

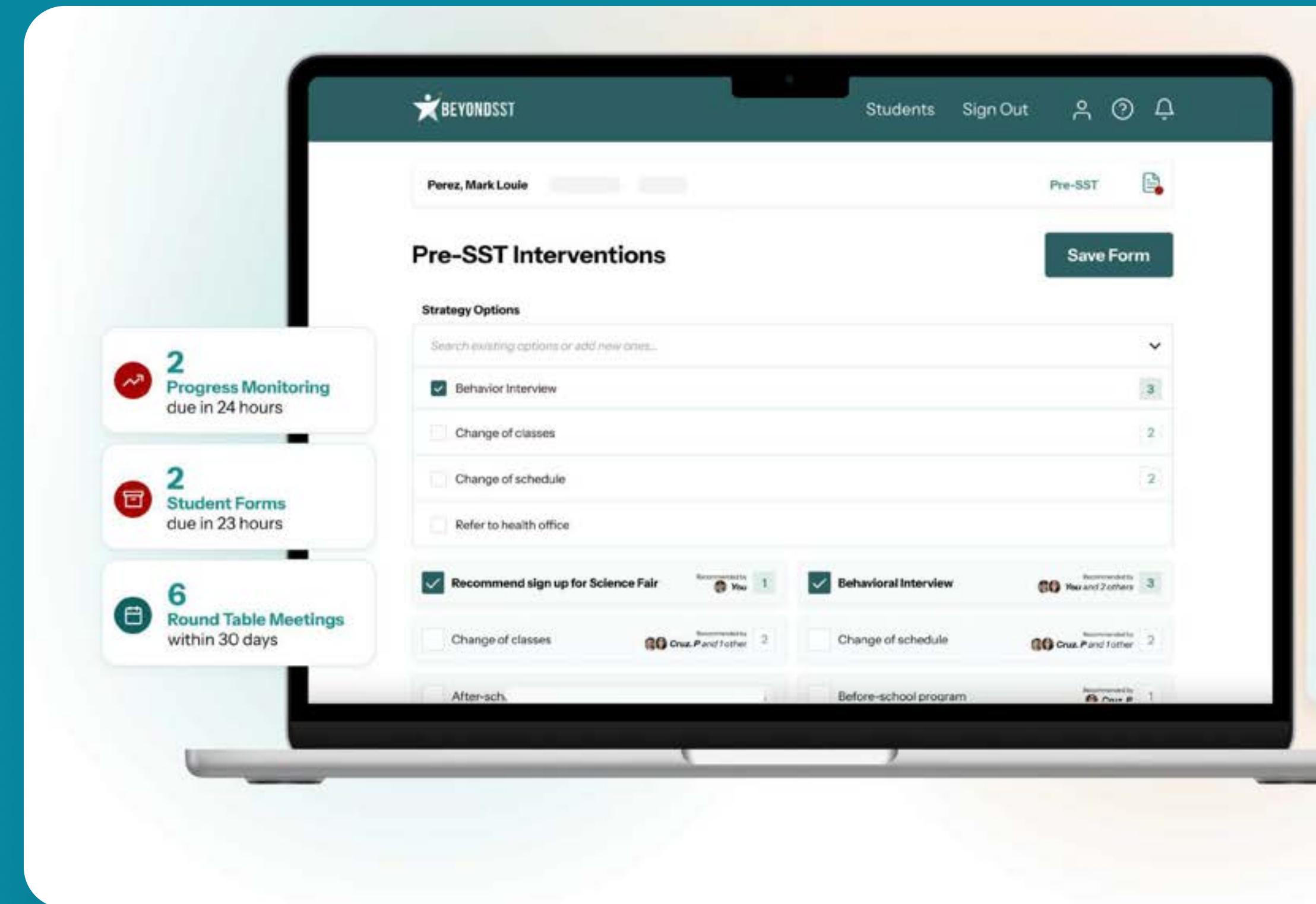


# Empowering teachers and staff towards their students' success,

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

💻 for **CodeStack - San Joaquin County Office of Education**

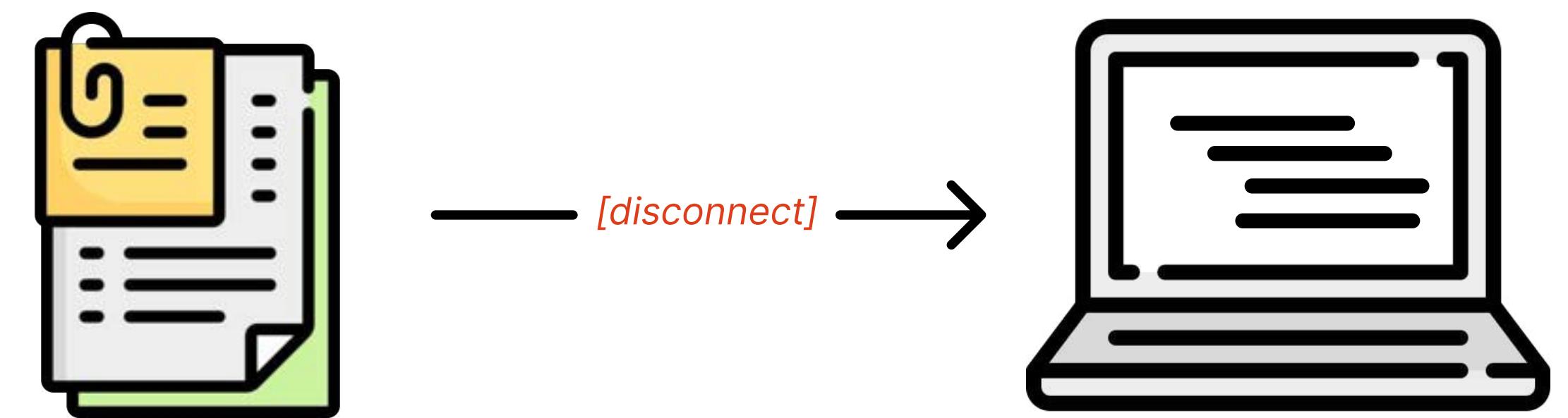
🚀 **1 designer, 1 project manager, 2 engineers, 2 user support specialists**



BACKGROUND & CONTEXT

# Directly translating paper forms into web forms was not enough.

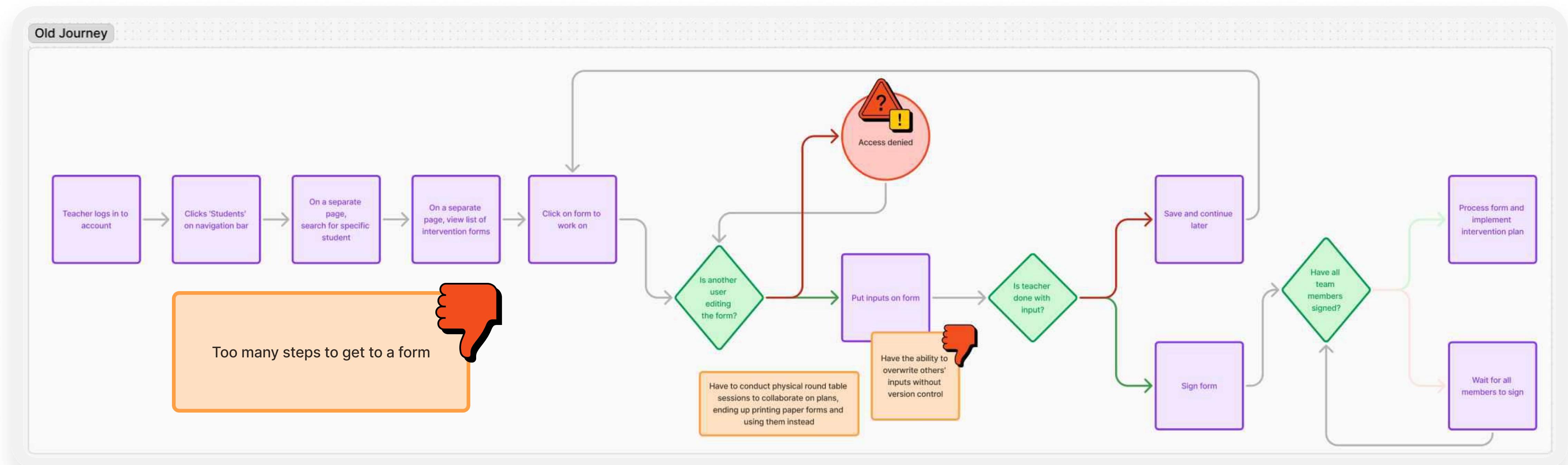
- **BeyondSST (Student Success Teams)** is a platform developed in 2009 to convert paper intervention plans into a digital format, but it didn't offer a seamless, user-friendly experience.
- Student's successful intervention plans **rely heavily on collaboration** between teachers, administrators and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

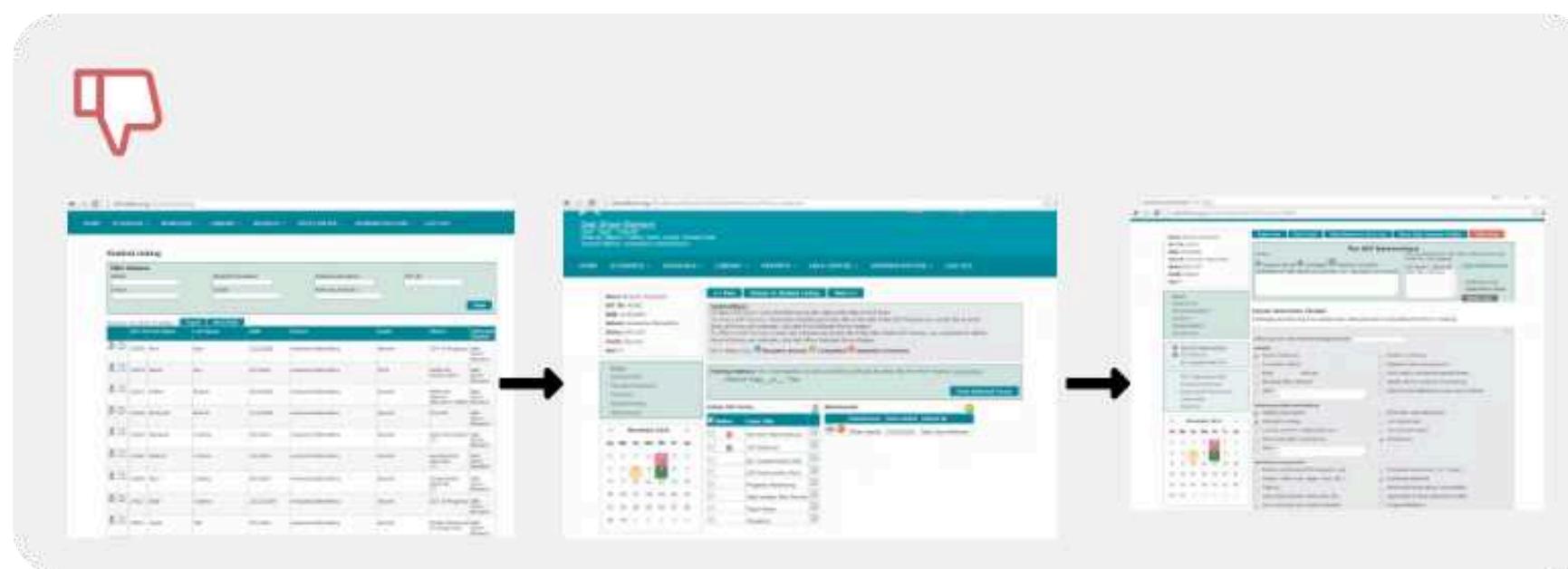
**What motivates her:** Her desire to help and smoothen out the process of making intervention plans.

**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

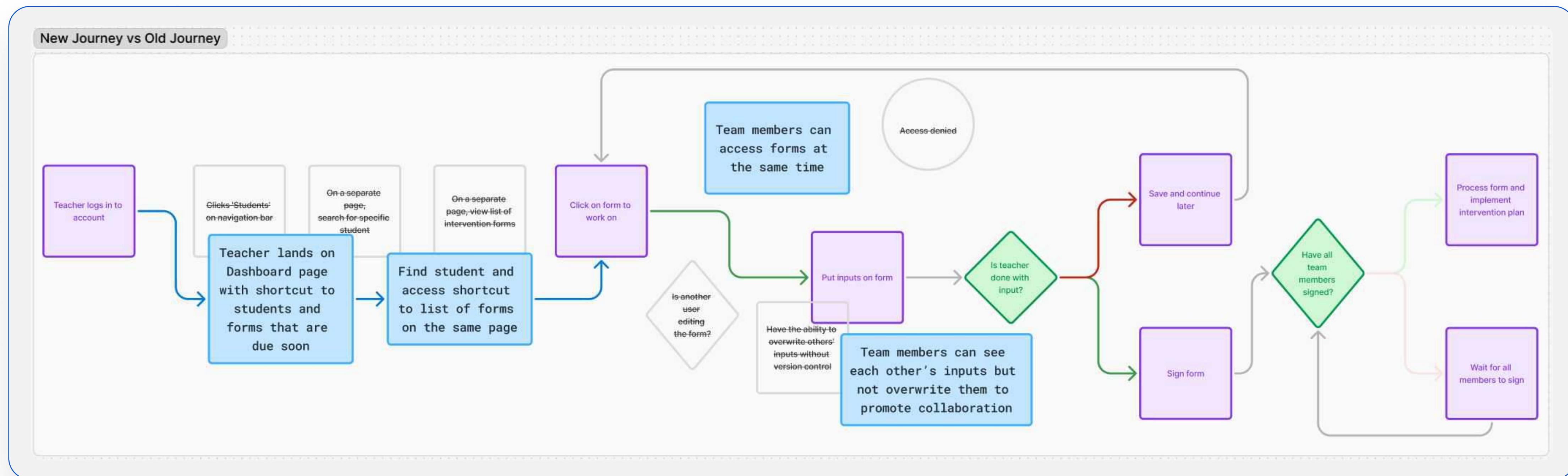
Team members worked on the same copy of a form so inputs can be overwritten intentionally or unintentionally, without a way to revert or track changes.

## 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?

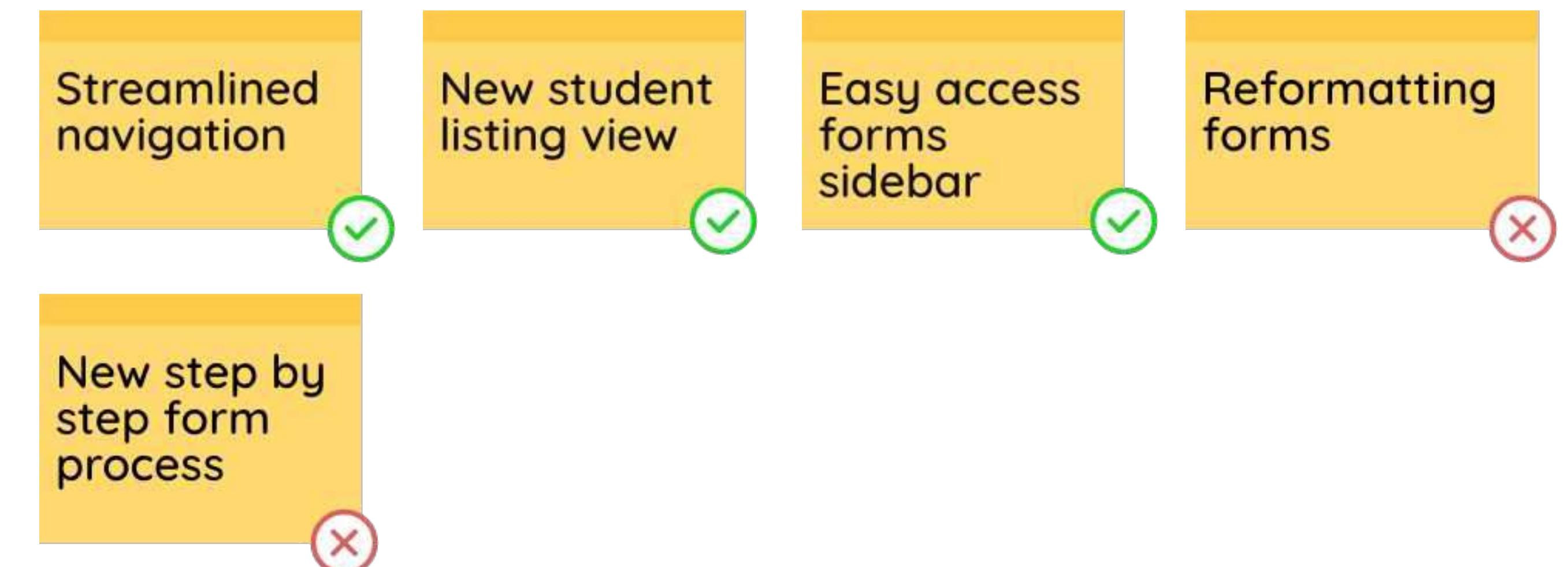
**Streamline the interface to make complexity approachable**

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

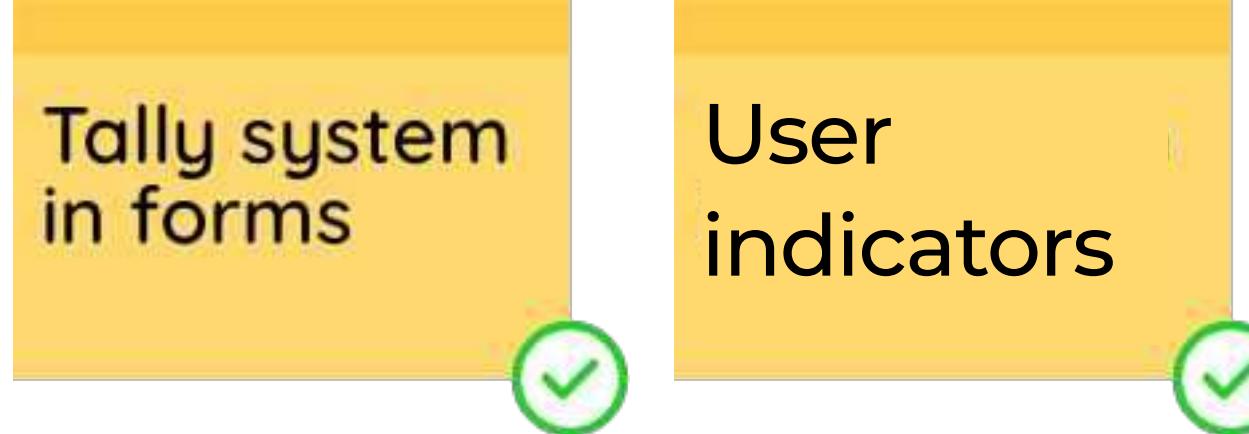
## Streamlining the Navigation

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

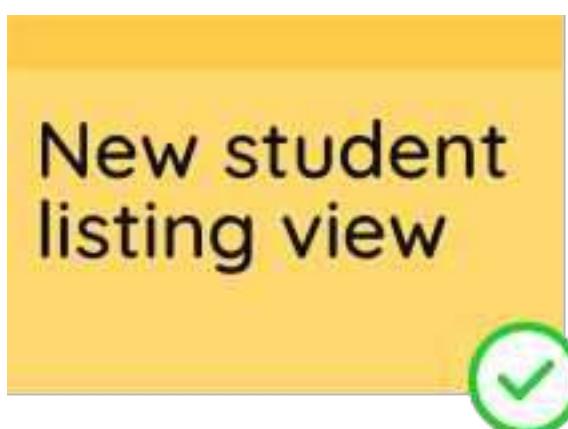
What if we show the voted options outside of the multi-select dropdown?

The image shows a user interface for a "Checklist" feature. At the top is a search bar with the placeholder "Enter keyword...". Below it is a list of items, each consisting of a small profile icon, the text "You and 7 others", a checkbox followed by a description, and a small number indicating the count of votes (e.g., "8"). Red arrows point from specific text annotations to these elements.

Profile Icon	You and 7 others	Option Description	Votes
Icon 1	You and 7 others	<input checked="" type="checkbox"/> Change of class(es)	8
Icon 2	You and 7 others	<input checked="" type="checkbox"/> Change of class(es)	8
Icon 3	Menchaca, D. and Rodriguez, E.	<input type="checkbox"/> Grade level/triad/roundtable intervention ...	2
Icon 4	Menchaca, D. and Rodriguez, E.	<input type="checkbox"/> Grade level/triad/roundtable intervention ...	2
Icon 5	Menchaca, D. and Rodriguez, E.	<input type="checkbox"/> Grade level/triad/roundtable intervention ...	2
Icon 6	Menchaca, D. and Rodriguez, E.	<input type="checkbox"/> Grade level/triad/roundtable intervention ...	2

To encourage more collaboration, what if we show which team members voted?

To encourage more collaboration, what if we show the number of votes?



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	
<input type="text" value="Search by name"/>	<input type="text" value="SST In Progress, 504 In Progress"/>	<input type="button" value="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.



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

Students Sign Out

**Forms**

for Ambriz, Louie Saul Ignacio

OVERDUE	Pre-SST Interventions
<a href="#">SST Referral</a>	<input type="checkbox"/>
<a href="#">ELL Supplemental Info</a>	<input type="checkbox"/>
<a href="#">SST Intervention Plan and Monitoring</a>	<input type="checkbox"/>
<a href="#">Notes</a>	<input type="checkbox"/>
<a href="#">504 Eligibility Documentation</a>	<input type="checkbox"/>
<a href="#">504 Accommodation Plan</a>	<input type="checkbox"/>
<a href="#">504 Manifestation Determination</a>	<input type="checkbox"/>
<a href="#">504 Behavior Intervention</a>	<input type="checkbox"/>
<a href="#">504 Checklist</a>	<input type="checkbox"/>
<a href="#">504 Notes</a>	<input type="checkbox"/>

*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

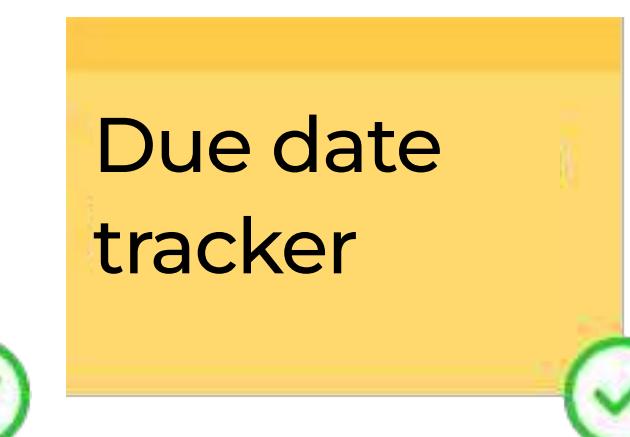
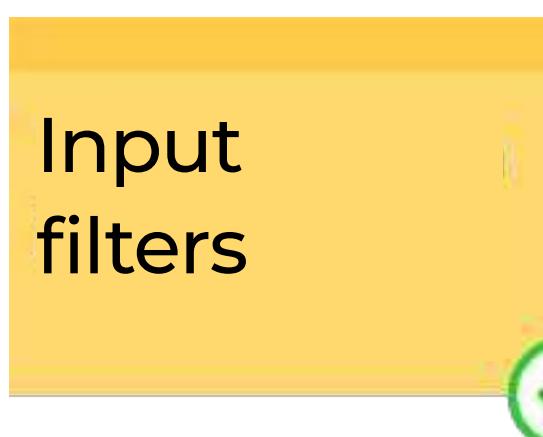
# Our user support specialists are the closest to our users, so I did internal testing with them.

**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  Change of class(es) 8

You and 7 others  Change of class(es) 8

You and 7 others  Change of class(es) 8

Minchaca, J. and Rodriguez, E.  Grade level/triad/roundtable intervention ... 2

Minchaca, J. and Rodriguez, E.  Grade level/triad/roundtable intervention ... 2

Johnston, J. and Rodriguez, E.  Grade level/triad/roundtable intervention ... 2

Minchaca, J. and Rodriguez, E.  Grade level/triad/roundtable intervention ... 2

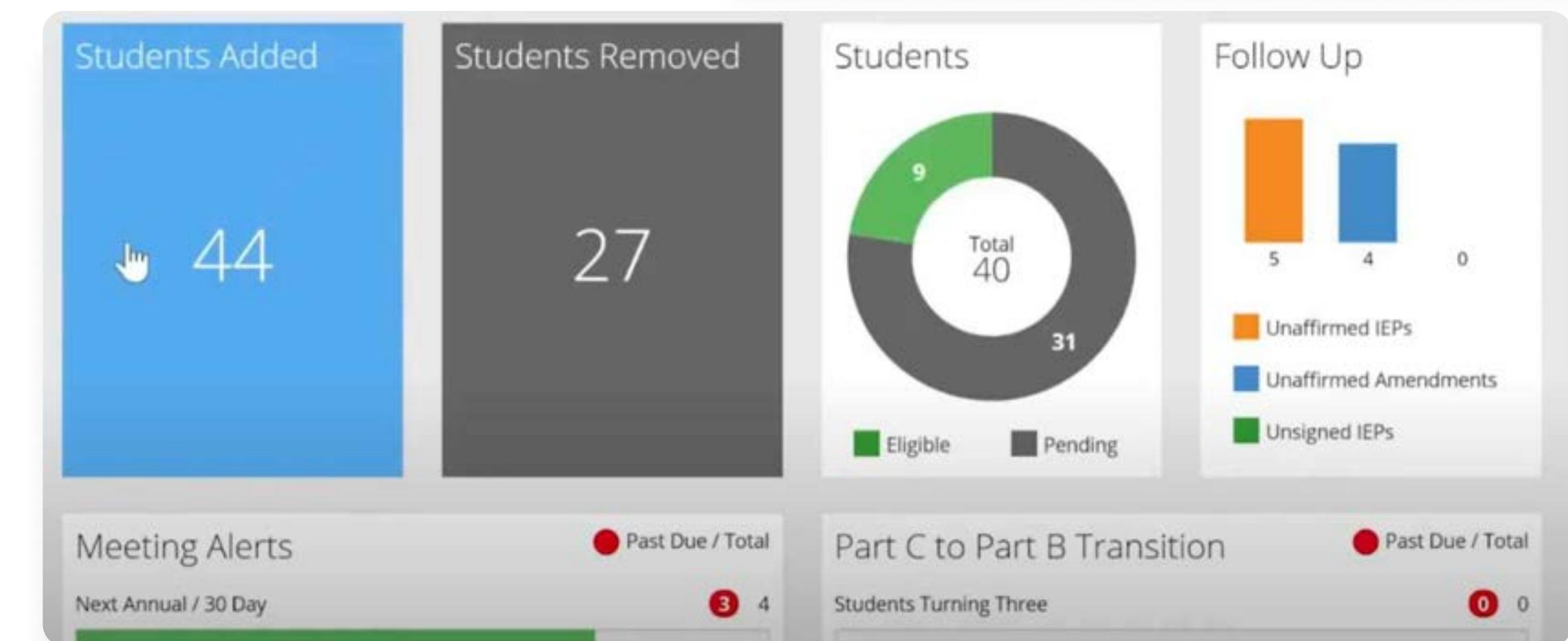
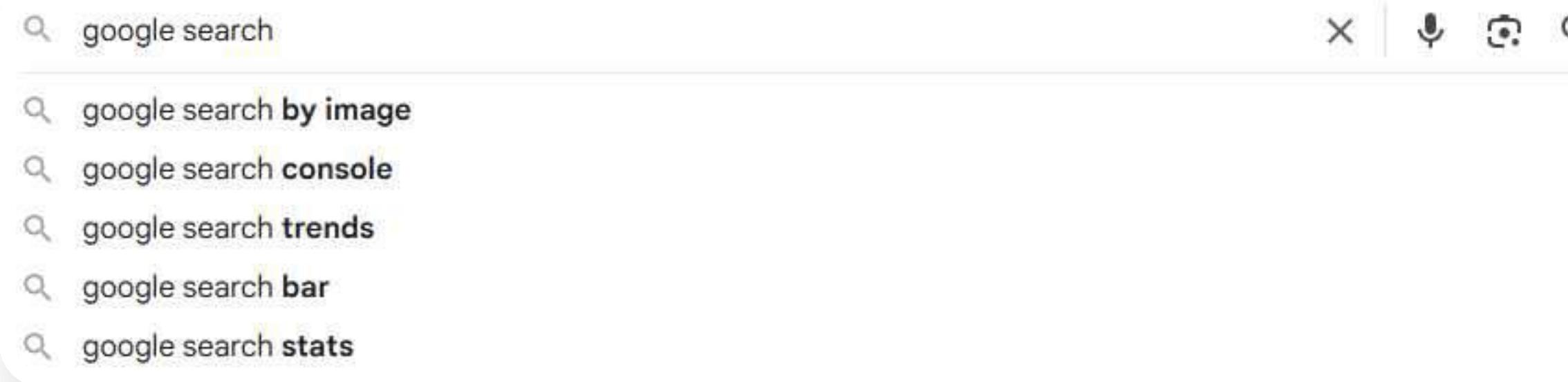
Minchaca, J. and Rodriguez, E.  Grade level/triad/roundtable intervention ... 2

Minchaca, J. and Rodriguez, E.  Grade level/triad/roundtable intervention ... 2

Optional filter out

IDEATION

# I adapted UX patterns that are familiar to our users.



## Skills & Endorsements

### Blogging · 38

Endorsed by Brendan Gawlowski and 3 others who are highly skilled at this

Endorsed by Hannah Craig and 2 other mutual connections

### Writing · 19

Endorsed by Léandre Larouche, who is highly skilled at this

Endorsed by Lizbeth (LB) Hernandez and 1 other mutual connection

### Editing · 15

Endorsed by Brooke Horn, who is highly skilled at this

Endorsed by Amanda Ostrove and 3 other mutual connections

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

**BEYONDSST**

**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

**BEYONDSST**

Perez, Mark Louie 03/05/2010 Grade 9

**Pre-SST Intervention Form**

**Strategy Options**

Search existing options or add anew ones...

All Selections | My Selections

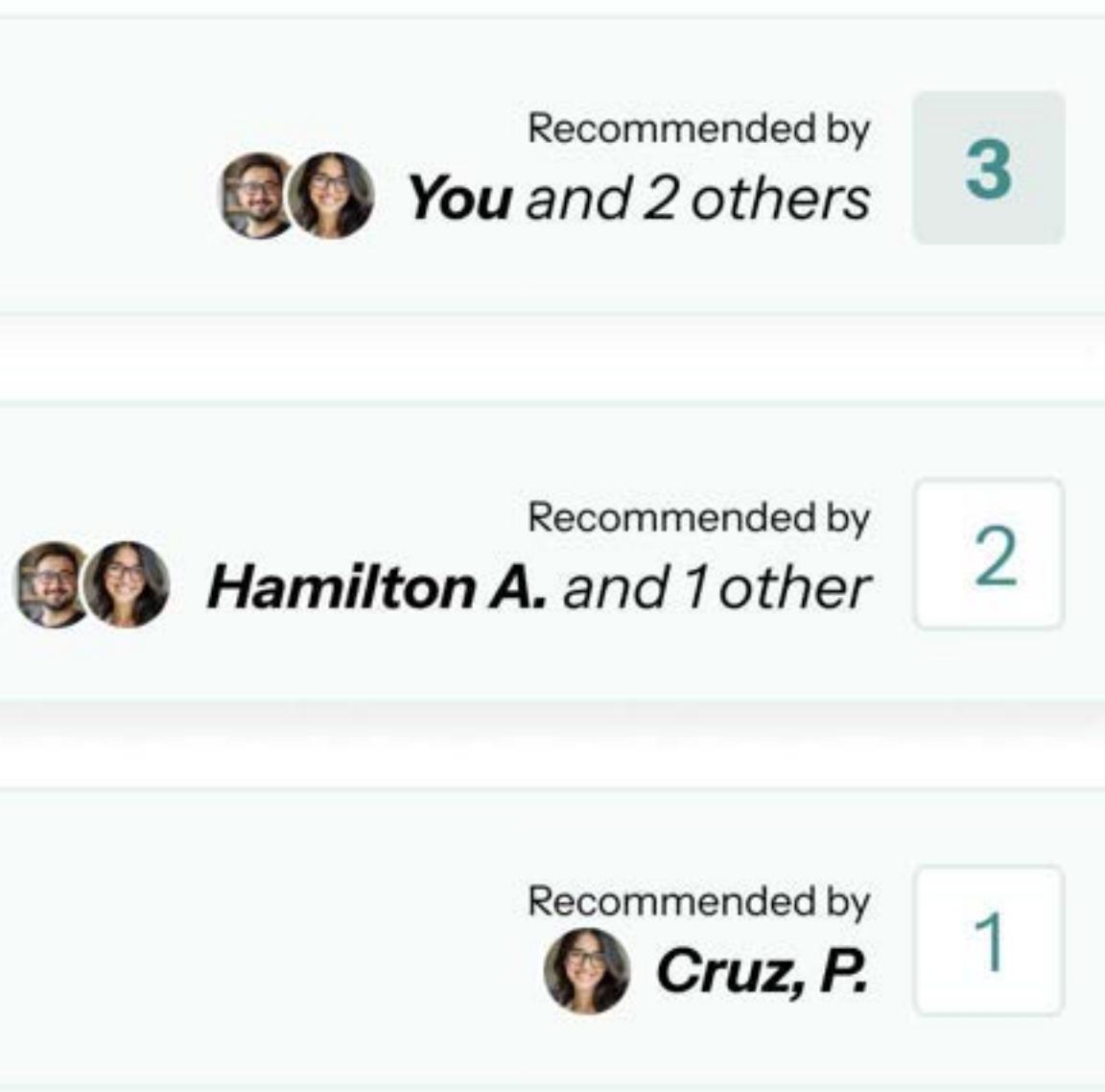
<input checked="" type="checkbox"/> Recommend sign up for Science Fair Recommended by You 1	<input checked="" type="checkbox"/> Behavioral Interview Recommended by You and 2 others 3
<input type="checkbox"/> Change of classes Recommended by Hamilton A. and 1 other 2	<input type="checkbox"/> Change of 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.



The screenshot displays a user interface for managing strategy options:

- Search Bar:** "Search existing options or add a new ones..."
- Strategy Options List:**
  - Recommend sign up for Science Fair:** Checked (selected), recommended by You (1). A red dot above the card indicates it was voted by the current user.
  - Behavioral Interview:** Checked (selected), recommended by You and 2 others (3). A red dot above the card indicates it was voted by the current user & others.
  - Change of classes:** Unchecked, recommended by Hamilton A. and 1 other (2).
  - Before-school program:** Unchecked, recommended by Cruz, P. (1).
  - Change of schedule:** Unchecked, recommended by Hamilton, A. (1).
  - Assign to counseling - at school:** Unchecked, recommended by Cruz, P. (1).
- Buttons:** "All Selections" (green) and "My Selections" (blue).
- Annotations:**
  - A red line with a dot points to the "Recommend sign up for Science Fair" card with the label "Voted by current user".
  - A red line with a dot points to the "Behavioral Interview" card with the label "Voted by current user & others, number reflects total votes".
  - A red line with a dot points to the "All Selections" button with the label "Toggle to between viewing All Selections or My Selections".
  - A red line with a dot points to the "Change of classes" card with the label "Voted by others, available for quick selection".

## SOLUTIONS

# Dropdown States

## Browsing through existing options

Start typing to filter through existing options



The screenshot shows a dropdown menu titled "Strategy Options" with the placeholder "Select existing options or add new ones...". It contains five items:

- Behavior Interview (Count: 3)
- Change of classes (Count: 1)
- Change of schedule (Count: 1)
- Refer to health office (Count: 0)

Annotations explain the counts:

- An orange arrow points to the "3" in the Behavior Interview row with the text: "Number card state for total votes, including current user's."
- An orange arrow points to the "1" in the Change of classes row with the text: "Number card state for total votes for options not voted by current user."
- An orange arrow points to the "0" in the Refer to health office row with the text: "No number card for options not voted by any team members."

## Adding custom option



The screenshot shows a dropdown menu titled "Strategy Options" with the placeholder "Select existing options or add new ones...". It contains two items:

- Recommend sign up for Science Fair
- Add "Recommend sign up for Science Fair" (Count: 1)

Annotations explain the addition:

- An orange arrow points to the "1" in the custom option row with the text: "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   

**Forms**  
for Perez, Mark Louie 

**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

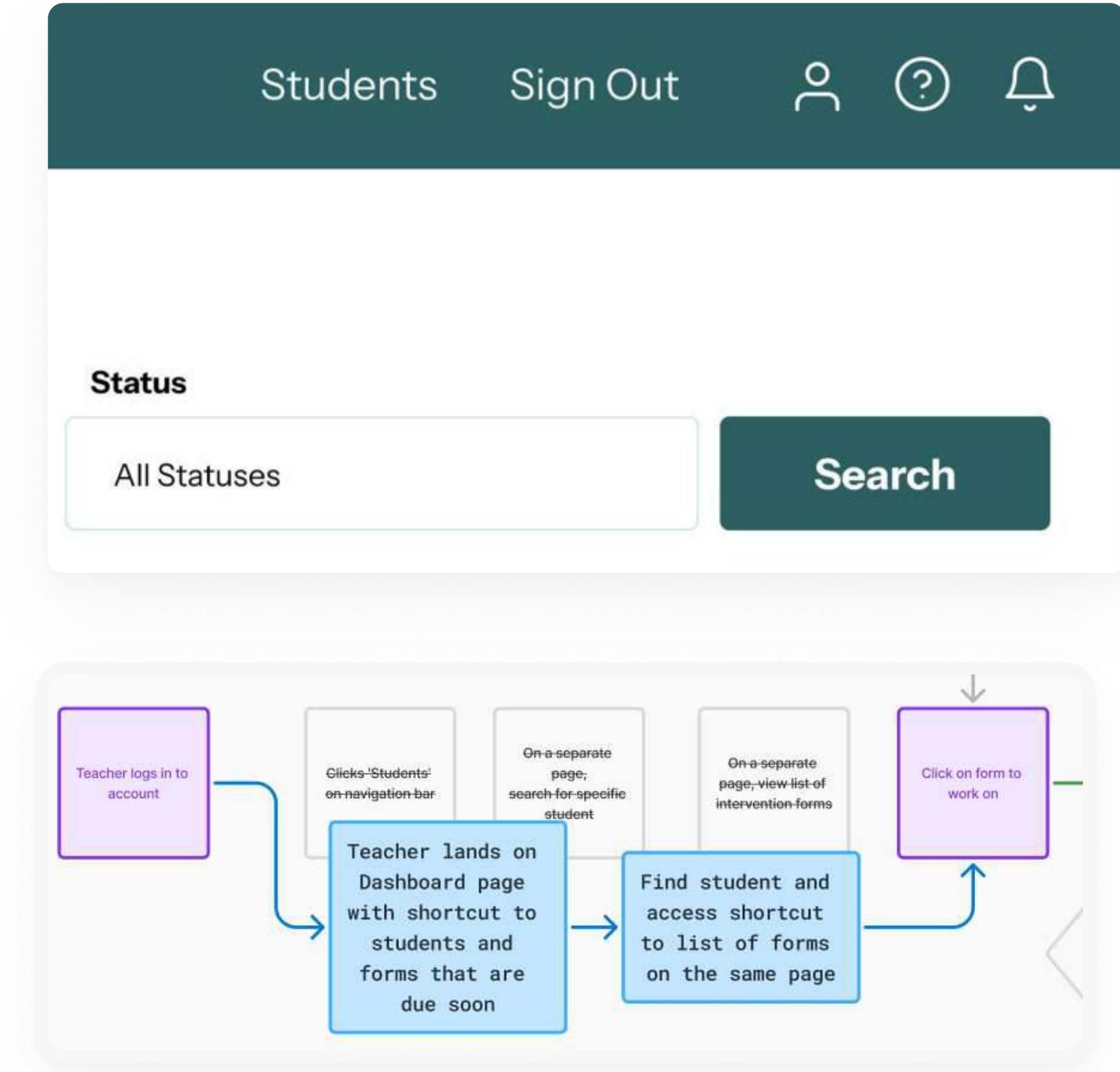
Perez, Mark Louie 03/05/2010 Grade 9

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 mobile application interface. At the top, there is a dark green header bar with the BEYONDSST logo on the left, and 'Students' and 'Sign Out' buttons on the right, along with icons for profile, help, and notifications.

The main content area is titled 'Dues Tracker & Stats'. It features three cards in the top row:

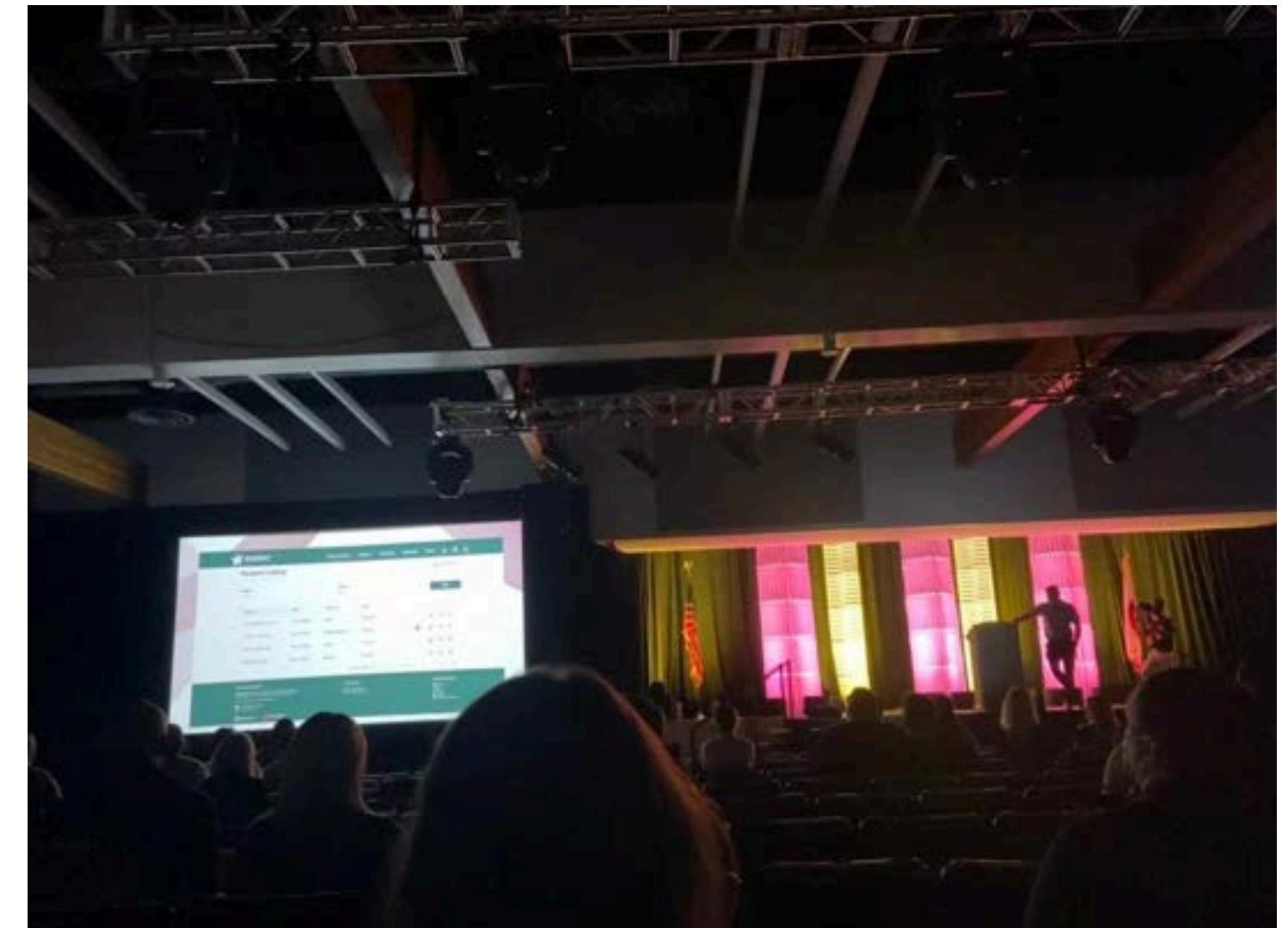
- 2 Progress Monitoring** due in 24 hours (red icon)
- 2 Student Forms** due in 23 hours (red icon)
- 6 Round Table Meetings** within 30 days (green icon)

Below this is a section titled 'Students Stats' with six cards:

Category	Value	Description
Current Students	143	Current Students
Successful Interventions	32	Successful Interventions
Ongoing Interventions	13	Ongoing Interventions
Referral from SEIS	1	Referral from SEIS
Transferring In	8	Transferring In
Transferring Out	0	Transferring Out

LAUNCH

# CodeStack Conference



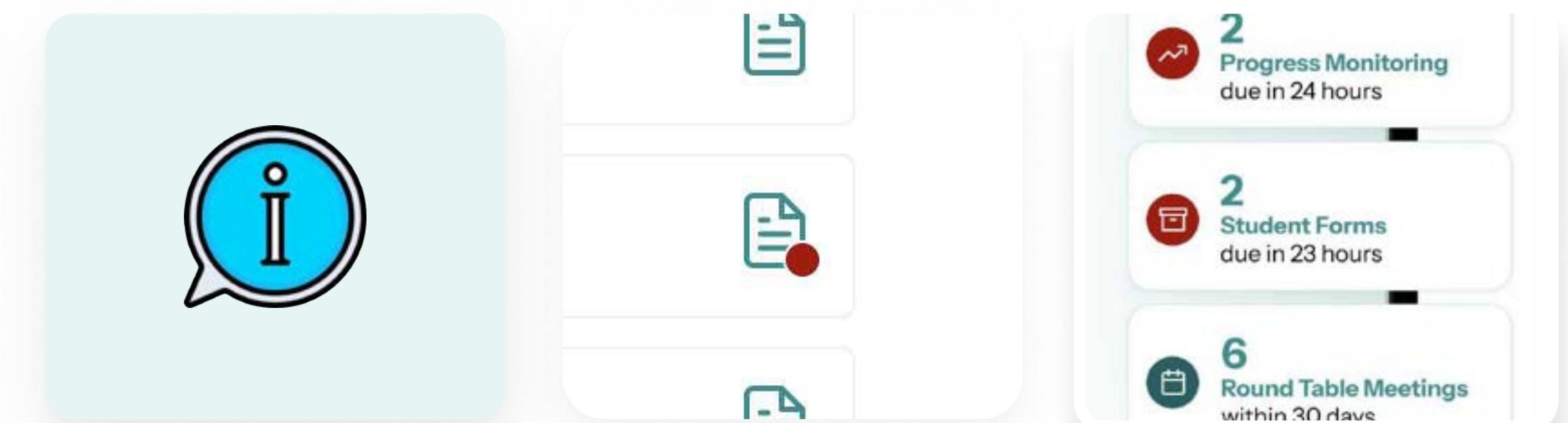
IMPACT

# 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.