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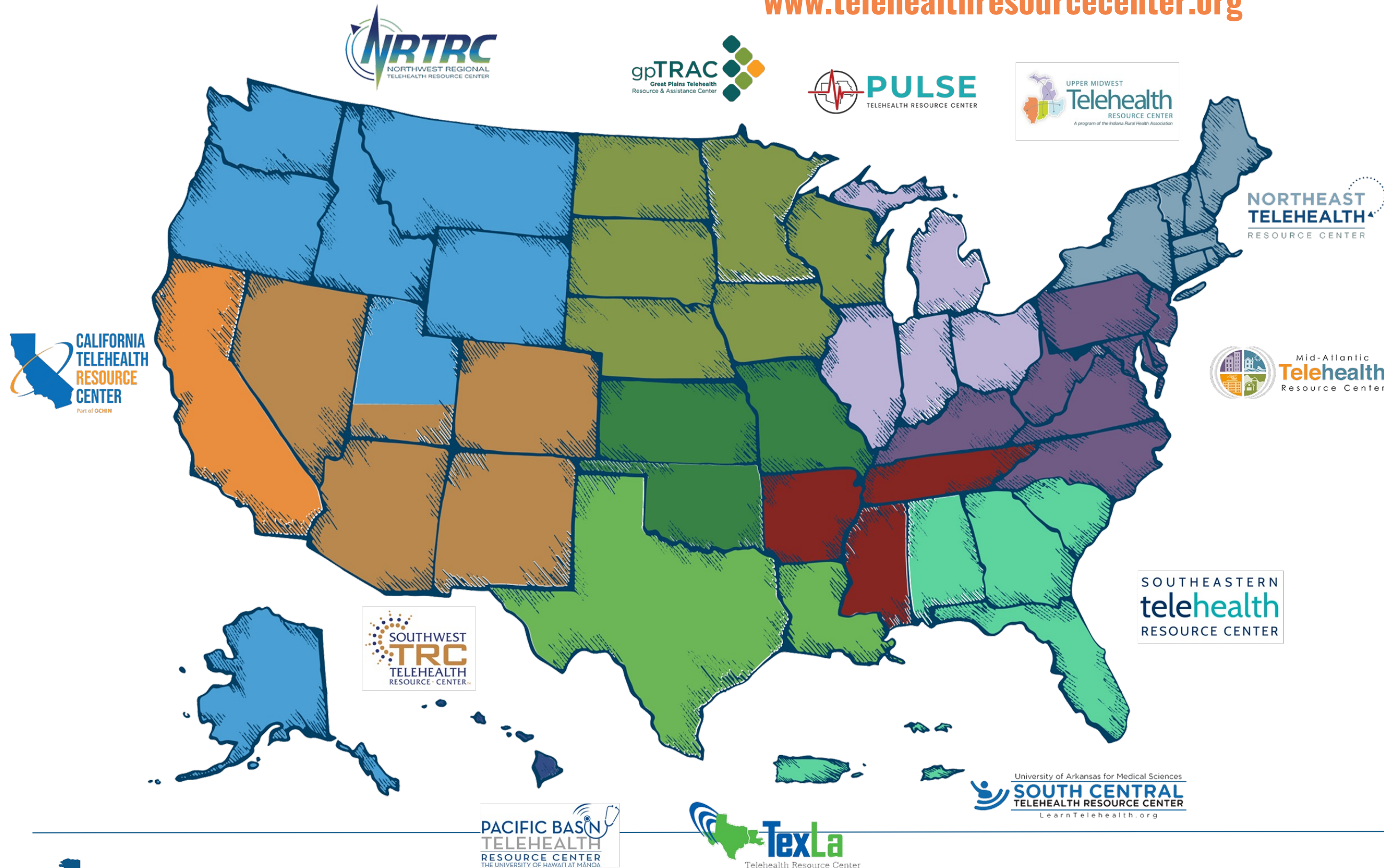
The Importance of Operations Planning for Telehealth: How to Develop a Plan that Works

August 20, 2026



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THE IMPORTANCE OF OPERATIONS PLANNING FOR TELEHEALTH



How to Develop a Plan that Works

DISCLAIMERS

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OBJECTIVES



- **Importance of Building a Plan**
- **Identifying Needed Elements**
- **Preparing for the Future**



If someone new joined your team tomorrow, could they figure out how your program operates?



**That's where an operations plan
comes in!**



WHY OPERATIONS PLANNING MATTERS

TURNING “WHAT CAN WE DO?” INTO “WHAT WE CAN DO!”

- Can turn a discrete operation into a sustainable program
- Creates needed consistency no matter program size
- Reduces reliance on individual staff knowledge
- Supports scalability
- Allows useable training



WITH A PLAN



**PRESERVED KNOWLEDGE
INDEPENDENT OF STAFF**



**CAN DUPLICATE SUCCESSFUL
PROCESSES**



**QUESTIONS CAN BE
ANSWERED CONSISTENTLY**

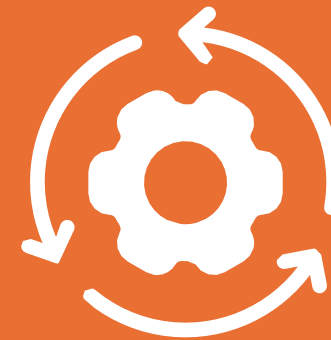


**CAN DETERMINE WHAT ISN'T
WORKING AND FIX IT**

WITHOUT A PLAN



**VULNERABLE TO STAFF
TURNOVER**



**SUCCESSFUL PROCESSES ARE
NOT UNDERSTOOD**



**ANSWERS TO QUESTIONS MAY
VARY**



**UNKNOWN ISSUES STALLING
IMPROVEMENT**



A telehealth program is only as reliable as the plan that supports it.

HOT The big stories of the **COVID-19 PANDEMIC**



**REAL EXAMPLE:
COVID-19**



OPERATIONS PLANNING TIMELINE

WHEN SHOULD I START?

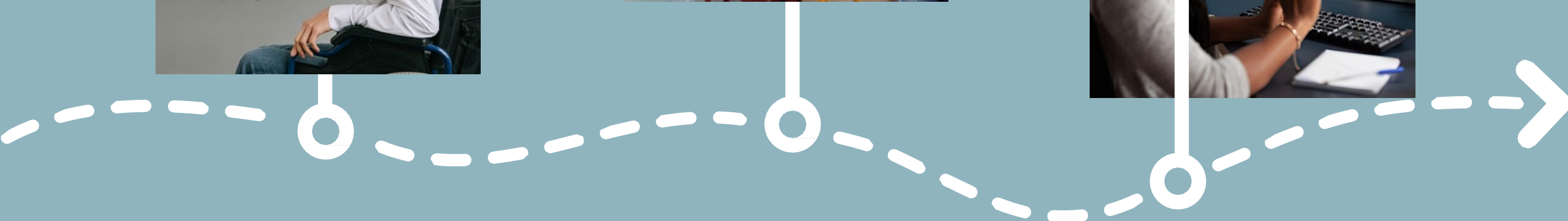
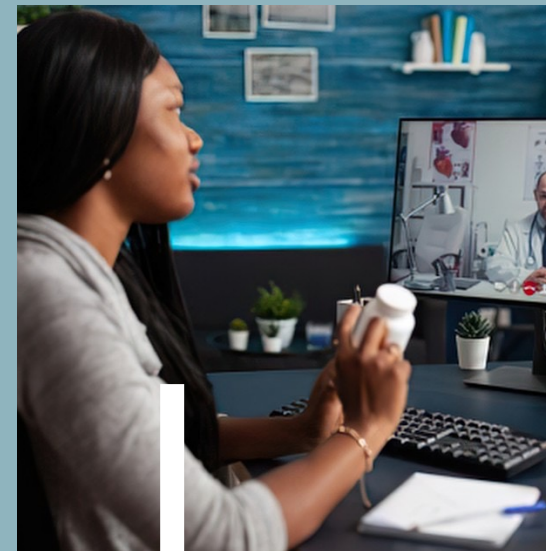
EXSISTING PROGRAMS

- Don't have a plan? Start one!



NEW PROGRAMS

- Don't have a program? Start with a plan!





WHAT IS AN OPERATIONS PLAN

ANSWERING QUESTIONS

- The goal of an operations plan is to answer questions in practical, actionable terms
 - *Who does what?*
 - *When and how do they do it?*
 - *What tools and resources do they need?*
 - *What happens when the usual process doesn't work?*
 - *How do we know the process is working?*

WHAT IT ISN'T

Keep your operations plan focused. Separate (but related) documents include a Business/Marketing Plan and a Technology Manual.





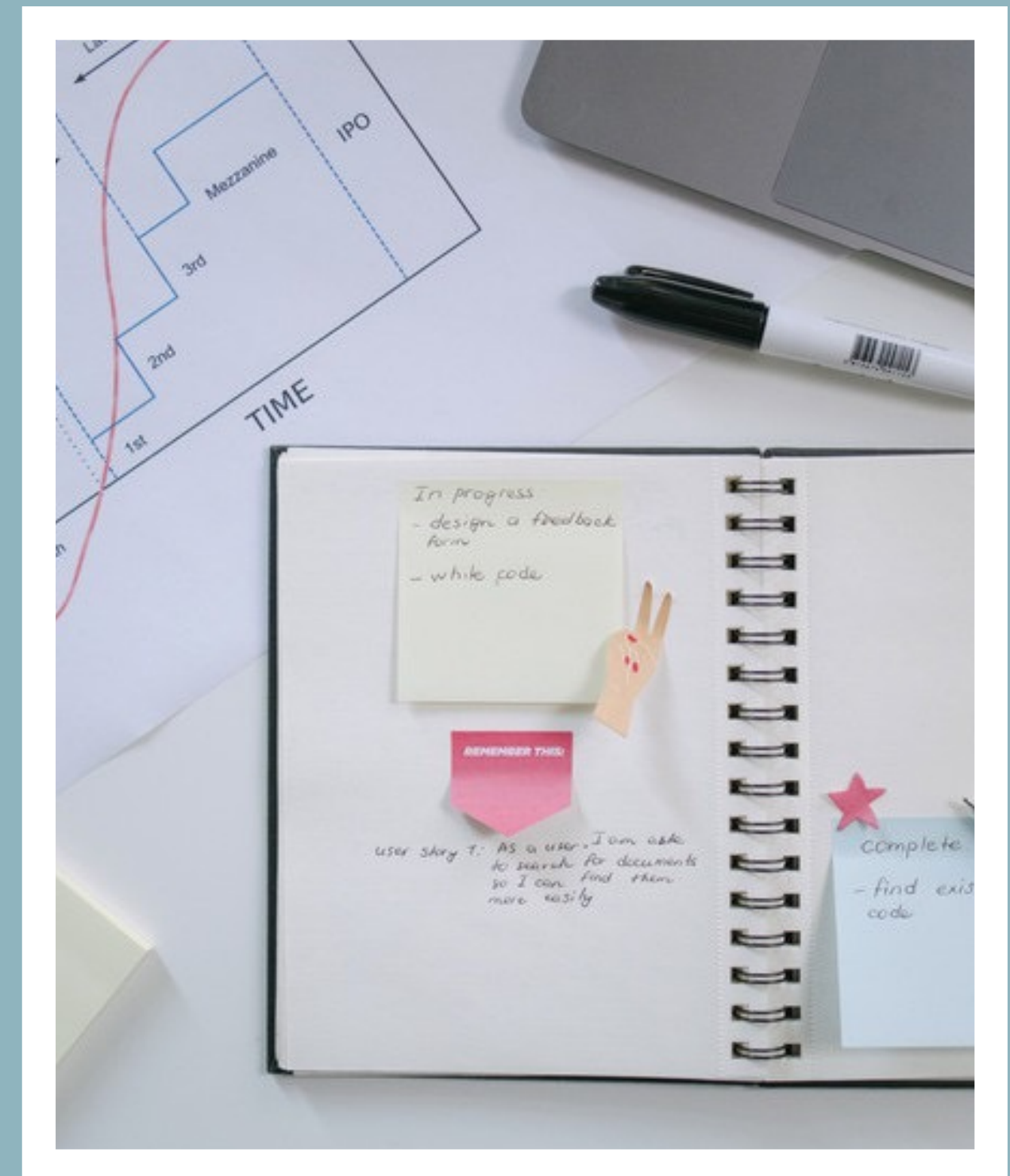
**Every program is different - so
every operations plan will look
different**



STANDARDIZING OPERATIONS

WHY IT MATTERS

- Consistent patient and provider experience
- Easier onboarding and cross-training
- Fewer errors and missed steps
- Easier troubleshooting
- Easier expansion to new sites/services





**To have a usable plan, we also need
to plan for when things don't go
according to plan**



TIERS OF RESPONSES

From single incidents to global disasters

LOCAL

- Natural and Man-Made
- Local Response Agencies
- Examples:
 - Storms, flooding, fires
 - Car accidents, shootings

STATE

- Natural and Man-Made
- State Response Agencies
- Examples:
 - Terrorist attacks, mass shootings
 - Hurricanes, earthquakes

NATIONAL

- Natural and Man-Made
- Federal Response Agencies
- Examples:
 - Terrorist attacks, cyberattacks
 - Pandemics



READY FOR ANY SITAUTION

BUILDING IN EMERGENCY PREPAREDNESS PLANNING

- Plan for multiple types of emergency situations that make sense for your program
 - Cybersecurity incident
 - Severe weather or facility closure
 - Loss of power/network
 - Unexpected staffing disruption
- Plan for ways that ordinary operations might go wrong
 - Patient medical emergency during a virtual visit
 - Unexpected staffing disruption
 - Technology failure

DETERMINE TRIGGERS BEFORE THEY HAPPEN



**REAL EXAMPLE:
IMAN OPERATIONS PLAN**

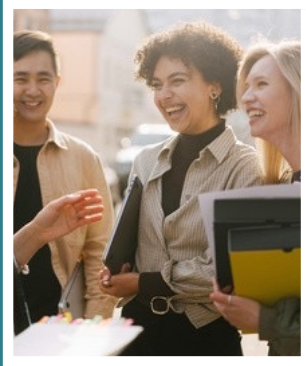


**We know why we need a plan -
now we need to know how to build
one.**



BUILDING A PLAN

GATHERING INFORMATION



PEOPLE

- Who is involved?
- Who makes decisions?
- Who provides backup?



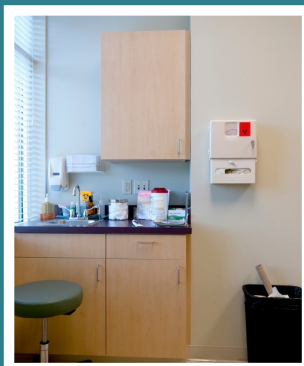
EQUIPMENT

- What systems/equipment are required?
- What are the dependencies?



PROCESS

- What happens now?
- Where are the handoffs?
- Where do failures occur?



ENVIRONMENT

- Where does care happen?
- What varies by site?
- What rules, requirements, and organizational policies apply?



FROM WORKFLOW TO WRITTEN

HOW WE DOCUMENT OUR PROCESS

- Determine our subject matter experts
- Document processes as they occur, not as we want them to occur
- Steps to document:
 - *Start/Trigger*
 - *Responsible Role*
 - *Required Steps*
 - *Decision Points*
 - *Documentation*
 - *Escalation*
 - *End Point*





FROM WORKFLOW TO WRITTEN

HOW WE DOCUMENT OUR PROCESS

Operations Plan - Table of Contents

Section 1. Background

Section 2. Program Overview

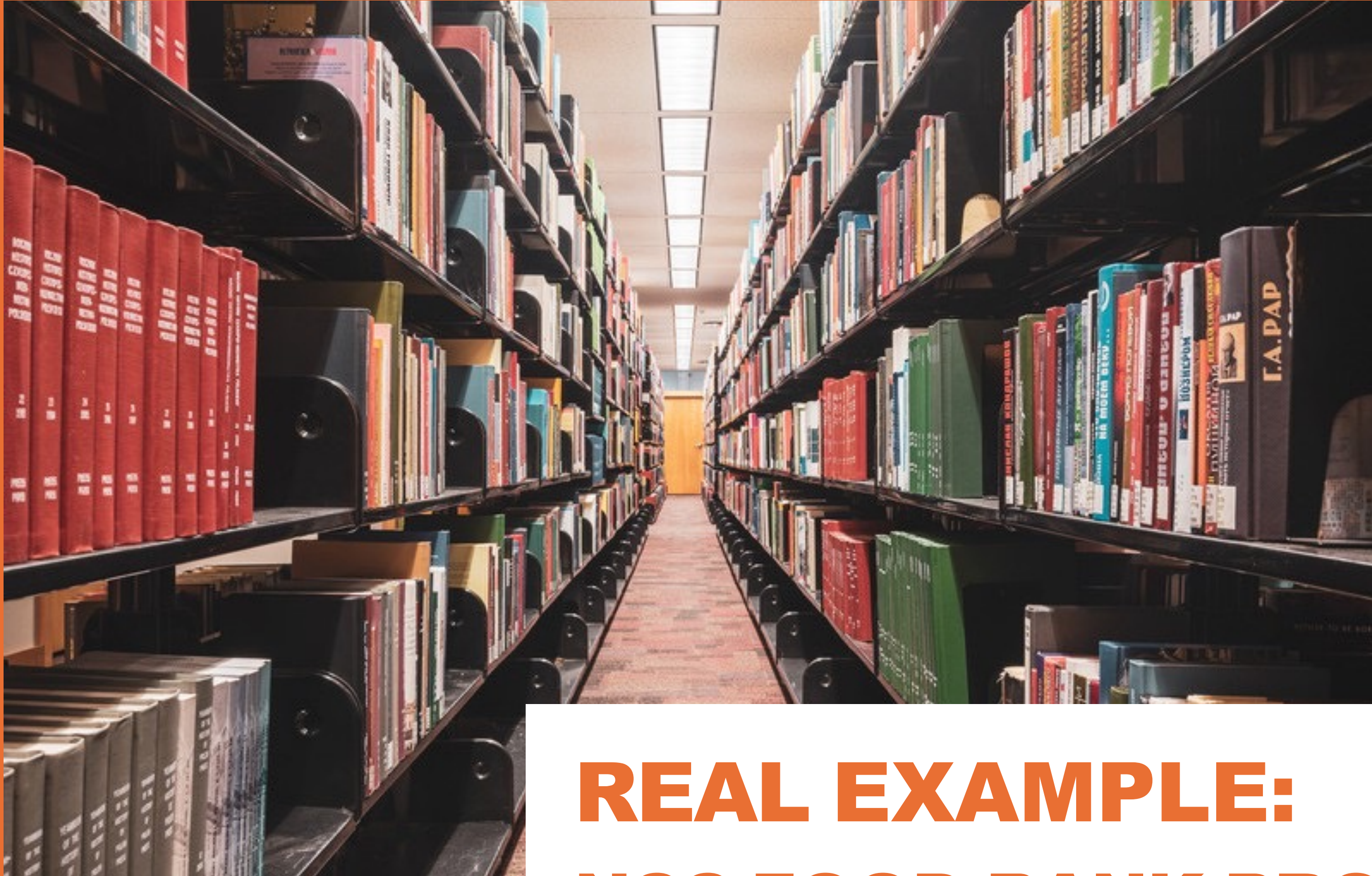
Section 3. Regulatory and Compliance

Section 4. Technology and Infrastructure

Section 5. Telehealth Workflow and Operations

Section 6. Staffing and Training

Section 7. Quality and Performance Improvement



REAL EXAMPLE: NCC FOOD BANK PROGRAM



**The goal is, above all else, a plan
that is usable by experts and
newcomers.**



TRAINING TO A PLAN

DOING IT BY THE BOOK

- A plan should be ACTUAL not ASPIRATIONAL
 - That doesn't mean that operations can't be improved - but it needs to be a process
- Training needs to be done on the plan as written - otherwise, it's useless





**Would this plan work if your
program unexpectedly doubled?**



READY TO EXPAND

WHY PREPARE?

- The goal is to have a plan that is scalable - it can expand or contract as needed

EMERGENCY OPERATIONS

- Examples: COVID-19 Pandemic, Extreme Weather Event, Mass Casualty Event
- Suddenly have to expand operations beyond normal scope for both long and short term situations

NORMAL OPERATIONS

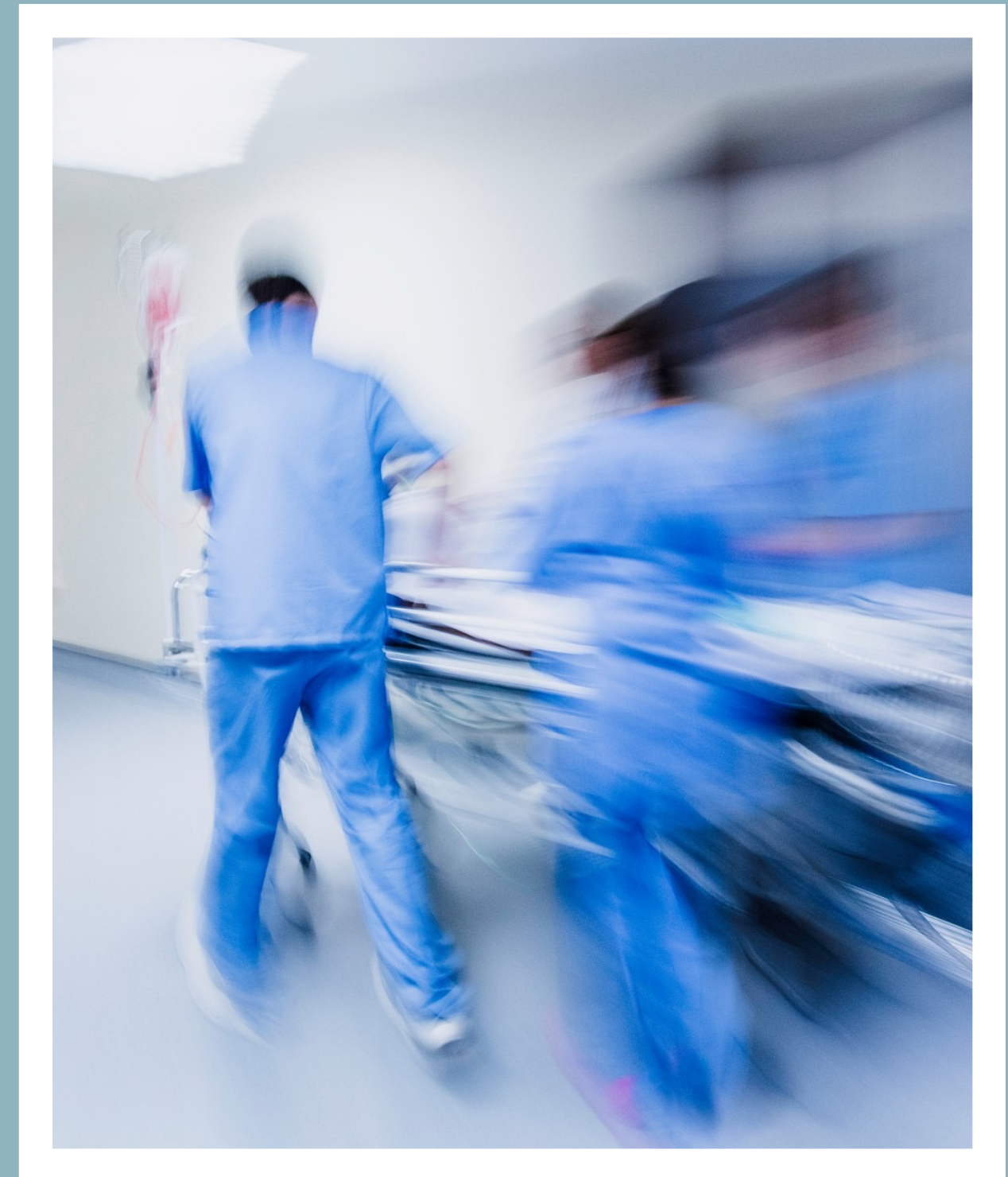
- Examples: New Facility, New Staff, Closure of Nearby Facility
- Potential of more resources, but higher workflow



READY TO EXPAND

BUILDING PLANS THAT SCALE

- Build plans with scalability in mind
- Clearly define roles and responsibilities
 - Limits to how many processes one person can handle
- Build in triggers to allow for scalable operations
 - Emergency Preparedness
 - Medical Surge





**Should we integrate new
technologies into our operational
planning?**



NEW AND EMERGING TECHNOLOGY

NOT JUST AI! (BUT ALSO A LOT OF AI)

AI AND AMBIENT DOCUMENTATION

REMOTE PATIENT MONITORING

PATIENT-GENERATED HEALTH DATA

VIRTUAL REALITY/IMMERSIVE TECHNOLOGIES

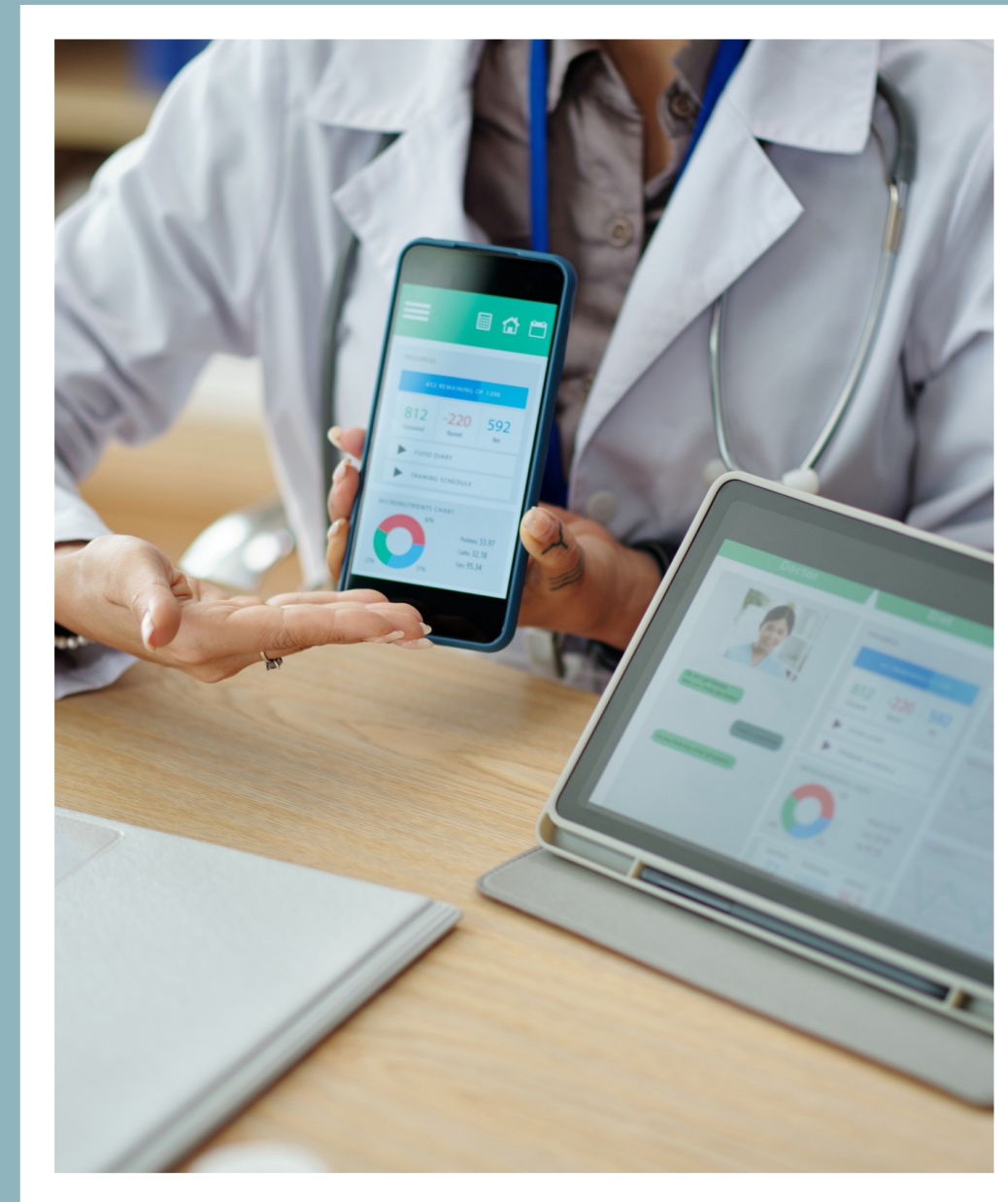
NEW TELEHEALTH PLATFORMS AND INTEGRATIONS



NEW AND EMERGING TECHNOLOGY

OPPORTUNITY OR OPERATIONAL RISK?

- What problem does it solve?
- Who needs to use it?
- What new workflow does it create?
- What can go wrong?
- What happens when it fails?
- What training/support is required?



**NEW TECHNOLOGY DOESN'T ELIMINATE OPERATIONAL COMPLEXITY—
IT OFTEN MOVES IT SOMEWHERE NEW.**



ACTION STEPS

PLANNING WITH NEW TECHNOLOGY

ASSESS YOUR READINESS

- Conduct a digital audit of current tools, workflows, and infrastructure.
- Identify where inefficiencies or bottlenecks exist.

START SMALL, THINK SMART

- Choose one area to pilot AI (automated appointment reminders or clinical documentation support.)
- Focus on a use case with clear ROI.

ENGAGE YOUR TEAM

- Train staff with simple, role-specific materials.
- Include all staff in making decisions
- Emphasize that AI supports — not replaces — human judgment.



MAINTAINING A PLAN

YOU MIGHT THINK YOU'RE DONE...YOU'RE NOT!

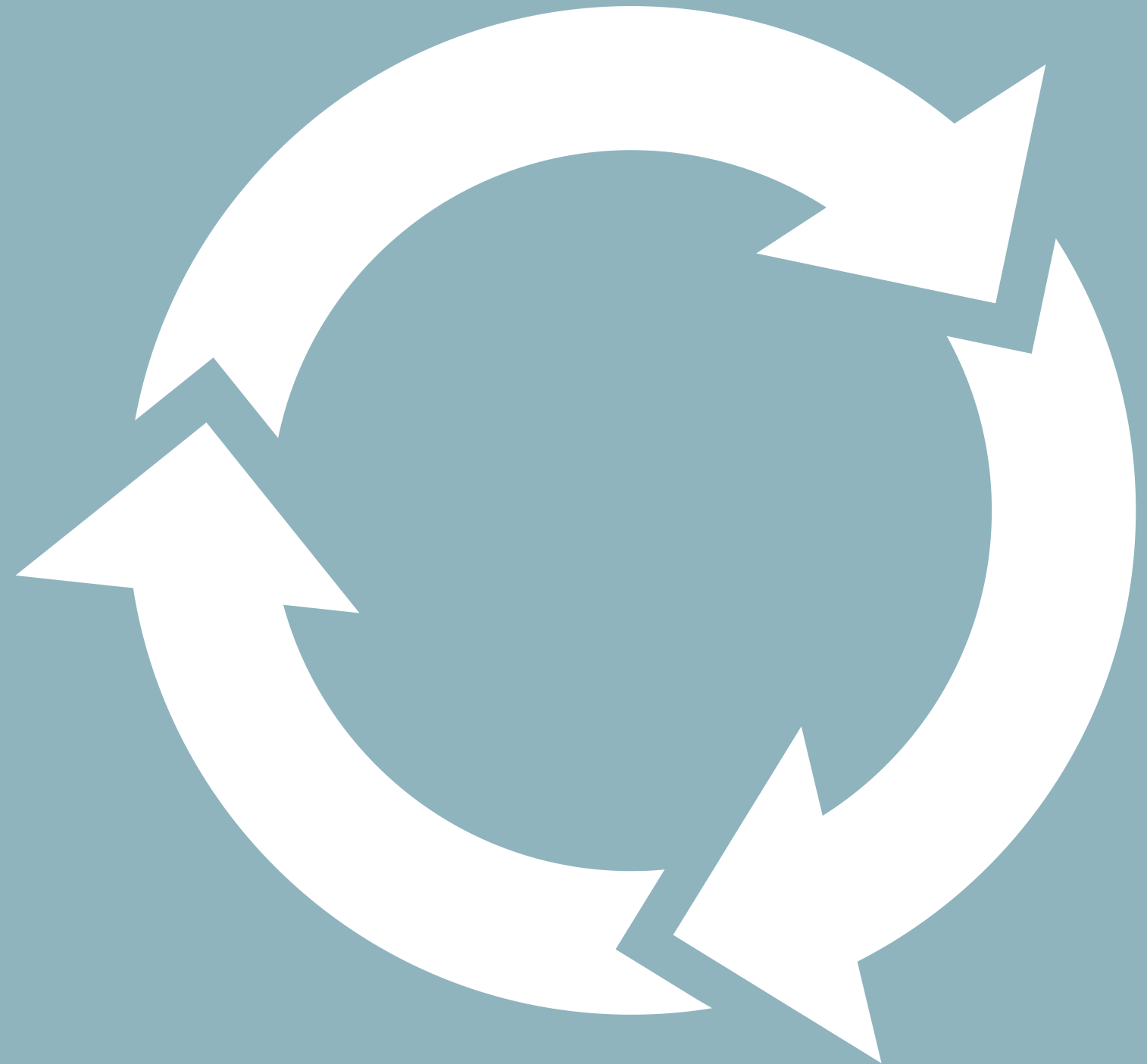
- Your plan is made to be used and edited
- Include updating and plan maintenance
 - Assign an owner
 - Establish review intervals
 - Capture lessons learned
 - Update after incidents
 - Incorporate staff feedback
 - Review when technology or workflows change
 - Track version/date changes



MAINTAINING A PLAN

YOU MIGHT THINK YOU'RE DONE...YOU'RE NOT!

- Plan
- Organize/Equip
- Train
- Exercise
- Evaluate/Improve



QUESTIONS?



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Our Next Webinar

The NCTRC Webinar Series

Occurs 3rd Thursday of every month.

Hosting TRC: TexLa Telehealth Resource Center (TexLa TRC)

Telehealth Topic: Leveraging Telehealth and Mobile Integrated Health for Access to Renal Transplantation in Rural West Texas

Date: Tuesday, September 29

Times: 10 AM – 11 AM PT



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