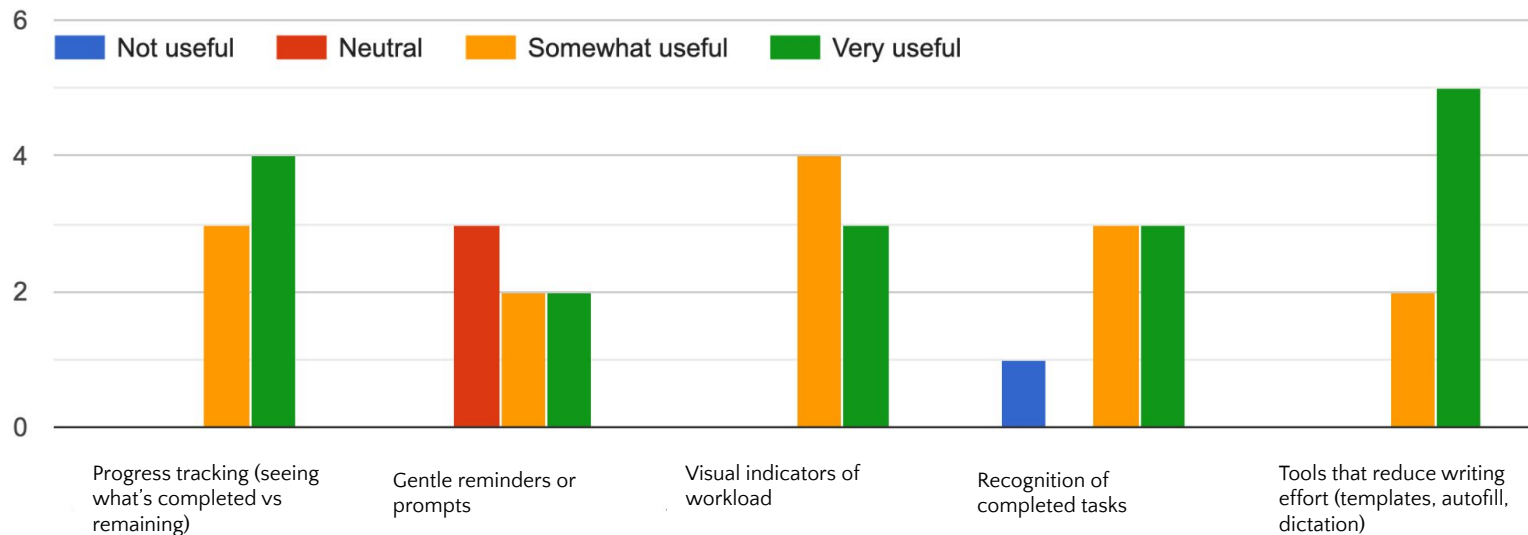


## 3. How many active cases do you typically manage?

7 responses



## 15. How useful would the following features be in supporting your workflow?



# Semi-Structured Interviews (Qualitative)

## Method:

- 5 semi-structured interviews (1 hour each)
- Participants: 3 social workers, 2 MFT therapists
- Focus: real experiences with documentation, workload, and cognitive strain

## Findings:

- Documentation creates mental fragmentation, requiring users to track multiple details simultaneously
- Participants experience emotional fatigue, especially when tasks feel repetitive or disconnected from client care
- Many delay documentation due to overwhelm, not lack of time
- Users rely on personal workarounds (notes, memory, external tools) to manage system limitations
- There is a disconnect between system requirements and real workflow demands

## Insight:

- Documentation requires sustained attention, memory, and emotional regulation while navigating complex system requirements.
- Participants described needing to hold multiple pieces of information in mind at once, often while managing time pressure and competing responsibilities.
- This creates a cognitively demanding process that contributes to fatigue and delays.
- These challenges are the result of interface design that is shaped by broader systemic constraints such as workload expectations, compliance requirements, and unclear documentation standards

# Moderated Usability Test (Wireframe Prototype)

## Method:

- 1 in person usability test (moderated)
- Participant interacted with prototype in real time (no guidance)
- Observed behavior, hesitation and task completion

## Context:

- 1 participant observed in a quiet controlled environment
- Test conducted on desktop device
- Researcher (me) present and observing

## Goal:

- To assess whether a returning user can navigate the system and complete a documentation task using context clues alone

| Date                                                                                                 | Participant ID     | Test Type                                   | Device                                                                         |
|------------------------------------------------------------------------------------------------------|--------------------|---------------------------------------------|--------------------------------------------------------------------------------|
| 4/23/26                                                                                              | P1                 | Moderated Usability Test                    | Desktop PC                                                                     |
| Task: Navigate the prototype without guidance to complete the intended User Flow of a returning user |                    |                                             |                                                                                |
|                                                                                                      |                    |                                             |                                                                                |
|                                                                                                      |                    |                                             |                                                                                |
| Code                                                                                                 | Category           | What It Measures                            | Researcher Notes                                                               |
| UNC                                                                                                  | Uncertainty        | Did user feel unsure what to do next?       | After user was told the user story, he appeared confident with how to proceed. |
| NAV                                                                                                  | Navigation Clarity | Were labels/buttons clear?                  | Participant didn't hesitate, followed the guided flow                          |
| FLOW                                                                                                 | Flow Clarity       | Did movement between pages feel intuitive?  | participant intuitively knew where to click before the guide instructed him    |
| HES                                                                                                  | Hesitation         | Did user pause or hesitate? Why?            | No hesitation                                                                  |
| RED                                                                                                  | Redundancy         | Did anything feel unnecessary?              | no verbal or non-verbal behavior indicated unnecessary actions                 |
| CL                                                                                                   | Cognitive Load     | Did the experience feel mentally effortful? | no stated confusion                                                            |
| IMP                                                                                                  | Improvement        | What would the user change?                 | user would like the ability to enlarge the web pages, font is too small        |

## Hypothesis:

- If the interface provides clear visual and contextual cues, a returning user will be able to follow the intended workflow and complete the documentation task with minimal hesitation or confusion, without needing explicit instructions

## Insight:

- The interface supports smooth navigation once the user understands the context, suggesting that the system is effective within a guided scenario but may rely on initial framing to orient the user.

# Unmoderated Remote Usability Test (Wireframe Prototype)



## Method:

- Remote usability test (unmoderated)
- 9 participants interacted with prototype independently
- No facilitator guidance or intervention
- Collected self-reported data on:
  - a. uncertainty
  - b. navigation clarity
  - c. hesitation
  - d. cognitive effort

## Context:

- Participants completed test in their own environment
- Desktop-based prototype interaction
- Scenario: navigate prototype to complete returning user documentation flow
- Prototype was unfinished (wireframe) with some implied interactions

## Goal:

- To assess whether users can navigate the system and complete the documentation flow without guidance
- To identify breakdowns in interaction clarity or workflow structure

## Hypothesis:

- If the interface provides clear visual and contextual cues, users will be able to follow the intended workflow and complete the flow independently with minimal hesitation or confusion

## Key Findings:

- Majority found the interface easy and intuitive
- Repeated confusion around “Take a Moment” interaction (unclear next step)
- Onboarding issues: sign in vs sign up unclear
- Missing workflow elements: patient list, next actions
- Mixed reactions to wellness feature (helpful vs disruptive)

## Insight:

- Users were generally able to navigate the system independently, indicating strong foundational usability; however, confusion occurred at key interaction points (e.g., unclear click actions, onboarding, and workflow gaps), suggesting that while the structure is effective, the system requires clearer affordances, stronger entry-point clarity, and better alignment with real-world workflow expectations.



# Steward Usability Testing Report (Spring 2026)

## Unmoderated + Moderated Usability Testing – Wireframe Prototype



### Overview

- Type of Study: Usability Testing (Moderated + Unmoderated)
- Participants: 10 total
  - 1 moderated (in-person)
  - 9 unmoderated (remote)
- Prototype Fidelity: Low-fi (Wireframe)
- Device: Desktop
- Scenario Tested: Returning user completing a documentation workflow

No formal instruction or walkthrough was provided to unmoderated participants. Users were expected to rely on interface cues and written instructions in the email to navigate and complete the task.

### Summary of Results

- The majority of participants were able to successfully navigate the interface independently
- Users consistently described the system as:
  - easy
  - intuitive
  - straightforward
- However, usability breakdowns occurred at:
  - onboarding and entry points
  - unclear interaction cues (what to click / when to act)
  - missing workflow steps
- Users demonstrated a strong expectation that the system should:
  - guide them
  - reduce effort
  - automate progression

### Observations

- Most participants were able to move through the prototype without assistance
- Several participants hesitated at specific interaction points:
  - “Take a Moment” screen
  - onboarding (sign in vs sign up)
  - unclear clickable elements
- Some users expected the system to:
  - automatically advance
  - provide clearer directional feedback
- Participants frequently relied on:
  - trial-and-error clicking
  - visual cues (highlighted buttons) to proceed
- Content-heavy sections led to:
  - skimming
  - reduced engagement

### Key Insights

- The interface supports independent navigation, even at the wireframe stage
- Usability issues are concentrated in interaction clarity, not overall complexity
- The system lacks workflow completeness aligned with real-world use
- Onboarding introduces early confusion and hesitation
- Users prioritize efficiency over optional reflective features
- There is a strong expectation that the system should act as a cognitive assistant, not just a tool



# Steward Usability Testing Report (Spring 2026)

## Unmoderated + Moderated Usability Testing – Wireframe Prototype



### Responses to “How can we improve the system?”

#### 1) Interaction Clarity (Recurring Theme)

Users did not always understand:

- what was clickable
- when to take action

Examples:

- “I didn’t know I had to press to move through...”
- “It took some time to figure out that I needed to click the circle.”

#### 2) Workflow Improvements

Users expected:

- a patient list before documentation
- clearer task progression
- actionable next steps

Examples:

- “It feels like a step was skipped...”
- Suggested adding referrals, scheduling, and follow-up actions

#### 3) Onboarding & Entry Flow

Confusion around:

- new vs returning user
- sign in vs sign up
- biometric login

Examples:

- “Am I a new user or returning user...?”

#### 4) Content & Readability

Users reported:

- text too long
- difficulty reading smaller content
- need for zoom and accessibility

Examples:

- “The paragraphs were a little long. I skimmed them.”

#### 5) Mixed Reactions to Wellness Feature

- Some users appreciated the pause
- Others found it disruptive and unnecessary

Examples:

“I want to get to where I need to go in 1–2 clicks.”

### Responses to Post-Test Questions

Did the interface feel intuitive?

- Majority: Yes
- Described as:
  - clear
  - easy to navigate
  - guided

Where did users hesitate?

- “Take a Moment” screen
- onboarding/login
- unclear progression points

Did anything feel unnecessary?

- Some users flagged:
  - wellness interruption
  - dense informational content
  - unclear ecosystem elements (e.g., Ecosia relevance)

What did users expect from the system?

- automation
- guidance
- reduced cognitive load

Key quote:

- “Have the program work for me.”

### Conclusion

The Steward prototype demonstrates a strong foundational interaction model, with users able to navigate and complete tasks independently.

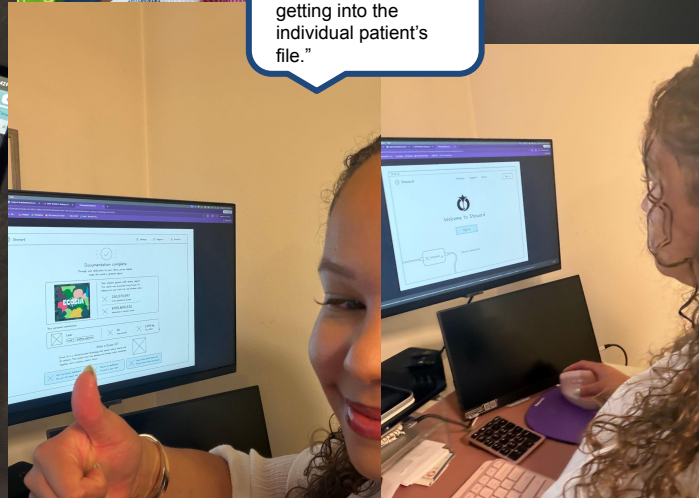
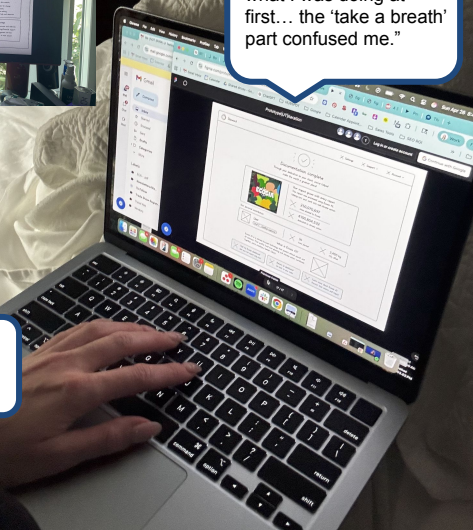
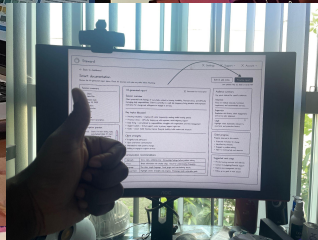
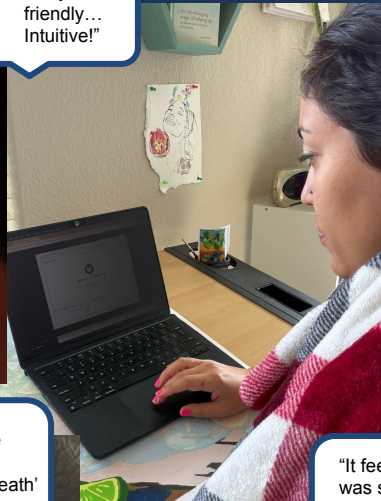
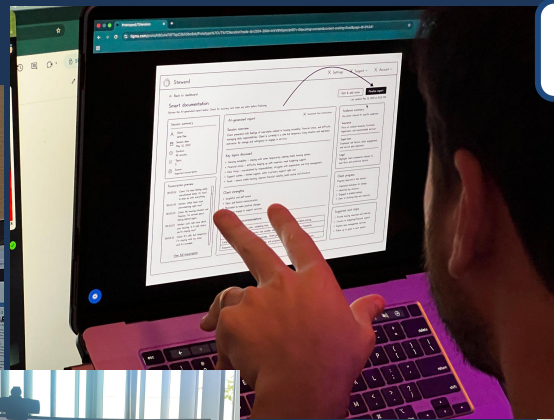
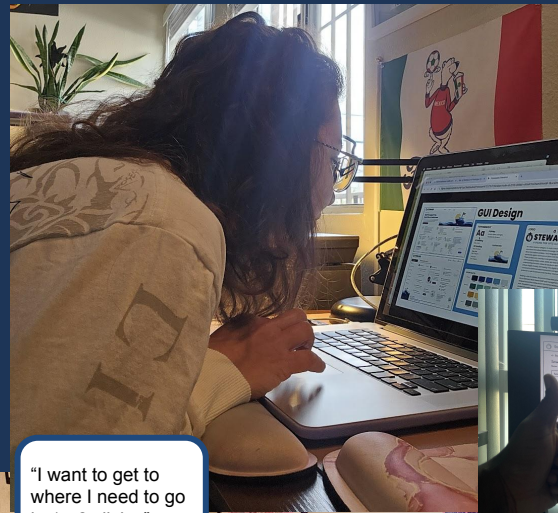
However, the system requires improvement in:

- interaction clarity
- onboarding structure
- workflow alignment
- cognitive support

Addressing these areas will be critical to transforming the prototype into a system that not only functions well, but actively supports users in high-demand, real-world environments.



# Usability Test Participants



# ▶▶▶▶ Special Thanks

[Simbolikon](#) - Logo Source & history

[FreetaxUSA](#) -Typography inspo

[Tubik](#) - Style inspo

[Ecosia.org](#) - Gamification Elements inspo

[Motorola](#) - Mobile Device inspo

[iFlytech](#) -Mobile Device inspo

[iFlytech](#) - Transcription inspo

[Reddit](#) - Nano image

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THANK YOU

Meryl Harden  
[merylharden@gmail.com](mailto:merylharden@gmail.com)  
[www.merylharden.com](http://www.merylharden.com)