



Aged Care Industry Trends

8th December 2015



Summary

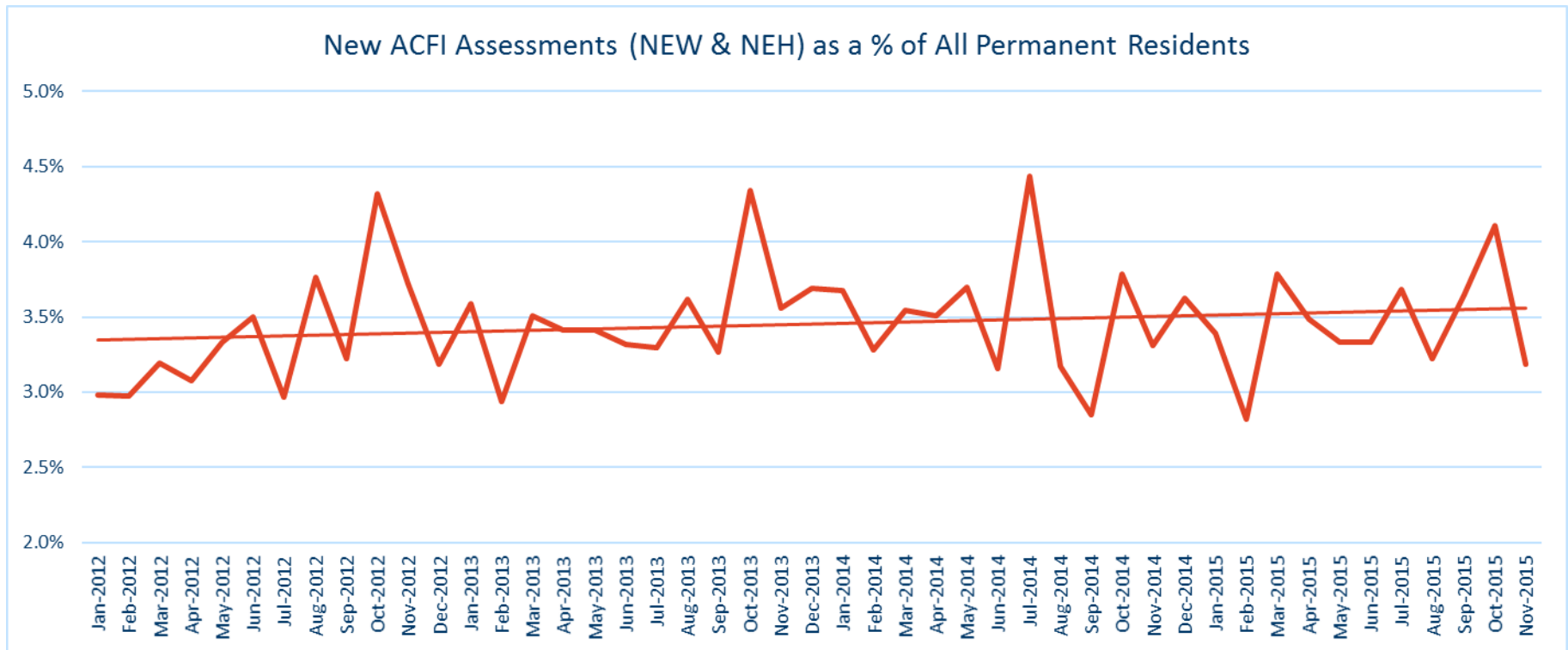
With recent reporting in the industry relating to the potential adjustments to ACFI funding we have analysed four key areas.

- Length of stay
 - The changes in aged care legislation over the last 4 years have triggered an expected reduction in length of stay which is only now beginning to show in industry trends
 - This measure will move slowly over time and is not likely to make significant movements regardless of any legislative changes
- Mobility
 - While there is a noted increase in the highest level of acuity ('D'), this would be expected when length of stay is shortening as a result of residents staying in their own homes longer and entering residential care later in life.
- Medication
 - The highest level of acuity ('D') is increasing but the next highest level ('C') is decreasing
 - The two lower levels ('A' & 'B') of acuity are stable
- Complex Health Care procedures
 - Five procedures are being utilised much more frequently than the others (3, 4a, 4b, 5, &12)

Length of stay

Calculating length of stay is complex and subject to interpretation

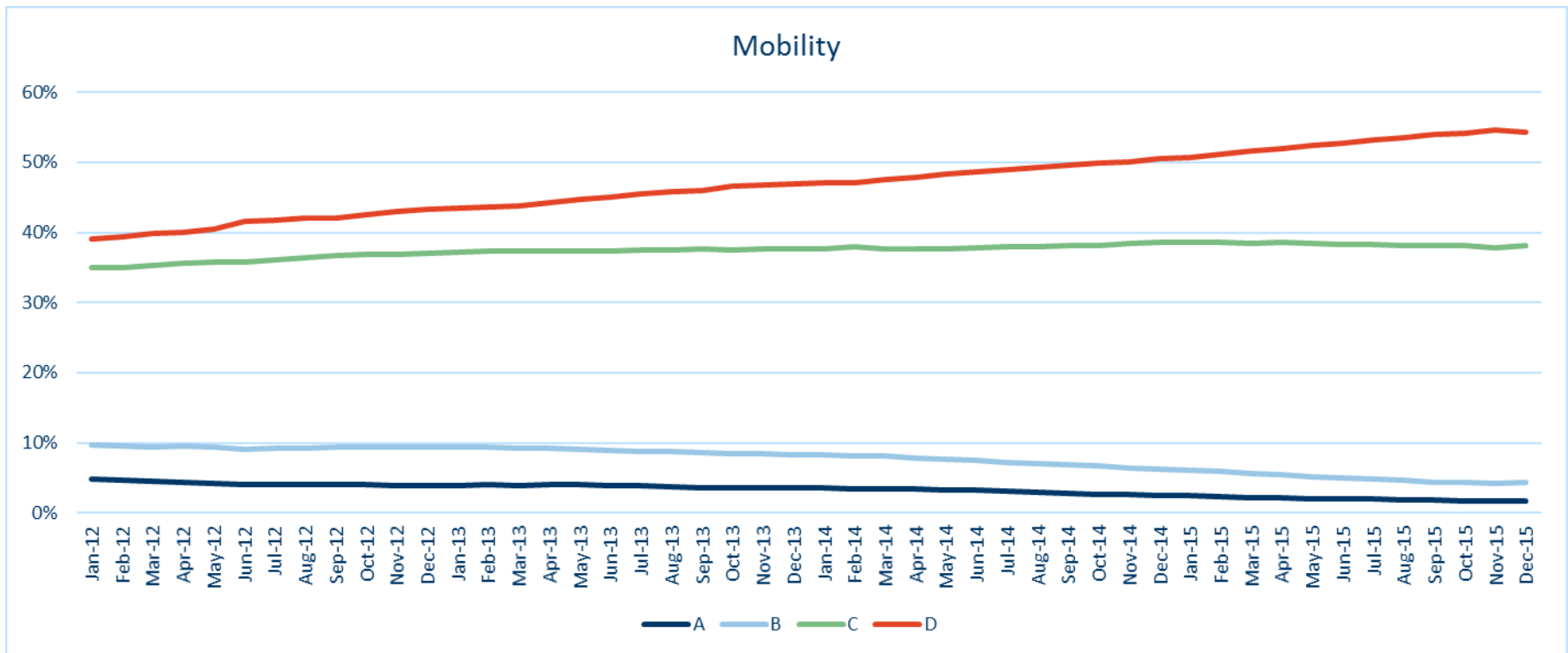
- The trend shows new resident ACFI assessments as a percentage of all permanent residents
- It is trending up slightly meaning that length of stay may be shortening
- The other contributing factor is the net movement in total residents, which has gone from 171,065 in 2012 to 177,820 in 2015, causing the line to flatten although the quantum of new assessments is increasing.



Mobility

Residents with higher needs in mobility have been consistently a larger segment of the population than those with lower level needs.

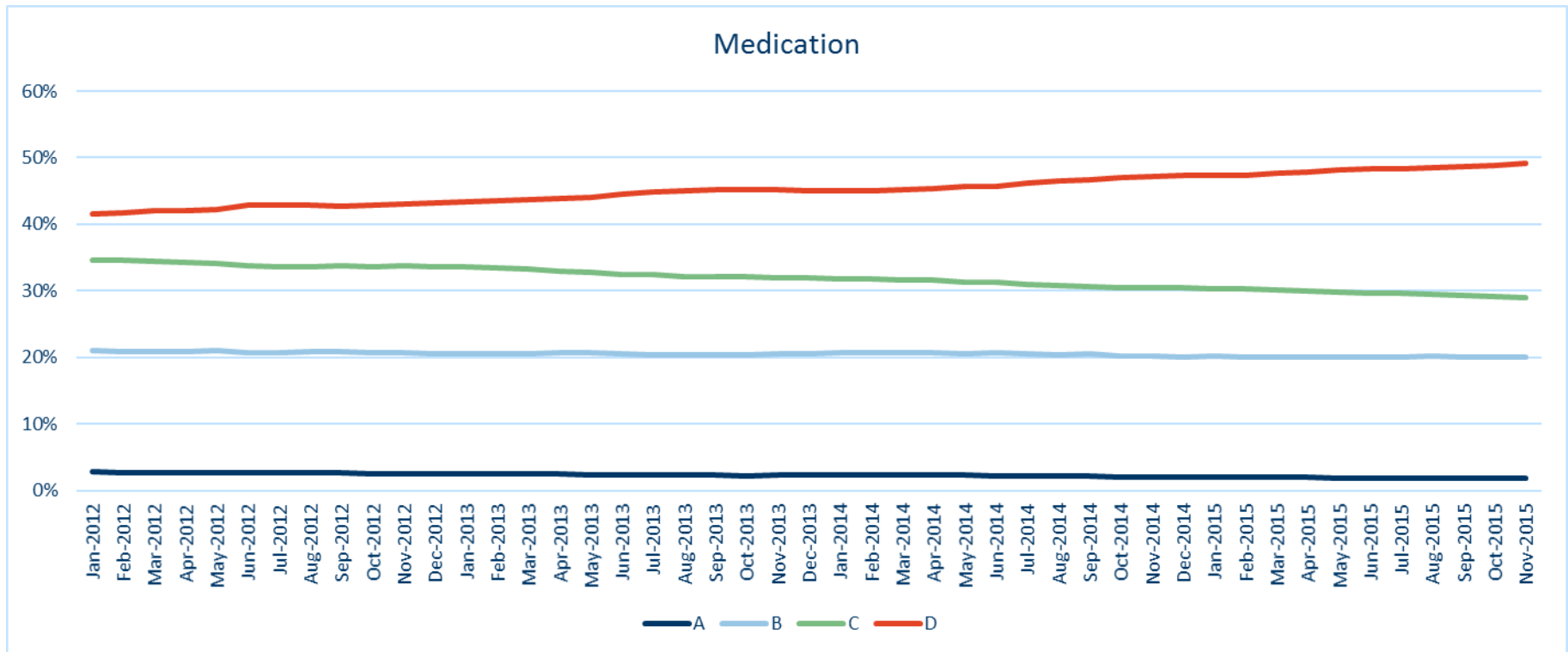
- The highest level of acuity ('D') has been the fastest growing rating
- The next lowest rating ('C') is more stable while the two lower levels of acuity are getting smaller as a percentage of the total resident population



Medication

The Highest level of needs in Medication have increased over time

- Most of the increase in 'D' claims have come from the next lowest rating of 'C'
- 'A' & 'B' claims have been mostly unchanged as a percentage of all permanent residents

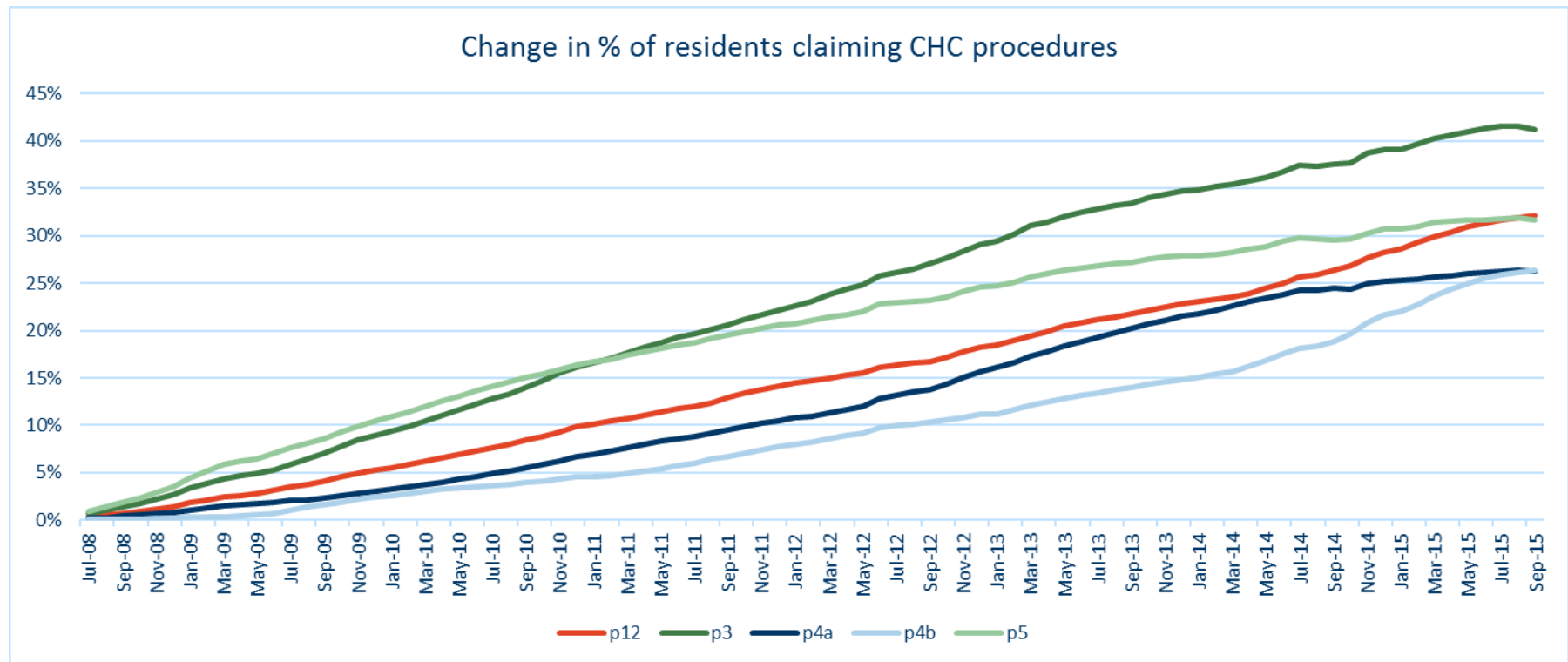


CHC Procedures

5 Procedural claims have increased at a faster rate than the other 14

Three of these procedures deal with pain management, p3, p4a & p4b

- P3 - Pain management
- P4a - Complex pain management
- P4b - Complex pain management with physio 4x week
- P5 - Complex skin integrity management
- P12 - Management of conditions requiring compression garments





Contact Us

Level 5, 56 Pitt Street
Sydney NSW 2000

Enquiries: 02 8823 3140
Support: 1300 738 145

info@mirusaustralia.com

www.mirusaustralia.com

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