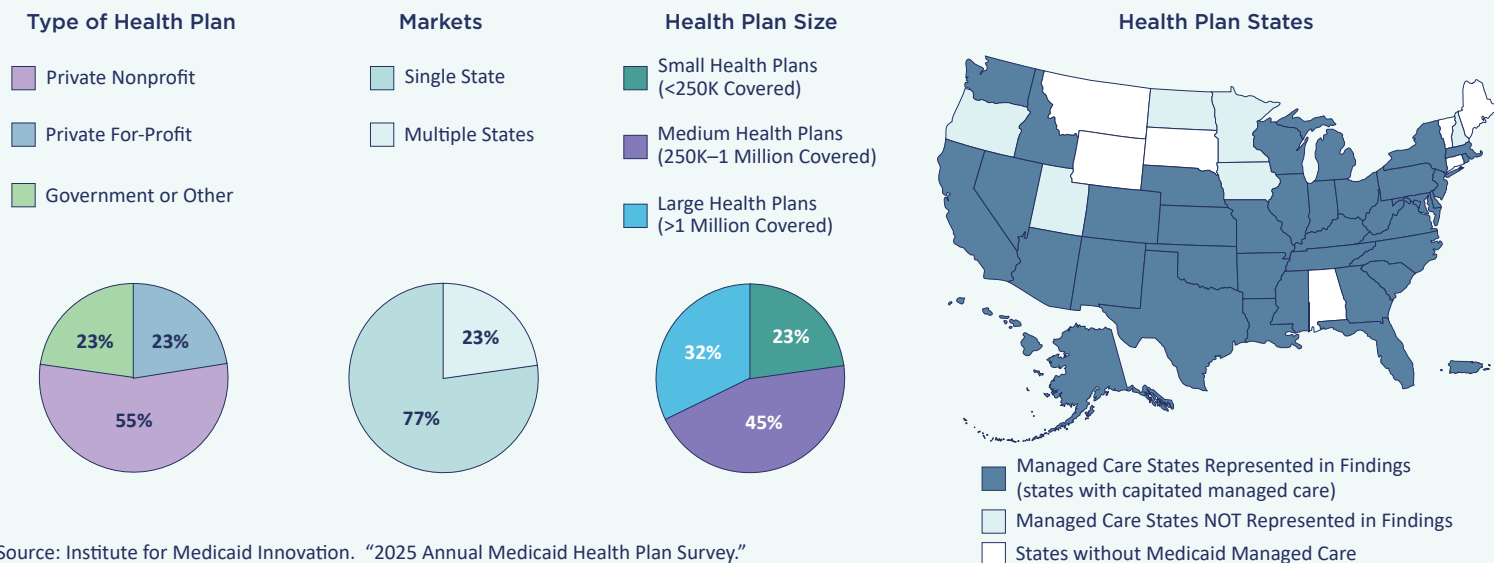




Annual Medicaid Managed Care Organization Survey Telehealth

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."

Provider Barriers Encountered by Medicaid Health Plans for Telehealth

	Small Health Plans	Medium Health Plans	Large Health Plans	All Health Plans
Computer or technology literacy	80%	90%	71%	82%
Lack of technological resources	100%	80%	71%	82%
Information technology systems	20%	70%	86%	64%
Broadband internet access	60%	70%	57%	64%
State telehealth coverage policies influencing provider adoption	20%	60%	57%	50%
Integration into care models	20%	60%	57%	50%
Provider disinterest	60%	40%	29%	41%
Insufficient internet speed for telehealth	40%	40%	43%	41%
Lack of interpreter services	40%	50%	14%	36%
Lack of training on telehealth best practices	40%	30%	29%	32%
Payment incentives	0%	30%	43%	27%
Other	0%	20%	57%	27%
Payment parity	0%	10%	29%	14%
Quality concerns from the provider	0%	30%	0%	14%
None	0%	10%	0%	5%

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

Notes: **Other** includes inconsistency within provider networks, challenges sending visit notes back to the primary care provider when telehealth is used through vendor, staff shortages, technology optimization, policy concerns, ongoing regulatory clarifications of telehealth, and lack of resources to support program implementation.



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.

Modalities That Medicaid Health Plans Cover as a Billable Visit or Service

95%	Live video visits	
86%	Audio only or telephone	
62%	Remote patient monitoring (e.g., blood pressure monitoring, digital scales, blood glucose monitoring, heart rate, oxygen saturation)	
52%	Provider-to-provider eConsult	
43%	Use of a health portal (e.g., for online appointment scheduling, obtaining test results, and secure messaging with one's provider)	
38%	Store and forward (e.g., receiving digital images of a patient's skin condition)	
19%	Live text chat	
10%	Other	

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

Notes: **Other** includes in-home medical services. No health plans selected "None."

Outcomes Medicaid Health Plans Attribute to Telehealth

Outcomes Medicaid Health Plans Attribute to Telehealth	All Health Plans
Increased patient access to services	82%
Improved continuity of care	64%
Increased behavioral health care utilization	64%
Increased member satisfaction	64%
Decreased emergency department utilization	55%
Improved patient compliance with care	55%
Decreased member no-shows	50%
Decreased urgent care utilization	50%
Increased cost savings	50%
Increased provider satisfaction	45%
Increased primary care utilization	36%
Increased prescribing	18%
Other	14%
Increased fraud or abuse	5%
None	5%

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

Notes: **Other** includes monitoring the delivery of services to providers to ensure that telehealth delivery is convenient for members. No health plans selected "Increased duplication of services."

Member Barriers Encountered by Medicaid Health Plans for Telehealth

Access to broadband or an internet subscription



Insufficient internet speed to allow for live telehealth interaction



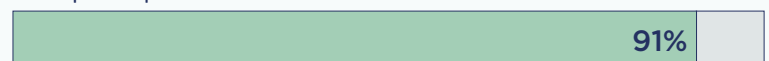
Computer or technology literacy



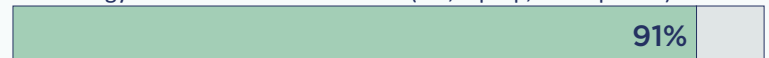
Health literacy



Limited data plans or insufficient data or minutes covered by smartphone plans



Technology or communication devices (i.e., laptop, smartphone)



Lack of awareness of or interest in telehealth as an option for accessing providers



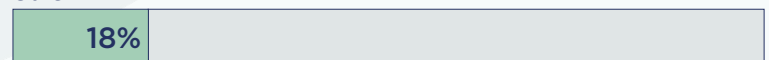
Quality concerns from the members



Lack of interpreter services
















Other



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

Notes: **Other** includes provider scheduling, and hours of operation. No health plans selected "None."

Changes to State Medicaid Policies or Requirements that Could Assist Medicaid Health Plans to Create More Equitable Access to Telehealth

	Support school-based health services delivered via telehealth, including behavioral health services	73%
	Enable health plans to create innovative reimbursement models	64%
	Reimburse for provider-to-provider consultations, including eConsults leveraging asynchronous telehealth modalities (such as store and forward) when a professional medical opinion is sought	64%
	Reimburse for evidence-based remote patient monitoring	59%
	Allow federally qualified health centers, rural health clinics, Indian Health Service clinics, and community mental health centers to serve as origination and distant site providers	55%
	Incentivize for evidence-based remote patient monitoring	55%
	Reimburse for services that can be delivered appropriately via audio only, including outpatient evaluation and management services and professional outpatient mental health care	55%
	Remove site restrictions that limit where members can be located during a telehealth visit	55%
	Reimburse for translation and interpreting services	50%
	Enable health plans to support community-based organizations with telehealth technology to support members' telehealth appointments	45%
	Reimburse nontraditional providers for facilitating telehealth appointments (e.g., emergency medical service providers facilitating a telehealth visit versus transporting a low-acuity patient to the ED)	45%
	Remove restrictions on the type of entity that can be reimbursed for remote patient monitoring (e.g., limiting reimbursement to home health agencies)	41%
	Other	9%

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

Notes: **Other** includes allowing providers to sit in other states than the member. Five percent (5%) of health plans selected "None."

Actions Medicaid Health Plans are Implementing to Create More Equitable Access to Telehealth

	All Health Plans
Digital literacy or technology literacy education for members	64%
Connecting members to community-based organizations that support access to technology or devices	45%
Connecting members to community-based organizations that support access to internet services	41%
Digital literacy or technology literacy education for providers	41%
Leveraging or promoting the Federal Communications Commission's Lifeline Program	41%
Connecting members to community-based organizations that support interpretation for needed languages	36%
Digital navigators for members	27%
Supporting community telehealth access points	27%
Supporting community hot spots for internet access	23%
Other	9%
Supplemental payments to members for mobile devices or data packages	9%
Partnering with telecom companies to offer low-cost internet to members	5%
Supplemental payments to members for in-home internet subscriptions	5%

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

Notes: **Other** includes interpretation support for languages requested by members. Nine percent (9%) of health plans selected "None."