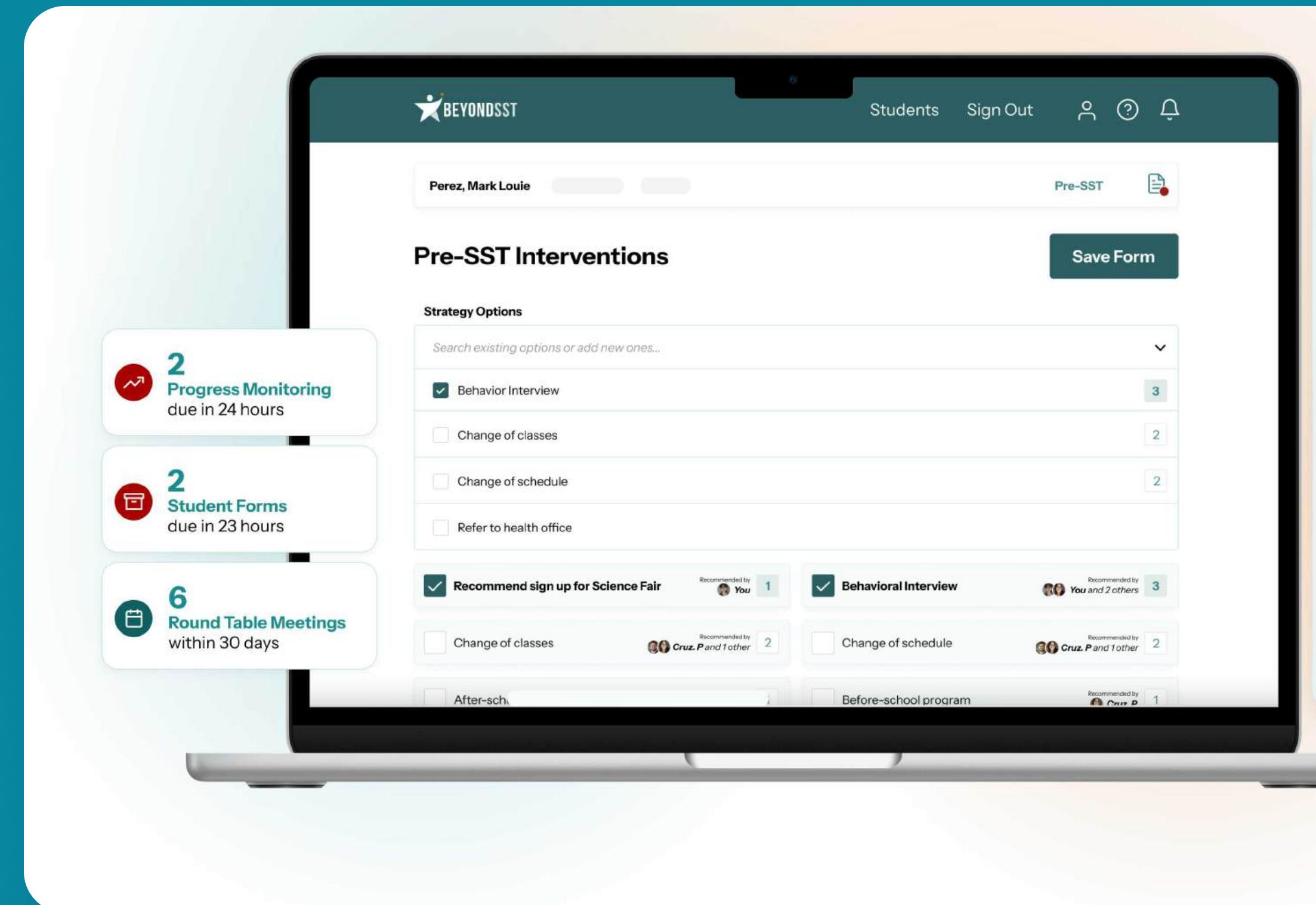




Empowering teachers and staff towards their students' success,

resulting in a **50% increase in user adoption** and a **200% boost in revenue**

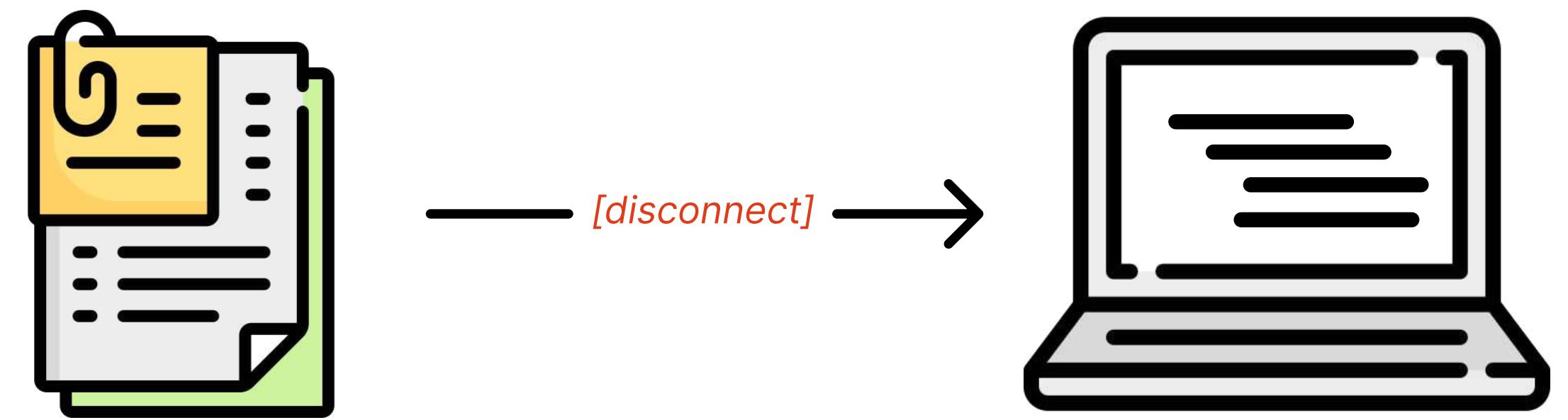
💻 for **CodeStack - San Joaquin County Office of Education**
🚀 **1 designer, 1 project manager, 2 engineers, 2 user support specialists**



BACKGROUND & CONTEXT

Directly translating paper forms into web forms was not enough.

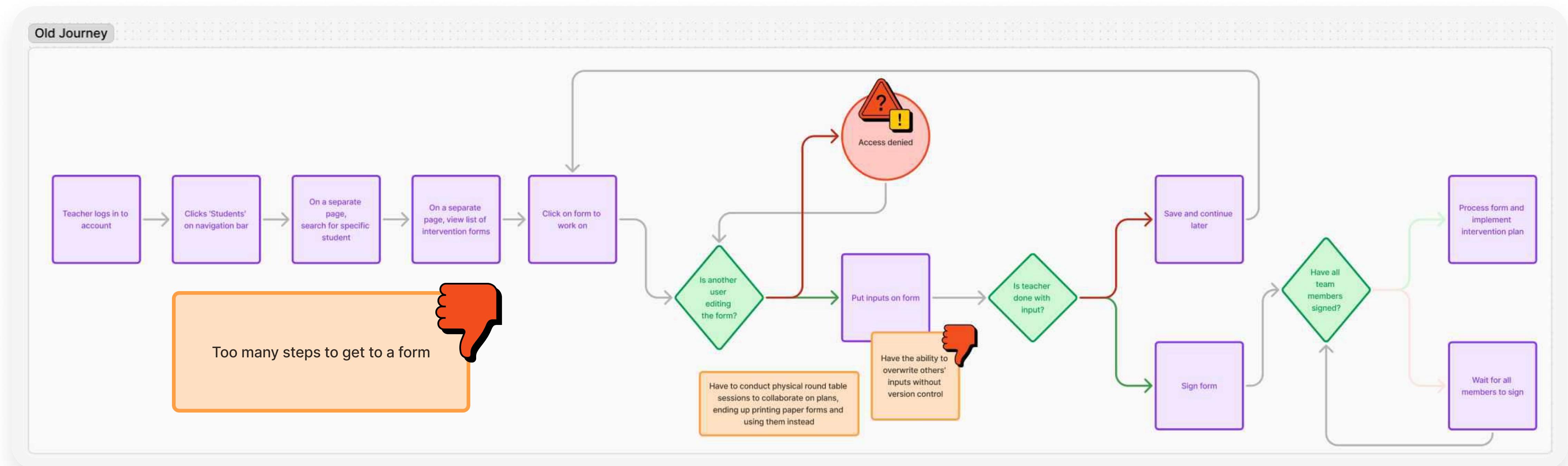
- **BeyondSST (Student Success Teams)** is a platform developed in 2009 to convert paper intervention plans into a digital format, but it didn't offer a seamless, user-friendly experience.
- Student's successful intervention plans **rely heavily on collaboration** between teachers, administrators and school staff members.



DISCOVERY

I collaborated with our user support specialists to put myself into our users' shoes.

- Our user support specialists shared a list of feedback they've received from our users' past calls. Then, I explored the current system and mapped my journey, documenting the problems and observations I've encountered.



These are the **known feedback from our user support calls.**

"This website is so hard to use, I'd rather go back to paper forms."

"Why am I locked out of the form? What does the padlock icon mean? This is wasting so much of my time."

"I can't find the student and the forms I need to work on."

"How do we even distinguish who did what?"

"All my work yesterday is gone today! Who erased my stuff?"

"I click on links and it says access denied."

Let's get to know our user types.



Mr. Cruz, 28

Mr. Cruz transferred to a new school district where they use BeyondSST for student intervention plans. He is struggling to use BeyondSST because the learning curve is big and it delays things than make things efficient.

What motivates him: He is motivated to learn new things fast to get up to speed as a new Math Teacher in the school.

What he needs: An easy-to-learn and use system that will help him get set to help his new students ASAP.



Mrs. Vander, 50

Mrs. Vander has been teaching at this school for about 20 years. She has watched technology take over her day-to-day responsibilities as a teacher and homeroom advisor. She's been trying to use BeyondSST for years since it was introduced, but the attempts always ended in frustration, so she just goes back to using paper forms until she is told to try BeyondSST again.

What motivates her: Her love for teaching and setting her students on the right path.

What she needs: A system that will introduce efficiency and not frustration.



Mrs. Lu, 36

Mrs. Lu is often a part of student intervention plans to help with plan delivery and communicating with both the student and their parents.

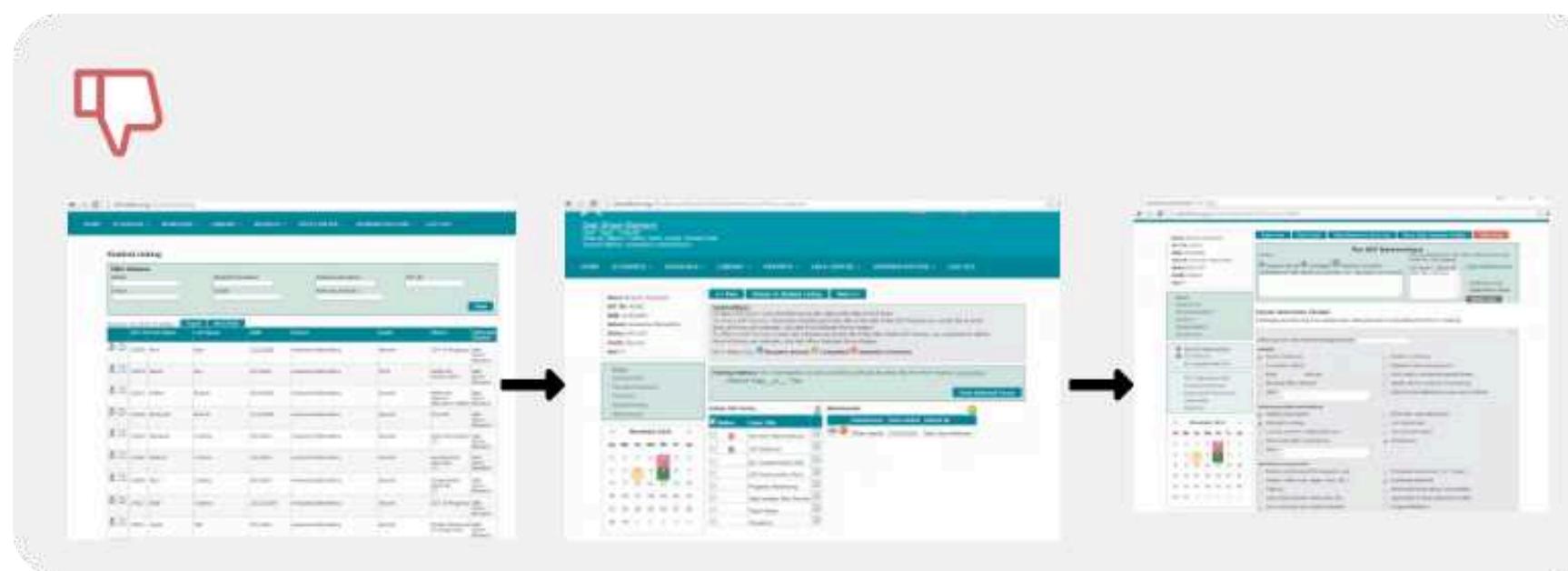
What motivates her: Her desire to help and smoothen out the process of making intervention plans.

What she needs: To be able to communicate and collaborate with the rest of the student success team without hiccups and conflicts.

PROBLEMS

Why did teachers and staff **struggle to adapt to the digital system?**

By merging our existing user feedback + my own exploration findings, I defined the key problems that drove away our users.



Navigation issues

It was either impossible or time consuming to get to the student's form that a user needs to work on.

Errors hindering collaboration

A form was only accessible to one person at a given time and also does not have any collaboration features, failing to simulate a round table discussion virtually.

Lack of version control

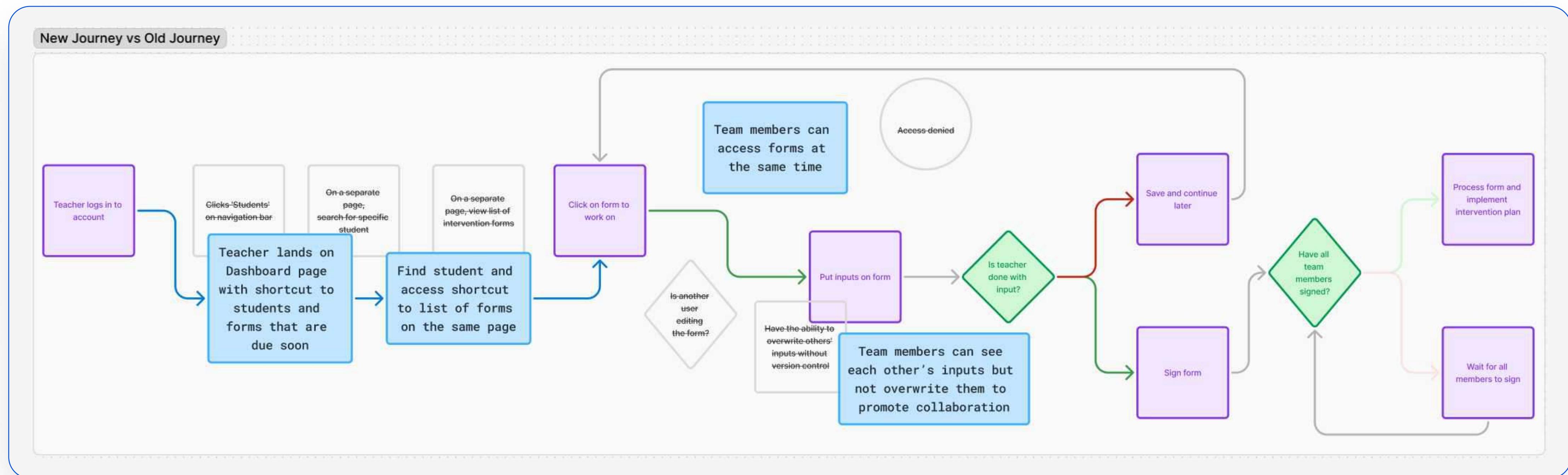
Team members worked on the same copy of a form so inputs can be overwritten intentionally or unintentionally, without a way to revert or track changes.

GOALS

We needed to win them back and get more schools to use the system.

I facilitated a live demo to our internal stakeholders (directors, managers, engineer) to show the reality and struggle of our users: **the current system is hindering our teachers' and staff's efficiency that improving it.**

With the help of our user support specialists, **I advocated for a full overhaul of the platform** instead of just a reskin.



GOALS

How do we win our users back?

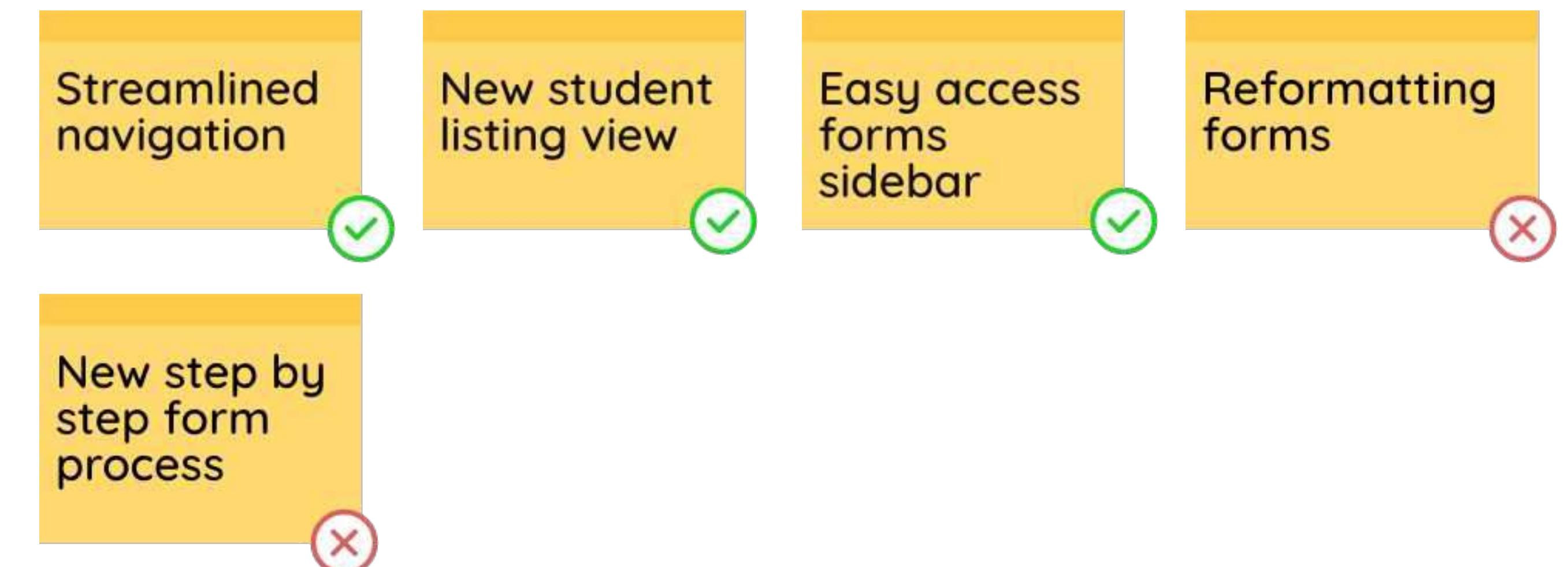
Streamline the interface to make complexity approachable

How do we get rid of rabbit holing and enable the user to navigate straight to the point?

Highlight collaboration between the SST members

How do we remove frustrations and friction between team members overwriting another's inputs?

Streamline the interface to make complexity approachable



IDEATION

I presented these ideas to our team.

I made sure that our engineers are also up to date early into the process and do feasibility checks frequently to avoid implementation issues.

Highlight collaboration between the SST members





IDEATION

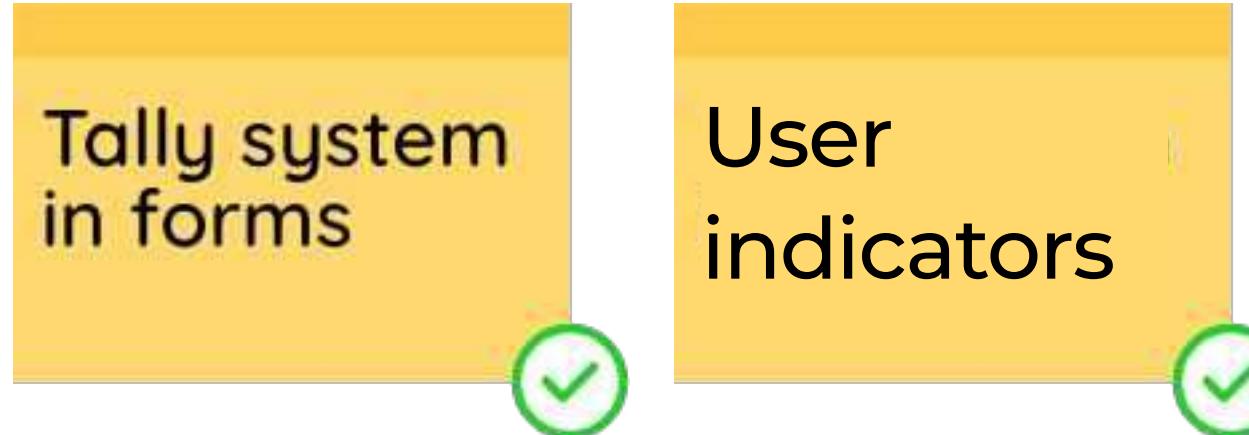
Streamlining the Navigation

What if we only show navigation links that matter to our users?

Based on analytics, most users only click on “Students” and they don’t go anywhere else.

Most of these navigation pages are only accessible to administrators, but links are still available to regular user types. They land on an “Access Denied” error.





IDEATION

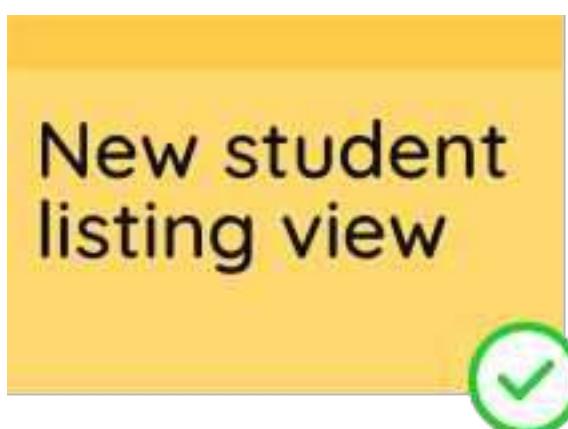
Designing a new collaboration view

What if we show the voted options outside of the multi-select dropdown?

The wireframe illustrates a user interface for a 'Checklist' feature. At the top, there is a search bar labeled 'Checklist' with a placeholder 'Enter keyword...' and a dropdown arrow. Below the search bar, a list of items is displayed in a grid format. Each item includes a user icon, a group name (e.g., 'You and 7 others' or 'Menchaca, D. and Rodriguez, E.'), a checked checkbox for 'Change of class(es)', and a small number indicating the count of votes (e.g., '8' or '2'). Red arrows point from specific annotations to these elements.

The annotations are:

- A red arrow points from the text "What if we show the voted options outside of the multi-select dropdown?" to the list of items.
- A red arrow points from the text "To encourage more collaboration, what if we show which team members voted?" to the user icons and group names.
- A red arrow points from the text "The list of dropdown options can be really long, what if we make it searchable?" to the search bar.
- A red arrow points from the text "To encourage more collaboration, what if we show the number of votes?" to the vote counts.



IDEATION

Cleaning up the Student Listing view

Before:

| SST ID | First Name | Last Name | DOB | School | Grade | Status | Referring Teacher |
|--------|------------|-----------|------------|--------------------|--------|-----------------------------------|-------------------|
| 42559 | Rain | Bow | 11/2/2006 | Awesome Elementary | Second | SST In Progress | Deb Shaw-Element |
| 34275 | Danny | Boy | 2/2/2006 | Awesome Elementary | Third | Referred Section 504 | Deb Shaw-Element |
| 42341 | Willow | Branch | 10/6/2006 | Awesome Elementary | Second | Referred Special Education (SEIS) | Deb Shaw-Element |
| 42342 | Redwood | Branch | 11/6/2006 | Awesome Elementary | Second | Pre SST | Deb Shaw-Element |
| 34282 | Marigold | Crawley | 4/5/2009 | Awesome Elementary | Second | Does Not Qualify | Deb Shaw-Element |
| 34296 | Mathew | Crawley | 7/4/2009 | Awesome Elementary | Second | Assessment Declined | Deb Shaw-Element |
| 34298 | Mary | Crawley | 5/5/2009 | Awesome Elementary | Second | Assessment Declined | Deb Shaw-Element |
| 34317 | Edith | Crawley | 10/10/2009 | Awesome Elementary | Second | SST In Progress | Deb Shaw-Element |
| 39607 | Super | Man | 5/5/2008 | Awesome Elementary | Second | Exited: Returned to General Ed | Deb Shaw-Element |

We want to retain only the most important columns that our users reference on the table and add a click to sort ascending or descending feature.

We want to provide an easy way to filter through the student list.

| Student Listing | | | |
|----------------------------|------------|-------------|-------------------------------|
| Keyword | Status | Filter | |
| Name | DOB | Grade Level | Status |
| Ambriz, Louie Saul Ignacio | 01/01/1969 | 12 | SST In Progress |
| Birch, Ernestina Linda | 04/24/1872 | 12 | 504 In Progress |
| Childers, Cristy Maricruz | 08/20/1992 | 12 | SST AND 504 In Progress |
| Flores, Gary Joseph | 03/12/1989 | 7 | Referred to 504 |
| Gallegos-Bell, Connie | 10/04/1990 | 7 | Referred to Special Education |
| Junez, Maria Cassandra | 11/30/1995 | 7 | Inactive |
| Rocafort, Joanne Marie | 10/05/1996 | 7 | SST In Progress |
| Schuster, Zachary Stephan | 06/12/1990 | 7 | SST In Progress |



IDEATION

Cleaning up the Student Listing view

Student Listing

| Student Listing | | | |
|----------------------------|------------|-------------|-------------------------------|
| Keyword | Status | Filter | |
| Name | DOB | Grade Level | Status |
| Ambriz, Louie Saul Ignacio | 01/01/1969 | 12 | SST In Progress |
| Birch, Ernestina Linda | 04/24/1872 | 12 | 504 In Progress |
| Childers, Cristy Maricruz | 08/20/1992 | 12 | SST AND 504 In Progress |
| Flores, Gary Joseph | 03/12/1989 | 7 | Referred to 504 |
| Gallegos-Bell, Connie | 10/04/1990 | 7 | Referred to Special Education |
| Junez, Maria Cassandra | 11/30/1995 | 7 | Inactive |
| Rocafort, Joanne Marie | 10/05/1996 | 7 | SST In Progress |
| Schuster, Zachary Stephan | 06/12/1990 | 7 | SST In Progress |

We want to create a pattern for our users whenever they see this form icon, they can open up the forms library sidebar.

The sidebar is titled 'Forms' and shows a list of student forms for Ambriz, Louie Saul Ignacio. The list includes:

- OVERDUE: Pre-SST Interventions (checkbox)
- SST Referral (checkbox)
- ELL Supplemental Info (checkbox)
- SST Intervention Plan and Monitoring (checkbox)
- Notes (checkbox)
- 504 Eligibility Documentation (checkbox)
- 504 Accommodation Plan (checkbox)
- 504 Manifestation Determination (checkbox)
- 504 Behavior Intervention (checkbox)
- 504 Checklist (checkbox)
- 504 Notes (checkbox)
- SST In Progress (checkbox)
- 504 In Progress (checkbox)
- SST AND 504 In Progress (checkbox)
- Referred to 504 (checkbox)
- Referred to Special Education (checkbox)
- Inactive (checkbox)
- SST In Progress (checkbox)
- SST In Progress (checkbox)

Aside from accessing forms, we also want to maximize the space to indicate overdue forms and selecting forms to download them as PDF.

IDEATION

Oh no! **How did I validate my design ideas?**



Since I did not have direct access to communicating with our users due to policies surrounding sensitive student data and privacy of staff in public education, I was not able to do early prototype testing to gauge feedback on ideas.

IDEATION

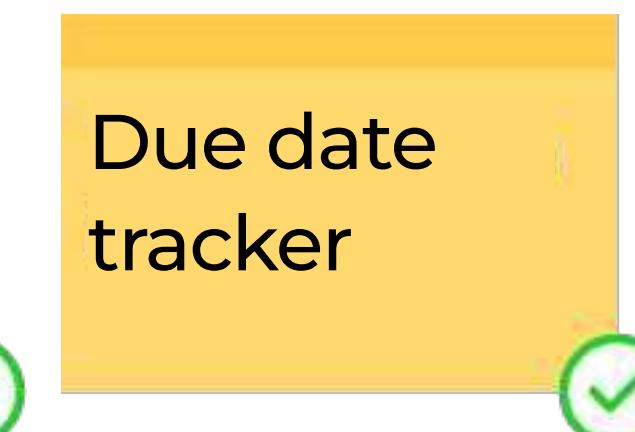
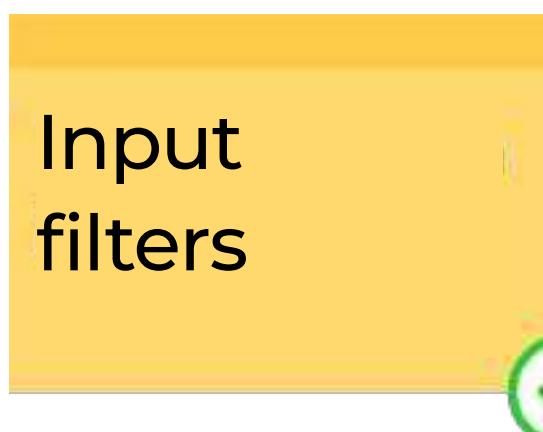
Our user support specialists are the closest to our users, so I did internal testing with them.

Positives:

- Less cluttered interface
- Significantly less time from signing in to accessing a student's intervention form
- Familiar micro interactions

For improvement:

- Let our users focus on their work while still promoting collaboration.
- Make it easy for users to filter and track student plans based on deadlines.
- Overdue indicator number are too small.
- Clean up overdue badge indicator on Forms Library.



Focus point

Checklist

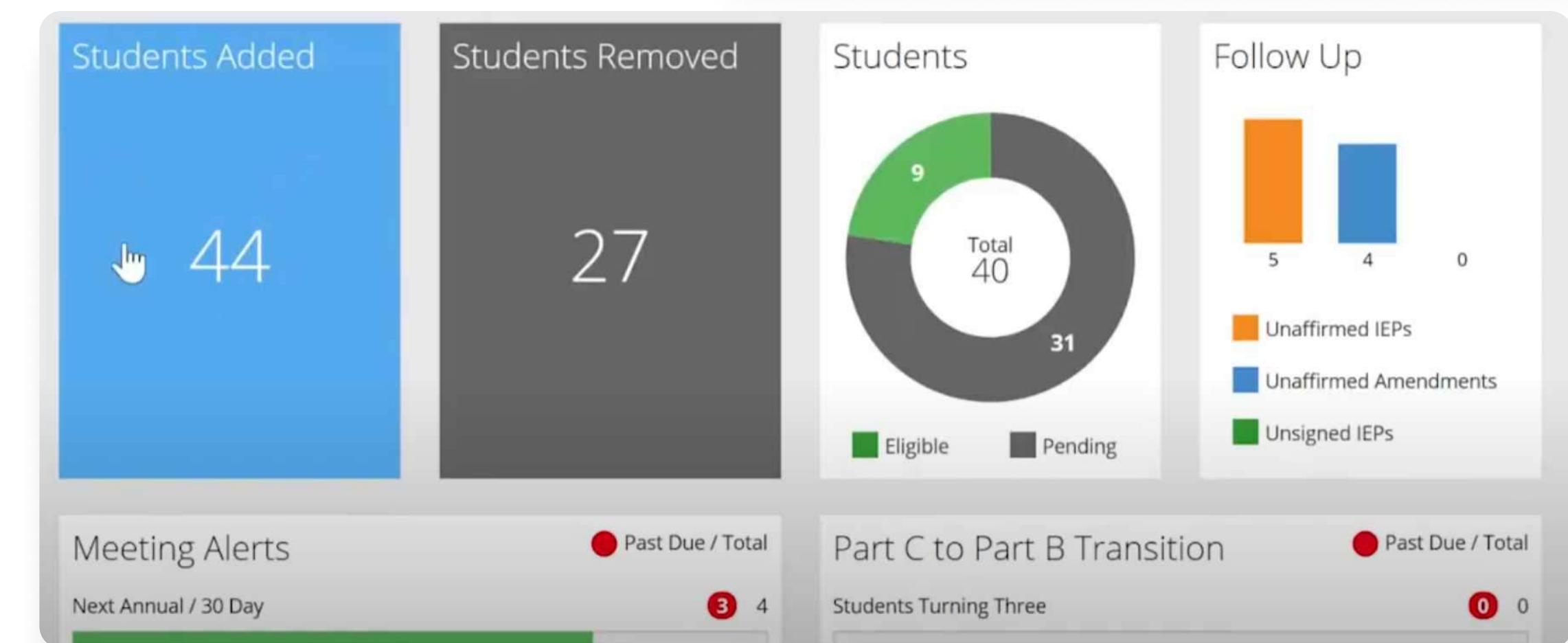
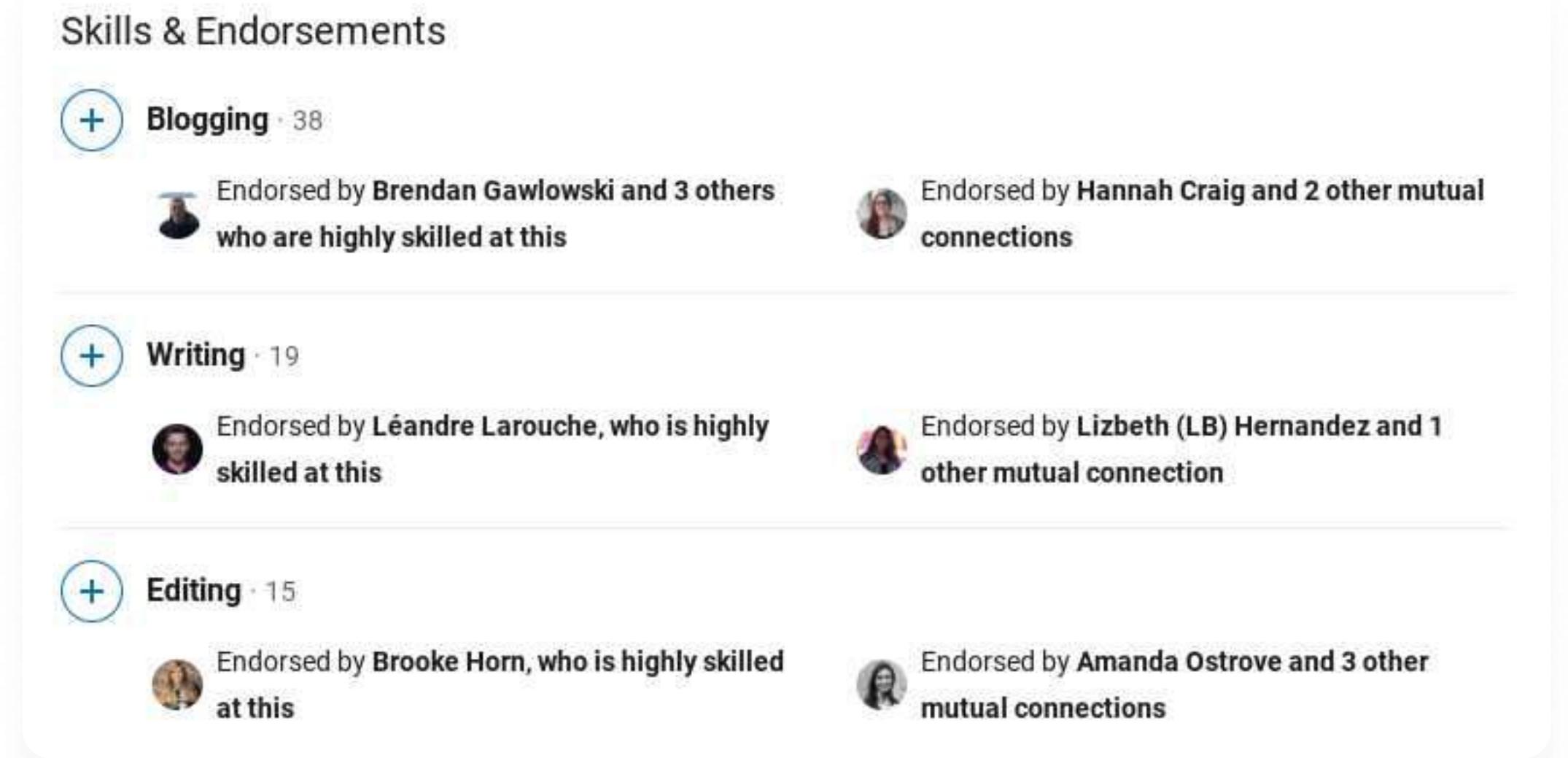
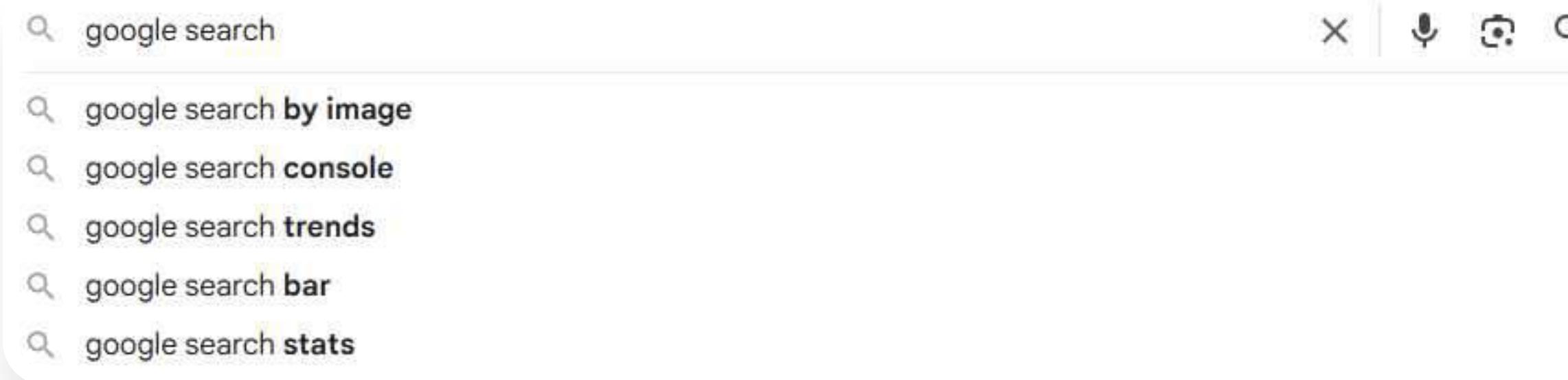
Enter keyword...

| | | |
|-------------------------------|---|---|
| You and 7 others | <input checked="" type="checkbox"/> Change of class(es) | 8 |
| You and 7 others | <input checked="" type="checkbox"/> Change of class(es) | 8 |
| You and 7 others | <input checked="" type="checkbox"/> Change of class(es) | 8 |
| Mendoza, J. and Rodriguez, E. | <input type="radio"/> Grade level/triad/roundtable intervention | 2 |
| Mendoza, J. and Rodriguez, E. | <input type="radio"/> Grade level/triad/roundtable intervention | 2 |
| Mendoza, J. and Rodriguez, E. | <input type="radio"/> Grade level/triad/roundtable intervention | 2 |

Optional filter out

IDEATION

I adapted UX patterns that are familiar to our users.



We referenced components that worked well for SEIS users (Special Education Information System), another platform in our suite of tools.



IDEATION

Ideas that were rejected

As a lot of the intervention forms are long and complicated, we want to analyze them and design a wizard-style experience to make the forms more digestible for our users.

We were not able to implement these ideas due to the forms being official and under the control of state educational policies and laws. We are not authorized to reformat or change the forms in any way.

Our path is not a one-way street, it loops, grows and evolve.



After numerous presentations with the team, we got an executive approval to start the implementation of the design with our engineers, and adapt an iterative process.

We wanted to get this on the hands of our users in real time, gather feedback and continue growing the platform.

SOLUTIONS

Transforming their digital experience beyond paper forms

2 Progress Monitoring due in 24 hours

2 Student Forms due in 23 hours

6 Round Table Meetings within 30 days

Students

Search by name: Enter student's name

Status: All Statuses

Search

| Name | Date of Birth | Grade Level | Status |
|-----------------------|---------------|-------------|-----------------|
| Alarcon, Jennie | 03/05/2010 | 9 | Pre-SST |
| Bardwin, Sethany Paul | 03/05/2010 | 9 | SST in Progress |

Forms for Perez, Mark Louie

- Pre-SST Interventions
- SST Referral
- ELL Supplemental Info
- SST Intervention Plan
- Notes
- 504 Eligibility Document

Pre-SST Intervention Form

Strategy Options

Search existing options or add anew ones...

All Selections | My Selections

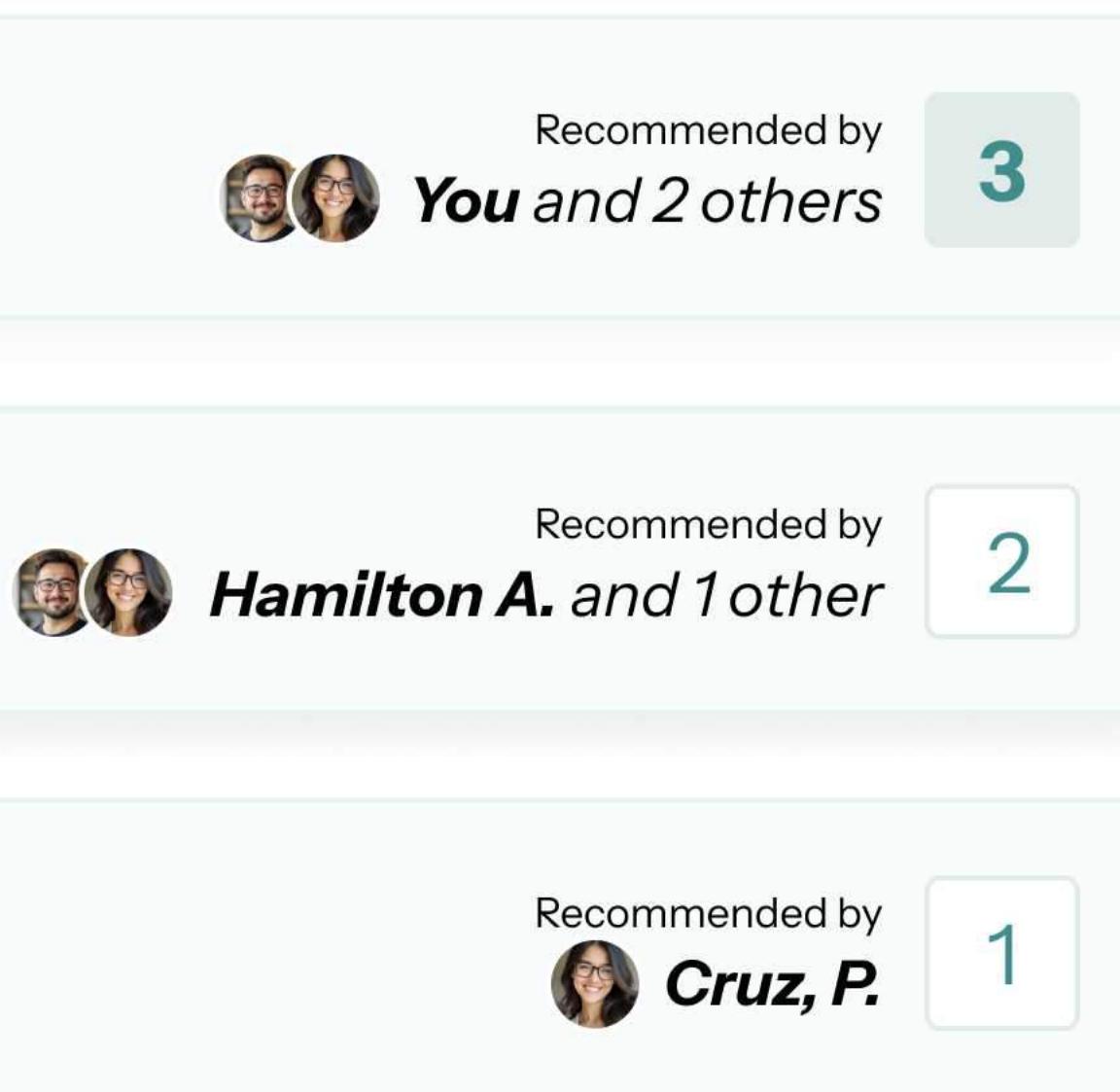
| | |
|--|---|
| <input checked="" type="checkbox"/> Recommend sign up for Science Fair Recommended by You 1 | <input checked="" type="checkbox"/> Behavioral Interview Recommended by You and 2 others 3 |
| <input type="checkbox"/> Change of classes Recommended by Hamilton A. and 1 other 2 | <input type="checkbox"/> Change of schedule Recommended by Hamilton A. 1 |
| <input type="checkbox"/> Before-school program Recommended by Cruz, P. 1 | <input type="checkbox"/> Assign to counseling - at school Recommended by Cruz, P. 1 |

Save Form

SOLUTIONS

Collaboration Experience

- Everyone has their own access to the forms without getting locked out.
- Easily upvote other team members' votes through the Quick Selection view.
- Voted options cannot be deselected by others.
- Use dropdown input to browse through all options, search for existing options or add new ones.



Dropdown input to either browse all options, search for existing options or add a custom one

Voted by current user

Voted by current user & others, number reflects total votes

Voted by others, available for quick selection

Toggle to between viewing All Selections or My Selections

Strategy Options

Search existing options or add a new one...

Recommended sign up for Science Fair Recommended by You 1

Behavioral Interview Recommended by You and 2 others 3

Change of classes Recommended by Hamilton A. and 1 other 2

Change of schedule Recommended by Hamilton, A. 1

Before-school program Recommended by Cruz, P. 1

Assign to counseling - at school Recommended by Cruz, P. 1

All Selections | My Selections

SOLUTIONS

Dropdown States

Browsing through existing options

Start typing to filter through existing options

Strategy Options

Select existing options or add new ones...

- Behavior Interview
- Change of classes
- Change of schedule
- Refer to health office

3
1
1

Number card state for total votes, including current user's.

Number card state for total votes for options not voted by current user.

No number card for options not voted by any team members.

Adding custom option

Strategy Options

Recommend sign up for Science Fair

- Add “Recommend sign up for Science Fair”

1

Type in custom option then select “Add”.
Others can vote for custom options once saved.

SOLUTIONS

Additional Information/Comments Display

- Team members can now read through other members' inputs without being able to overwrite them.
- There is a name indicator per each input so users know whose comment is which.

Additional Information/Comments

Enter information or comments to share with the success team

 Cruz, Patricia

Upon consistent observation across the modular parameters, the student has demonstrated a fluctuating tendency toward objective realignment in accordance with the preliminary scaffolding of the strategic uplift matrix. While engagement levels remain intermittently conceptual, the interplay between cognitive elevation and task-oriented flux suggests a promising ambiguity. Continued calibration of the formative vector should yield further insight into the longitudinal oscillation of performance patterns.

 Hamilton, Albert

The student has consistently engaged with the layered rubric framework, often aligning their output with the tertiary benchmarks of the adaptive learning continuum. While temporal pacing occasionally diverges from the normative trajectory, their utilization of the heuristic anchor points remains nominally effective. There is measurable interface between the reflective cycle and procedural abstraction, which, although not directly correlative, suggests a latent synthesis within the differentiated modality spectrum.

[See more...](#)

SOLUTIONS

Forms Library

- Access a student form straight from the Students listing page or wherever the Student Identification component is.
- Look out for the red dot indicator that indicate form overdue status.
- Select one or more forms to download as one file.

BEYONDSST

Students Sign Out   

Students

Search by name Status

| ↑ Name | ↓ Date of Birth | ↓ Grade Level | ↓ Status |
|-------------------------|-----------------|---------------|--|
| Alarcon, Jennie | 03/05/2010 | 9 | Pre-SST  |
| Bardwin, Sethany Paul | 03/05/2010 | 9 | SST in Progress  |
| Corns, Melanie Girly | 08/21/2010 | 9 | Referred  |
| Dominico, Sanner | 05/17/2010 | 9 | Exited  |
| Jones, Nebraska | 05/04/2010 | 9 | SST in Progress  |
| Perez, Mark Louie | 03/05/2010 | 9 | Pre-SST  |
| Sutherbee, Omar Gilbert | 01/28/2009 | 9 | Referral Processed  |
| Vander, Anton Gerr | 10/05/2010 | 9 | Assessment Denied  |

Forms
for Perez, Mark Louie 

- Pre-SST Interventions 
- SST Referral
- ELL Supplemental Info
- SST Intervention Plan
- Notes
- 504 Eligibility Document
- 504 Accommodation Plan
- 504 Manifestation
- 504 Behavioral Intervention
- 504 Checklist
- 504 Notes

Student Identification Component

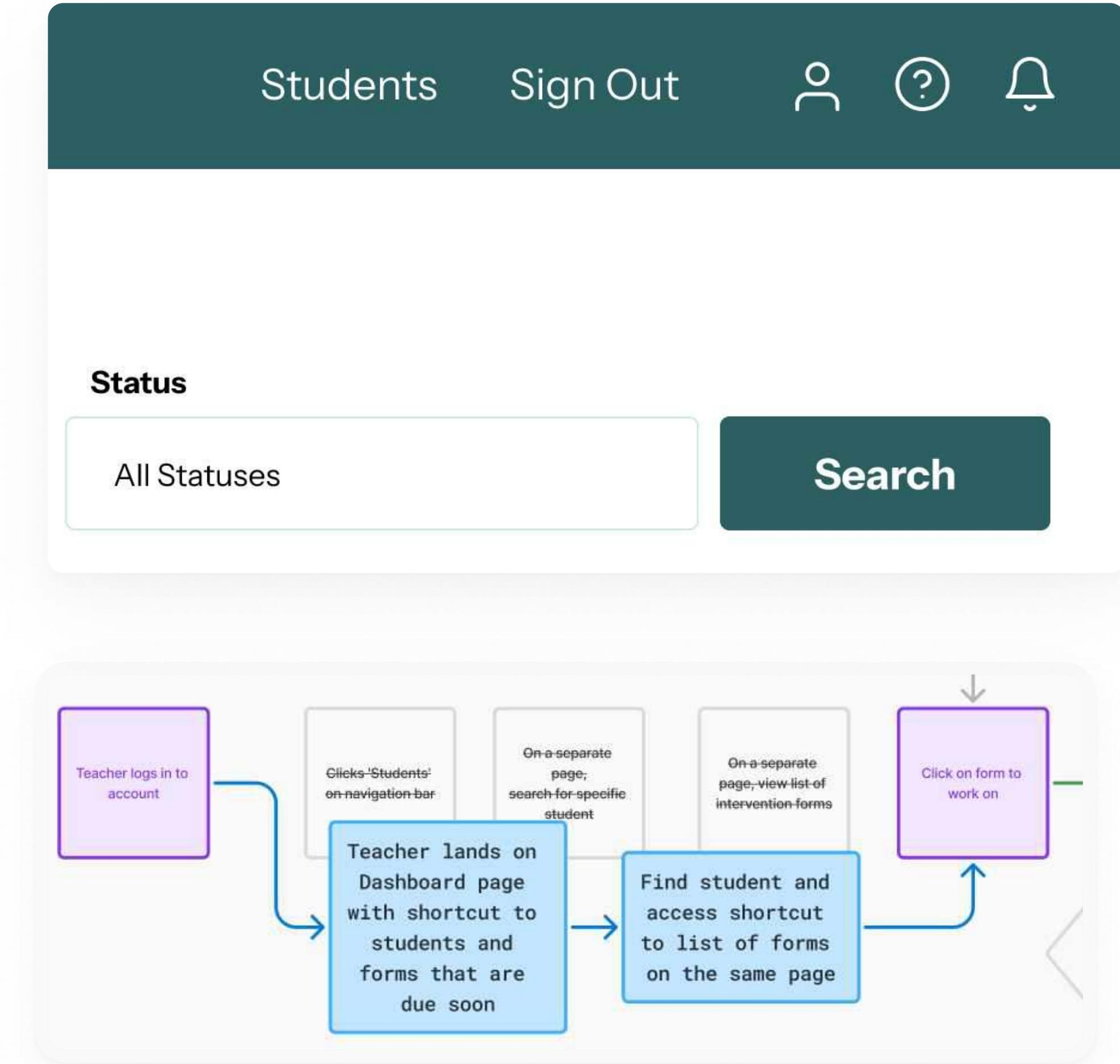
Perez, Mark Louie 03/05/2010 Grade 9

Pre-SST 

SOLUTIONS

Focused Navigation

- We simplified the navigation bar to focus only on places that they need to be.
- We want to avoid unnecessary confusion by removing navigational items that only administrators have access to, instead of letting users get there and showing them a “Access Denied” message.



SOLUTIONS

Dues Tracker & Stats

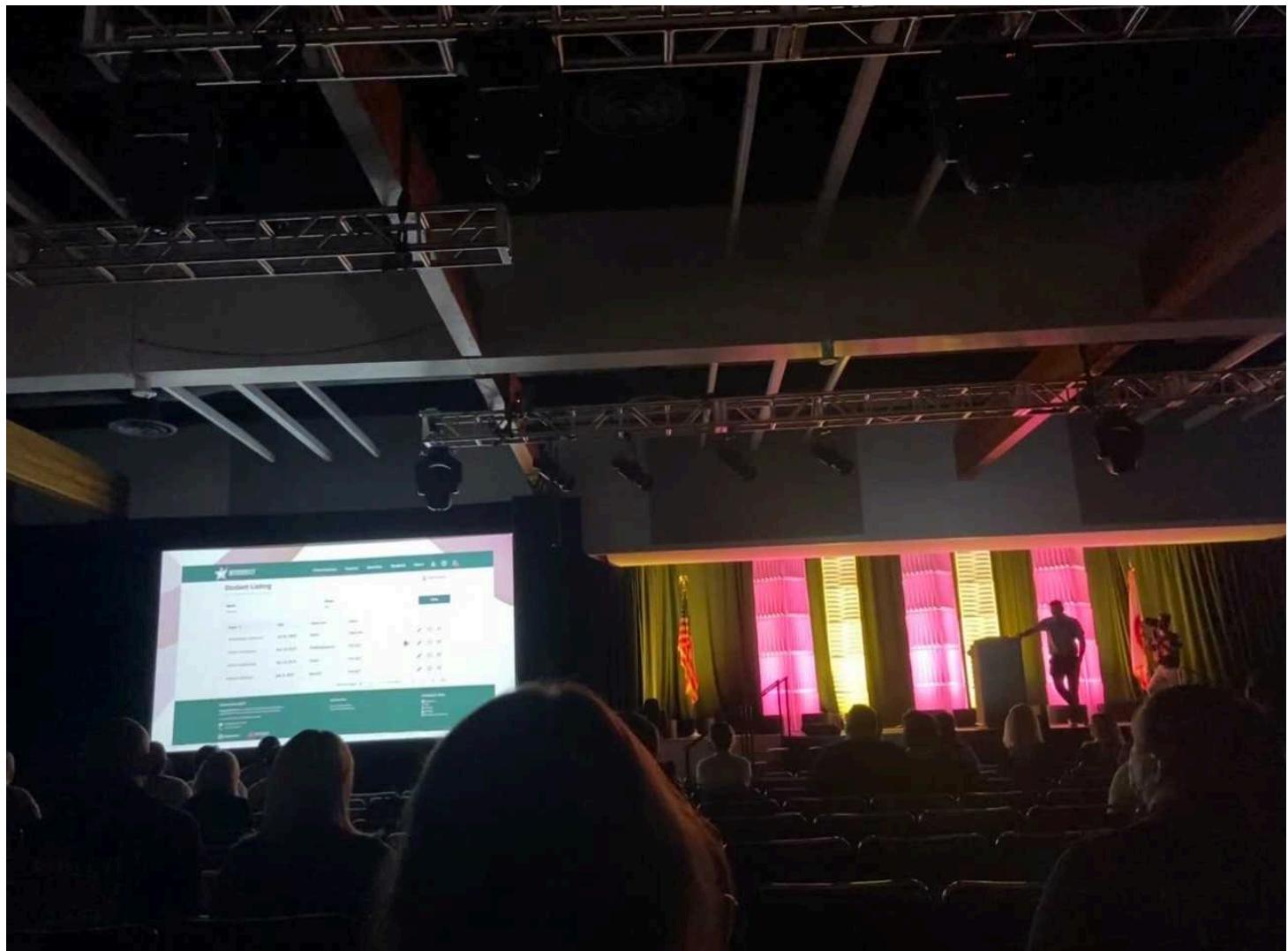
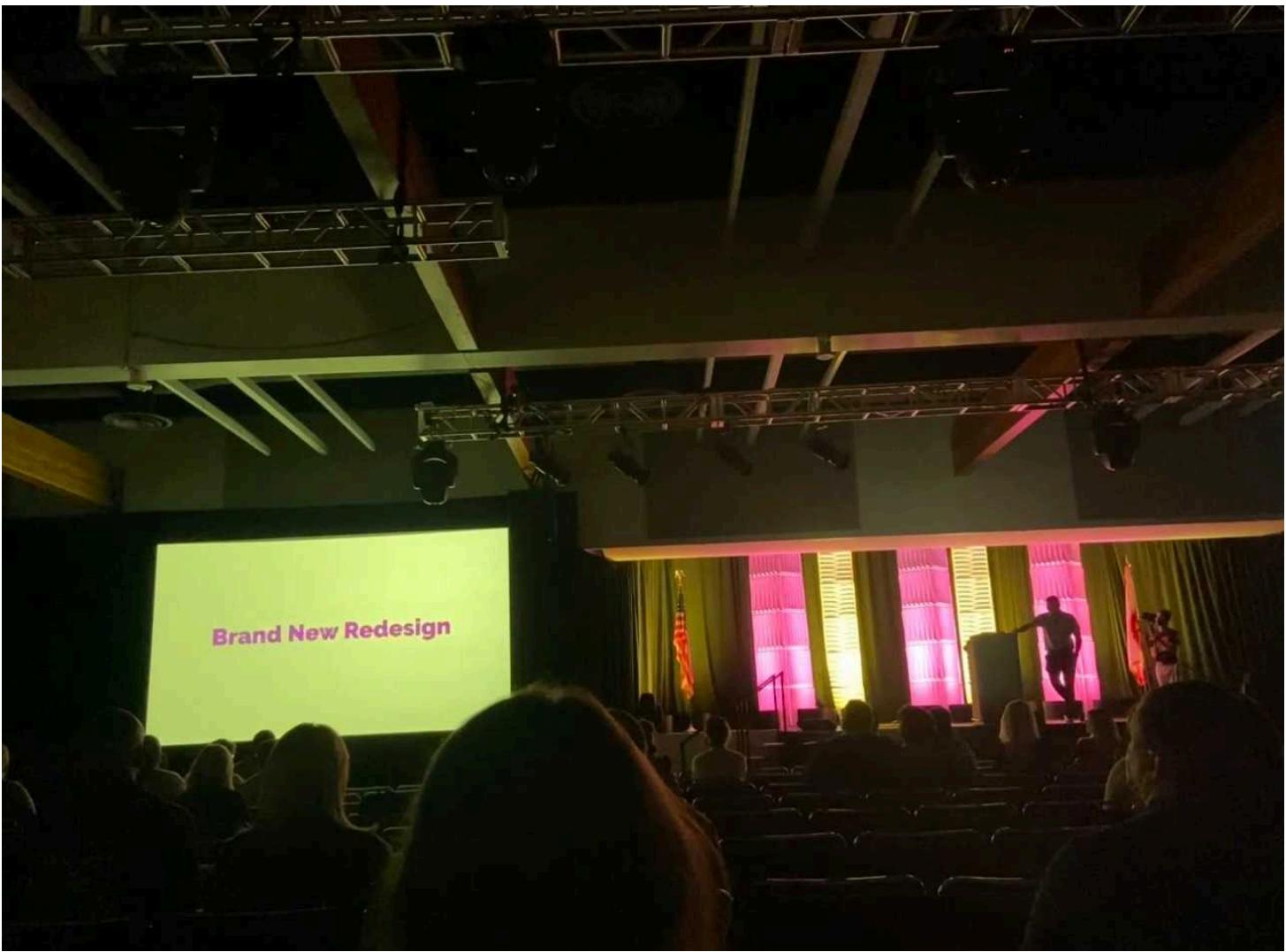
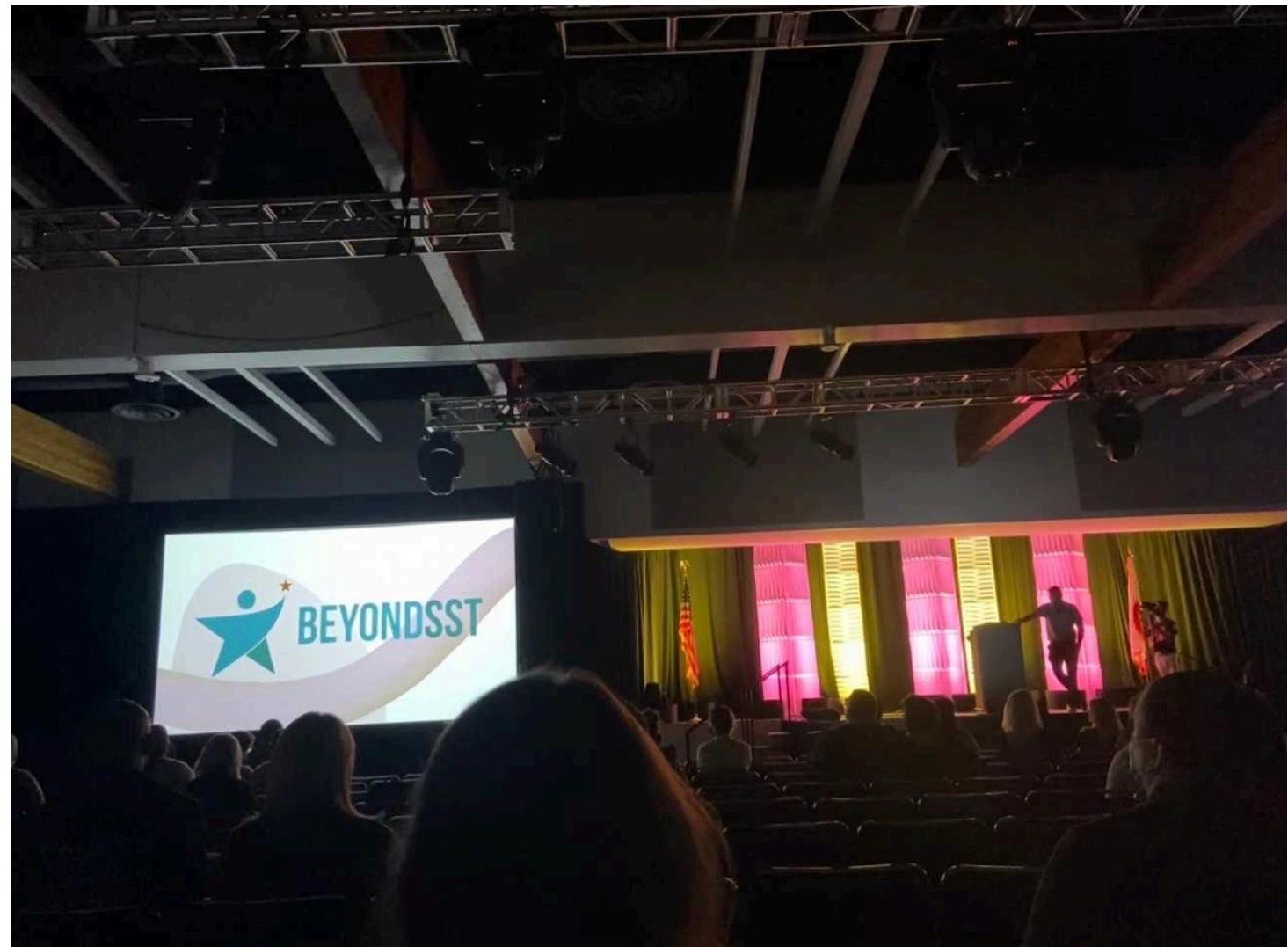
- As soon as the user signs in, we want to highlight what exactly needs to be done for maximum efficiency.
- We also added student stats that are important to the users and the schools.

The screenshot shows the BEYONDSST application interface. At the top, there is a dark green header bar with the BEYONDSST logo on the left and navigation links for "Students", "Sign Out", and user icons on the right. Below the header, the main content area has a white background. On the left side of the main area, there is a vertical list of three items, each enclosed in a light gray rounded rectangle with a thin green border. The first item is "2 Progress Monitoring" with a red icon of an upward arrow, followed by "due in 24 hours". The second item is "2 Student Forms" with a red icon of a clipboard, followed by "due in 23 hours". The third item is "6 Round Table Meetings" with a teal icon of a calendar, followed by "within 30 days". To the right of these items, the word "Students Stats" is centered above a grid of six smaller boxes arranged in two rows of three. Each box contains a large number, a brief description, and a small icon. The top row contains: "143 Current Students" (with a person icon), "32 Successful Interventions" (with a checkmark icon), and "13 Ongoing Interventions" (with a gear icon). The bottom row contains: "1 Referral from SEIS" (with a person icon), "8 Transferring In" (with a person icon), and "0 Transferring Out" (with a person icon).

| Students Stats | | |
|-------------------------|--------------------------------|-----------------------------|
| 143 Current Students | 32 Successful Interventions | 13 Ongoing Interventions |
| 1 Referral from SEIS | 8 Transferring In | 0 Transferring Out |

LAUNCH

CodeStack Conference



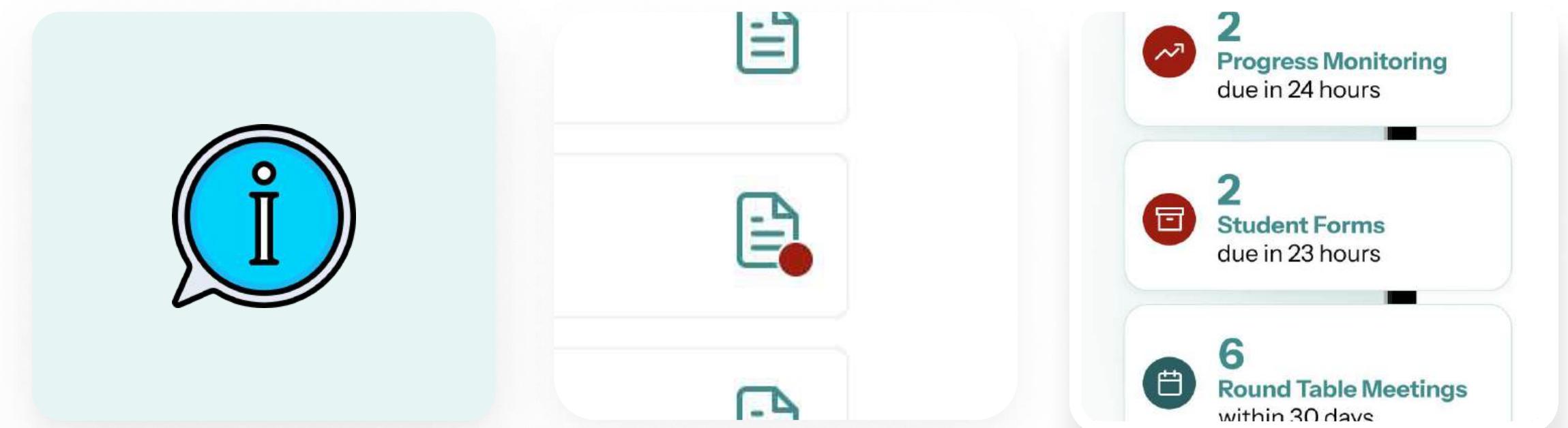
IMPACT

Was the design successful?

Key feedback gathered

- Overall positive sentiments
- Rise in sign ins and intervention plan forms being submitted through the system
- Some user groups experience some learning curve
- Rise in user support calls, but in a good way

For next iterations



Help Center

Improve Action Icons
Legibility

Customizable Dues
Tracker Cards

IMPACT

We've helped our **teachers and staff to advocate for their students' success**, and more!

+12%

annual growth in **students with successful intervention plans** through the system

+18%

annual growth in **adoption**

+50%

increase in **students in the system**

+200%

increase in **revenue**

RETROSPECTIVE

My personal thoughts as the designer

- Working with cross-functional teams went smoothly overall, despite initial friction over differing project scopes. I'm happy I managed feedback effectively and collaborated with user support specialists, I provided key insights that helped secure buy-in from leadership for a full platform overhaul, beyond just a visual refresh.
- Early involvement of team members turned it into a collaboration, not a battle for design's place at the table, which was crucial to the project's success.
- Learning a sprawling system pieced together over the years was a challenging adventure.
- Seeing the audience's smiles and hearing their applause as we unveiled and demoed the new platform at CodeStack's annual conference was incredibly rewarding.
- SSTs handle dozens of complex forms for each student every day. Due to legal and official policies, we were not authorized to completely reinvent the process of filling them out. If this constraint didn't exist, I would have loved the opportunity to design a tailor-made workflows for each form, further improving efficiency and enhancing the overall experience for our SSTs as they dedicate their hard work to their students' success.