



RELAY 

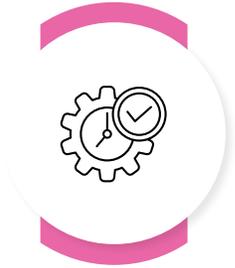


January 13th, 2026

Timberline Client Intro

relayhub.com

Goals and Purpose of Webinar



Share our progress

- What have we been doing together?
- Where are we today?



Begin to share Relay products and services

- Introduce Relay and overview the Relay approach (since you all know Timberline!) – how can we be better together!
- As we continue to evolve our long-term strategy, share products and services to gather feedback and educate our districts on what is potentially available.



We know the prospect of change can be daunting. What questions do you have?

- Q&A Time with clients to gather feedback and help provide more clarity.
- Depending on how many questions we receive, we can use these questions to build a common FAQ that we can answer and distribute.



Progress Update

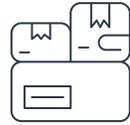
Progress & Engagement To Date



People

>25
Team 1-1
Sessions

>40
Hours
Meeting



Product

>25
Demo
Hours

Coordinator
Sandbox
Accts



Process

5+
Process
Meetings

WEEKLY
Claiming
Reviews



District feedback

170+
IA Districts
Today

>175
Webinar
Registrants



Product/Process Observations

Team Read Out

Challenges

Relay Enhancements



Data Readiness & Pre-Documentation

- Manual eligibility checks are time-consuming and error-prone
- If teachers don't tell us there was an amendment, we can over/under bill
- Staffing turnover (especially with paras) makes training and setup a recurring burden

- Monthly automated Medicaid eligibility checks and updates via Infinite Campus data imports
- Import IEP data from Achieve (via file upload) to reduce manual setup
- Training materials and ongoing support for onboarding and system usage for paraprofessionals



Staff Experience and Service Documentation

- Paras, who struggle with documentation
- Varying levels of Medicaid knowledge among staff Getting paras to log at all
- Teachers moving services to other areas of the IEP so we cannot bill. Student still receives the same care but becomes unbillable
- Staff logging for a student and listing them as absent, TTRAK will still bill this, causing over billing if TBS does not catch it
- TBS reports are easy to run but time consuming for both the district and TBS to make them usable

- Mobile-accessible logging allows paras to log services on phones
- Easy to use system for para documentation
- Role-based dashboards show provider activity (green/yellow/red status)
- Caseload management and provider log-in data support accountability and training
- Supports district-wide documentation—not just Medicaid-eligible students, allowing for paras to use one easy to use system, saving them time
- Relay validates attendance to ensure compliance and audit-proof logging



Claims Validation and Tracking

- Updating Google docs is time consuming and leaves a lot of room for error
- Reviewing denied claims is a very manual process and due to the number of denied claims each week it can cause a delay in claim adjustments

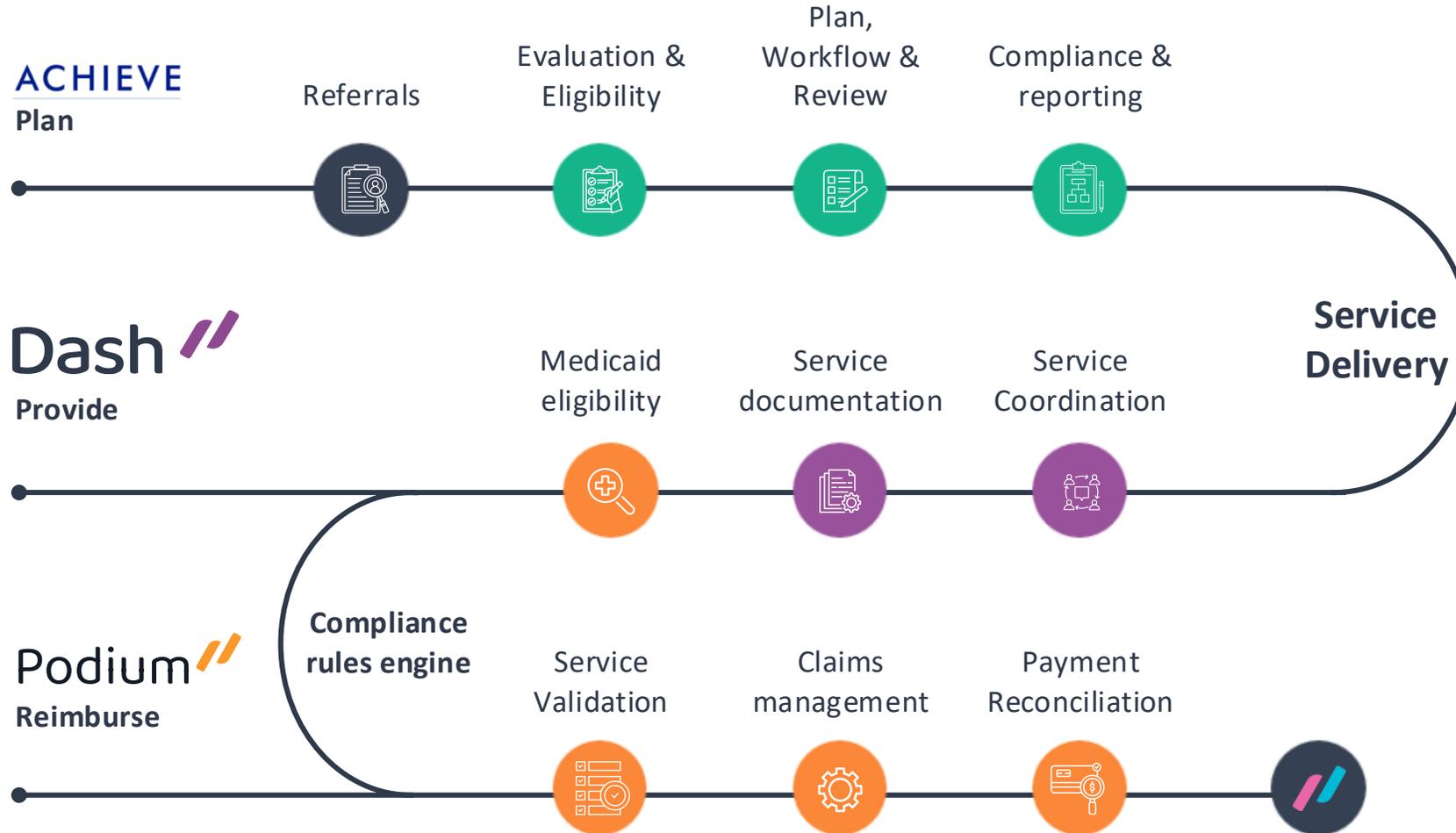
- Claim tracking dashboard shows real-time claim status (paid, held, denied)
- Denial reason codes and dollar amounts help prioritize correction efforts
- Claims can be held until supervised, corrected, and reviewed before submission
- Supports both managed (Relay submits) and supported (district submits) service levels



Product Demonstration

Special Services Journey

Service & Program Visibility



Student data security

Claims Validation – Context For Demo

Medicaid Eligibility Request in Bulk

Student Data

- Student Demographics
- Achieve File
- Parental Consent
- Dx Signed Date

Common Vendors:

- Student Demographics
- Achieve File
- Parental Consent
- Dx Signed Date



Claim Files

- Medicaid Eligibility Check
- Services from Parental Consent/IEP Date
- Services from Dx Signed Date
- PP, NR, SW and TR Services validation
- Nursing Sign off
- Under time or duplicate times are held in the system for review

Flex Reporting Examples - Service Break Down Report

RELAY Iowa ServicePortal
Welcome [redacted] My Account | Logout

[Home](#) | [Reports](#) | [Student Search](#) | [Help](#) | [Administration](#) | [Flex Analytics](#)

Recap

Q School Year

21/22

22/23

RECAP_CY23 Q1 (SFY23 Q3; FFY23 Q2) Federal share = 69.33%

IEP Level	District	Attendant services (Net)	Behavior Services (Net)	Health Services (Net)	Nursing (Net)	Transportation Services (Net)	Grand Total (GROSS)
Totals		\$3,677.68	8,786.05	\$61,770.20	\$94.30	\$1,998.92	\$110,092.54
Level 3	[redacted]	\$2,834.70	3,266.83	\$25,133.05	\$78.59	\$0.00	\$45,165.39

Q Check Date Year

22/23

23/24

RECAP_CY23 Q2 (SFY23 Q4; FFY23 Q3) Federal share = 68.13%

IEP Level Name (Student)	District	Attendant services (Net)	Sum(iff [Service Type] like '*T2001*' and	Behavior Services (Net)	Health Services (Net)	Nursing (Net)	Transportation Services (Net)	Grand Total (GROSS)
Totals		\$3,884.43	34.33752	\$34,854.23	\$187,378.13	\$2,355.47	\$6,163.79	\$486,...

Q IEP Level Name

Level 1

Level 2

Level 3

RECAP_CY23 Q3 (SFY24 Q1; FFY23 Q4) Federal share = 65.63%

IEP Level Name (Student)	District	Attendant services (Net)	Behavior Services (Net)	Health Services (Net)	Nursing (Net)	Transportation Services (Net)	Grand Total (GROSS)
Totals		\$0.00	132,885.75	\$140,772.09	\$941.29	\$0.00	\$420,276
Level 3	[redacted]	\$0.00	78,006.93	\$80,661.11	\$599.08	\$0.00	\$244,545

Q IEP Level Name

Level 1

RECAP_CY23 Q4 (SFY24 Q2; FFY23 Q1) Federal share = 64.63%

IEP Level Name (Student)	District	Attendant services (Net)	Behavior Services (Net)	Health Services (Net)	Nursing (Net)	Transportation Services (Net)	Grand Total (GROSS)
Totals		\$0.00	0.00	\$0.00	\$0.00	\$0.00	\$0.00
Level 1	[redacted]	\$0.00	0.00	\$0.00	\$0.00	\$0.00	\$0.00

relayhub.com | 9

Flex Reporting Examples - Gross vs Net Report

RELAY Iowa ServicePortal My Account | Logout

[Home](#)
[Reports](#)
[Student Search](#)
[Help](#)
[Administration](#)
[Flex Analytics](#)

No selections applied Selections

Finance (Gross/Net) CY 2023

Finance_CY23 Q1 (SFY23 Q3; FFY23 Q2) Federal share = 69.33%;

Student Name	Student UIC	District	Attendant services (Net)	Behavior Services (Net)	Health Services (Net)	Nursing (Net)	Transportation Services (Net)	Grand Total (GROSS)
Totals			\$3,677.68	8,786.05	\$89,095.92	\$94.30	\$1,998.92	\$110,092.87
			\$8.74	0.00	\$1,736.00	\$0.00	\$0.00	\$1,744.74

Finance_CY23 Q2 (SFY23 Q4; FFY23 Q3) Federal share = 68.13%

Student Name	Student UIC	District	Attendant services (Net)	Behavior Services (Net)	Health Services (Net)	Nursing (Net)	Transportation Services (Net)	Grand Total (GROSS)
Totals			\$3,884.43	34,854.23	\$187,378.13	\$2,355.47	\$6,163.79	\$486,381.05
			\$0.00	0.00	\$827.92	\$0.00	\$202.21	\$1,512.13

Finance_CY23 Q3 (SFY24 Q1; FFY23 Q4) Federal share = 65.63%

Student Name	Student UIC	District	Attendant services (Net)	Behavior Services (Net)	Health Services (Net)	Nursing (Net)	Transportation Services (Net)	Grand Total (GROSS)
Totals			\$0.00	132,885.75	\$140,772.09	\$941.29	\$0.00	\$420,279.13
			\$0.00	0.00	\$1,175.96	\$0.00	\$0.00	\$1,791.96
			\$0.00	0.00	\$2,798.20	\$0.00	\$0.00	\$4,264.16
			\$0.00	313.32	\$0.00	\$0.00	\$0.00	\$47.32

Finance_CY23 Q4 (SFY24 Q2; FFY23 Q1) Federal share = 64.63%

Student Name	Student UIC	District	Attendant services (Net)	Behavior Services (Net)	Health Services (Net)	Nursing (Net)	Transportation Services (Net)	Grand Total (GROSS)
Totals			\$0.00	0.00	\$0.00	\$0.00	\$0.00	\$0.00
			\$0.00	0.00	\$0.00	\$0.00	\$0.00	\$0.00



Relay Overview – What we learned in IA?

170+ Districts in Iowa

1000+ Districts across 24 States



Cedar Rapids CSD

Dubuque CSD

College Community CSD

Linn-Marr CSD

Cedar Falls CSD

Fort Dodge CSD

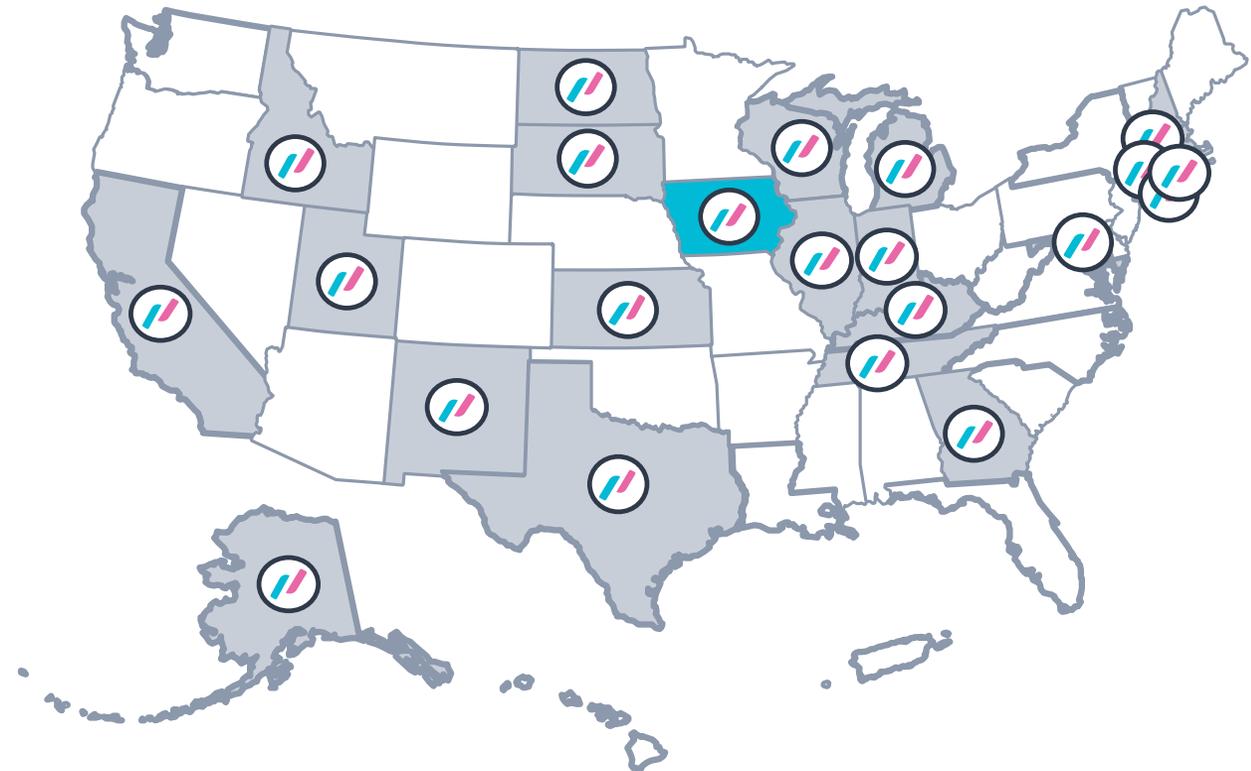
Ottumwa CSD

Muscatine CSD

Saydel CSD

Oskaloosa CSD

For more than 32 years, Relay has driven measurable results and lasting partnerships - earning a 99% client retention rate that reflects the trust and satisfaction of our customers.



Iowa 24/25 Results

Example Clients	SY 2023-2024 Medicaid Revenue	SY 2024-2025 Medicaid Revenue	2024-2025 Change in Medicaid \$
District 1	\$701,633	\$1,687,525	\$985,892 (140%)
District 2	\$294,026	\$507,191	\$213,165 (73%)
District 3	\$128,764	\$202,329	\$73,565 (57%)
District 4	\$725,772	\$1,218,443	\$492,671 (68%)
District 5	\$256,370	\$862,332	\$605,962 (236%)
District 6	\$523,400	\$921,019	\$397,619 (76%)



Key Takeaways

Navigating away from paper-based documentation to an electronic solution

Eliminating administrative burden of manual data entry with platform integration

Deeper insight into program with reporting functionality and dashboard analytics

Increased provider adoption rate with efficient documentation platform

IA Client Success Manager works with team to identify program gaps and help streamline processes



Services, Training and Support Review

Services: Go Forward Discussion



Service/Activity



Description



Prior Process (TBS)



Process (Relay)

Service/Activity	Description	Prior Process (TBS)	Process (Relay)
Onboarding and Data Gathering	Gathering rosters, documents, users, etc.	On-site meeting	Shared Basecamp/Virtual meeting
New Districts - Medicaid Forms	Forms required by IME, etc. To establish a New Medicaid District	Prefilled by TBS	Cost Based Service
User Account Mgmt	Managing accounts, logins, etc	Manual Process (TBS Coordinator)	District can make manual changes, bulk loader available, help center available for support
SIS Data Integration	Ongoing provision/update of the SIS data	Manual Process (TBS)	sFTP - Nightly (Tech Help Req'd)
IEP Data Integration	Ongoing provision/update of the IEP data for All Students	Manual Process (TBS)	Monthly Basecamp
Billing and Claiming Frequency	The frequency of billing and claim submission	Daily	Monthly
Transportation Log Processing	Process of collecting and processing logs	Paper-based, manual	Templated, imported
Claims Management	Eligibility mgmt., claims create/submit, clean-up, imports	Ongoing, manual	Ongoing, automated validations
Rejected Claims, Gap Reports, Rev Reports	Reports to understand Medicaid revenue, denials, etc	Monthly	Flex and Podium Reporting, no billing for TAO, automated checks
Missing supervisor approvals	Notifying clients of services that are still awaiting approval	Monthly Notifications	Embedded in Product
Quality Assurance	Compliance with rules and requirements for auditing purposes	Quarterly	Software Validation Monthly, Random Sampling Annually
Software Training	On-site or virtual training of new/existing staff	First Year - Annual Ongoing - Onsite/Virtual	First Year - Annual Ongoing - Annual Virtual Self Service Training Tools
Ongoing Support Tickets	The support of providers and administrators - answering day to day questions and needs	Daily (TBS Coordinator)	Daily (CSM), help@relayhub.com
Provider Outreach	Reminding providers to submit logs, due dates, etc.	Email/Onsite (Client Specific)	System Announcements, Automated Email Reminders relayhub.com



Summary & Next Steps

Relay & Timberline – Better Together!



Additional Claiming Opportunities

- Identify prescribed services not being claimed
- Visibility into what services are getting held up and why
- Growing staff accountability
- Future proofed for Medicaid expansion



Major Time Savings in Relay

- Reduce data entry by provider staff
- Sync data to avoid lags
- Less time spent on Medicaid overall with better customer support



Compliant, Secure System

- Automate annual service level and SPA updates
- Validate each service before claim submission
- Deploy regular security patches to platform

Next Step



Questions?



District Thoughts & Survey



DON'T MISS!
Fill out the survey for
a chance to win a
\$25 Gift Card.



Appendix

Summary



Updates/Enhancements

- User Friendly:
 - Streamlined group logging
 - Device agnostic logging
 - Drop downs and auto comments
- Data Accuracy/Timeliness:
 - Achieve and other data imports
- District Reporting:
 - Access to gap analysis reports
 - State level reporting
- Automated Validations:
 - Attendance through data import
 - Medicaid Eligibility Check
 - Services from Parental Consent/IEP Date
 - Services from Dx Signed Date
 - PP, NR, SW and TR Services validation
 - Nursing Sign off
 - Under time or duplicate times are held in the system for review.
- User Creation:
 - District admin can create without approval step
- Notifications:
 - Reminders to providers on missing logs to increase logging



Changes

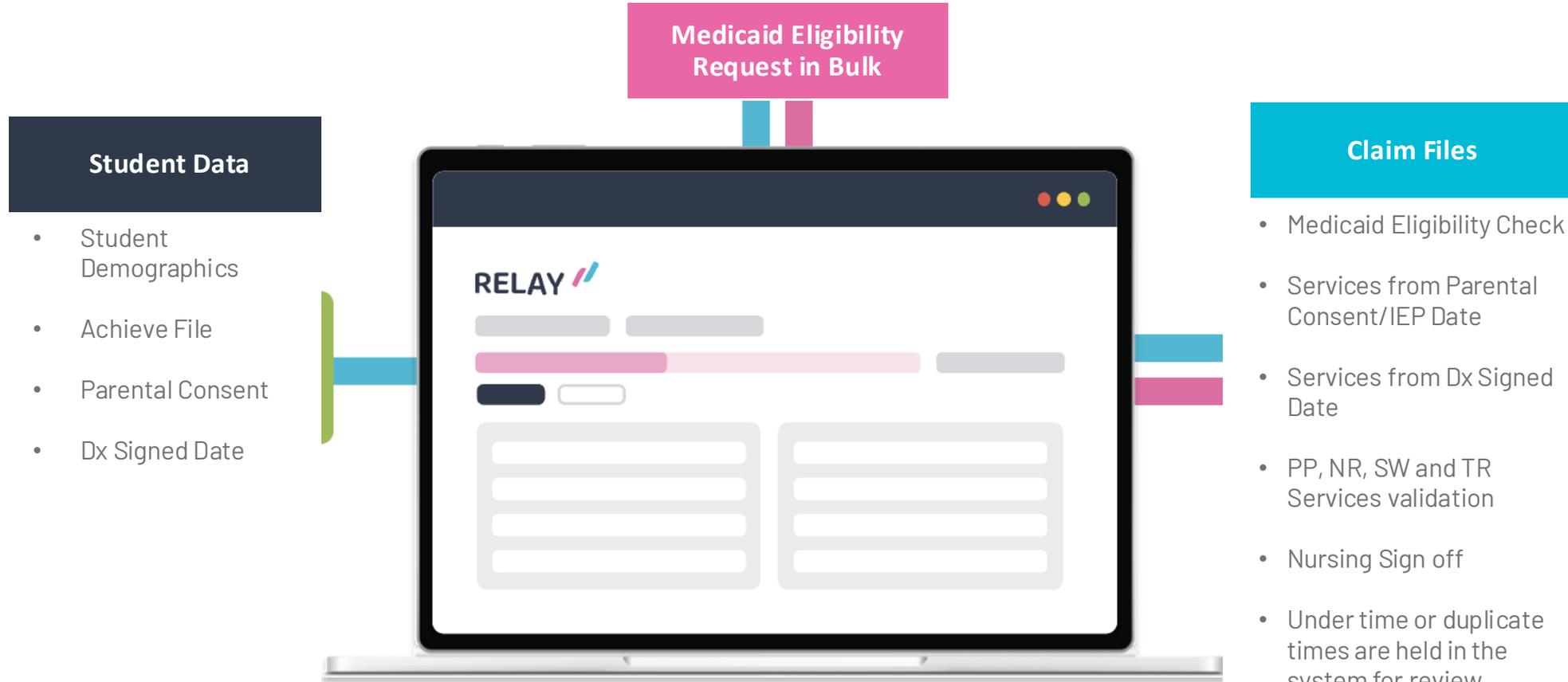
- Billing and Claiming Submission is done Monthly vs. Daily
- Scope of Work: Team will focus on data verification/gap analysis and follow up vs data creation
- User Specific Virtual Training: Once the initial in person is complete leverage virtual training and online resources/recordings
- Templates no longer created for each user
 - Calendar and prefill
 - Service type drop downs
 - Individual vs group manually defaulted
 - Behavior vs health
 - Case load management done by Admin and/or Provider
- Manual district logging intervention done via reports and provider reminders via email/phone

Discussion Guide

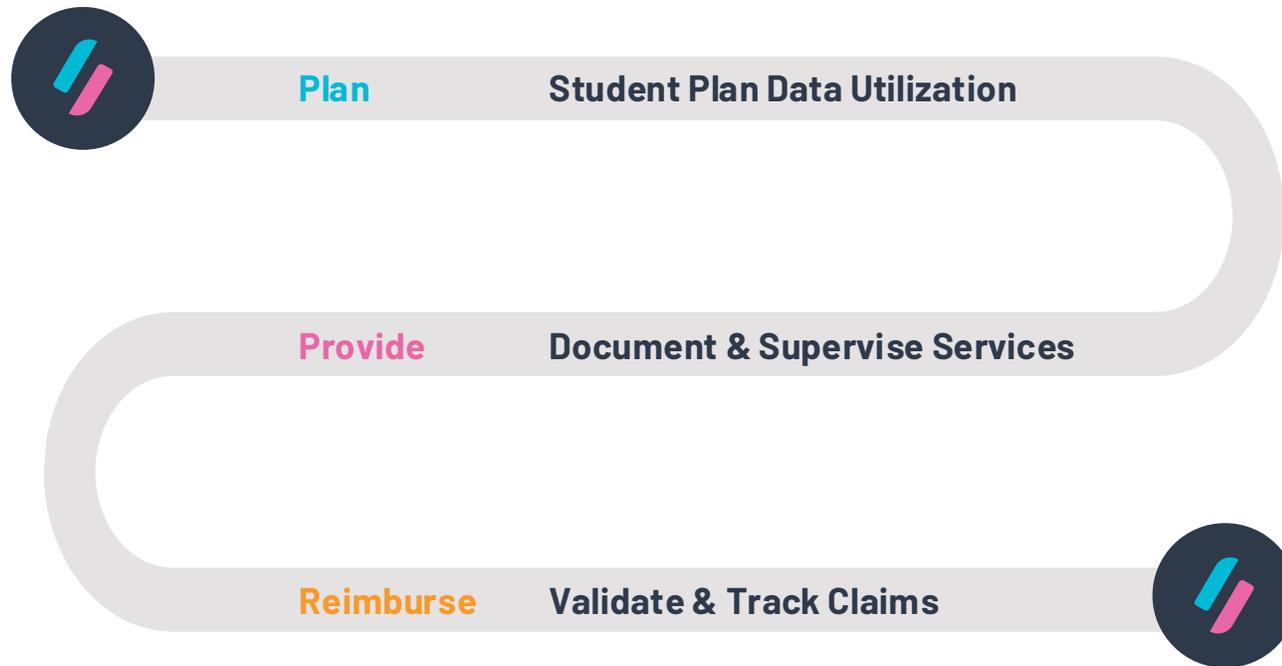
- 01 Progress Update
- 02 Relay Overview
- 03 Solution Demonstration
- 04 Services, Training & Support Review
- 05 Next Steps Discussion



Claims Validation



Top 3 Relay Benefits in Iowa



Time Savings & Compliance

Data Imports with Achieve IEP and Infinite Campus for streamlined data transfers, ensuring faster processing and higher compliance



Automated Medicaid Eligibility

Identifies Medicaid-eligible students more frequently, improving accuracy and increasing reimbursement opportunities



Enhanced Insights & Accountability

Provides dashboards for real-time insights into program health and provider accountability, supporting data-driven decision-making

*Relay never needs direct access to your systems to import data

Product/Process Observations

Team Read Out

Challenges



Data Readiness & Pre-Documentation

- Manual eligibility checks are time-consuming and error-prone
- If teachers don't tell us there was an amendment, we can over/under bill
- Staffing turnover (especially with paras) makes training and setup a recurring burden



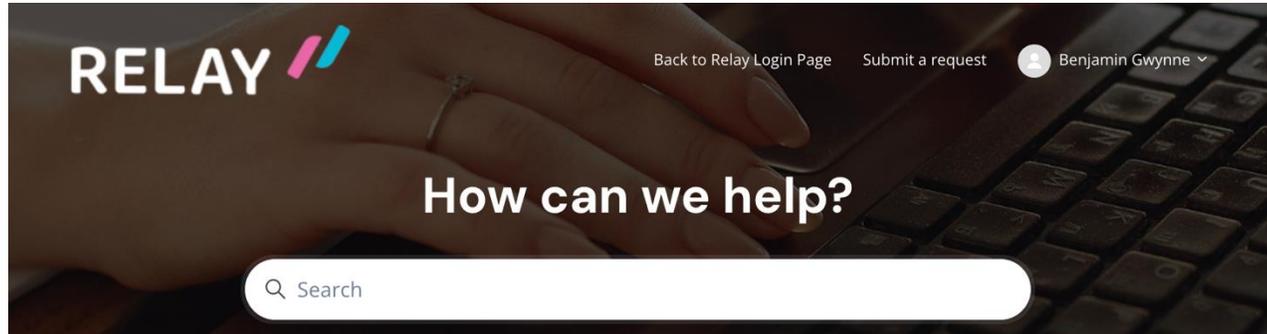
Staff Experience and Service Documentation

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- Teachers moving services to other areas of the IEP so we cannot bill. Student still receives the same care but becomes unbillable
- Staff logging for a student and listing them as absent, TTRAK will still bill this, causing over billing if TBS does not catch it
- TBS reports are easy to run but time consuming for both the district and TBS to make them usable



Claims Validation and Tracking

- Updating Google docs is time consuming and leaves a lot of room for error
- Reviewing denied claims is a very manual process and due to the number of denied claims each week it can cause a delay in claim adjustments



Quick Videos



Service Entry - The Basics

Learn the basics of service entry



Editing & Deleting a Service

Learn how to edit or delete a service log



Service Entry - Quick Log Functionality

Learn how to use the quick log feature



Managing Your Caseload

Learn how to manage your caseload

Additional Resources



General Videos



Health Related Service Provider Resources

Explore



Blog



Webinars

Popular articles

Managing Your Caseload: A Step-by-Step Guide for Efficient Caseload Management

The Basics of Service Entry - A Step-by-Step Guide for Initial Service Entry

Service Entry - Quick Log Functionality

How do I Enter Services for Multiple Students? A Guide to Efficient Service Entry

How to Build and Manage Student Groups for Efficient Service Documentation

Supervision - A step by step guide on approving services entered by supervised providers.

Still need help?

Our team of experts are available and just a click away

Contact us

Video Library

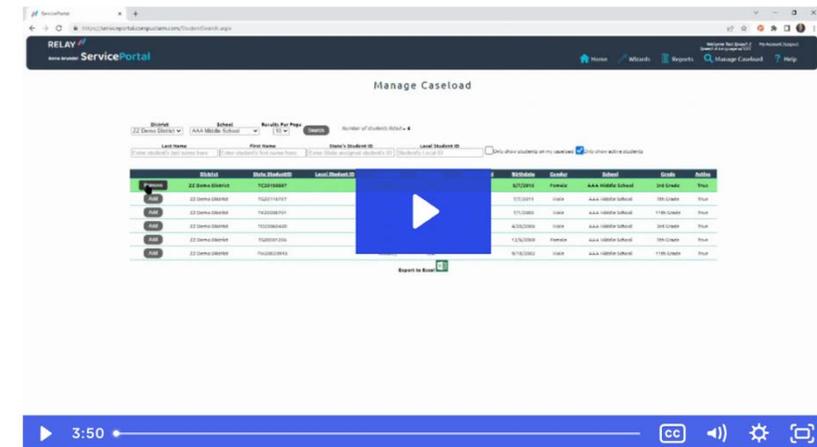


Michael Dunkle

Updated 6 months ago

Quick videos demonstrating Service Portal functionality

Manage Your Caseload - learn the basics



Progress Update



People = Who are we?



People: What motivates our teams, who are the people and what commonalities and differences do we have? **Common People, Common Mission!**

Products = What do we have?



Products: What tools and technologies do we have available in our expanded portfolio? What may best serve clients? **Great, evolving Tools in Relay to help!**

Process = How we do it?



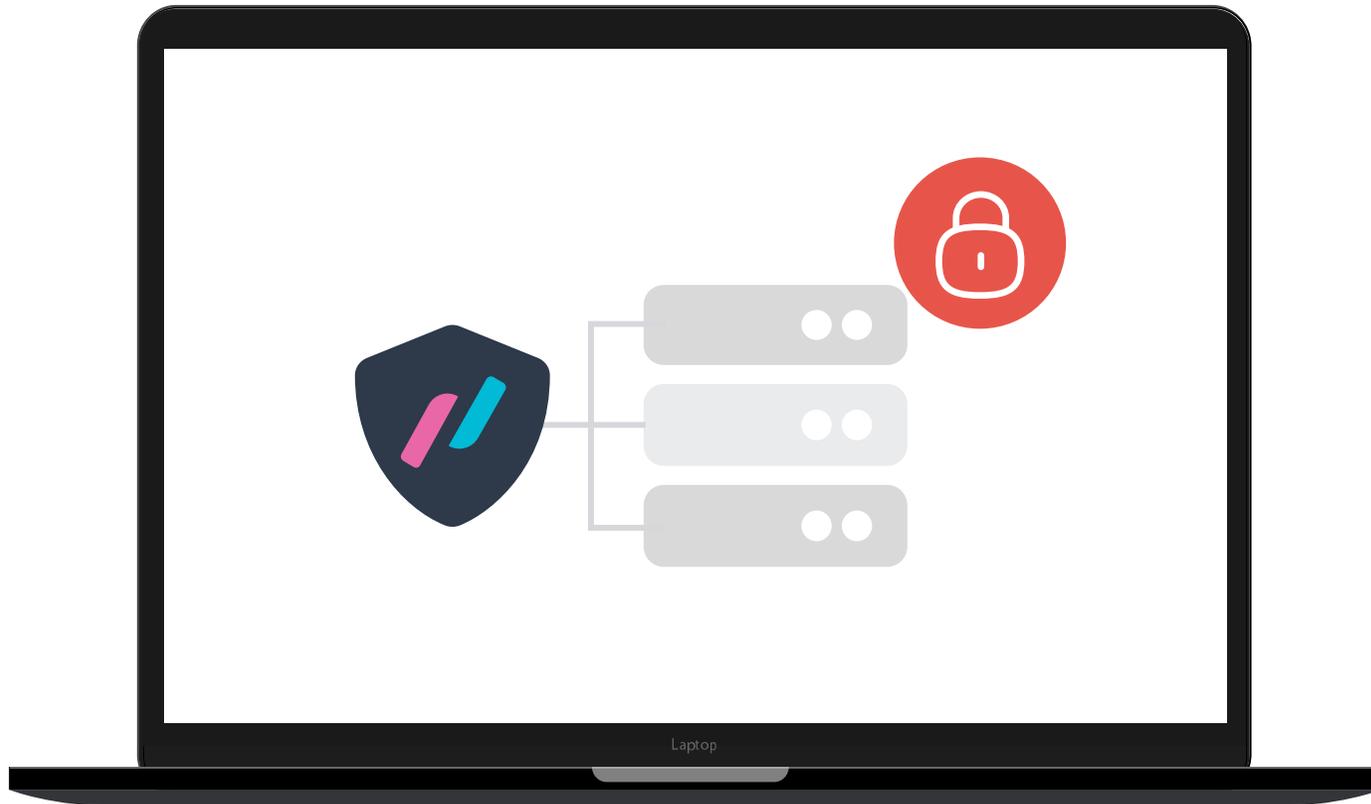
Process: What key activities do our teams take to complete our work? What do we ask our clients to do? **Lots of manual, non-automated process that can be improved (TBS), great auditing that can be further adapted (Relay)**

What's Next?

We want to start to validate our learning through the voice of our clients. We want to share, listen and learn directly from Districts!

Relay Security Highlights

RELAY //



HIPAA, FERPA Compliant

SOC 2 Certified Hosting Environment

Qualys Webserver Grade A Test Results

Dedicated Cyber Security Resource with NIST
NCSP Certifications that Leads Company Security
Process and Training Plans

Strong Password Policies and
Automated Timeouts

Data encryption in transit & at rest

Third Party Penetration Testing and continuous
remediation process for issue resolution

Regular backups and disaster recovery plan