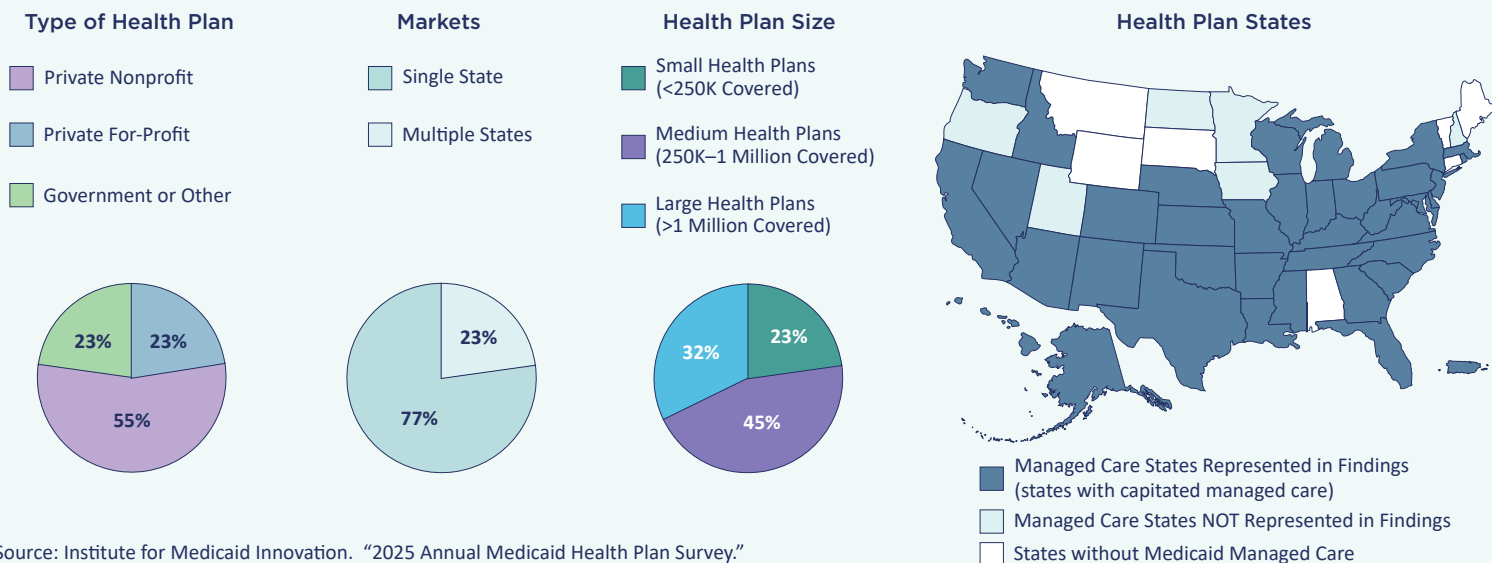




Annual Medicaid Managed Care Organization Survey Behavioral Health

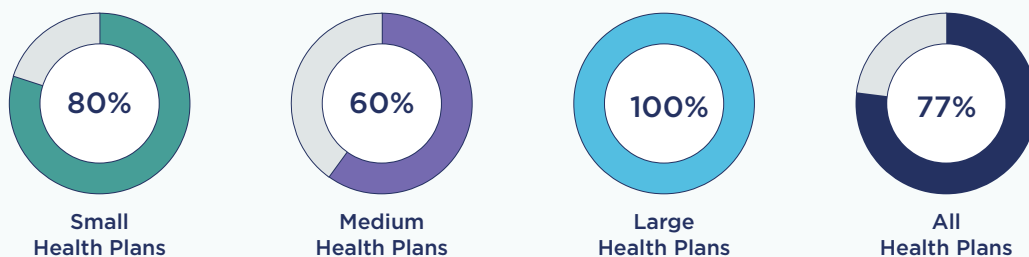
Demographics

In its eighth year, the 2025 survey findings represent health plan data from almost every state with Medicaid managed care. The annual survey collected information at the parent company and corporate levels and is intended to equip Medicaid stakeholders with the information needed to accurately articulate the national narrative about Medicaid managed care. The survey respondents are representative of the national demographics of all Medicaid health plans.



Source: Institute for Medicaid Innovation. "2025 Annual Medicaid Health Plan Survey."

Medicaid Health Plans At Risk for Behavioral Health



Source: Institute for Medicaid Innovation. "2025 Annual Medicaid Health Plan Survey."

Notes: Health plans that are not at risk for behavioral health did not respond to questions in the behavioral health section of the 2025 Annual Medicaid Health Plan Survey.



95%

of Medicaid health plans that are at risk for behavioral health services also are at risk for child and adolescent behavioral health services.

Source: Institute for Medicaid Innovation. "2025 Annual Medicaid Health Plan Survey."



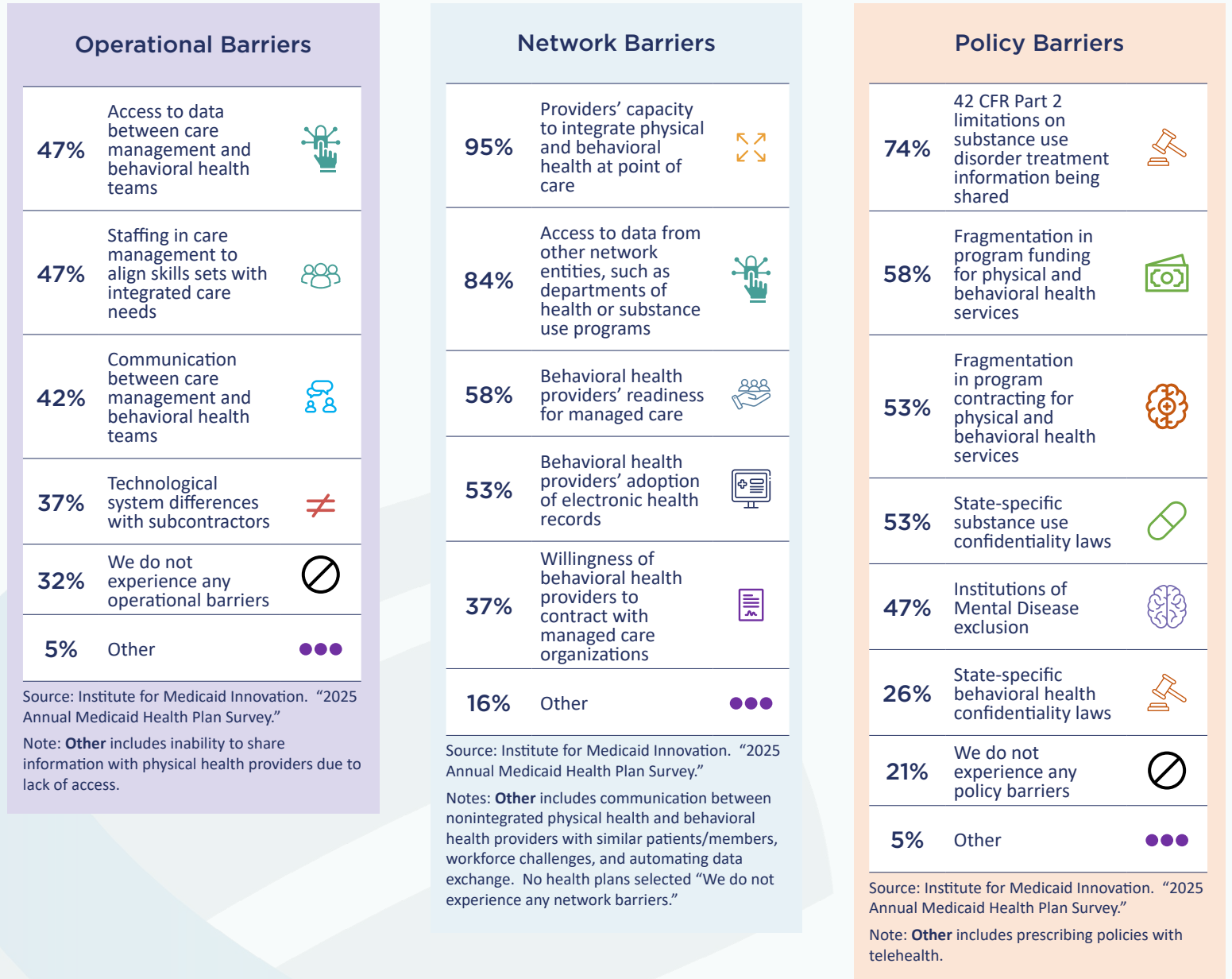
Support for this project is provided by the Robert Wood Johnson Foundation. The views expressed here do not necessarily reflect the views of the Foundation.

Medicaid Health Plans Experiencing Barriers for Behavioral and Physical Health Integration























Source: Institute for Medicaid Innovation. "2025 Annual Medicaid Health Plan Survey."

Medicaid Health Plans' Barriers to Behavioral and Physical Health Integration













Child and Adolescent Behavioral Health

Barriers That Medicaid Health Plans Experience Managing Child and Adolescent Behavioral Health

79%	Availability of in-person behavioral health providers		63%	Coordinating with departments of child services or departments of juvenile justice for children engaged with child welfare or juvenile justice systems	
79%	Availability of treatment options for substance use disorders, specifically for children or adolescents		58%	Members' access to technology to engage in virtual behavioral health services	
79%	Excessive wait times for specialty care		47%	Carved-out benefits	
74%	Cultural and familial stigma around mental illness		47%	Immigration status of parents or caregivers	
74%	Members' ability to access in-person behavioral health		42%	Language barriers	
68%	Identifying and coordinating with schools (e.g., unable to get documentation of care provided at schools)		42%	Providers' infrastructure to support virtual behavioral health	
68%	Members' parents' or caregivers' willingness to engage with behavioral health services		37%	Churn (member or eligibility related)	
68%	Pediatricians' capacity to assess behavioral health needs		37%	Providers' inability to adopt the Collaborative Care Model	
68%	Pediatricians' capacity to provide appropriate levels of care for behavioral health needs		21%	Other	
68%	Providers' inability to embed a behavioral health provider in a primary care setting				
63%	Availability of virtual behavioral health providers				

Source: Institute for Medicaid Innovation. "2025 Annual Medicaid Health Plan Survey."
Notes: **Other** includes workforce challenges and insufficient number of providers who offer services to children 12 and younger. No health plans selected "None."

Initiatives Medicaid Health Plans Use to Address Access Barriers for Child and Adolescent Behavioral Health Services

	Educate members to help destigmatize mental illness	63%		Administer behavioral health services in schools	42%
	Contract with more virtual behavioral health providers	58%		Provide coaches and peer support to expand available resources	42%
	Provide services in multiple languages	58%		Other	37%
	Connect members to infrastructure to access virtual care	53%		Incentivize members' parents/caregivers to engage with behavioral health services	21%
	Provide training to pediatricians on integrating behavioral health into their practice	47%		Provide behavioral health services in medical emergency rooms	11%

Source: Institute for Medicaid Innovation. "2025 Annual Medicaid Health Plan Survey."











Notes: **Other** includes outreach and engagement initiatives for pediatric members on available mental health services, contracting with providers that offer behavioral health services in schools, provide care management through the lifespan, pre- and postnatal care management, supporting community health workers, recruitment efforts for providers to work in schools, and covering services via single case agreements with out-of-state providers. No health plans selected "None."

Top Three Barriers Medicaid Health Plans Experience Managing Child and Adolescent Behavioral Health by Health Plan Size

	Small Health Plans	Medium Health Plans	Large Health Plans	All Health Plans
Availability of in-person behavioral health providers	60%	86%	86%	79%
Availability of treatment options for substance use disorders specifically for children or adolescents	80%	71%	86%	79%
Excessive wait times for specialty care	60%	86%	86%	79%

Source: Institute for Medicaid Innovation. "2025 Annual Medicaid Health Plan Survey."

Initiatives Medicaid Agencies Could Use to Assist Health Plans with Addressing Behavioral Health Needs of Members

	Facilitate increase of behavioral health provider participation in Medicaid	84%
	Facilitate increase in behavioral health provider workforce	84%
	Champion policies to facilitate data sharing across physical health and behavioral health MCOs	79%
	Remove data sharing restrictions	79%
	Support behavioral health home and community-based service providers	74%
	Increase Medicaid payment rates for behavioral health	68%
	Cover codes for mental health screening, peer support, and collaborative care	63%
	Authorize mobile crisis services	47%
	Authorize telehealth regulations that permit virtual-only providers for behavioral health, including opioid use disorder treatment or buprenorphine prescribing	47%
	Expand payment around audiovisual delivery of mental health and substance use disorder services	42%
	Carve-in behavioral health (where not carved in)	37%
	Expand payment around audio-only delivery of mental health and substance use disorder services	37%
	Other	0%

Source: Institute for Medicaid Innovation. "2025 Annual Medicaid Health Plan Survey."

Note: No health plans selected "States cannot provide further assistance."

Initiatives with Significant Percentage Changes from 2024 to 2025

