PERFORMING DATA REVIEW

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

****You must logged into the Upstate network****

1. **Click this link to Tableau** *(*for Tableau access, complete a request form on self-serve*)*: **Practitioner Reappraisal Data: Provider Summary - Tableau Server (upstate.edu)**
   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. **If you are not seeing the Provider Summary, search Practitioner Reappraisal Data in the search bar**
5. **Click on the report labeled Provider Summary to open all of the reports at the same time; each will show in a different tab, but this will provide a summary report.**
6. **Select the practitioner from the drop-down menu labeled "All" by typing the name last name, then first (e.g.: Smith, Mary)**
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.*