



Behavioral Health

The New Normal

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April 2025

United
Healthcare

Where are we in our emotional health journey?

- Florida Behavioral Health Utilization Trends
- Florida Behavioral Health Network Update
- Virtual Behavioral Health Utilization
- Substance Use Disorder
- Digital apps and self guided care
- Coaching vs therapy
- What's on the Horizon- Emerging Technology

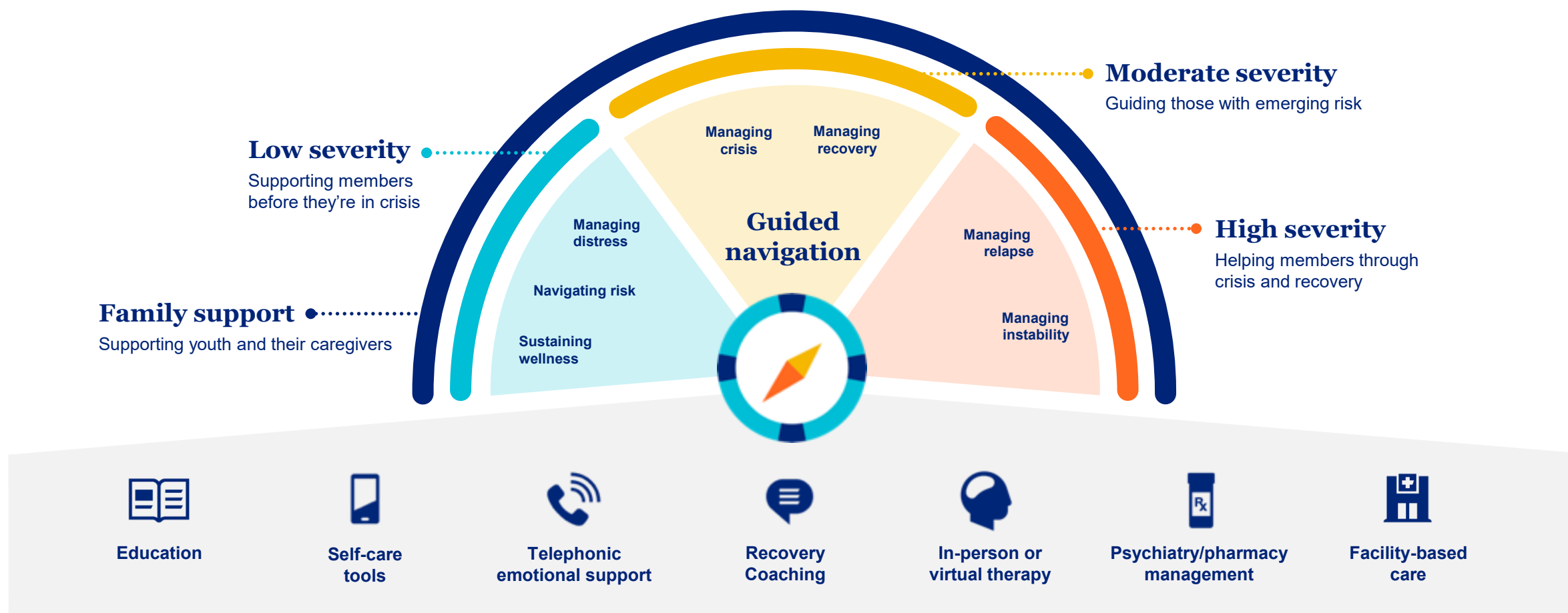


Who is using BH services in Florida ?

- Gen alpha males – born 2010 – 2024
- Applied behavioral analysis
- Gen Z – adolescents – 2007- 2010
- Outpatient and applied behavioral analysis
- Gen Z- Adults – 1997-2006
- Outpatient
- Number 1 substance of choice ?
- Alcohol
- Male Subscribers – ages 35-49



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



Behavioral network by the numbers....

Florida Commercial Network

Unique Providers

30,977 ▲ **10.2 %**

Data as of 02.26.2025

YOY

Attested EAP

Unique Providers

9,172 ▲ **4.5%**

YOY

Facilities

Unique Providers

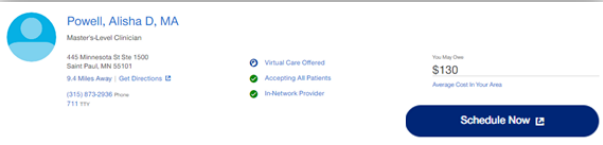
262 ▲ **9.2%**

YOY

Online scheduling

- Real-time access to provider schedules via DocASAP
- 20,000+ clinicians
- Partnerships include Alma, AbleTo, Simple Practice

DOCASAP



Specialized programs to improve member access

Express Access Network



785 ▲ **42.8%** YOY

- Providers contracted to offer appointments within 5 business days
- 92% of commercial members have access w/in 20 mi

Median time to care

11

In-person

5

Virtual

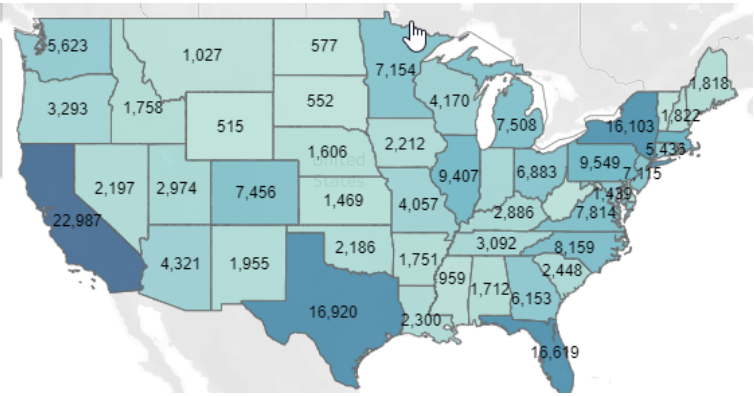
virtual visits Network

Unique TMH Providers

20,284 ▲ **2.4%** YOY

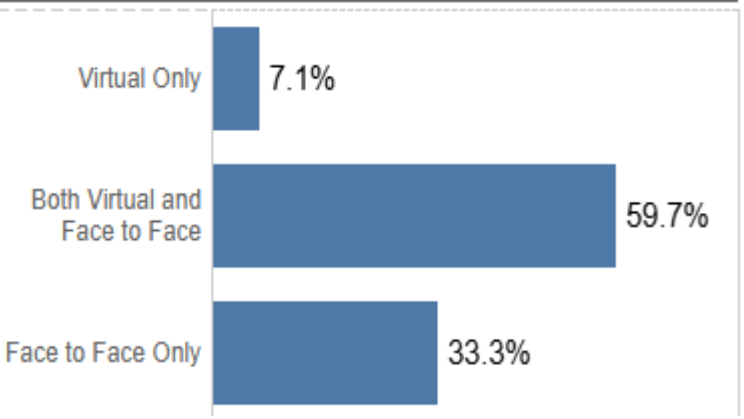
Provider + License State combo

42,079 ▲ **18.9%** YOY



Virtual visits network as of 02.26.2025

Virtual vs. Face to Face

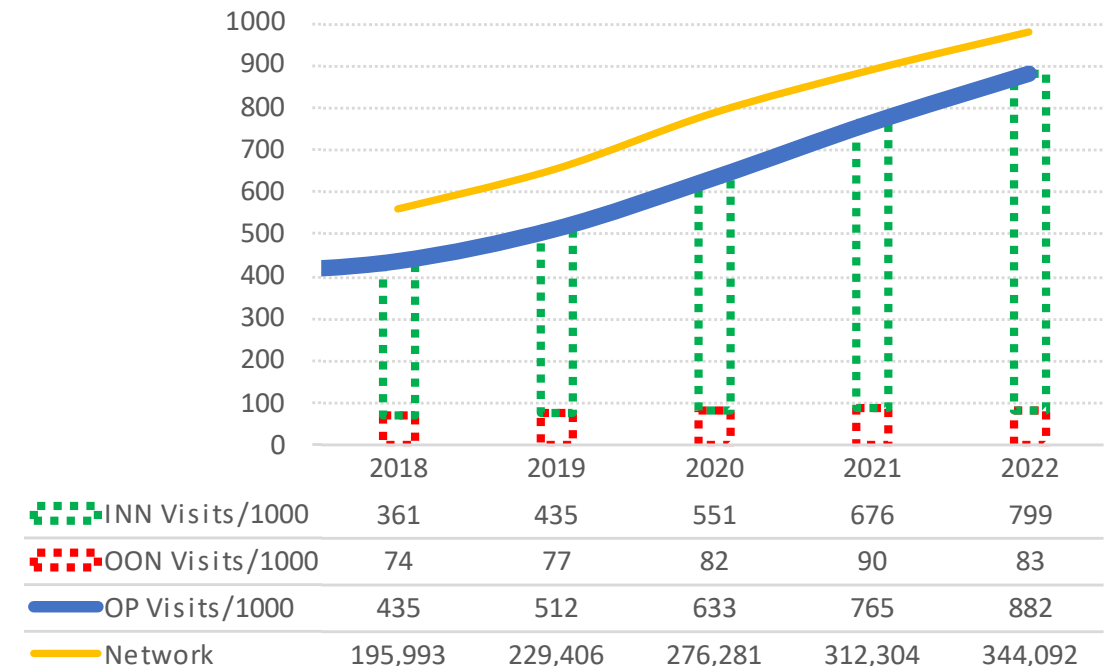


E&I Claims-based Algorithm: Jan 24 – Dec 24

Responding to behavioral health access challenges through innovative approaches

Network	<ul style="list-style-type: none"> • Open recruitment for high use out-of-network providers • Network Growth <ul style="list-style-type: none"> • 81% growth vs '21 in prescriber access • 85% growth vs '21 in ABA providers and adolescent specialists (Youth Mental Health) • Psych Urgent Care Program
Technology	<ul style="list-style-type: none"> • Real-time access to provider schedules through Optum™ virtual visits platform scheduling • Provider education tools for diversity, equity & inclusion • Digital navigation to improve quality referrals
Collaboration	<ul style="list-style-type: none"> • Targeted fee reimbursement structures • Value-based arrangements to promote industry standard assessments (e.g. AbleTo, Alma) • Enhanced provider education tools for diversity, equity & inclusion

**+75% BH network access growth since 2018
(mainly INN growth)**

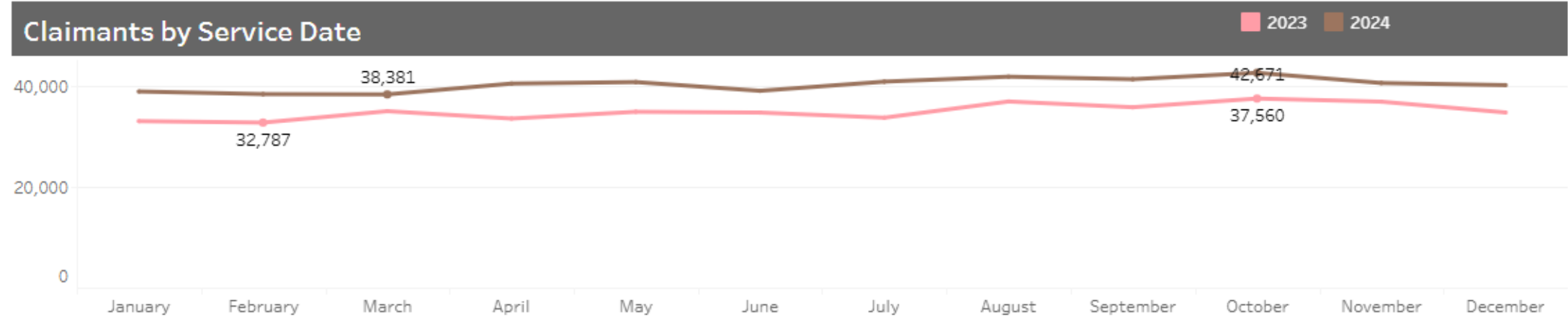


Improved timely access to care with improved outcomes and affordability

Virtual Behavioral Health Services – Florida

Summary Metrics

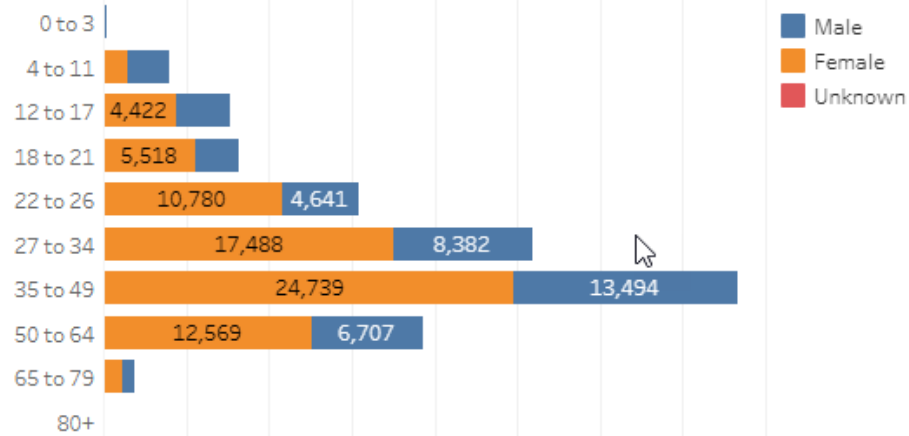
	Claimants	Total Units	Paid Amount	Avg Paid per Claimant	Claimant Cost Share	Avg Units per Claimant	Avg Paid per Unit	Claimants per 1000	Units per 1000
Current	117,156	904,983	\$96,108,731	\$820.35	\$264.17	7.72	\$106.20		
Prior (YoY)	107,124	769,719	\$78,966,164	\$737.15	\$263.61	7.19	\$102.59		
% Change	▲9.4%	▲17.6%	▲21.7%	▲11.3%	▲0.2%	▲7.5%	▲3.5%		



Virtual Behavioral Health Services- Trends

Claimants by Claimant Age

Gender

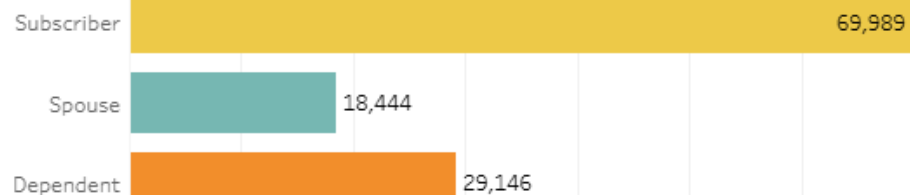


Minimum Claimant Count per Age Group

10

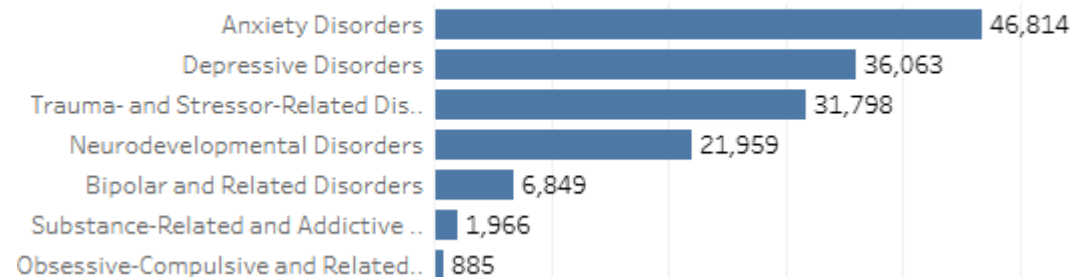
38,289

Claimants by Employee Relationship



Claimants by Diagnosis Category

Diagnosis Category

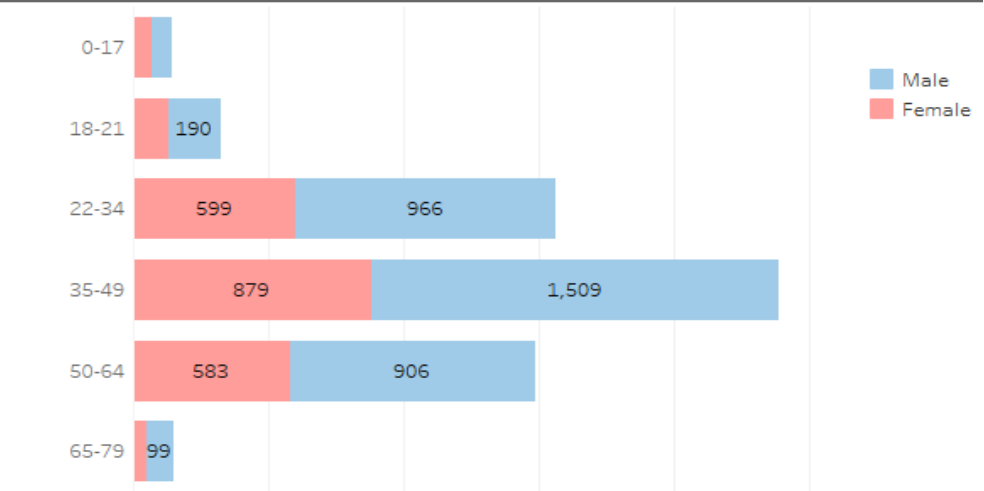


Substance Use Disorder – Florida

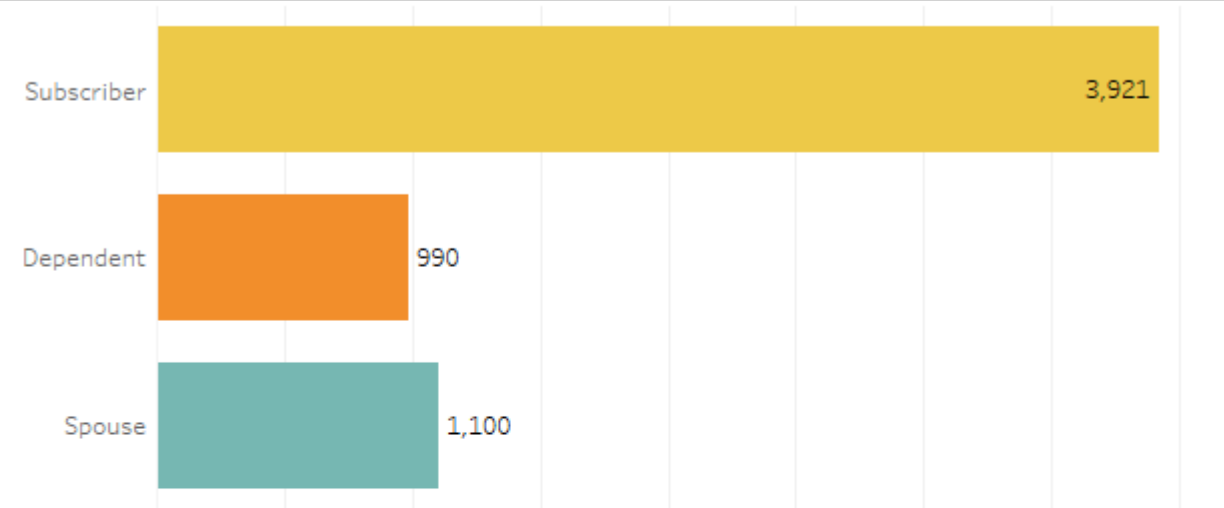
Summary Metrics

	Claimants	Paid Amount	Avg. Paid per Claimant	Paid PMPM
Current	6,011	\$32,627,906	\$5,428	
Prior	5,866	\$34,571,281	\$5,894	
% Change	▲ 2.5%	▼ -5.6%	▼ -7.9%	

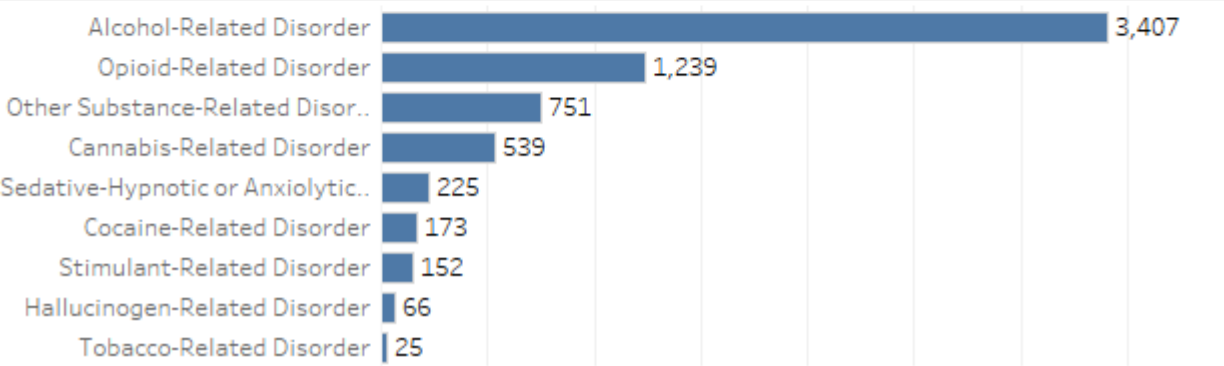
Claimants by Claimant Age



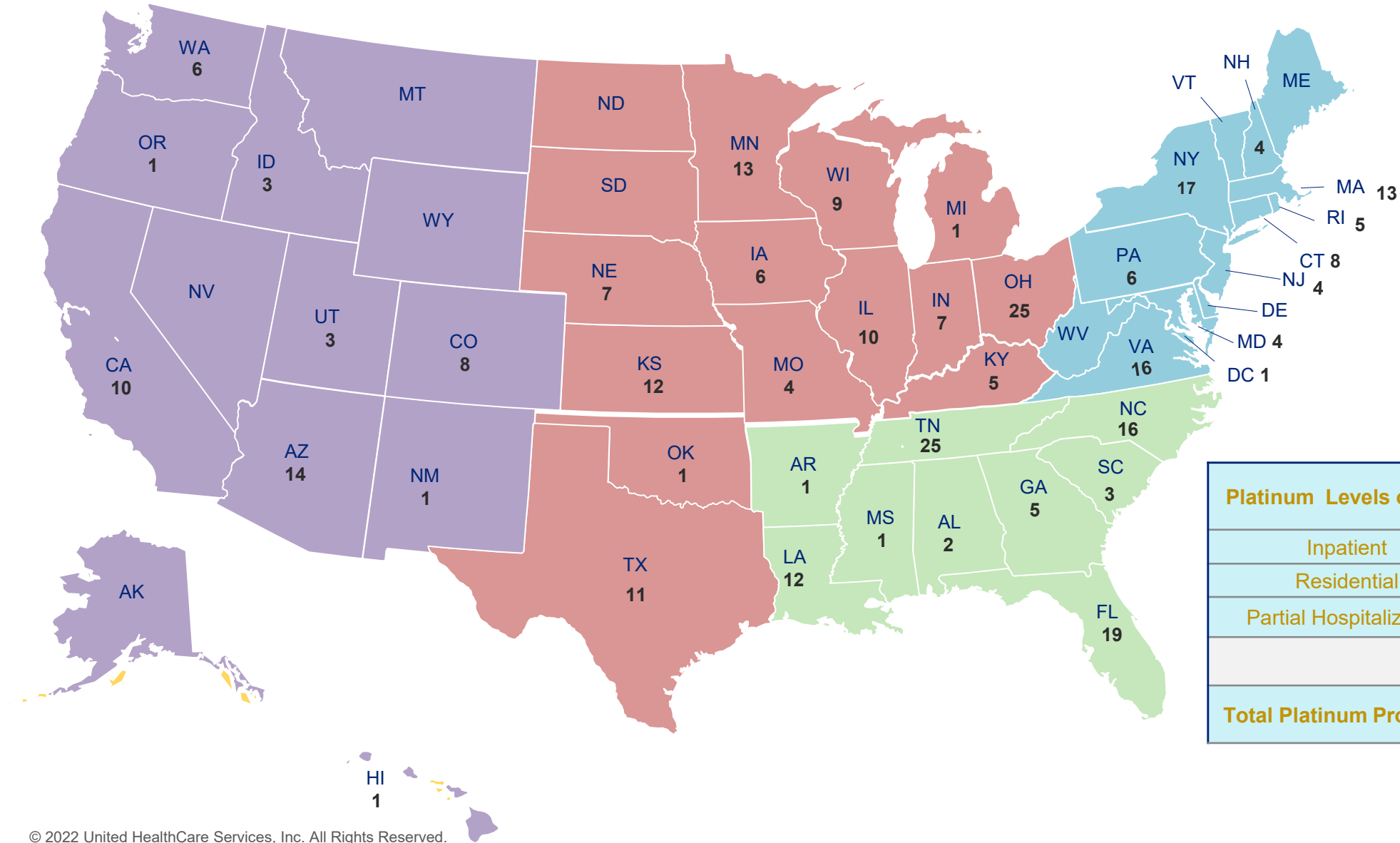
Claimants by Employee Relationship



Claimants by Diagnosis Subcategory



CY-2024/25 Platinum Levels Of Care By State



Platinum Levels of Care	MH	SUD
Inpatient	177	43
Residential	18	48
Partial Hospitalization	28	6
	223	97
Total Platinum Programs	320	



Key Areas of Behavioral Health Network Growth



Trauma/PTSD



Substance use



Pediatric/Adolescents



Low acuity depression



OCD/Anxiety



First episode psychosis

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. 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

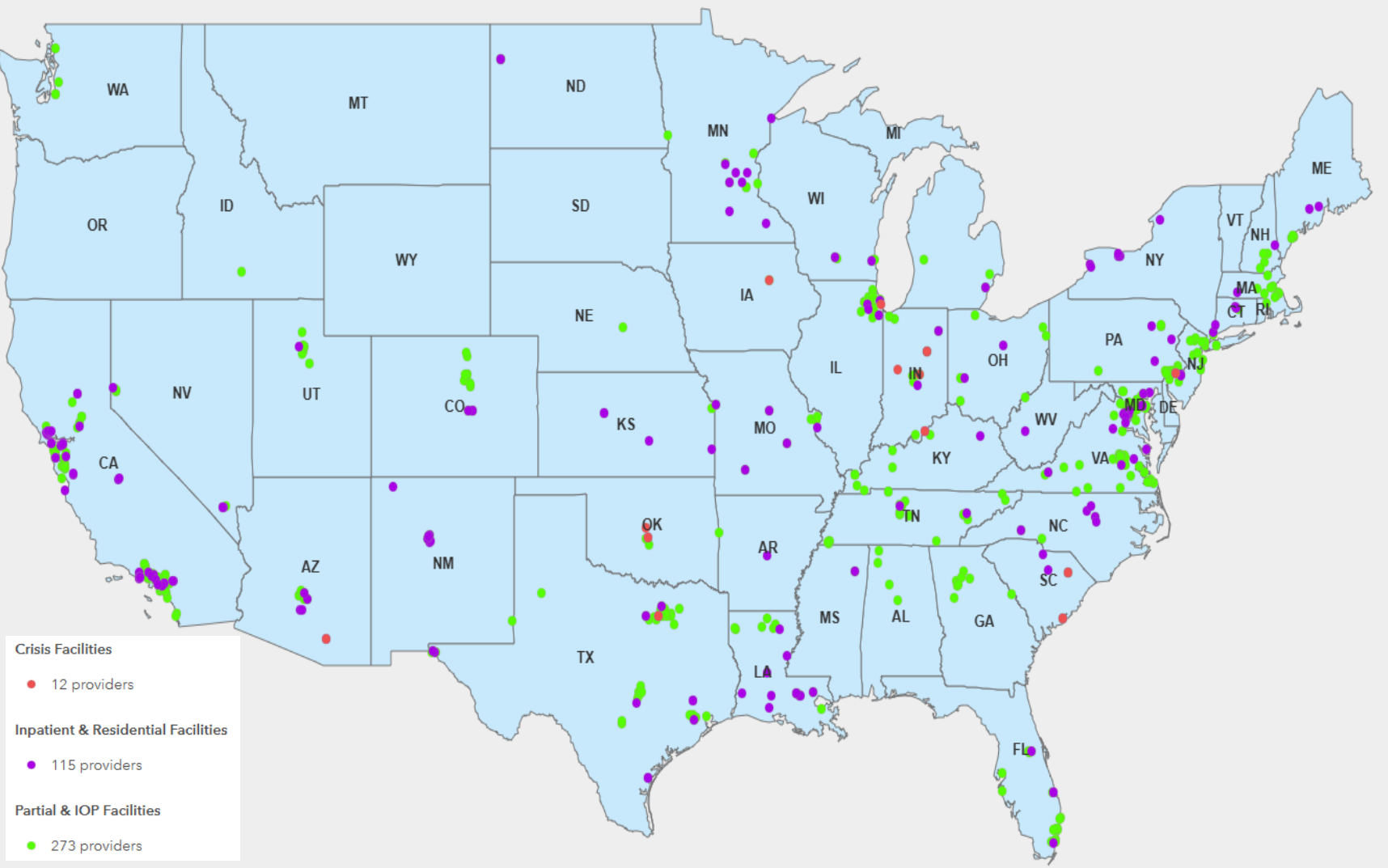
*The Great Collide 2022 report. On Our Sleeves: The Movement for Children's Mental Health



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New Pediatric Programs in 2024



400

new facility-based pediatric programs, including partial/IOP, inpatient/residential and outpatient/crisis



217

existing in-network facilities added/expanded pediatric programming



7,335

child and adolescent providers added to our network²

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



Driving care through strategic partnerships



Increased access to care for pediatrics and adolescents:



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

charlie health

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



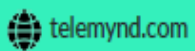
InStride Health offers support to pediatrics and adolescents with OCD and anxiety related disorders.



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



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



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



Increased SUD access to care, expanding EBT:



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



Groups offers MOUD programs centered around community – healing, recovering and maintaining success with group therapy.



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



Baymark comprehensive addiction treatment programs deliver medically-supervised services for adults in a variety of modalities and settings. As the largest specialty healthcare organization in North America addressing substance use disorders, providing a full continuum of care.



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

monument

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



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

Adult and other Specialty Strategic Partners



Increasing Access to Mental Health Care



- **NOCD** licensed therapists specialize in Exposure and Response Prevention (ERP) therapy, the most effective OCD treatment.



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



- **Sondermind** 4k licensed providers that deliver behavioral health care in a virtual format for adults



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



- **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. By using telepsychiatry to connect individuals with licensed psychiatrists and therapists, Array makes it easier for them to get the help they need, when and where it works for them.



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



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



- **Alma** 6k plus providers in 50 states treating adolescents and adults through a virtual platform



- **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





Health

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

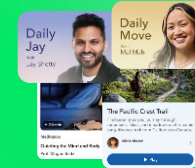
Interests,
mood-
checkins &
screenings



Asymptomatic

Calm Mindfulness

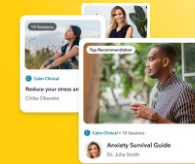
Focus | Meditation | Sleep



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



Questions ?

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