Voice of the Purchaser Survey on Behavioral Health Support
Spring 2023 Survey Results
Summary & Methodology

National Alliance, in partnership with HR Policy Association and in conjunction with the Path Forward, conducted a survey to understand the perceived importance and performance of services received from behavioral health service providers, including health plans. The survey gauged concerns and views of employers around the following:

- Equitable Access
- Quality of Care
- Integration of Behavioral Health into Primary Care
- Workplace Mental Health Support

The survey, including key purchaser expectations, was developed via an iterative process through feedback and insights from employers, coalitions, the Path Forward Steering Committee, and others. Survey responses were then collected from February to March 2023 using the online survey platform Qualtrics. Respondents could select up to five service providers to evaluate performance and had the option for each provider to indicate whether any specific requirement was out-of-scope or if they did not know how to evaluate (those responses were not included in the results). Respondents were also asked to provide qualitative comments on up to three key delighters and dissatisfiers for each provider.

The survey was distributed through National Alliance coalition members and the HR Policy Association resulting in a convenience sampling of 221 private and public employers from a variety of industries providing coverage for more than 10 million people across the country.

General attitudinal statements and importance ratings were evaluated overall (not at the service provider level). The performance results at the health plan/vendor level were only based on responses where employers chose to rate that dimension for that service provider. Average service provider ratings were only included where there was five or more ratings to a question.
Voice of the Purchaser Highlights:

**Network access**

- While 99% agreed that effective and timely access to in-network behavioral health providers is important, only 31% were satisfied; 31% expressed dissatisfaction with efforts to systematically identify and address gaps in network access; and 33% expressed dissatisfaction with efforts to help facilitate access for members having problems accessing timely behavioral health services.

- Tele-behavioral health services were important to 95% of employers and 65% were satisfied with these services.

- Only 34% of employers agreed that their behavioral health directories accurately reflect the providers available to plan participants, and 26% indicated dissatisfaction that their plan provides a directory that accurately reflects in-network behavioral health providers.

- 84% of employers agreed that behavioral health access and quality are as important as the financial management of behavioral health costs.

**Quality of care**

- While 54% were satisfied with the promotion of standardized measurement for behavioral health services, only 33% were satisfied with engagement and reporting of behavioral health outcomes.

- Monitoring appropriate prescribing of behavioral health medications relative to patient outcomes was important to 94% of employers and 41% indicated being satisfied with performance in this regard.

- 43% of employers were satisfied that their service providers administered denials that were clinically justified and sensitive to patient needs.
Voice of the Purchaser Highlights:

Integration of behavioral health into primary care

- 84% agreed that it was important that plans support, promote and incentivize integration of behavioral health into primary care, but only 28% were satisfied
- 64% agreed that early identification through broad use of behavioral health screenings can mitigate the severity of mental health issues

Workplace mental health support

- Achieving high engagement in workplace behavioral health programs was important to 92%, but only 39% were satisfied
- Providing behavioral health awareness and stigma reduction programs was important to 89% and 40% were satisfied that their vendors were meeting these needs

Health equity and whole person health

- Only 27% of employers were satisfied that their service providers evaluate and tailor behavioral health services to diverse communities (e.g., LGBTQ+, People of Color)
- Only 14% of employers were satisfied with service provider support of whole person program integration through data and process coordination
221 Total Respondents

Number of Employees

- 10,000+ employees: 34%
- 5,000-9,999 employees: 10%
- 1,000-4,999 employees: 25%
- 500-999 employees: 12%
- Fewer than 500 employees: 19%
Coalitions with 5 or more employer member responses

- Dallas/Fort Worth Business Group on Health
- Florida Alliance for Healthcare Value
- Greater Philadelphia Business Coalition on Health
- HealthCareTN
- Kansas Business Group on Health
- Lehigh Valley Business Coalition on Healthcare
- Mid-America Coalition on Health Care
- Midwest Business Group on Health
- North Carolina Business Group on Health
- Northeast Business Group on Health
- Pittsburgh Business Group on Health
- St. Louis Area Business Health Coalition
- Washington Health Alliance

Vendors and health plans with 5 or more responses

- Other non-Health Plan (40)
- United Healthcare/Optum (37)
- Other Blue Health Plan (33)
- Aetna/Healthagen (32)
- CIGNA/Evernorth (32)
- Kaiser (25)
- Anthem/Carelon Behavioral Health/Elevance Health (19)
- Other non-Blue Health Plan (14)
- Highmark (14)
- HCSC (13)
- Lyra (11)
- Capital Blue Cross (10)
- Magellan Health (9)
- Spring Health (6)
- Headspace (formerly known as Ginger) (5)
- Virgin Pulse (5)
Breakdowns by Industry & Approach to Covering Behavioral Health Services

### Industry Breakdown

- **Other**: 16%
- **Health Care and Social Assistance**: 16%
- **Federal, State, or Local Government**: 15%
- **Manufacturing**: 15%
- **Educational Services**: 11%
- **Finance and Insurance**: 11%
- **Retail**: 5%
- **Professional Services**: 4%
- **Transportation**: 4%
- **Technology**: 3%

### Coverage Approach

- **Health Plan or other TPA**: 83%
- **Carve-Out**: 16%
- **Overlay**: 13%
- **Carve-In**: 10%
- **Pay Out-of-Network services at In-Network benefit levels**: 6%
Our plan participants are able to access in network behavioral health treatment in a timely manner.

Our behavioral health provider directories are an accurate reflection of the providers available to our plan participants.

The rapid expansion of tele-behavioral health has made a significant improvement in behavioral health access.

Early identification through broad use of behavioral health screenings (e.g., PHQ-9, GAD-7) can mitigate severity of mental health issues.

Behavioral health should be integrated into Primary Care (e.g., Collaborative Care Model).

Behavioral health access and quality are as important as the financial management of behavioral health costs.
Key Employer Comments:

Access

• “I would rank access and quality as even more important than financial management.”

• “Lack of providers, even in metropolitan cities, is a struggle. Inpatient care is an even bigger struggle. Fighting to keep patients institutionalized is a struggle even with the large health plans.”

• “Access to in-network mental health services through health plans is an utter failure. Access to critical mental health services, such as inpatient services, is even worse. We are failing as a country.”

Tele-behavioral

• “Virtual care has been a great improvement in access to care, but in-person remains an important mode of treatment and is far less accessible both from an availability and in-network standpoint.”

• “Very few participants are utilizing the telehealth option for mental health services (Our participants still like to see a provider in-person).”
Key Delighters

Behavioral support practices that exceed employer’s expectations

• “Very happy with our on-site behavioral health support and also training sessions available to our managers and employee resource groups”
• “Collaboration with our EAP, availability of other programs that support members, and expansion of telemedicine with behavioral health”
• “Easy to manage copays for members, easy to find in-network providers”
• “Availability of no cost behavioral health telehealth services”
• “Patient management and ensuring that patient is followed up to ensure they are able to get an appointment with a provider”
• “Telehealth innovation ... integrated with chronic condition programs”
• “Have shown willingness to provide mental health access data”
• “Processes to treat post EAP visits as a network”
• “Efforts to pay network providers more and expansion of network”
• “In-network provider listing, in-network diverse provider listing, access to unlimited services”
• “Dedicated behavioral health line for members”
• “Assigning case managers”
• “Integration with primary and other types of care”
Key Concerns

Behavioral support practices where employer’s expectations were not met

• “Scarcity of in-network care”
• “No outcomes reporting”
• “Medical/mental health integration for whole person care”
• “Network availability of providers, upkeep of directory, provider reimbursement”
• “Not as cutting edge as some of the disruptor models”
• “Provider access across insured populations”
• “Access to specialized in-network providers, not concerned with employer’s concerns regarding lack of mental health care”
• “Time it takes for employees to get assistance”
• “Limited capabilities for a customized plan”
• “Lacks diverse provider list”
• “Mental health parity compliance”
• “Fully insured plan – we receive almost no info; need to see what we can get access from vendor”
• “Providing outcomes data and incentivizing high quality providers”
• “Reporting and member support”
• “General wait times and access”
• “Wouldn’t develop a smooth handoff from EAP to health plan; their answer was to switch to their EAP”
• “In Medicare, mental health copayments and coinsurances can be different than physical health; there needs to be parity”
• “Equity lens application”
• “Lack of new patient providers and lack of education”
• “Collection of race/ethnicity for behavioral health providers has stalled at 56%; need more reporting on where the gaps are and what they’re doing about recruiting providers of color”
**Network Access**

**Level of Importance**

- Provides effective and timely access to in-network behavioral health providers: 90% Very Important, 9% Important, 1% Somewhat Important, 0% Not important. Average Importance: 3.9

- Systematically assesses and addresses gaps in access for in-network behavioral health providers: 70% Very Important, 28% Important, 3% Somewhat Important, 0% Not important. Average Importance: 3.7

- Facilitates appointments for members having problem accessing timely behavioral health services as necessary: 55% Very Important, 35% Important, 8% Somewhat Important, 2% Not important. Average Importance: 3.4

- Provides a directory that accurately reflects in-network behavioral health providers accepting new patients: 71% Very Important, 25% Important, 3% Somewhat Important, 1% Not important. Average Importance: 3.7

**Overall Average Level of Importance:** 3.7
### Network Access

#### Level of Satisfaction

<table>
<thead>
<tr>
<th>Service Description</th>
<th>1 = Dissatisfied</th>
<th>2 = Somewhat Dissatisfied</th>
<th>3 = Somewhat Satisfied</th>
<th>4 = Satisfied</th>
<th>Total Satisfaction</th>
<th>Average Level of Satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provides effective and timely access to in-network behavioral health providers</td>
<td>9%</td>
<td>17%</td>
<td>31%</td>
<td>43%</td>
<td></td>
<td>3.0</td>
</tr>
<tr>
<td>Systematically assesses and addresses gaps in access for in-network behavioral health providers</td>
<td>13%</td>
<td>18%</td>
<td>25%</td>
<td>44%</td>
<td></td>
<td>2.8</td>
</tr>
<tr>
<td>Facilitates appointments for members having problem accessing timely behavioral health services as necessary</td>
<td>15%</td>
<td>18%</td>
<td>30%</td>
<td>37%</td>
<td></td>
<td>2.8</td>
</tr>
<tr>
<td>Provides a directory that accurately reflects in-network behavioral health providers accepting new patients</td>
<td>10%</td>
<td>16%</td>
<td>36%</td>
<td>38%</td>
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<tr>
<td><strong>Overall</strong></td>
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<td>2.9</td>
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</table>
## Network Access

### Variation in Satisfaction by Health Plan / Vendor

<table>
<thead>
<tr>
<th>Importance</th>
<th>All Health Plans/Vendors</th>
<th>3.8-4.0</th>
<th>3.4-3.7</th>
<th>3.1-3.3</th>
<th>2.8-3.0</th>
<th>2.5-2.7</th>
<th>2.2-2.4</th>
<th>1.9-2.1</th>
<th>1.8 -1.0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provides effective and timely access to in-network behavioral health providers</td>
<td>3.9</td>
<td>3.0</td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facilitates appointments for members having problem accessing timely behavioral health services as necessary</td>
<td>3.4</td>
<td>2.8</td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<tr>
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</tr>
</tbody>
</table>

*Results only included with 5 or more responses*
Other Access

Level of Importance

- **Provides appropriate reports to support plan sponsor compliance with mental health parity (e.g., CAA)**
  - 4 = Very Important: 1%
  - 3 = Important: 7%
  - 2 = Somewhat Important: 33%
  - 1 = Not important: 33%
  - Average Level of Importance: 3.5

- **Provides effective tele-behavioral health services**
  - 4 = Very Important: 4%
  - 3 = Important: 25%
  - 2 = Somewhat Important: 31%
  - 1 = Not important: 10%
  - Average Level of Importance: 3.7

- **Administers denials that are clinically justified and sensitive to patient needs**
  - 4 = Very Important: 10%
  - 3 = Important: 31%
  - 2 = Somewhat Important: 31%
  - 1 = Not important: 12%
  - Average Level of Importance: 3.5

- **Includes health equity lens to support diverse workforces (e.g., diversity/representation within the network)**
  - 4 = Very Important: 2%
  - 3 = Important: 31%
  - 2 = Somewhat Important: 31%
  - 1 = Not important: 12%
  - Average Level of Importance: 3.4

- **Manages access to medications with an appropriate orientation toward patient success**
  - 4 = Very Important: 4%
  - 3 = Important: 37%
  - 2 = Somewhat Important: 33%
  - 1 = Not important: 25%
  - Average Level of Importance: 3.5

**Overall Average Level of Importance**: 3.5
**Other Access**

**Level of Satisfaction**

- Manages access to medications with an appropriate orientation toward patient success
  - 4 = Satisfied
  - 3 = Somewhat Satisfied
  - 2 = Somewhat Dissatisfied
  - 1 = Dissatisfied

- Provides appropriate reports to support plan sponsor compliance with mental health parity (e.g., CAA)
  - Average Level of Satisfaction: 3.2

- Provides effective tele-behavioral health services
  - Average Level of Satisfaction: 3.6

- Administers denials that are clinically justified and sensitive to patient needs
  - Average Level of Satisfaction: 3.3

- Includes health equity lens to support diverse workforces (e.g., diversity/representation within the network)
  - Average Level of Satisfaction: 3.0

- Overall
  - Average Level of Satisfaction: 3.3
### Other Access

#### Variation in Satisfaction by Health Plan / Vendor

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<thead>
<tr>
<th>Importance</th>
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<tbody>
<tr>
<td>Provides appropriate reports to support plan sponsor compliance with mental health parity (e.g., CAA)</td>
<td>3.5</td>
</tr>
<tr>
<td>Provides effective tele-behavioral health services</td>
<td>3.7</td>
</tr>
<tr>
<td>Administers denials that are clinically justified and sensitive to patient needs</td>
<td>3.5</td>
</tr>
<tr>
<td>Includes health equity lens to support diverse workforces (e.g., diversity/representation within the network)</td>
<td>3.4</td>
</tr>
<tr>
<td>Manages access to medications with an appropriate orientation toward patient success</td>
<td>3.5</td>
</tr>
</tbody>
</table>

*Results only included with 5 or more responses*
Quality of Care Management

Level of Importance

- Promotes and rewards use of standardized measurement for behavioral health specialists
  - 4 = Very Important: 37%, 51%
  - 3 = Important: 12%, 2%
  - 2 = Somewhat Important: 12%, 7%
  - 1 = Not important: 1%, 4%
  - Average: 3.2

- Ensures that all members are systematically screened for depression, anxiety, and substance use disorder
  - 4 = Very Important: 51%
  - 3 = Important: 37%, 30%
  - 2 = Somewhat Important: 12%, 4%
  - 1 = Not important: 4%, 12%
  - Average: 3.2

- Monitors appropriate prescribing of behavioral health medications relative to patient outcomes
  - 4 = Very Important: 33%
  - 3 = Important: 34%, 36%
  - 2 = Somewhat Important: 19%, 12%
  - 1 = Not important: 0%, 7%
  - Average: 3.5

- Provides incentive payments to mental health and substance use providers who meet access and clinical quality metrics
  - 4 = Very Important: 48%
  - 3 = Important: 44%, 34%
  - 2 = Somewhat Important: 19%, 12%
  - 1 = Not important: 4%, 4%
  - Average: 2.6

- Evaluates and reports on engagement with and outcomes of behavioral healthcare services
  - 4 = Very Important: 48%
  - 3 = Important: 44%, 36%
  - 2 = Somewhat Important: 19%, 12%
  - 1 = Not important: 2%, 4%
  - Average: 3.3

- Evaluates and tailors behavioral healthcare services to diverse communities (LGBTQ+, people of color)
  - 4 = Very Important: 52%
  - 3 = Important: 39%
  - 2 = Somewhat Important: 39%, 33%
  - 1 = Not important: 7%
  - Average: 3.4

Overall Average Level of Importance: 3.2
<table>
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<tr>
<th>Description</th>
<th>Level of Satisfaction</th>
<th>Average Level of Satisfaction</th>
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<tbody>
<tr>
<td>Promotes and rewards use of standardized measurement for behavioral health specialists</td>
<td>5% 13% 28% 54%</td>
<td>3.3</td>
</tr>
<tr>
<td>Ensures that all members are systematically screened for depression, anxiety, and substance use disorder</td>
<td>5% 9% 41% 45%</td>
<td>3.2</td>
</tr>
<tr>
<td>Monitors appropriate prescribing of behavioral health medications relative to patient outcomes</td>
<td>5% 4% 41% 50%</td>
<td>3.1</td>
</tr>
<tr>
<td>Provides incentive payments to mental health and substance use providers who meet access and clinical quality metrics</td>
<td>14% 17% 21% 48%</td>
<td>2.7</td>
</tr>
<tr>
<td>Evaluates and reports on engagement with and outcomes of behavioral healthcare services</td>
<td>11% 13% 33% 43%</td>
<td>3.0</td>
</tr>
<tr>
<td>Evaluates and tailors behavioral healthcare services to diverse communities (LBGTQ+, people of color)</td>
<td>10% 19% 27% 44%</td>
<td>2.9</td>
</tr>
<tr>
<td>Overall</td>
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<td>3.1</td>
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Quality of Care Management

Variance in Satisfaction by Health Plan / Vendor

<table>
<thead>
<tr>
<th>Importance</th>
<th>All Health Plans/Vendors</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.2</td>
<td>3.3</td>
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<tr>
<td>3.4</td>
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<td>3.5</td>
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<tr>
<td>3.3</td>
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Promotes and rewards use of standardized measurement for behavioral health specialists

Ensures that all members are systematically screened for depression, anxiety, and substance use disorder

Monitors appropriate prescribing of behavioral health medications relative to patient outcomes

Provides incentive payments to mental health and substance use providers who meet access and clinical quality metrics

Evaluates and reports on engagement with and outcomes of behavioral healthcare services

Evaluates and tailors behavioral healthcare services to diverse communities (LBGTQ+, people of color)

*Results only included with 5 or more responses*
Integrating Behavioral Health Into Primary Care

Level of Importance

- Financially supports, promotes and incentivizes behavioral health integration into primary care (e.g., CoCM)
  - Very Important: 45%
  - Important: 39%
  - Somewhat Important: 15%
  - Not important: 2%

- Promotes and rewards systemic behavioral health measurement (e.g., PHQ-9, GAD-7) for primary care providers
  - Very Important: 46%
  - Important: 40%
  - Somewhat Important: 13%
  - Not important: 1%

- Provides training to primary care on how to access an in-network behavioral health specialists
  - Very Important: 47%
  - Important: 44%
  - Somewhat Important: 7%
  - Not important: 2%

- Has notation in directory for primary care practices that have integrated behavioral health
  - Very Important: 41%
  - Important: 36%
  - Somewhat Important: 18%
  - Not important: 5%

4 = Very Important  3 = Important  2 = Somewhat Important  1 = Not important

Average Level of Importance

- Financially supports, promotes and incentivizes behavioral health integration into primary care: 3.3
- Promotes and rewards systemic behavioral health measurement: 3.2
- Provides training to primary care on how to access in-network behavioral health specialists: 3.4
- Has notation in directory for primary care practices that have integrated behavioral health: 3.1
- Overall: 3.2
Integrating Behavioral Health Into Primary Care

Level of Satisfaction

- Financially supports, promotes and incentivizes behavioral health integration into primary care (e.g., CoCM)
  - Satisfied: 28%
  - Somewhat Satisfied: 52%
  - Somewhat Dissatisfied: 7%
  - Dissatisfied: 13%
  - Average: 3.0

- Promotes and rewards systemic behavioral health measurement (e.g., PHQ-9, GAD-7) for primary care providers
  - Satisfied: 22%
  - Somewhat Satisfied: 59%
  - Somewhat Dissatisfied: 6%
  - Dissatisfied: 12%
  - Average: 3.0

- Provides training to primary care on how to access an in-network behavioral health specialists
  - Satisfied: 28%
  - Somewhat Satisfied: 45%
  - Somewhat Dissatisfied: 17%
  - Dissatisfied: 10%
  - Average: 2.9

- Has notation in directory for primary care practices that have integrated behavioral health
  - Satisfied: 18%
  - Somewhat Satisfied: 42%
  - Somewhat Dissatisfied: 26%
  - Dissatisfied: 14%
  - Average: 2.6

Overall Average: 2.9
## Integrating Behavioral Health Into Primary Care

### Variance in Satisfaction by Health Plan/Vendor

<table>
<thead>
<tr>
<th>Importance</th>
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<tbody>
<tr>
<td></td>
<td>3.8-4.0</td>
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<td></td>
<td>1.9-2.1</td>
</tr>
<tr>
<td></td>
<td>1.8 -1.0</td>
</tr>
</tbody>
</table>

- Financially supports, promotes and incentivizes behavioral health integration into primary care (e.g., CoCM)
  - Importance: 3.3
  - Score: 3.0
- Promotes and rewards systemic behavioral health measurement (e.g., PHQ-9, GAD-7) for primary care providers
  - Importance: 3.2
  - Score: 3.0
- Provides training to primary care on how to access an in-network behavioral health specialists
  - Importance: 3.4
  - Score: 2.9
- Has notation in directory for primary care practices that have integrated behavioral health
  - Importance: 3.1
  - Score: 2.6

*Results only included with 5 or more responses*
Workplace Mental Health

Level of Importance

Achieves high engagement in workplace behavioral health programs (e.g., EAP)

- 4 = Very Important
- 3 = Important
- 2 = Somewhat Important
- 1 = Not important

- 52% at 4
- 40% at 3
- 7% at 2
- 1% at 1

Average Level of Importance: 3.5

Provides effective supervisor training related to recognizing and responding to behavioral health concerns

- 44% at 4
- 44% at 3
- 10% at 2
- 3% at 1

Average Level of Importance: 3.3

Provides effective behavioral health awareness and stigma reduction programs

- 46% at 4
- 43% at 3
- 9% at 2
- 2% at 1

Average Level of Importance: 3.3

Supports whole person program integration through data and process coordination

- 48% at 4
- 41% at 3
- 9% at 2
- 1% at 1

Average Level of Importance: 3.4

Overall

Average Level of Importance: 3.4
# Workplace Mental Health

## Level of Satisfaction

<table>
<thead>
<tr>
<th>Description</th>
<th>Average Level of Satisfaction</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achieves high engagement in workplace behavioral health programs (e.g., EAP)</td>
<td>2.9</td>
<td>4 = Satisfied (9%), 3 = Somewhat Satisfied (23%), 2 = Somewhat Dissatisfied (28%), 1 = Dissatisfied (28%)</td>
</tr>
<tr>
<td>Provides effective supervisor training related to recognizing and responding to behavioral health concerns</td>
<td>2.9</td>
<td>4 = Satisfied (14%), 3 = Somewhat Satisfied (26%), 2 = Somewhat Dissatisfied (31%), 1 = Dissatisfied (29%)</td>
</tr>
<tr>
<td>Provides effective behavioral health awareness and stigma reduction programs</td>
<td>3.1</td>
<td>4 = Satisfied (10%), 3 = Somewhat Satisfied (11%), 2 = Somewhat Dissatisfied (26%), 1 = Dissatisfied (39%)</td>
</tr>
<tr>
<td>Supports whole person program integration through data and process coordination</td>
<td>2.8</td>
<td>4 = Satisfied (14%), 3 = Somewhat Satisfied (15%), 2 = Somewhat Dissatisfied (12%), 1 = Dissatisfied (28%)</td>
</tr>
</tbody>
</table>

**Overall:** 2.9
Workplace Mental Health
Variation in Satisfaction by Health Plan / Vendor

Achieves high engagement in workplace behavioral health programs (e.g., EAP)
- Importance: 3.5
- All Health Plans/Vendors: 2.9

Provides effective supervisor training related to recognizing and responding to behavioral health concerns
- Importance: 3.3
- All Health Plans/Vendors: 2.9

Provides effective behavioral health awareness and stigma reduction programs
- Importance: 3.3
- All Health Plans/Vendors: 3.1

Supports whole person program integration through data and process coordination
- Importance: 3.4
- All Health Plans/Vendors: 2.8

*Results only included with 5 or more responses*