

Digital Behavioral Health: A Practical Playbook for Healthcare Operations Teams **Operations Toolkit**





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Table of Contents

About CTRC	1
Executive Quick Start Guide	2
Core Implementation Deliverables	2
Start With the Problem You Are Solving	3
Modality Selection: Choosing the Right Tool for the Right Workflow	3
Building Operationally Reliable Telebehavioral Workflows	5
Privacy, Security, and Safety Operations	6
Payment, Billing, and Financial Sustainability	7
Build Documentation Into Workflows	7
Infrastructure and Technical Readiness	8
Workflow and Change Management	9
Measuring Performance and Operational Success	10
Vendor Due Diligence Checklist	11
Provider-Type Operational Considerations	11
Strategic Operational Considerations	12
Operational Calls to Action	13
References	14

ABOUT CTRC

The California Telehealth Resource Center (CTRC) offers no-cost, unbiased training, educational resources, and technical assistance to help California providers and patients get the most from telehealth. As the federally designated telehealth resource center for the region, we offer unbiased tools and services based upon proven telehealth practices. We create lasting change and improvement by focusing on implementation, sustainability, reimbursement and policy, integration, workflows, and patient/provider adoption.

As part of the National Consortium of Telehealth Resource Centers and the OCHIN family of companies, CTRC assists thousands of providers and patients annually. We have extensive experience supporting the healthcare safety net, rural and urban providers, and patients and families throughout California who would otherwise be unable to access quality healthcare due to geographic isolation, language/cultural barriers, lack of insurance, disability, homelessness, and more.



Digital Behavioral Health Operations Toolkit

A Practical Playbook for Healthcare Operations Teams

Digital behavioral health programs are increasingly becoming a core component of healthcare delivery across California and nationally. Rising behavioral health demand, workforce shortages, emergency department boarding, and limited specialty access continue to challenge healthcare organizations, particularly in rural and underserved communities.

For operations teams, the success of telebehavioral health is rarely determined by technology alone. Sustainable programs depend on operational readiness, workflow integration, staff training, reimbursement alignment, privacy safeguards, patient engagement, and continuous performance improvement.

This toolkit is designed to help healthcare operations leaders, program managers, implementation teams, clinical operations staff, and digital health coordinators build and optimize telebehavioral health services in practical, scalable, and compliant ways.

Core Implementation Deliverables

Every digital behavioral health program should produce a standardized set of operational documents and workflows before scaling services.

Key implementation deliverables include:

- Service definition and scope statement
- Modality selection guidelines
- Workflow maps and staffing models
- Payer coverage and reimbursement matrix
- Patient education and consent materials
- Vendor due diligence documentation
- Measurement and reporting plans
- Safety and escalation protocols

Organizations that formalize these operational components early are typically better positioned to scale services while reducing workflow confusion, denials, and patient safety risks.

Start With the Problem You Are Solving

Telebehavioral health programs should begin with a clearly defined operational problem statement.

Common challenges include:

- Long behavioral health wait times
- Emergency department psychiatric boarding
- High referral leakage
- Delayed specialty access
- Workforce shortages
- Poor follow-up after crisis events
- Access barriers related to transportation or geography

A simple scope statement can help align operations, clinical leadership, and executive priorities:

“We will use [modality] for [population] to solve [problem], measured by [metric], with [escalation path] when needed.”

Clear scope definition prevents workflow sprawl and helps organizations focus implementation efforts on measurable operational outcomes.

Modality Selection: Choosing the Right Tool for the Right Workflow

Operations teams should avoid treating all digital health services as interchangeable. Different care scenarios require different modalities, workflows, staffing structures, and reimbursement pathways.

Telehealth Visits

Best suited for:

- Real-time therapy visits
- Medication management
- Follow-up behavioral health appointments
- Integrated behavioral health within primary care

Operational considerations:

- Video preferred when clinically appropriate
- Audio-only workflows may still be necessary for patient access
- Clear escalation pathways to in-person care should exist

eConsults

Best suited for:

- Primary care specialty support
- Referral guidance
- Behavioral health collaboration
- Psychiatric consultation prior to transfer

Operational considerations:

- Closed-loop communication workflows
- Structured documentation templates
- Referral tracking processes

Remote Therapeutic Monitoring (RTM)

Best suited for:

- Therapy adherence monitoring
- Behavioral symptom coaching
- Treatment engagement support

Operational considerations:

- Eligible clinician tracking
- Patient communication documentation
- Escalation for symptom deterioration

Remote Patient Monitoring (RPM)

Best suited for: High-risk chronic disease management
Physiologic monitoring
Ongoing symptom tracking

Operational considerations: Defined review cadence
Alert escalation protocols
Staffing models for monitoring review

AI-Enabled Administrative Workflows

Best suited for: Documentation assistance
Patient message drafting
Administrative task reduction

Operational considerations: Human review requirements
Governance policies
Clear boundaries prohibiting unsupervised clinical advice

Building Operationally Reliable Telebehavioral Workflows

Strong workflows are one of the most important predictors of digital health sustainability.

Operations teams should standardize:

- Pre-visit screening processes
- Consent collection workflows
- Privacy checks
- Safety planning
- Follow-up scheduling
- Interpreter coordination
- Documentation templates
- Escalation pathways

Privacy, Security, and Safety Operations

Behavioral health services involve highly sensitive patient information, making operational privacy and safety planning essential.

HIPAA and Security Considerations

Operations teams should collaborate closely with IT and compliance departments to ensure:

- HIPAA-compliant telehealth platforms
- Business associate agreements (BAAs)
- Role-based access controls
- Encryption in transit and at rest
- Audit logging
- Multi-factor authentication
- Secure remote work environments
- Incident response plans

Security planning should include both organizational systems and third-party vendors.

Accessibility and Civil Rights Compliance

Digital behavioral health programs should support:

- Interpreter services
- Captioning
- Screen-reader compatibility
- Accessible patient instructions
- Alternative communication method

Accessibility should be built into procurement and workflow planning from the start rather than added later.

Clinical Safety Planning

Operational safety protocols should define:

- Crisis escalation thresholds
- After-hours workflows
- Emergency response procedures
- Patient location verification
- Technology disconnection procedures
- Warm handoff workflows

Programs should also clearly communicate what the service does not monitor or manage.

Payment, Billing, and Financial Sustainability

Digital behavioral health programs often fail financially when reimbursement workflows are addressed too late.

Operations and revenue cycle teams should build payer matrices that verify:

- Coverage by modality
- Audio-only reimbursement
- Eligible provider types
- Required modifiers
- Documentation standards
- Prior authorization requirements
- Place of service rules
- Reimbursement variability by payer

Organizations should not assume payer consistency across:

- Medicare
- Medicare Advantage
- Medi-Cal
- Medi-Cal managed care
- Commercial payers
- Tribal/IHS programs
- VA programs

Build Documentation Into Workflows

Operational teams should ensure EHR templates capture:

- Modality used
- Consent documentation
- Time requirements
- Device review documentation
- Patient communications
- Medical necessity language

Incomplete documentation remains one of the most common causes of telehealth denials and audit findings.

Infrastructure and Technical Readiness

Digital behavioral health depends heavily on operational infrastructure.

Connectivity Planning

Healthcare organizations should evaluate:

- Broadband reliability
- Cellular coverage
- Clinical site connectivity
- Redundant internet options
- Patient internet limitations

Plan alternatives for patients facing connectivity barriers, including:

- Audio-only workflows
- Community access points
- Loaner devices
- In-clinic telehealth rooms

Platform and Integration Planning

Platforms should support:

- Multi-party visits
- Interpreter integration
- Secure messaging
- Accessibility features
- Device integration
- EHR documentation workflows

Operational inefficiencies often increase significantly when digital platforms are poorly integrated into existing workflows.

Workflow and Change Management

Successful telebehavioral health implementation requires structured change management.

Identify Operational Champions

Programs should designate:

- One clinical champion
- One operational champion

These leaders help align workflows, resolve barriers, and maintain implementation momentum.

Role-Based Training Matters

Training should be customized for:

- Schedulers
- Medical assistants
- Nurses
- Behavioral health clinicians
- Billing teams
- IT support staff
- Front desk personnel

Training should include scripts, escalation workflows, troubleshooting guidance, and patient engagement strategies.

Avoid Unfunded Operational Burden

Operations teams should clearly define:

- Who reviews incoming data
- Who contacts patients
- Who documents time
- Who manages onboarding
- Who handles technical support

Unclear staffing ownership frequently contributes to clinician burnout and workflow instability.

Measuring Performance and Operational Success

Operational measurement should remain practical, actionable, and continuous.

Healthcare operations teams should focus on a small set of trusted metrics reviewed consistently over time.

Recommended Metrics

Access Metrics

- Time to appointment
- Visit completion rates
- No-show rates
- Referral closure rates
- Avoided transfers

Workflow Reliability Measures

- Consent documentation rates
- Successful connection rates
- RPM data transmission rates
- Interpreter utilization tracking

Balancing Measures

- Consent documentation rates
- Successful connection rates
- RPM data transmission rates
- Interpreter utilization tracking

Accessibility Measures

Stratify metrics whenever possible by:

- Language preference
- Disability status
- Rurality
- Broadband access
- Device access

Accessibility monitoring helps identify unintended barriers to care access that may otherwise remain invisible in aggregate reporting.

Vendor Due Diligence Checklist

Before selecting digital behavioral health vendors, operations teams should evaluate:

- Clinical fit and evidence base
- EHR interoperability
- Security and HIPAA compliance
- Accessibility support
- Data ownership terms
- AI governance practices
- Reliability and uptime
- Reporting capabilities
- Training support
- Total cost transparency

Vendor evaluation should involve operational, clinical, compliance, IT, and revenue cycle stakeholders whenever possible.

Provider-Type Operational Considerations

Rural Hospitals and CAHs

Telebehavioral health can help:

- Reduce emergency department boarding
- Support psychiatric crisis response
- Improve transfer coordination
- Expand specialty access

Regional partnerships may improve sustainability and workforce coverage.

RHCs

RHCs can integrate behavioral health into primary care through:

- Follow-up telehealth visits
- Medication management
- Collaborative care workflows
- Coordinated chronic disease management

FQHCs and CHCs

Safety-net organizations should prioritize accessible telehealth design that supports patients with varying language, technology, and connectivity needs.

Organizations should also:

- Ensure interpreter availability
- Utilize accessible platforms
- Support culturally responsive care
- Align workflows with PPS/APM billing requirements
- Coordinate managed care documentation standards

Community Behavioral Health Providers

Smaller practices should focus heavily on:

- Consistent documentation
- Privacy safeguards
- Crisis protocols
- Audio-only billing verification
- Standardized workflows to reduce audit risk

Strategic Operational Considerations

Digital behavioral health is increasingly becoming part of broader healthcare transformation initiatives rather than a standalone virtual care program.

Operations teams should anticipate continued evolution in:

- Hybrid care delivery models
- AI-enabled administrative workflows
- Behavioral health integration models
- Remote patient engagement strategies
- Broadband and digital access initiatives
- Value-based reimbursement structures

Organizations that build flexible, scalable workflows now will be better positioned to adapt to future operational, policy, and reimbursement changes.

CTRC Operational Calls to Action

CTRC encourages healthcare operations teams to:

- Engage revenue cycle and compliance teams early in planning
- Build patient access & accessibility considerations into operational design
- Develop measurable implementation goals before scaling
- Create structured pilot programs before organization-wide expansion
- [Telehealth Technology Needs & Readiness Assessment](#)
- [Digital Health Payment Guide - California Telehealth Resource Center](#)
- Explore CTRC AI governance and vendor evaluation tools before implementing AI-enabled solutions



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