

# Tools Recommendations

Data Doctor thrives on data and technology solutions can help you collect the data you need to run a selective practice. We have collected a list of tools that some of our customers have used to solve their technological challenges. This is not an exhaustive list. It is intended to provide you a starting point as you begin to evaluate solutions to fit your Data Doctor practice's unique needs.

## Appointment Scheduling

Although not governed by HIPPA requirements, please work with your organization's HR department to ensure you handle this data responsibly.

Tool	Good for	Pros	Cons
	Pre-scheduled appointments Recurring office hours Themed office hours	Web based; accessible anywhere Automates patient to Doctor pairing Automates appointment confirmations Integrates with Zoom and Webex	Subscription service only
	Pre-scheduled appointments Ad-hoc free form appointments	Free Web based; accessible anywhere	Manual patient matching to Doctor Must have Google account to use
	Pre-scheduled appointments Recurring office hours Themed office hours	Pre-installed on most machines	Manual patient matching to Doctor
	Pre-scheduled appointments Recurring office hours Themed office hours	Web based; accessible anywhere Automates patient to Doctor pairing Automates appointment confirmations Integrates with most Calendar suites Screen sharing enabled Automated Time Zones translation	Subscription service only
	Pre-scheduled appointments Ad-hoc free form appointments	Web based; accessible anywhere Automates patient to Doctor pairing Automates appointment confirmations	Free & subscription service Free version does not integrate with Calendar suites
	Pre-scheduled appointments Ad-hoc free form appointments	Web based; accessible anywhere Appointment times capability	Must have Google account to use May require development work to capture appointment data.
	Pre-scheduled appointments Ad-hoc free form appointments	Web based; accessible anywhere Automates patient to Doctor pairing Automates appointment confirmations	Free & subscription service Additional Calendar to manage by Doctor
	Pre-scheduled appointments Ad-hoc free form appointments	Web based; accessible anywhere Automates patient to Doctor pairing Automates appointment confirmations Integrates with GSuite	Free & subscription service Free version only permits for one appointment topic

## Issue data collection / Prescription form

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Tool	Pros	Cons
Google Form + Google Sheets 	Free Web based; accessible anywhere Easier user interface for data collection Automates transfer from survey to data source Can connect directly to Google Sheet in Tableau View the Tableau Data Doctor suggested <a href="#">Issue Collection Template using Google Form</a>	Requires Google account Requires data cleaning & manipulation before analyzing
SurveyMonkey 	Web based; accessible anywhere Good user interface for data collection Automates transfer from survey to data source Can connect directly to SurveyMonkey with web data connector (WDC) in Tableau	Subscription service Requires data cleaning & manipulation before analyzing Connecting directly connecting data from Tableau is more challenging
Excel 	Pre-installed on most machines	Manual data entry Challenging user interface for data collection during appointment
Your Organization's Help Desk Solution	Already available within your organization Compare Data Doctor ticket metrics to Support/IT desk ticket metrics	May require web form development Likely requires IT support to implement

## Skills assessment

Use the skills assessment to understand what your Doctors know in order to match them more accurately with your patients, or, if provided to a larger (team, department, or organizational) group of individuals, it can also help you to understand where knowledge gaps exist within your patient population. Identifying knowledge gaps can help you to determine whether offering a themed Data Doctor day or recurring practice would be the most impactful solution for your organization's success with Tableau or could provide you with the data needed to advocate for training within your organization

Tool	Pros	Cons
Google Form + Google Sheets 	Free Web based; accessible anywhere Easier user interface for data collection Automates transfer from survey to data source Can connect directly to Google Sheet in Tableau View <a href="#">Tableau Data Doctor's Recommended Template</a> using Google Form	Requires Google account Requires staff to complete new form when skills change Requires data cleaning & manipulation before analyzing

**Smartsheet Intake Form**


Web based; accessible anywhere  
Easier user interface for data collection  
Automates transfer from survey to data source  
Can connect directly to Smartsheet with web data connector (WDC) in Tableau

Subscription service  
Requires staff to complete new form when skills change  
Requires data cleaning & manipulation before analyzing

**SurveyMonkey**


Web based; accessible anywhere  
Good user interface for data collection  
Automates transfer from survey to data source  
Can connect directly to SurveyMonkey with web data connector (WDC) in Tableau

Subscription service  
Requires staff to complete new form when skills change  
Requires data cleaning & manipulation before analyzing  
Connecting directly connecting data from Tableau is more challenging

**Wordpress & Ultimate Member Plugin**


Web based  
Make accessible anywhere or just within your network  
Staff can update skills as they change  
Good user interface for data collection  
Automates transfer from survey to data source  
Can connect directly to MySQL in Tableau

May require IT support to implement  
Cleaning multi-select response data is challenging  
Advanced Ultimate Member Plugin features require payment

**Word & Excel**


Pre-installed on most machines

Manual data entry  
Challenging user interface for data collection

## Logistics

As you plan your Data Doctor program, below is some guidance to help you think through logistics and best practices for planning and running your program.

Meeting Planning	Good for	Pros	Cons
In Person	<p>Companies where all champions are physically located in the same area</p> <p>Yearly gatherings if travel if feasible</p> <p>Training events</p>	<p>Facilitates networking</p> <p>Easiest option for hands-on training</p>	<p>Not always scalable for companies geographically dispersed</p> <p>More time commitment from attendees</p> <p>Room/facilities required</p>
Virtual	<p>Frequent or recurring meetings</p> <p>Companies where Doctors (or Champions) are geographically dispersed</p> <p>Adhoc meetings</p> <p>Auto-transcription activation</p>	<p>Often already available at your company (check with your IT or corporate communications team)</p> <p>No geographical limitations</p> <p>No rooms/space needed</p>	<p>Might be an additional charge</p> <p>Attendees can easily multitask</p>

## Staffing

Depending on the size of your Data Doctor or Champion program, you might enlist the help of some “staff” to help run training events for your champions. Alternatively, the individuals who are running the champion program may be the trainers/staff themselves. Below are some key things to think about as you build out your program. The bigger the program, the more staff you should have to help run the program.

Staff are usually most helpful in helping during the initial stages of getting your program up and running. After you’ve selected your Doctors or Champions, you’ll need to have a handful of training sessions to educate and inform them around the expectations for the program and skills they should know. Staff/trainers can help lead these programs.

Tip	Why	How	Cons
Schedule meetings as far in advance as possible	Schedules fill up quickly. Once you’ve planned your calendar of events for the year, send calendar placeholders around for all champions		
Select staff based on their skill set	Having staff with a variety of backgrounds will help bring additional perspectives and assistance to your Champion program	In the initial planning stages of your program, have individuals nominate other Tableau users who might be a good fit Reach out to your readiness team (if you have one) to see if there are	Not always scalable for companies geographically dispersed More time commitment from attendees Room/facilities required