

PERFORMING DATA REVIEW

To perform data review for a member of the medical staff:

****You must be on the Upstate network****

1. Click this link to Tableau (****you must be logged into the Upstate network****):
<https://tableau.upstate.edu/#/site/upstate/workbooks/1230?origin=cards>
[hare link](#)
 - a. (You can also get to Tableau by going to iPage
(<https://www.upstate.edu/ipage/intra/>)> Administrators/Managers > Tableau)
2. Log in using your Upstate login (if you do not have access, you will have to complete the Tableau Account Request Form in self-serve)
3. Accept the Tableau Terms of Use
4. Search Practitioner Reappraisal Data in the search bar
5. Click on the report labeled Progress Notes to open all of the reports at the same time
6. Select the practitioner from the drop-down menu labeled “All”
7. Review all available data (You can see more detail in the individual reports by clicking the tabs across the top of the report)
8. Complete the Practitioner Data Review form (found online at <https://www.upstate.edu/medstaff/pdf/datareviewform.pdf>):
 - a. You may need to:
 - i. Discuss your findings with the practitioner.
 - ii. Create a plan to improve performance.
 - b. You may want to:
 - i. Add additional comments to explain your rationale, findings, or decision-making.
 - ii. Add suggestions for additional data metrics you would like to see in the future for this specialty or subspecialty.
9. Sign the form.
10. Save the form.
11. Return the completed form to: Medical Staff Services
[medstaff@upstate.edu (e-mail) or 315-464-8524 (fax)]

REMINDER: Reviewers must be of a similar or more advanced clinical degree or license as the individual being reviewed, and must be able to comment on the individual's clinical judgement and competence.