

# Behavioral Health The New Normal

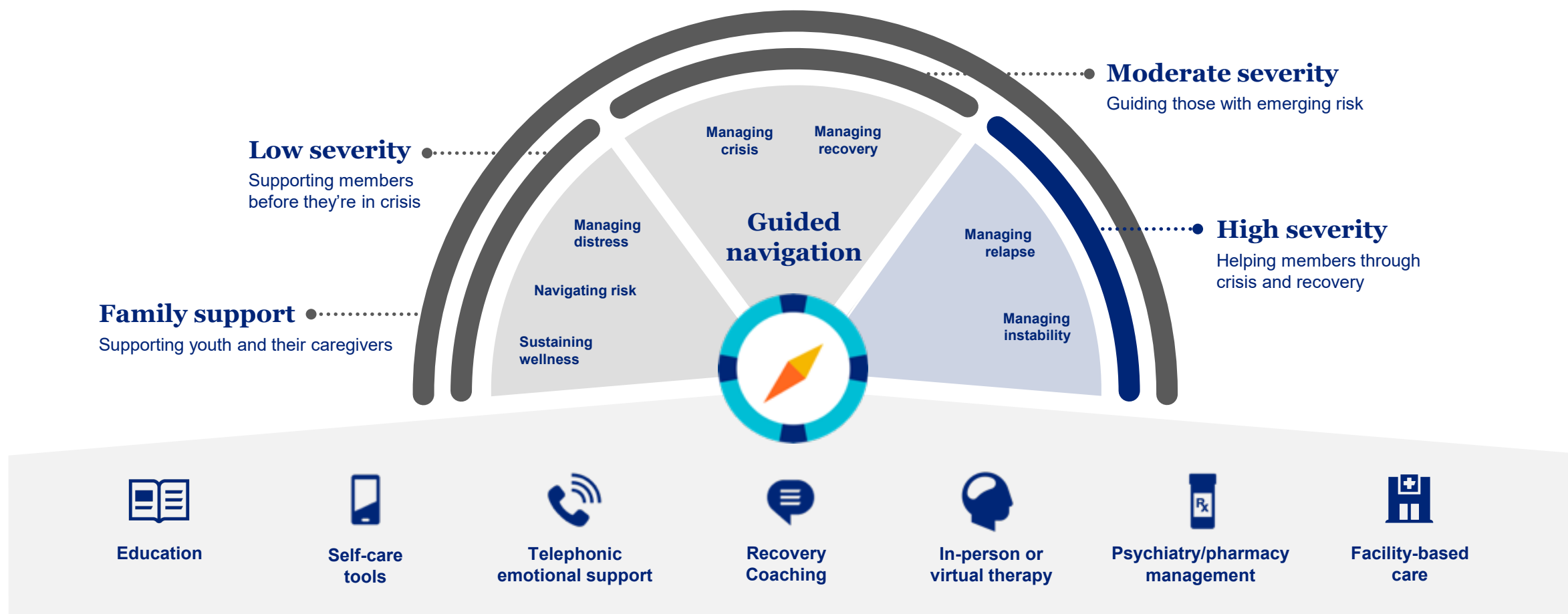
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Sr. Director, Behavioral Health Evidence Based Services

# Where are we in our emotional health journey to the new normal?

- Behavioral Health Network Update
- Youth Mental Health Crisis
- Strategic Partners and Specialty Services
- Platinum Program Discussion
- NALC Virtual Utilization Trend
- NALC Substance Use Disorder Utilization Trend
- Digital Apps and Low Acuity Solutions
- What's on the Horizon- Emerging Technology

# Guiding adults, youth and caregivers to the right care for their unique needs across a full range of behavioral health solutions



# Behavioral Health Provider Network

## National commercial network<sup>1</sup>

**487,826**  
unique providers    ▲ 9.1% YOY

## EAP network<sup>1</sup>

**89,617**  
unique providers    ▲ 4.5% YOY

## Facilities<sup>1</sup>

**4,512**  
unique providers    ▲ 6.6% YOY

## Specialized programs to improve member access



### Express access network<sup>2</sup>

**9,669**  
providers    ▲ 8.1% YOY

- Providers contracted to offer appointments within 5 business days
- 92% of commercial members have access within 20 miles

### Median time to care

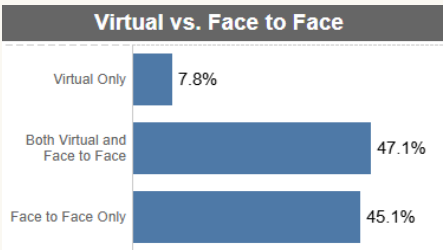
**11** in person    **5** virtual



### Virtual visits network<sup>3</sup>

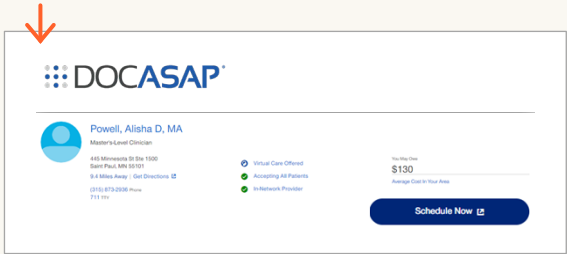
**263,393**  
unique virtual providers    ▲ 16.4% YOY

**585,369**  
provider + license state    ▲ 26.3% YOY



### Online scheduling

- 30,000+ clinicians
- Partnerships include Alma, AbleTo, Headway and Grow
- Real-time access to provider schedules via DocASAP



1. Nussbaum D. Optum Provider Network Summary Dashboard. Accessed Oct 12, 2025.  
2. Nussbaum D. Optum Provider Network Summary Dashboard. E&I Claims-based Algorithm: January–December 2024.  
3. Nussbaum D. Provider Network Summary Dashboard. Accessed Oct 12, 2025.

# Going beyond access to evidence and outcomes

## Network

- Robust network, with guaranteed fast access to care and use of assessments to track treatment progression
- Digital navigation, including real-time access to provider schedules through DocASAP
- Specialty providers delivering evidence-based care to meet unique needs

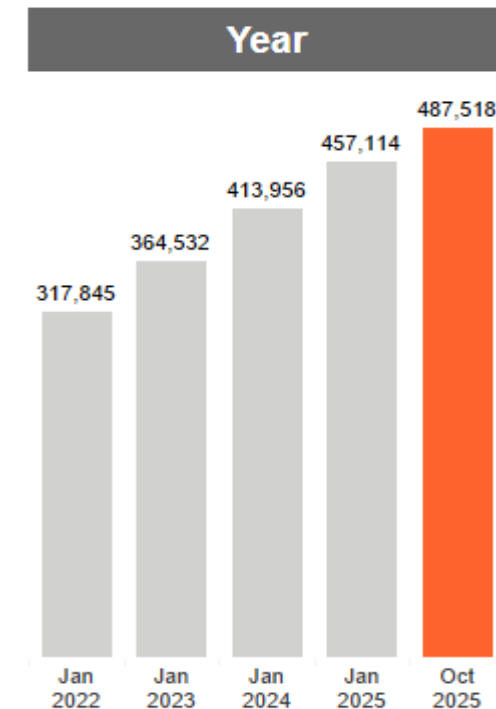
## Quality

- Value-based care arrangements in outpatient settings enables condition improvement tracking
- Evidence-based care driving quality outcomes
- Flexible care options that support members before they are in crisis, including psych urgent care
- Platinum designations for facility based care

## Collaboration

- Ongoing analysis of provider reimbursement to help balance unit cost trends with market competitiveness
- Strategic alliances help ensure timely access to specialized care
- Provider learning courses at no charge (some eligible for continuing education units (CEUs), including cultural awareness training)

## 65% BH network access growth since 2022



**Improved timely access to care with improved outcomes and affordability**

# How the mental health crisis is affecting children

**1 in 5**

children has a mental health condition

**50%**

of mental health illnesses begin by age 14

**4 in 10**

teens reporting that they feel persistently sad or hopeless

**1 in 5**

teens has contemplated suicide



Source: Centers for Disease Control and Prevention. YRBS Data Summary & Trends. [cdc.gov/healthyyouth/data/yrbs/yrbs\\_data\\_summary\\_and\\_trends.htm](https://cdc.gov/healthyyouth/data/yrbs/yrbs_data_summary_and_trends.htm). Last reviewed April 27, 2023.



# How children's mental health impacts the workforce



**At least once a month:**

**75%** of parents missed work (full or partial day)

**72%** of parents had work interrupted

**58%** of parents felt like work quality was negatively affected

**50%** felt unprepared in a meeting

**50%** fell behind on workload

\*The Great Collide 2022 report. On Our Sleeves: The Movement for Children's Mental Health



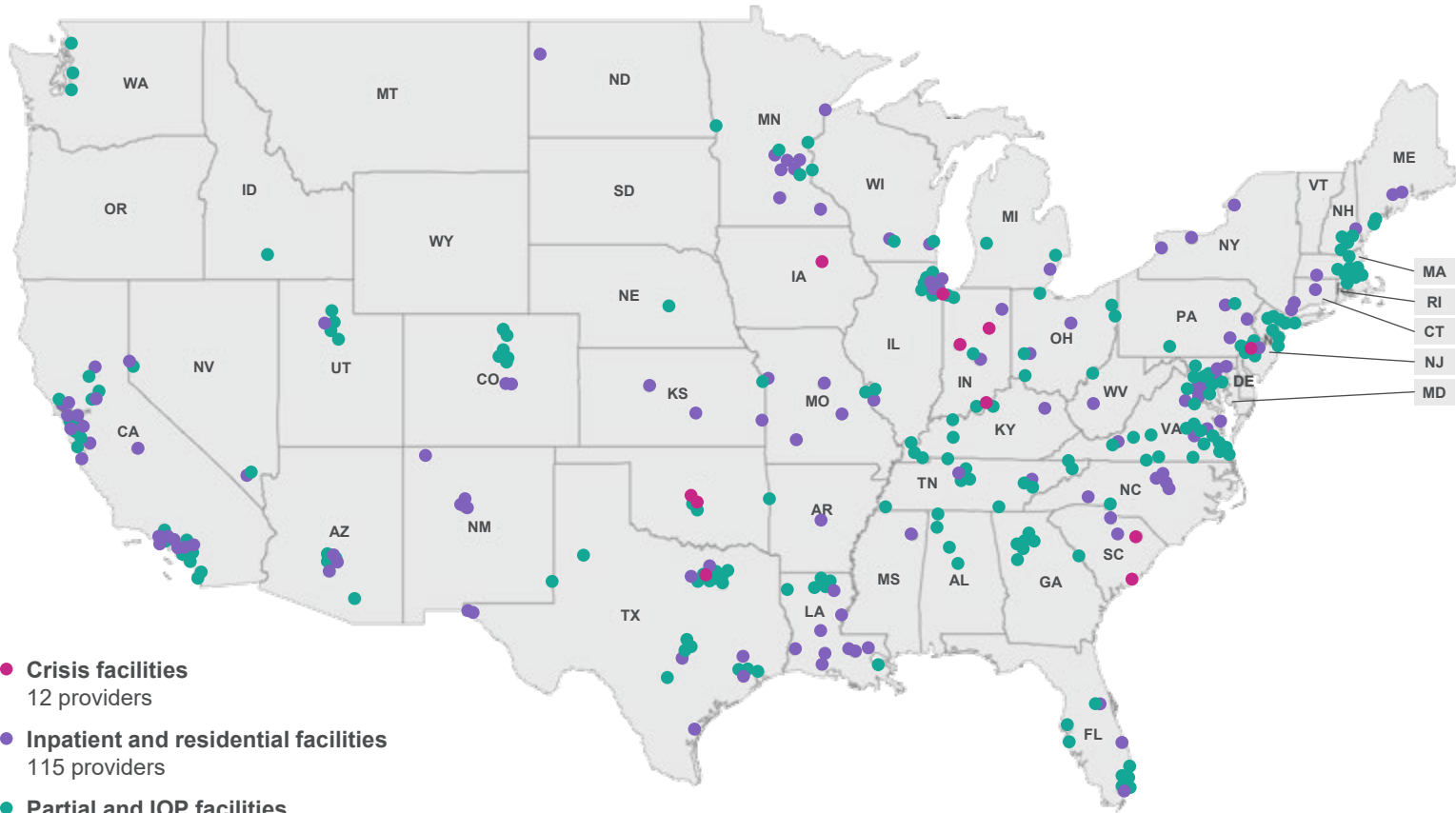
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# New pediatric programs in 2024



1. Optum analysis of child/adolescent programs added to behavioral health network through Dec. 2024. Talbot M. January 2025.  
2. Optum analysis of Network Summary Dashboard, Commercial and UBH General Networks 2023 vs. 2024. Talbot M. January 2025.



**400**

new facility-based pediatric programs, including partial/intensive outpatient, inpatient/residential and outpatient/crisis<sup>1</sup>



**217**

existing in-network facilities added/expanded pediatric programming<sup>1</sup>



**7,335**

child and adolescent providers added to our network<sup>2</sup>

# Driving care through strategic partnerships

## Increased access to care for pediatrics and adolescents



**Bend** offers a full continuum of care from low to high severity for the pediatric and adolescent population, involving the entire family and care team.



**InStride Health** offers support to pediatrics and adolescents with OCD and anxiety-related disorders.



**Charlie Health** offers intensive treatment, including medications, for adolescent and young adults for mental health and substance use concerns.



**Little Otter** offers comprehensive mental health care and family support through a digital platform, treating children ages 1–14.



**Equip** offers is a fully virtual intensive eating disorder program using evidence-based interventions for lasting results.



**Telemynd** offers a comprehensive range of mental health services, including therapy and psychiatric care, delivered through a secure telehealth platform from ages 5 years.

# Specialty strategic partners

## Increasing access to mental health care



**AbleTo** offers an 8-week virtual CBT program in addition to therapy and coaching.



**Nema Health** offers virtual programming for women, lead by women, for sexual trauma and other events like pregnancy loss.



**Alma** offers treatment for adolescents and adults through a virtual platform, with 6,000+ providers in 50 states.



**NOCD** licensed therapists specialize in exposure and response prevention (ERP) therapy, the most effective OCD treatment.



**Array** delivers psychiatry, behavioral and mental health care to individuals who are in their home or any other private space using secure, online video calls.



**Talkiatry** offers personalized virtual psychiatry visits and medication management.



**Brightside** offers a virtual program that combines cognitive and behavioral therapy with independent skill practice for a wide range of symptoms.



**Resilience Lab** offers members struggling with mild to moderate mental health issues in both virtual and in-person care.



**Mindpath** offers psychiatry and therapy services in a virtual or brick and mortar format. Mindpath On Demand allows for same-day appointments for urgent treatment needs.



**SonderMind** delivers virtual behavioral health care to adults, with 4,000 licensed providers.

# Driving care through strategic partnerships

## Increased substance use disorder access to care, expanding evidence-based treatment



**Affect Therapeutics** offers an evidence-based digital treatment program for stimulant use and alcohol use disorders in states where there is critical need, with rapid expansion nationwide.



**Hazelden Betty Ford** offers a virtual treatment and recovery coaching program so members can have access outside of the physical locations.



**BayMark** offers comprehensive addiction treatment programs deliver medically supervised services for adults in a variety of modalities and settings.



**Monument** leverages a holistic approach utilizing evidence-based practices for the treatment of alcohol use disorder.



**BrightView** leverages a holistic approach utilizing evidence-based practices for the treatment of opioid use disorder with medications for opioid use, group therapy, individual counseling and psychosocial services.



**Ria** offers a 100% online alcohol treatment program with expert medical, coaching and peer support.



**Groups** offers medications for opioid use programs centered around community — healing, recovering and maintaining success with group therapy.

# Online specialty providers

**My behavioral health searches** [View all](#)

[Anxiety](#) [Anxiety th...](#) [Detox](#) [Jon Doe, MD](#) [Recent search](#) [Recent search](#)

**Mental health professionals** [Treatment centers](#)

**Mental health professionals**

These mental health professionals provide therapy and treatment for a variety of needs. They include psychiatrists, psychologists, therapists, counselors and more.

**Stress and anxiety** [View all](#)

**Couples and family counseling** [View all](#)

**Alcohol and drug use** [View all](#)

**Online specialty groups**

Finding the help you need, when you need it, can seem daunting sometimes. These online mental health services are designed to connect you to the right specialty care, fast.

**Bend**  
Bend provides virtual mental health care for kids, teens, young adults and their families — and can work closely with your pediatrician or primary care team.

**Talkiatry**  
Psychiatry, with you in mind. Virtual mental health care covered by insurance.

**Equip**  
Virtual eating disorder treatment that works. Caring for people of all ages, genders and diagnoses.

**Ria Health**  
Effective and evidence-based alcohol treatment. 100% online. Private, secure and from the comfort of your home.

**Charlie Health**  
Personalized intensive therapy for depression, self-harm, substance use disorders and more. Available virtually, and in as little as 24 hours.

## New provider group marketplace concept



### Display groups with specialized programs:

- Virtual programs with immediate access
- National or very large footprint
- Specialized programs (substance use disorders, eating disorders, etc.)

#### Bend

Bend provides virtual mental health care for kids, teens, young adults and their families — and can work closely with your pediatrician or primary care team.

[Explore Bend](#)

#### Talkiatry

Psychiatry, with you in mind. Virtual mental health care covered by insurance.

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Virtual eating disorder treatment that works. Caring for people of all ages, genders and diagnoses.

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#### Charlie Health

Personalized intensive therapy for depression, self-harm, substance use disorders and more. Available virtually, and in as little as 24 hours.

[Explore Charlie Health](#)

#### Affect Therapeutics

A digital alcohol and drug addiction program that is private, save and really works.

[Explore Affect](#)



## Platinum Recognition Program

### Quality and efficiency in care

#### Specialties:

- Acute mental health
- Eating disorder
- Substance use disorder

#### Eligibility criteria:

- Must be in-network with Optum
- Claims date requires minimum of 12 months
- At least 20 qualified admits for inpatient, residential or partial hospitalization
- Methodology — Aligns with Centers of Excellence for medical disease management

#### Performance metrics:

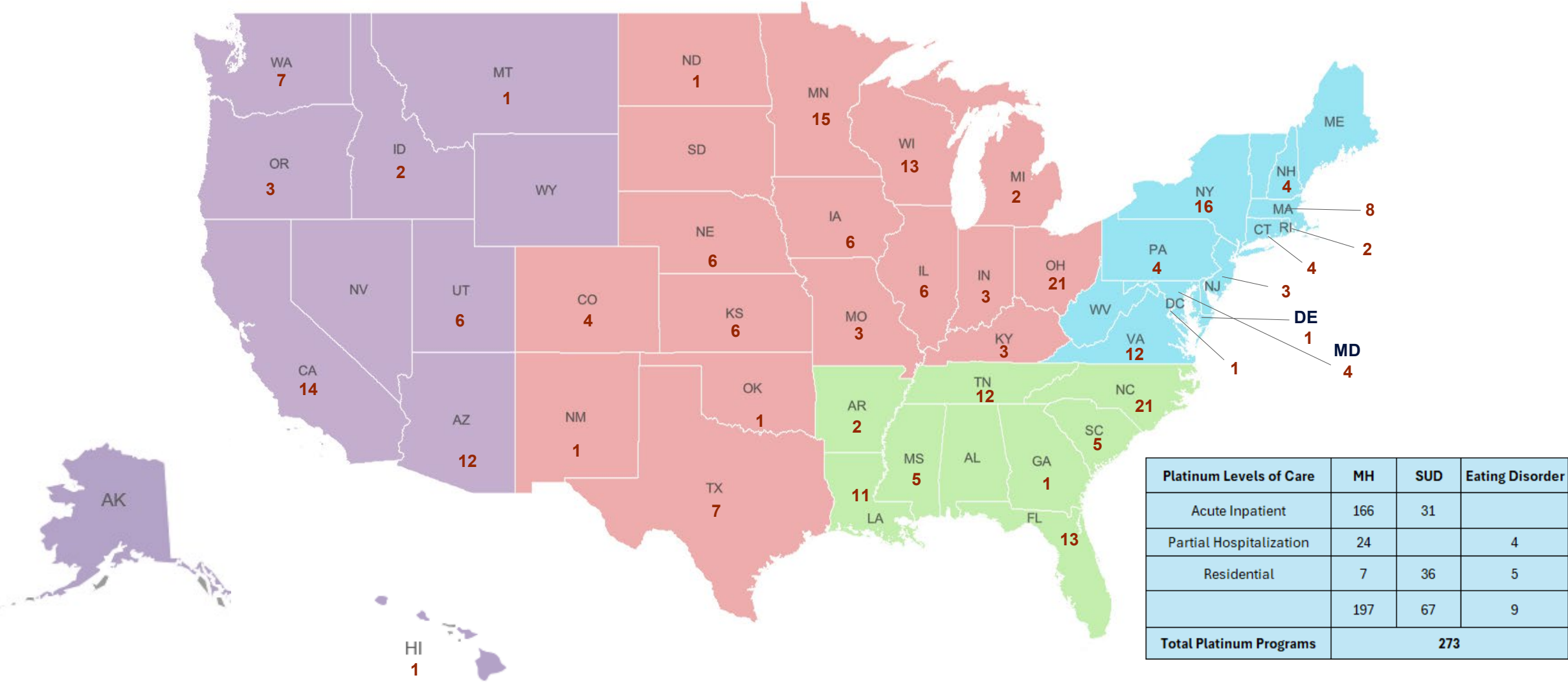
- Readmission rates
- 7- and 30-day follow-up post-discharge rates
- Outlier length of stay
- Outlier episode cost rate
- Meets 4 out of 5 metrics
- Once recognized, the program is awarded with a modified utilization management oversight

#### Data access:

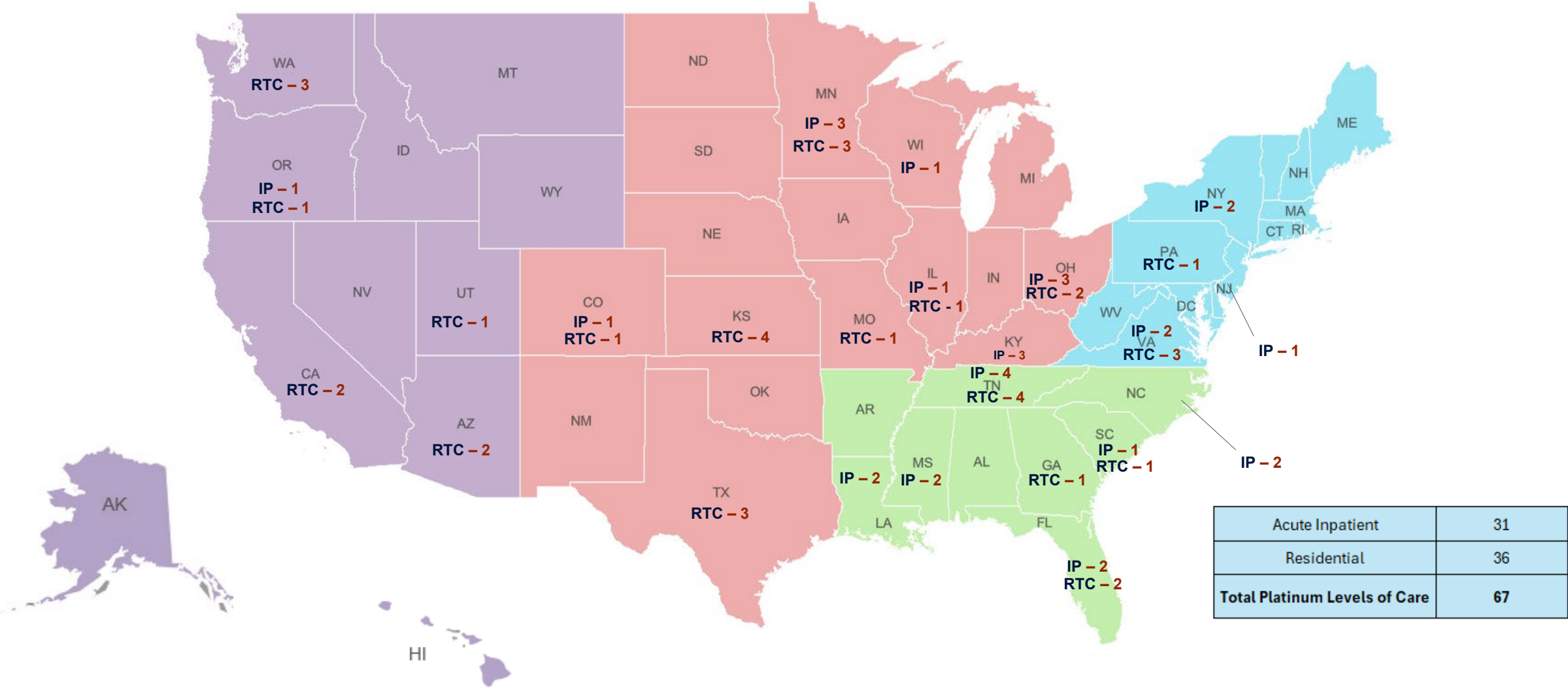
- Track progress via Provider Express
- Quarterly outreach for declining metrics

For additional information, visit: [Platinum Recognition \(providerexpress.com\)](https://providerexpress.com)

# CY-2025 Platinum Levels Of Care By State

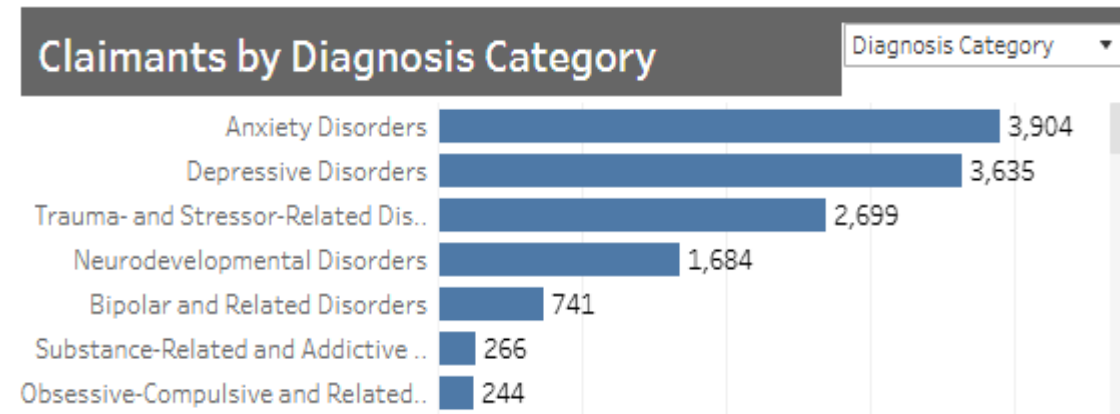
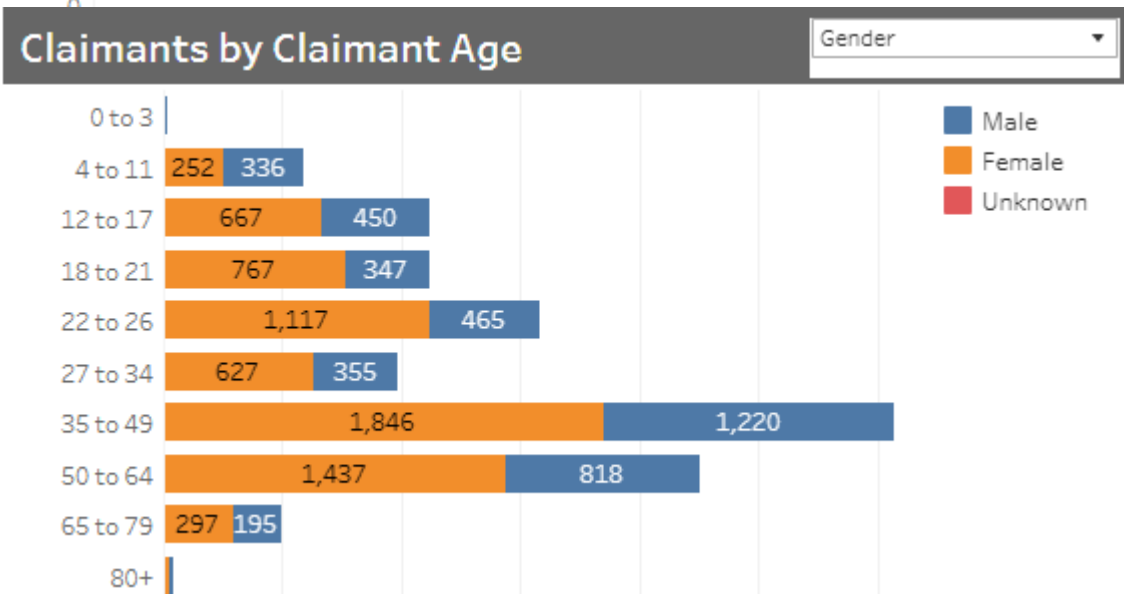
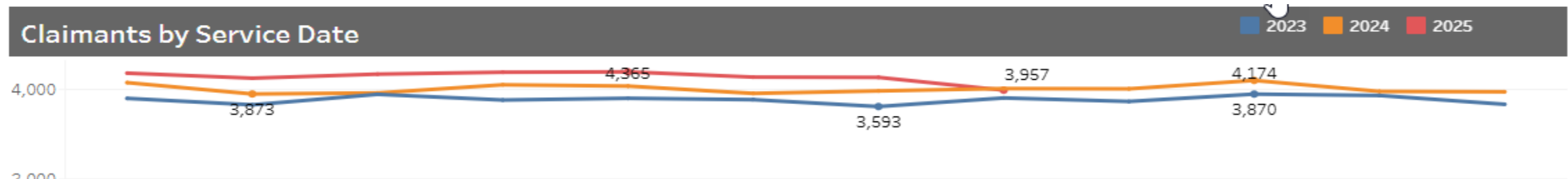


# SUD CY-2025 Platinum Levels Of Care By State

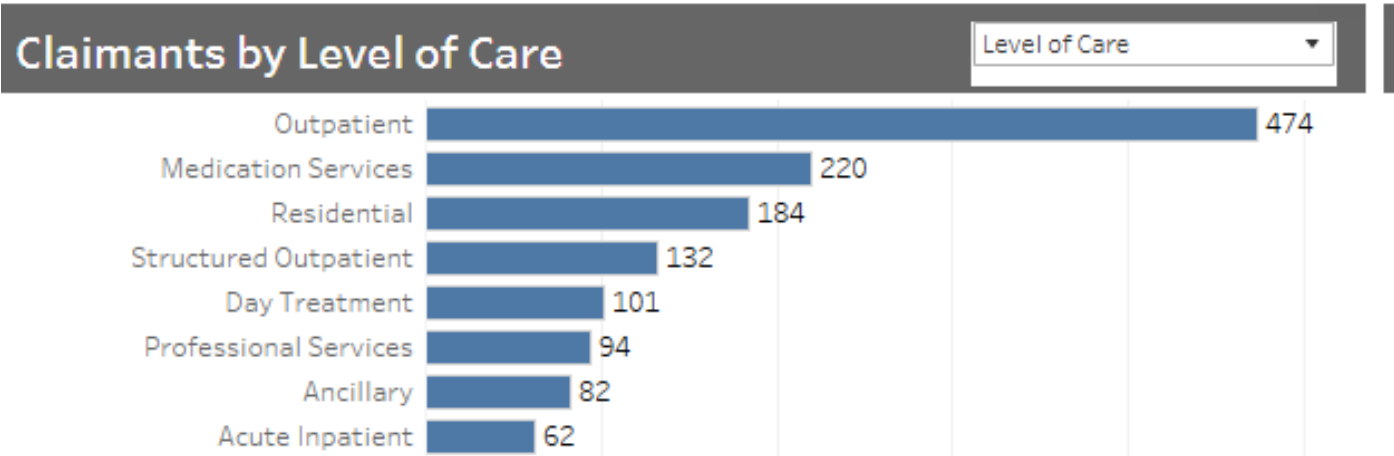
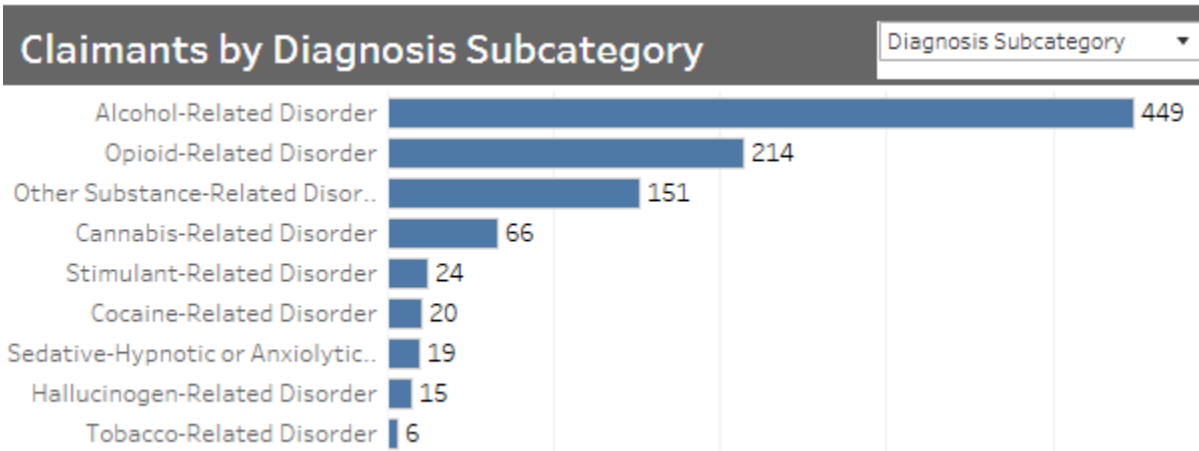
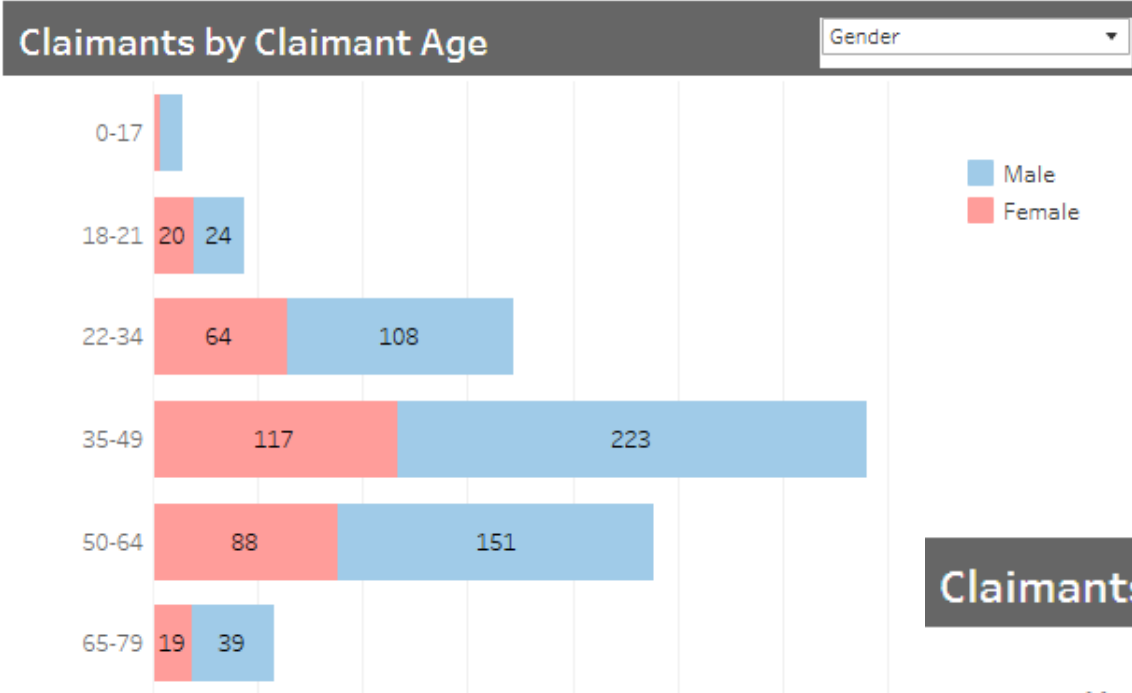




# Virtual Behavioral Health – Utilization and Trends



# Substance Use Disorder





# Health

Calm Health offers evidence-based, HIPAA-compliant mental health solutions that can be easily integrated into existing health programs and services.

Interests,  
mood-  
checkins &  
screenings



Asymptomatic

Calm Mindfulness

Focus | Meditation | Sleep



Subclinical  
-Mild

Calm Condition programs  
+ Calm Mindfulness

Stress Reduction (GAD) | Condition  
Support | Treatment Support



Moderate  
-Severe

Partner Recommendation

Tele-Mental Health | Behavioral Health  
Network | In/Outpatient facilities



# The Treatment Horizon



Coaching vs Therapy



Digital Therapeutics



Interventional Psychiatry

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