Purpose of collection
The Survey of Aged Care Homes collects information on accommodation payments and building activity during the previous financial year. The Assistant Minister for Social Services is required by section 63-2 of the Aged Care Act 1997 to present this report to Parliament by 30 November in each year.

Approved Providers of aged care are responsible for answers in this Questionnaire.

Approved Providers must complete a separate Questionnaire for each residential aged care service that they operated on 2 July 2014, as identified by a separate RACS ID.

Approved Providers operating a number of homes may prefer to use the electronic spreadsheet that can be downloaded from http://www.dss.gov.au/sach. An online option is also available at Go.srnet.com.au/sach

Copies of this Questionnaire are also available at the above Internet address.

This Questionnaire is in two parts. Use the checklist on Page 5 to find out which parts, if any, you need to answer.

Due date
Please complete this form and return it to Sweeney Research to the reply paid address or fax number below by 28 August 2014.

Early responses would be very helpful.

How to respond
1. Mail completed Questionnaires (free post) to:
   Sweeney Research
   Reply Paid 88796
   South Melbourne VIC 3205
   OR
2. Fax completed Questionnaires to: (03) 8199 0172
   Please don’t forget to include the Area Code
   OR
3. Send a Questionnaire spreadsheet attached to an e-mail to agedcare@sweeneyresearch.com.au

Help available
If you have problems in completing this form, or you may have difficulties meeting the due date, please contact Sweeney Research on 1800 357 739 (Freecall, except from mobile phones).
**Service Details**
What is the Residential Aged Care Service Identification number (RACS ID) of this aged care service?

What is the full name of this aged care service?

What is the name of the Approved Provider for this service?

Is the provider a Public Benevolent Institution endorsed by the Australian Taxation Office?
Yes ☐ No ☐

**Contact Details**
Name of person completing this form

Position in Approved Provider organisation

Telephone

Fax

E-mail address

This Survey is in two parts. Use the checklist of Page 5 to find out which parts, if any, you need to answer. Please see Page 3 and 4 for the Glossary of terms.

Even if you have no answers for either part, please return at least this page (page 2) and page 5 so we know that you have responded to the Survey.
# Glossary of terms used in this Survey

## Part 1: Accommodation bonds and charges

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Accommodation bond</strong></td>
<td>An accommodation bond is an amount that permanent residents may be asked to pay when they require low care or enter an extra service place. It is like an interest free loan to the aged care home and by law it must be used by the home to improve building standards, and the quality and range of aged care services provided.</td>
</tr>
<tr>
<td><strong>Accommodation bond balance</strong></td>
<td>Aged care homes are allowed to deduct monthly amounts, called retention amounts, from an accommodation bond for up to 5 years. Providers are also allowed to deduct other amounts, such as interest and charges owed to them by the resident, from the bond prior to refunding it. The accommodation bond balance is the balance of the bond amount after all deductions have been made (both retention and other).</td>
</tr>
<tr>
<td><strong>Accommodation bond lump sum amount</strong></td>
<td>Residents can pay an accommodation bond in one lump sum, by periodic (fortnightly or monthly) payments, or by a combination of both. The accommodation bond lump sum amount is the part of the total bond that is paid using a lump sum payment method, that is, it excludes any part paid periodically.</td>
</tr>
<tr>
<td><strong>Accommodation bond lump sum equivalent amount</strong></td>
<td>The lump sum equivalent amount of the accommodation bond is the total agreed value of the bond that would be paid as a lump sum, regardless of how the bond is actually paid.</td>
</tr>
<tr>
<td><strong>Accommodation charge</strong></td>
<td>An accommodation charge is a daily amount permanent residents may be asked to pay when they enter high care. This is in addition to, and does not include extra service charges, standard resident contributions, or income tested fees.</td>
</tr>
<tr>
<td><strong>Combined payment</strong></td>
<td>A combination payment is an alternative way to pay an accommodation bond combining both the lump sum and periodic payment method.</td>
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<tr>
<td><strong>High Care</strong></td>
<td>High level care provides people who need almost complete assistance with most activities of daily living with 24 hour care, either by registered nurses, or under the supervision of registered nurses. Nursing care is combined with accommodation, support services (cleaning, laundry, meals), allied health services (physiotherapy, occupational therapy, recreational therapy and podiatry) and personal care services (help with dressing, eating, toileting, bathing).</td>
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<tr>
<td><strong>Low Care</strong></td>
<td>Low level care is the care in which is provided for people who have been assessed by an ACAT and need accommodation services such as meals, laundry, room cleaning as well as additional help with personal care, with nursing care provided if required.</td>
</tr>
<tr>
<td><strong>Periodic Payments</strong></td>
<td>Periodic Payments are regular payments from a resident to a provider of an amount equivalent to the amount of interest the provider could have derived from the accommodation bond if it had been paid as a lump sum, plus a retention amount.</td>
</tr>
<tr>
<td><strong>Retention Amounts</strong></td>
<td>A retention amount is an amount deducted monthly from a resident’s bond for up to five years. For residents moving into an aged care home after 1 July 2013, the maximum monthly retention amounts in 2013-14 were $171 for bonds under $20,520 and $331 for bonds in excess of $39,720.</td>
</tr>
</tbody>
</table>
Permanent Resident

Permanent residents excludes residents receiving respite care.

Transferred Resident

A transferred resident is a resident that has transferred from one facility to another between 1 July 2013 and 30 June 2014.

**Part 2: Building activities**

Completed building work

Completed means that all work had finished by 30 June 2014. This includes work that commenced before 1 July 2013. The value of completed work is the total cost of the building work, not just the work done in 2013-14. The total should exclude any part of the GST component that was, or is eligible to be claimed back.

Building work in progress

In progress means construction had begun but was not complete by 30 June 2014. This includes work that commenced before 1 July 2013. The value of work in progress is equal to the estimated total cost of the building upon completion, not just the work that had been done in 2013-14. The total should exclude any part of the GST component that was, or is eligible to be, claimed back.

Building work being planned

Planned means that some significant preparatory planning activity had occurred by 30 June 2014—for example, discussions with architects or discussions about financing or provisions for future financing.

New building

A new building is the construction of a completely new facility, and does not include extensions to an existing building.

Rebuild

A rebuild is the demolition of an entire service and its reconstruction on the same site.

Upgrade

An upgrade is the renovation or refurbishment of an existing facility, including extensions to an existing building or reconstruction of part of a building. Do NOT include routine repairs and the maintenance of premises such as painting, plumbing, electrical work or gardening.

---

Approved Providers operating a number of homes may prefer to use the electronic spreadsheet that can be downloaded from [http://www.dss.gov.au/sach](http://www.dss.gov.au/sach)

This information is protected under the *Aged Care Act 1997*
1. **Do you need to answer Part 1 on Accommodation Payments?**

   In the year ending **30 June 2014**:

   (a) Did any resident admitted to this service pay, or agree to pay, an accommodation charge or an accommodation bond? [ ] Yes [ ] No

   (b) Did this service get any income from accommodation bonds? [ ] Yes [ ] No

   (c) Did this service get any income from accommodation charges? [ ] Yes [ ] No

   (d) Did this service hold any accommodation bond money at any time during the year? [ ] Yes [ ] No

   *If you responded ‘Yes’ to any of the above Questions, please tick this box and complete Part 1*

2. **Do you need to answer Part 2 on Building Activity?**

   (a) Did you **complete** any building work for this service in the year ending 30 June 2014? [ ] Yes [ ] No

   (b) Was any other building work for this service **in progress** on 30 June 2014? [ ] Yes [ ] No

   (c) Apart from work mentioned in the previous two answers, was any building work being **planned** for this service as at 30 June 2014? [ ] Yes [ ] No

   *If you responded ‘Yes’ to any of the above Questions, please tick this box and complete Part 2  ........................................................*

**Reminder!** Even if you do not need to answer either Part 1 or Part 2, please return this page and page 2 so we know that you have sent a survey response for this aged care home.

Approved Providers operating a number of homes may prefer to use the electronic spreadsheet that can be downloaded from [http://www.dss.gov.au/sach](http://www.dss.gov.au/sach)
## Section A. Accommodation Bonds of New Permanent Residents in 2013-2014

A1 For each new permanent resident admitted to this service between 1 July 2013 and 30 June 2014 that agreed to pay an accommodation bond, please provide the following information relating to the agreed accommodation bond lump sum equivalent amount (regardless of whether or not that amount has been paid).

### Note:
- Date of entry must be after 30 June 2013
- Accommodation bonds should not include cents
- For definitions and explanations, please refer to the glossary on Page 3 and 4.

<table>
<thead>
<tr>
<th>Resident number</th>
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<th>Was this bond rolled over by a transferring resident?</th>
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**Check:**
- If required, please use the additional space provided at the end of the Survey (Page 14) or attach a list in a similar format.
Section B. Accommodation Charges and Bonds for All Permanent Residents in 2013-2014

Note:
- This section applies to all permanent residents in this aged care service during 2013-14 who were eligible for Australian Government subsidy, not just new residents.
- For definitions and explanations, please refer to the glossary on Page 3.
- Use whole dollars only - do not include cents. If any answer is $0, please place a ‘0’ in the last box.

Accommodation Charges

B1 What was the total of accommodation charges received from all high care residents of this service in the year ending 30 June 2014?

$ 

Accommodation Bonds

Lump sum

B2 What was the total value of lump sum accommodation bond balances held at close of business on 30 June 2013?

Include:
- Entry contributions paid prior to 1 October 1997

Do not include:
- Interest

$ 

B3 What was the total value of accommodation bond lump sum amounts received between 1 July 2013 and 30 June 2014?

Note:
- If a bond was paid by combination of lump sum and periodic payment, only include the lump sum amount.
This information is protected under the *Aged Care Act 1997*

**B4** What was the total value of accommodation bond balances **refunded** for residents who left the service between 1 July 2013 and 30 June 2014?

**Note:**
- The refund amount is the amount that was refunded after any deductions were made.

**B5** What was the total amount **retained** (i.e. retention amount) from accommodation bonds held as a lump sum between 1 July 2013 and 30 June 2014?

**Include:**
- retention amounts to which the provider was entitled as a result of holding the bond

**Do not include:**
- other deductions for interest and charges owed by residents or interest earned from accommodation bonds.

**B6** What was the total value of other amounts **deducted** from lump sum accommodation bonds received between 1 July 2013 and 30 June 2014?

**Include:**
- any amounts deducted for interest and charges owed by residents

**Do not include:**
- interest earned from accommodation bonds.

**B7** What was the total value of lump sum accommodation bond balances **held** at close of business on 30 June 2014?

**Include:**
- any entry contributions paid prior to 1 October 1997

**Do not include:**
- any amounts counted in the answers to Questions B4 and B5
- Interest earned from accommodation bonds.

**Check:**
- The value of the lump sum accommodation balances held at 30 June 2014 (B7) should equal B2 + B3 - B4 - B5 - B6.
Part 2: Building Activities

Note:
For definitions and explanations, please refer to the glossary on Page 4.
In estimating the total cost of building activity, include the following components:
- preliminary costs associated with consultation, insurance, notices and fees
- preparation of the land to be built on (i.e. substructure costs)
- construction of the main building (i.e. superstructure costs)
- finishing and fitting out the completed building
- connection of plumbing, electrical and mechanical services (exclude routine repairs and maintenance to these services).

Section c. Completed Building Activity

C1  Did you complete any building or upgrading work for this service in the year ending 30 June 2014?  
Yes  No 
Go to Question C2  Go to Question D1

New Building Completed

C2  If you completed an entirely new building to accommodate new or transferred aged care places, what was the total cost of the new building? $   ,   ,   

C3  How many residents can be accommodated in the new building(s)?  

Rebuilding Completed (Demolition and Rebuild)

C4  If you completed rebuilding of an existing service, what was the total cost of the rebuilding work? $   ,   ,   

C5  How many residents can be accommodated in the rebuilt building(s)?  

C6  How many residents could be accommodated in the building(s) prior to rebuilding?  

Upgrading Completed (Structural renovation or refurbishment)

C7  If you completed an upgrade to an existing service what was the total cost of the upgrade? $   ,   ,   

C8  How many residents can be accommodated in the upgraded building(s)?  

C9  How many residents could be accommodated in the building(s) prior to upgrading?  

Note: For definitions and explanations, please refer to the glossary on Page 4. 
In estimating the total cost of building activity, include the following components:
- preliminary costs associated with consultation, insurance, notices and fees
- preparation of the land to be built on (i.e. substructure costs)
- construction of the main building (i.e. superstructure costs)
- finishing and fitting out the completed building
- connection of plumbing, electrical and mechanical services (exclude routine repairs and maintenance to these services).
**Section D. Building Activity in Progress at 30 June 2014**

D1 Was any building or upgrading work **in progress** for this service on 30 June 2014? .................................................................

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Go to Question D2</td>
<td>Go to Question E1</td>
</tr>
</tbody>
</table>

New Building in Progress

D2 If work was in progress on an entirely new building to accommodate new or transferred aged care places, what will be the estimated total cost of the new building at completion? $ ......, ......, ......

D3 How many residents will be accommodated in the new building(s)? ...... ...... ......

Rebuilding in Progress (Demolition and Rebuild)

D4 If work was in progress to rebuild an existing service, what is the estimated total cost of the rebuilding at completion? $ ......, ......, ......

D5 How many residents will be accommodated in the rebuilt building(s)? ...... ...... ......

D6 How many residents could be accommodated in the building(s) prior to the start of rebuilding? ...... ...... ......

Upgrading in Progress (Structural renovation or refurbishment)

D7 If work was in progress to upgrade an existing service what was the total cost of the upgrade? $ ......, ......, ......

D8 How many residents will be accommodated in the upgraded building(s)? ...... ...... ......

D9 How many residents could be accommodated in the building(s) prior to the start of upgrading? ...... ...... ......
Section E. Planned Building Activity

E1 Was any building or upgrading work **planned** for this service as at 30 June 2014? .........................................................

Yes  No

Go to Question E2  Go to next page

New Building Planned

E2 If any work is planned for an entirely new building to accommodate new or transferred aged care places, how many residents will be accommodated in the planned new building(s)?

Rebuilding Planned (Demolition and Rebuild)

E3 How many residents will be accommodated in the rebuilt building(s)?

E4 How many residents can currently be accommodated in the building(s) planned for rebuilding?

Upgrading Planned (Structural renovation or refurbishment)

E5 If any work is planned to upgrade an existing facility, how many residents will be accommodated in the upgraded part of the building(s)?

E6 How many residents can currently be accommodated in the building(s) planned for upgrading?

End of Part 2

Please turn to Page 13 for instructions on completing and returning the form.
Do you have any comments you wish to provide?

Please estimate the time taken to complete this survey.

**Include:**
- the time actually spent reading the instructions, working on the Questions and obtaining the information
- the time spent by all employees in collecting and providing this information

Thank you for completing this survey.

**Due date**
Please return this form to Sweeney Research to the reply paid address or fax number below by **28 August 2014**.

**How to respond**
1. Mail completed Questionnaires (post free) to:
   Sweeney Research
   Reply Paid 88796
   South Melbourne VIC 3205 OR
2. Fax completed Questionnaires to: (03) 8199 0172
   Please don’t forget to include the Area Code OR
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   agedcare@sweeneyresearch.com.au

**Help available**
If you have problems in completing this form, or you may have difficulties meeting the due date, please contact Sweeney Research on 1800 357 739 (Freecall, excluding mobile phones).

This information is protected under the *Aged Care Act 1997*
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