

Telehealth Readiness Checklist

For treatment centers adding virtual care. Work through each section before you launch, so telehealth expands access without creating compliance or billing gaps. Built for behavioral health, start to finish.

THE RULE OF THUMB: Telehealth is core infrastructure, not a side offering. Design the services, licensing, compliance, billing, and workflows together. A great in-person clinician is not automatically ready for video.

1. Services you will offer virtually

- ☐ Individual therapy and group therapy
- ☐ Telepsychiatry and medication management
- ☐ Mental health assessments and intake
- ☐ Virtual IOP or other structured levels of care
- ☐ Telehealth addiction treatment, including medication for opioid use disorder where permitted

2. Technology and platform

- ☐ Secure, HIPAA-compliant video platform (never consumer video apps for care)
- ☐ Audio-only backup for patients with limited connectivity, where the payer allows it
- ☐ A simple patient guide: device with camera, stable internet connection, quiet private space

3. Licensing and compliance

- ☐ Clinician licensure verified for every state where your patients are physically located
- ☐ Documented informed consent for telehealth on file for each patient
- ☐ Privacy and security safeguards, encryption, and a written telehealth policy

4. Insurance and billing

- ☐ Coverage confirmed per plan (Medicare covers behavioral telehealth on a permanent basis)
- ☐ Correct telehealth codes and place-of-service set up before the first claim
- ☐ Audio-only and video rules checked with each insurance provider, in writing

5. Clinical workflows

- ☐ Virtual intake, scheduling, and follow-up systems in place
- ☐ A written crisis and safety protocol for remote sessions (local resources, emergency steps)
- ☐ Documentation, no-show, and re-engagement processes adapted for telehealth appointments

READY TO LAUNCH

Start with one or two services, prove the workflow with a small group of patients, then expand. Keep clinicians at the center: telehealth extends their reach, it never replaces their judgment.