

Nursing Home Fact Sheet

CON Modernization Task Force

March 23, 2018

Facilities, Quality, Innovation:

- 229 licensed comprehensive care facilities (CCFs) with 28,452 beds
- Average bed occupancy statewide: 89% in 2015
- CCF use rates have been trending down for all age groups, except <65, for many years
- Number of licensed CCF beds has declined 3.3% between 2007 and 2015
- Payor Mix (2015): Medicaid (61%), Medicare (19%), private pay (14%), other (6%)
- Nursing Home Compare Star Ratings: Maryland (30% facilities rated as below or much below average) compared to 32% nationally - Maryland (48%) above or much above average compared to 49% nationally
- Innovations: Erickson has formed a Medicare Advantage plan; 16 Maryland facilities participate in MedStar's MSSP ACO; 21 Maryland facilities are participating in Accountable Care Coalition of the Chesapeake, a CMS Next Gen Accountable Care Organization; one facility is in the CMS's Bundled Payments for Care Improvement Model 3 program; several nursing home are partnering with hospitals on telehealth projects.

Regulatory Scope:

- CON approval required to establish a CCF, relocate a CCF, add beds to a CCF, make a capital expenditure of \$6+ million
- Current CCF State Health Plan adopted in 2007 – update anticipated in 2018
- Bed need projection is primary approach in SHP for regulating supply of CCF beds – bed supply regulated on a jurisdictional basis.
- Continuing care retirement communities have exception to CON approval requirements for a limited number of CCF beds to exclusively serve continuing care contract holders
- CCFs obtaining CONs must agree to serve Medicaid patients with required minimum participation levels based on geographic location

Supply – 2014

Nursing Homes

- Maryland – 3.8 per 100,000 population
- U.S. – 4.9 per 100,000 population

Average Beds per Facility

- Maryland – 122
- U.S. – 109

Nursing Home Beds

- Maryland – 4.6 per 1,000 population
- U.S. – 5.4 per 1,000 population

Average Annual Bed Occupancy Rate

- Maryland – 89.7%
- U.S. – 82.3%