



Data Reporting Trend Analysis

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Presented by:

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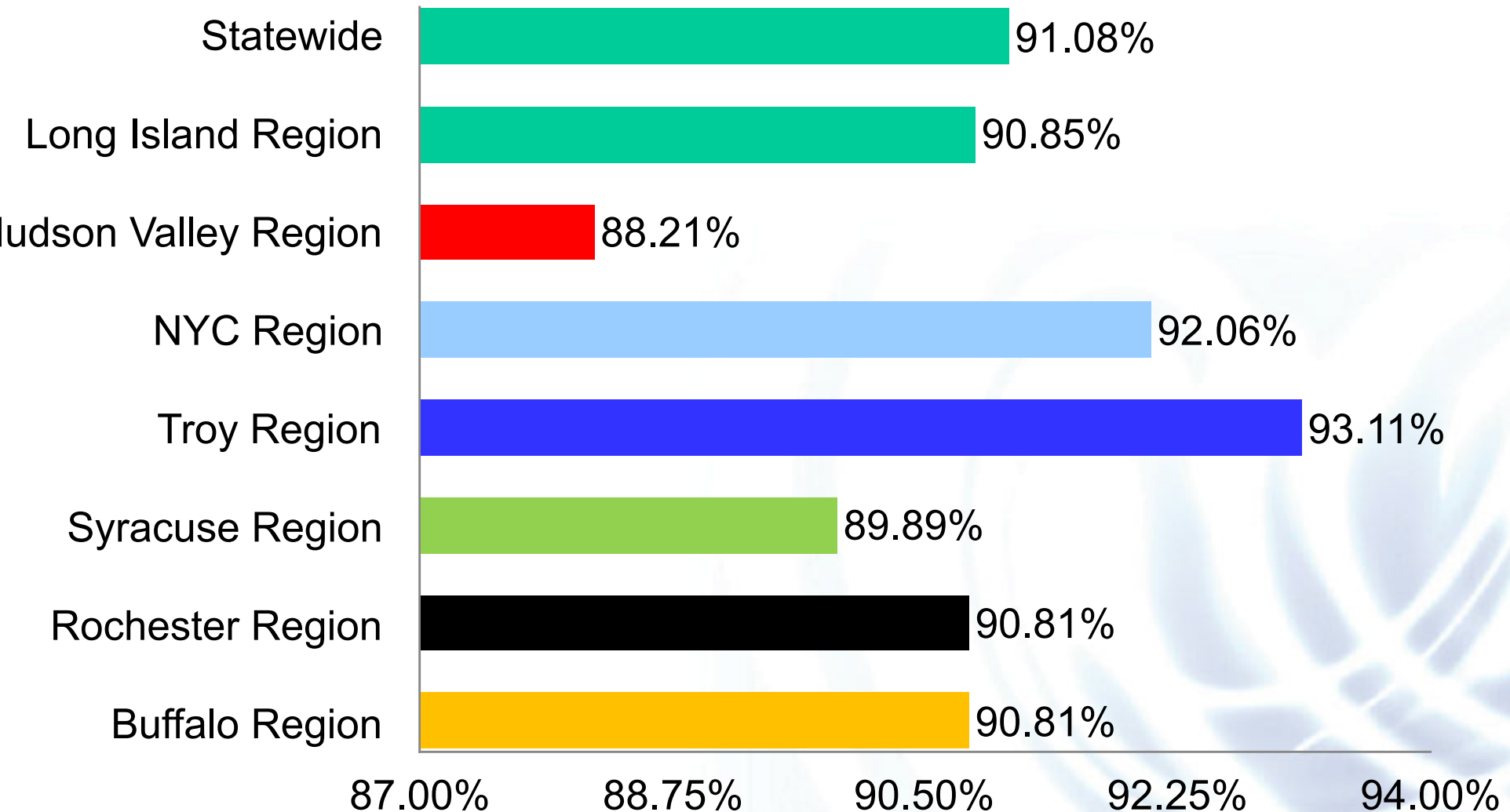
Today's Agenda...

- ☑ Cost Analysis Book Overview
- ☑ Occupancy Trends
- ☑ Payor Mix Trends
- ☑ Average Hourly Rates:
 - ☑ RNs
 - ☑ LPNs
 - ☑ Nursing Aides

Cost Analysis Book Overview

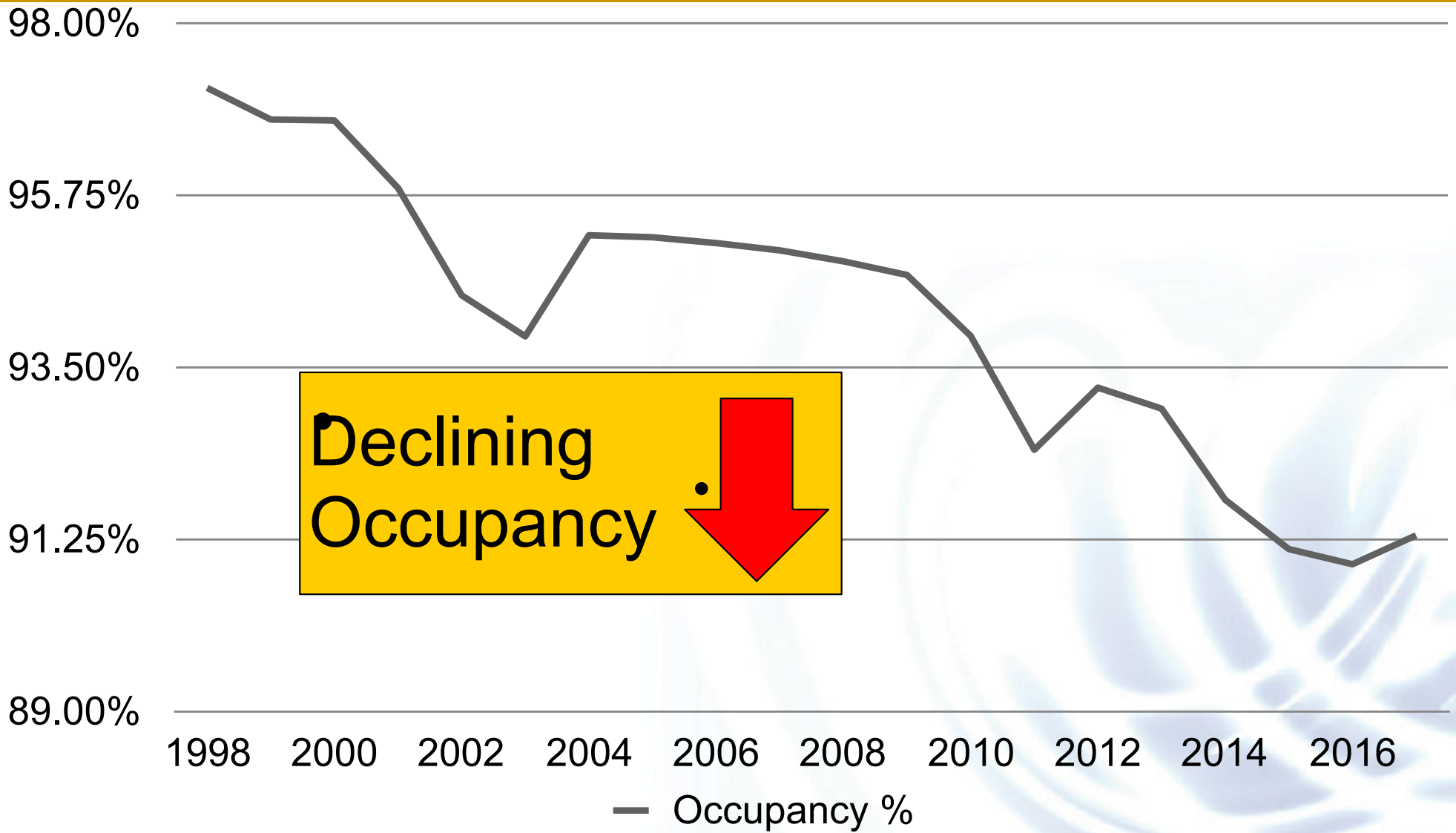
- Analysis of 2016 RHCF-4 Cost Reports
- 87 Skilled Nursing Facilities included
- Proprietary, Non-Profit, & Publicly Owned Entities
- Union & Non-Union Labor
- Facilities included have Bed Capacity ranging from 43 to 527 Beds

Occupancy Trends: 2017 Occupancy



Data Reference:
Health.Data.NY.gov

Occupancy Trends: Long Island 1998-2017



Data Reference:

Intercounty Health Facilities Association

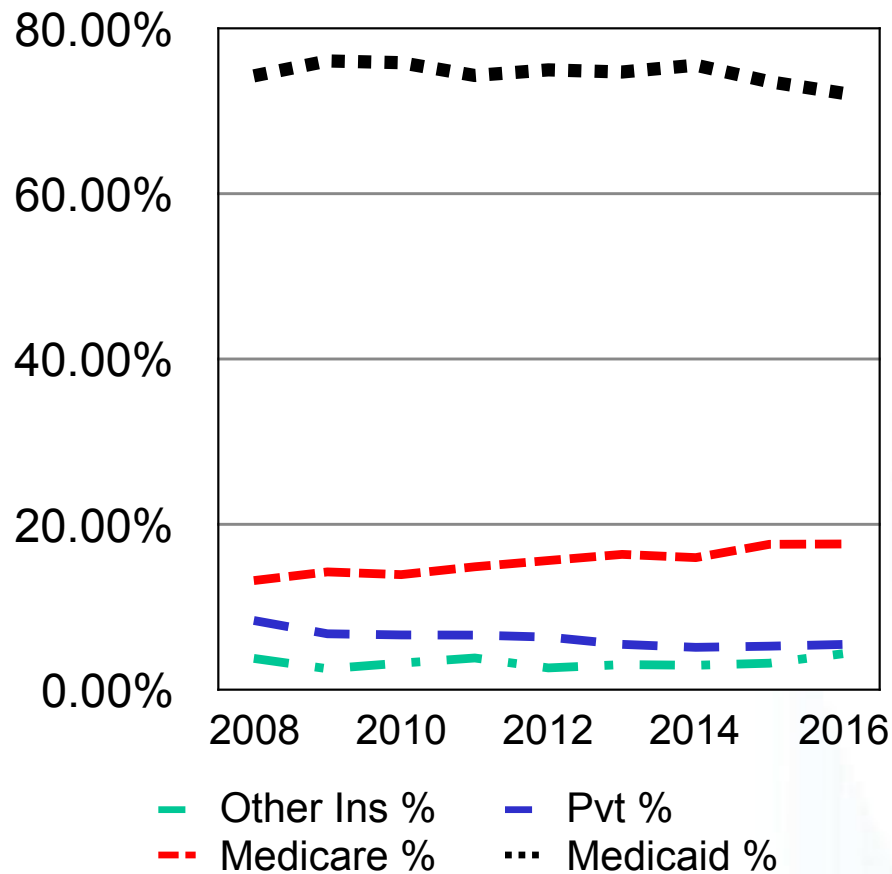
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Occupancy Trends

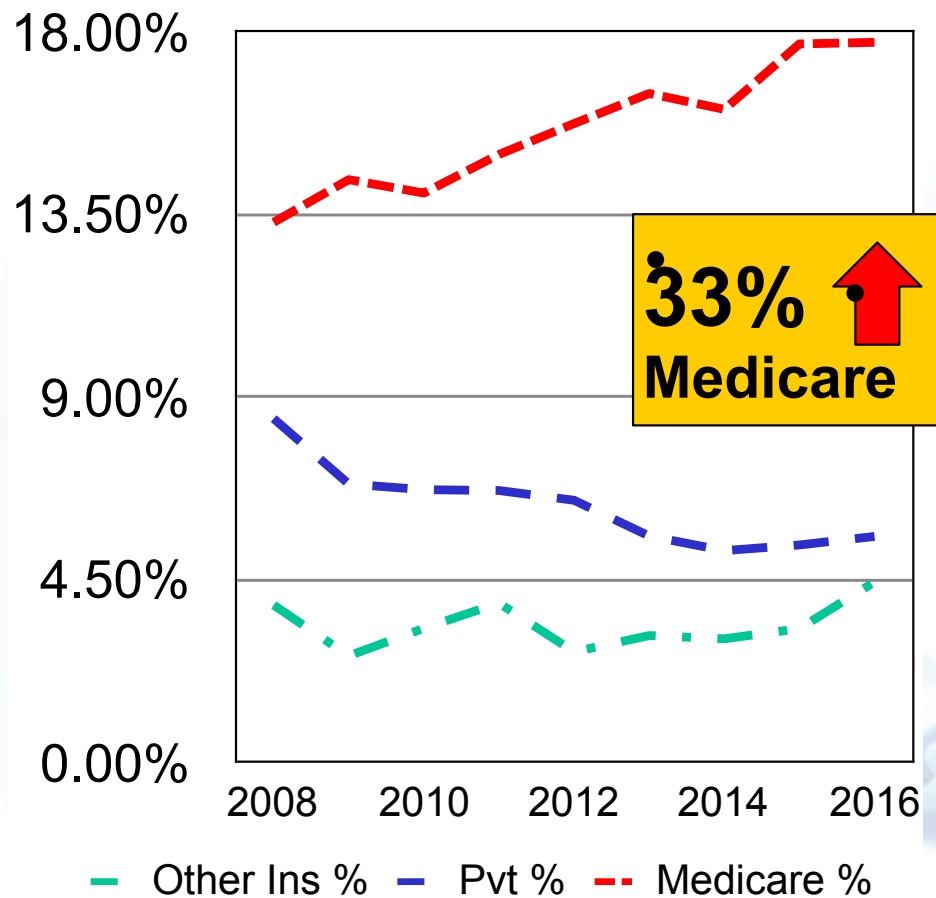
- Factors affecting occupancy:
 - Diversion of lower acuity patients to Home and Community Based Services (HCBS)
 - Managed Care and Insurance authorizing fewer inpatient days than traditional Medicare and Medicaid.
 - Shifting of higher acuity patients from Hospitals to Sub-Acute Providers
 - Consolidation and Vertical Integration of Upstream and Downstream Providers.

Payor Mix Trends

All Payors



Non-Medicaid

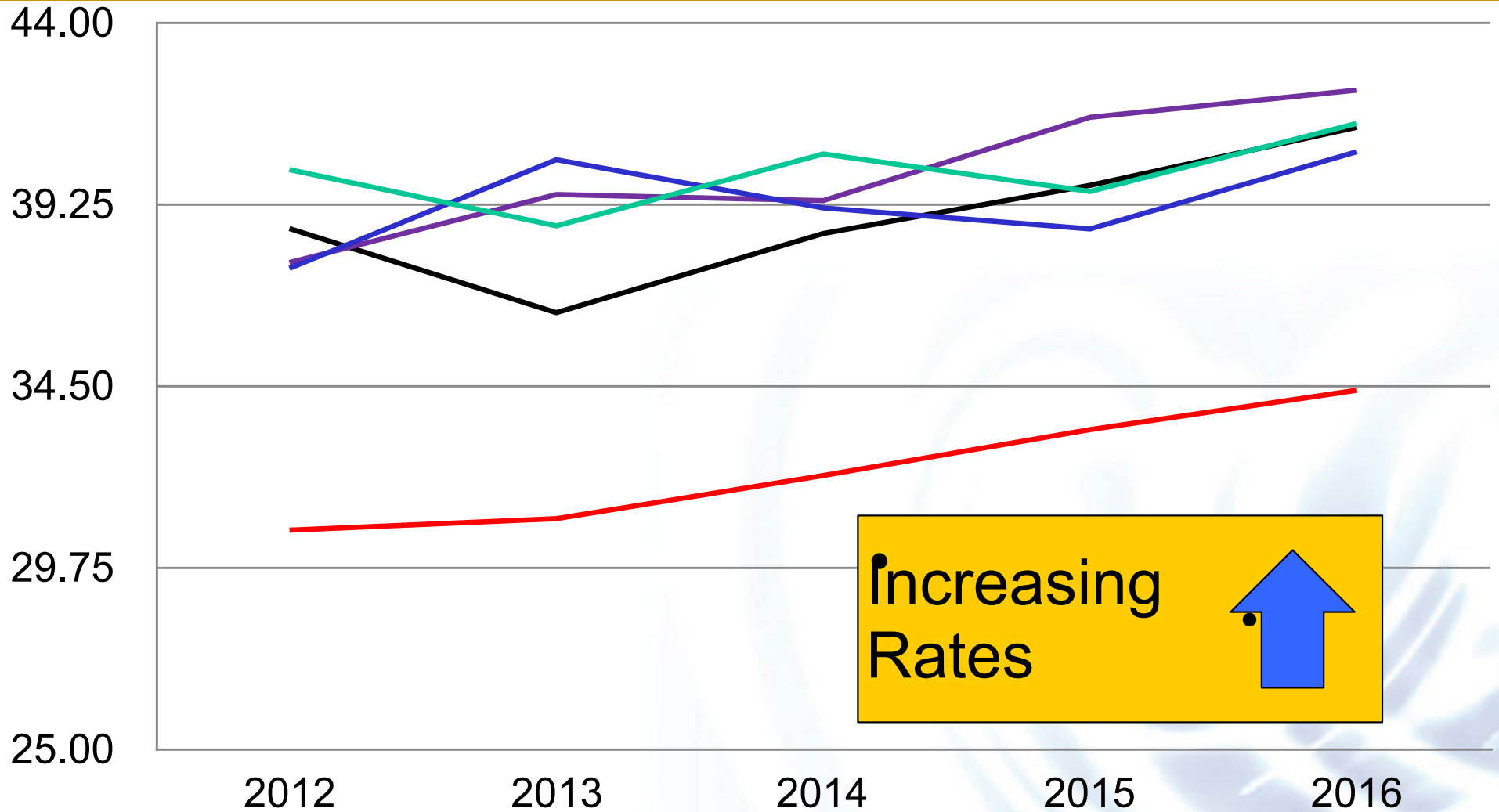


Data Reference:
HMM Cost Book

Payor Mix Trends

- Payor mix observations
 - Medicare Mix increased 34% since 2008
 - Private Mix decreased 34% since 2008
 - Medicaid and Insurance relatively flat
 - Operators shift admission strategy based on reimbursement, healthcare operating environment.

RN Average Hourly Rates: 2012 - 2016

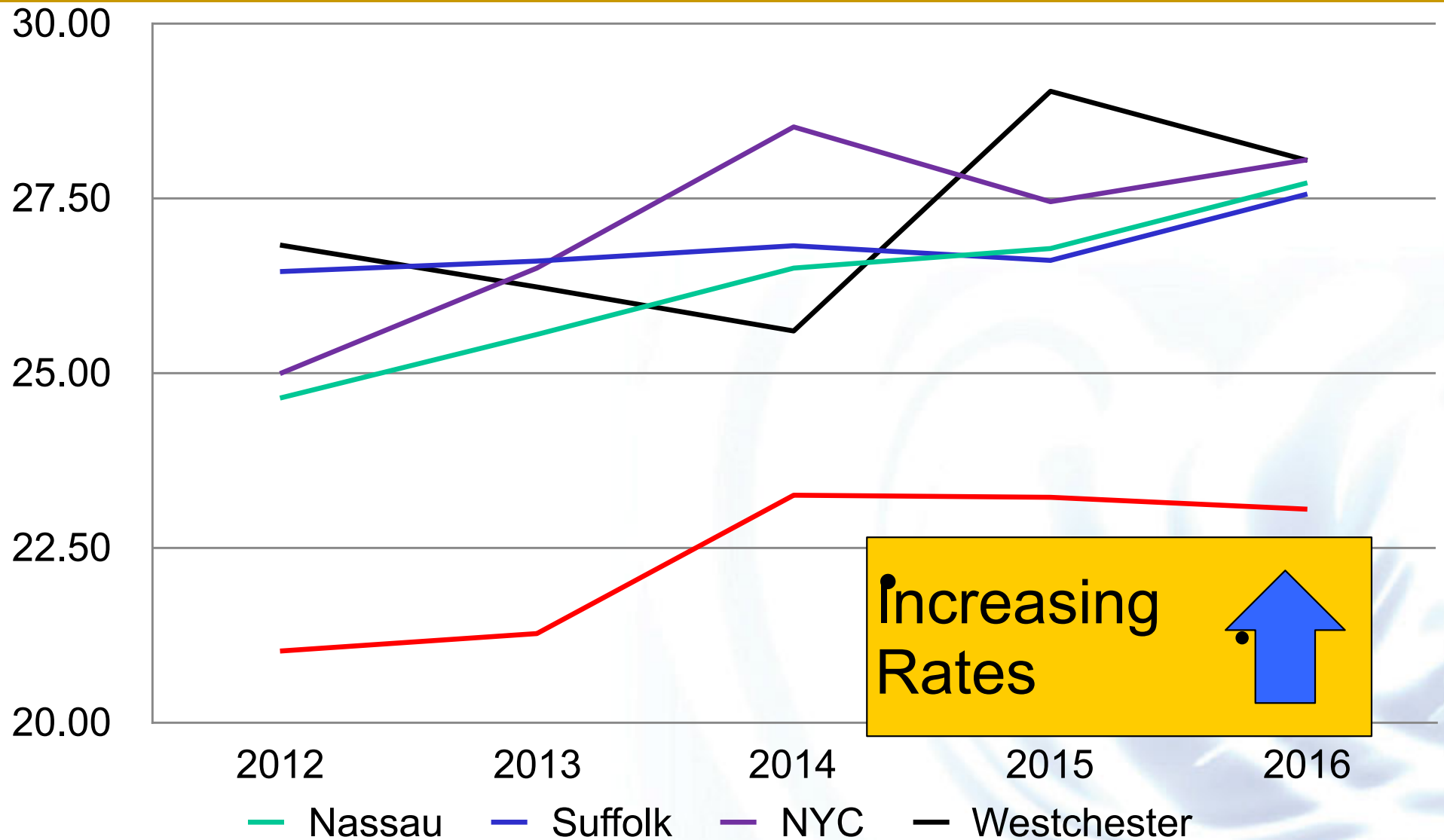


Data Reference:
HMM Cost Book

— Nassau — Suffolk — NYC — Westchester
— Other

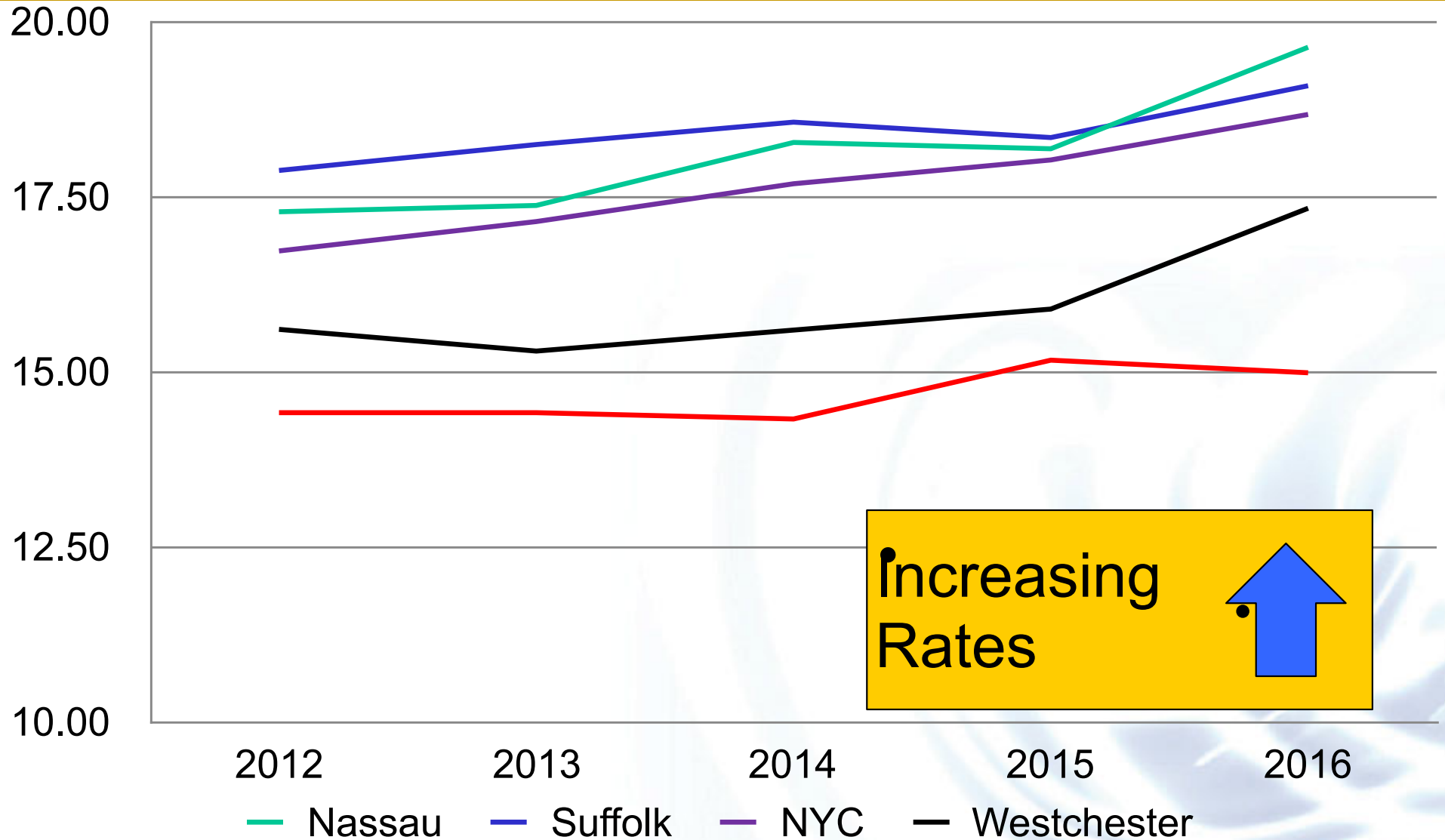
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LPN Average Hourly Rates: 2012 - 2016



Data Reference:
HMM Cost Book

Nursing Aide Average Hourly Rates: 2012 - 2016



Increasing Rates 

Data Reference:
HMM Cost Book

Average Hourly Rate Trends

- Factors affecting Average Hourly Rates:
 - Average increase in hourly rates between 2012 and 2016:
 - 8.3% for RNs
 - 8.6% for LPNs
 - 9.4% for Nursing Aides.
 - Minimum wage set to rise on 12/31/2017.
 - Medicaid Rate Trend Factor eliminated in 2007.

• Thank You

Questions?



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