Guide to Creating a Local Formulary

STEP ONE

Create or refine a list of approved medications for each plan formulary with which you contract.

STEP TWO

Type or copy (if the list is an e-file) the list onto a spread-sheet. You may then choose to limit the list to medications you typically order and/or categorize according to disease state or other criteria that makes sense in your practice.

STEP THREE

If you do not have an electronic medical record system, order small, color-coded dots from a local office supplier. Select a color to represent each plan. When a patient checks in, have the front desk staff place the representative dot on the cover of the patient's record. This tells you which plan the patient belongs to. (Electronic medical records usually identify which plan the patient belongs to.)

Note: Many plans have different formularies for different product lines or tiers of coverage, so you may want to use colors according to plan product lines in some cases.

STEP FOUR

Print the spreadsheet and place on the wall (or laminate small, pocket-size version) to quickly identify what medications are authorized for each patient as you prescribe.