



# State Agency Director Orientation Course

## Prerequisite (Recorded Session)

Prior to the training, please view the prerequisite video linked below. You will need to [log in](#) using the email address you used to register for the event, navigate to the agenda tab, and then select 2024 SADOc Agenda. Select the link below titled “CMS Survey Cycle – From Complaint to Enforcement” to begin viewing the prerequisite.

[CMS Survey Cycle—From Complaint to Enforcement](#)





## State Agency Director Orientation Course

April 22–23, 2024  
 Hilton Baltimore—Inner Harbor  
 401 West Pratt Street, Baltimore, MD 21201

### Day 1: Monday, April 22, 2024

Moderators—Mark Hennessey, Heather Lang

HOLIDAY 4–6

8:30 AM	<b>Welcome and Logistics</b> Caprina Buckner, Tarnisha Boone	15 min
8:45 AM	<b>Overview and Welcome</b> David Wright, Karen Tritz, Mark Hennessey	30 min
9:15 AM	<b>Overview, Goals, and Icebreaker Activity</b> Mark Hennessey, Heather Lang	60 min
10:15 AM	<b>“Survival of the Fittest”—Your First Year as a State Agency Director</b> Kimberly Smoak	45 min
11:00 AM	<b>BREAK</b>	15 min
11:15 AM	<b>“Survival of the Fittest”—Panel</b> Moderator: Kimberly Smoak Caroline Tippens, Mark Hennessey, Corinna Getchell	30 min
11:45 AM	<b>Immediate Jeopardy and Appendix Q</b> Stacy Wilkins	60 min
12:45 PM	<b>LUNCH</b>	90 min
2:15 PM	<b>CMS Survey Cycle—From Complaint to Enforcement</b> Kimberly Smoak	30 min
2:45 PM	<b>Managing Complaints—CMS Expectations and State Perspective</b> Karen Tritz, Kimberly Smoak	30 min
3:15 PM	<b>BREAK</b>	15 min
3:30 PM	<b>SOG CMS Location and State Survey Agency Working Relationship</b> Kristi Jordan, Gerardo Ortiz	30 min
4:00 PM	<b>Action Plan Debrief (Wrap-Up of Day 1)</b> Mark Hennessey, Heather Lang	15 min
4:15 PM	<b>ADJOURN</b>	
4:30 PM	<b>Networking Event (Optional)</b>	

## Day 2: Tuesday, April 23, 2024

HOLIDAY 4–6

8:30 AM	<b>Recap Day 1 Activity—Key Terms and Topics Review</b> Mark Hennessey, Heather Lang	30 min
9:00 AM	<b>Problem Areas and Challenging Issues</b> Laura Hudspeth	30 min
9:30 AM	<b>Federal Budget and Appropriations Overview</b> Dave Wetherson, Shaneka Thompson	30 min
10:00 AM	<b>BREAK</b>	15 min
10:15 AM	<b>State Survey Agency Budget Overview</b> Bill Montejo	30 min
10:45 AM	<b>Long Term Care Process (Survey and Enforcement)</b> Rufina Tu, Enrico Lachica	45 min
11:30 AM	<b>LUNCH</b>	90 min
1:00 PM	<b>Federal Appeals Process</b> Gregg Brandush	45 min
1:45 PM	<b>Handling Public Inquiries—Freedom of Information Act (FOIA) and Data Requests</b> Karen Hillman	30 min
2:15 PM	<b>BREAK</b>	15 min
2:30 PM	<b>Partnering with the Media</b> David Wright	30 min
3:00 PM	<b>Clinical Laboratory Improvement Amendments</b> Gregg Brandush	45 min
3:45 PM	<b>Ask Us Anything</b> David Wright, Mark Hennessey, Karen Tritz	45 min
4: 30 PM	<b>ADJOURN</b>	