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FORMULARY ADVISOR®

GETTING STARTED GUIDE

FEBRUARY 2009

HEALTHCARE

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INTRODUCTION

Welcome to Formulary Advisor®, an easy-to-use, electronic solution to manage your formulary.

Your hospital's formulary is vital for containing rising drug costs and promoting patient safety. But managing and updating that formulary can be time consuming. Plus, ensuring clinicians consider your formulary when making prescribing and dispensing decisions can be a challenge. Accessible via desktop PCs and handheld PDAs, Formulary Advisor helps guide your prescribing clinicians toward formulary drugs, saving your pharmacists, nurses, and physicians time, and your facility money.

Formulary Advisor offers two components. The first provides authorized administrators an easy-to-use tool to manage and update your formulary or formularies (if you have more than one). The administrator can also choose to post messages, alerts, newsletters, web links and other information important to your organization.

The second component gives clinicians real-time, point of care access to your formulary to promote formulary compliance. Links to Micromedex drug information are readily available providing dosing information, drug interactions, adverse effects, contraindications, and more. Clinicians can access concise information through DrugPoints® summary documents, or more in-depth information in the DRUGDEX® System (via the Internet product Healthcare Series Online). These options allow clinicians fast access to the precise information they need.

About This Guide

This guide was written specifically for the Formulary administrator who is just getting started with the setup of the Formulary Advisor at his or her hospital or facility. Use this document in conjunction with the "*Formulary Advisor® Administrator's Guide*" to help you to create, define, and setup Formulary Advisor at your location. Some tables and forms for your use have been provided in this guide. Photocopy these pages if additional forms are required.

For purposes of clarification and illustration, fictitious hospitals and groups (i.e., Exemplary Healthcare, MidTown Hospital, St. Francis Hospital, etc.) are used throughout this guide.

This manual has been designed to print double-sided. If you print this manual single-sided, blank pages will print. These blank pages are intentional. You are not missing any information.

Implementation Service Available (*for a limited time only*)

Our Implementation Team can help to optimize your investment. For a limited time only, we are offering to help you get your formulary up and running quickly and with minimal resource requirements from your staff. Our Implementation Team is ready to help you with the initial design, setup, and formulary load process. Based upon your input, we will:

- Upload your NDC-based (National Drug Codes) formulary import file into the Formulary Advisor application
- Add drug items with invalid NDCs
- Add custom drug items used at your hospital or facility

- Transition the formulary management process to the designated formulary administrator at your hospital or facility

For more information on our implementation service, contact your local sales representative.

OVERVIEW OF THE FORMULARY ADVISOR IMPLEMENTATION

Step 1 - Identify your Administrator(s)

It is a good idea to designate one or two individuals as administrators of your formulary. As administrators, these individuals will setup and define the system to reflect your facility's protocols, workflow, and standard operating procedures. Administrators are also responsible for any on-going formulary maintenance.

Step 2 - Analyze your Organization; Identify your Formulary Setup

Before beginning any work in Formulary Advisor, you must analyze your organization's formulary needs and decide how many formularies to define. A single formulary can be created and used throughout your organization, or you can create multiple formularies (such as an Inpatient Formulary and an Outpatient Formulary). See "Formulary Setup" on page 7 for more information on identifying and naming your formulary.

Step 3 - Define Formulary Settings

Before you can add items to a formulary, you must define some basic settings. Settings include:

- Default formulary (first formulary displayed in the clinicians' dropdown list)
- Show/Do Not Show clinicians items that do not have formulary status (usually this means they are not on the formulary, but formulary status can also include designations such as, "Do Not Prescribe", or "Item Not Available" etc.)
- Show/Do Not Show cost information
- Show Actual/Relative cost information
- Definition of relative cost symbols

See "Formulary Settings" on page 11 for more information on this topic.

Step 4 - Create or Import Your First Formulary

Three options are available for creating a formulary in Formulary Advisor:

- Import your formulary using NDC (National Drug Codes)
- Copy the Sample Formulary and tailor your formulary from this existing formulary
- Create a blank (empty) formulary and add each of your formulary items individually

When time is critical, the import option may be your best solution to getting your formulary into the hands of your clinicians. See "Create the First Formulary" on page 15 for more information and step-by-step instructions for each of the creation options listed above.

Step 5 - Identify Pharmacy Information to Present to your Clinicians

Formulary Advisor offers administrators a powerful tool to communicate with the clinicians in their hospital. The Pharmacy Information page can present relevant, up-to-date information on news, events, and protocols via: a general message, a hypertext link to a file or document, or hypertext link to an Internet URL address. For more information see "Pharmacy Information" on page 21.

Step 6 - Publish your Formulary

Make the formulary available to your clinicians desktop PCs and handheld PDAs by publishing it. Publish a formulary from the 'Publish' function found in the Formulary Management tab. See "*Chapter 2: The Formulary Management Page - Publish*" in the "*Formulary Advisor® Administrator's Guide*" for more information.

CHAPTER 1: FORMULARY SETUP

DEFINING FORMULARIES

The first item to think about prior to rolling out the Formulary Advisor to the end users in your organization is the number of formularies needed. It is recommended that you evaluate the needs, requirements, and workflow of your organization when defining your formularies.

Formularies can be defined to identify:

- a Hospital or Organization
- a Formulary Type (e.g., Inpatient or Outpatient)
- a Unit (e.g., ICU, Pediatrics, Surgical, etc.)

You may define and create as many formularies as needed for your organization.

Note: Give some thought as to how you want to name your formulary, as formularies cannot be renamed later. The most common usage is the name of your facility or organization, plus the type or group name if applicable (for example, St. Francis Formulary, or Mercy Outpatient, or MidTown Pediatric). Using dates or revision numbers, or anything that may change later is not recommended and should be avoided.

Organization (Entity) Administrators

If you are an organization (entity) administrator, there may be sub-entities associated with the entity. An example of this type of setup could be a corporate group (entity) and the affiliated hospitals (sub-entities).

As an organizational administrator, you may want to define one or more formularies for each sub-entity. This setup allows the entity administrator to access and maintain each sub-entity if desired.

There are two ways to setup entity/sub-entity formularies:

1. Allow all sub-entities to have access to all other sub-entities. End users of Formulary Advisor are able to view all the other sub-entity formularies (see Diagram 1).
2. Allow the sub-entity administrator and end users access only to their sub-entity formularies (see Diagram 2).

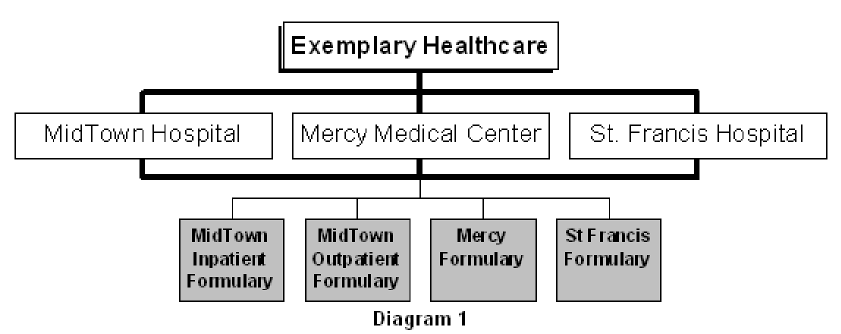


Diagram 1

The multi-hospital setup shown in Diagram 1 illustrates that all sub-entities, or hospital-level formulary administrators (as well as the entity administrator) are able to view and maintain *all* of the formularies.

If you do not want sub-entity administrators and end users accessing formularies outside of their own, you may want to consider the setup illustrated in Diagram 2.

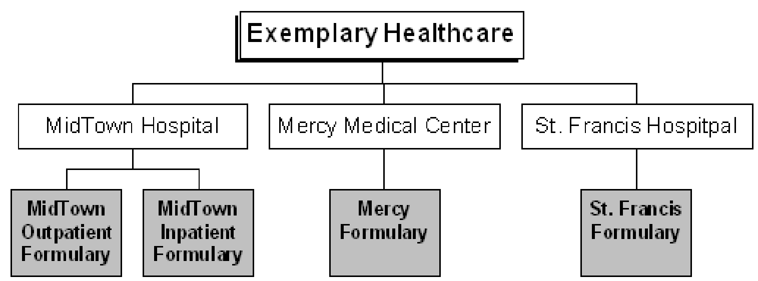


Diagram 2

The multi-hospital setup shown in Diagram 2 illustrates that sub-entities (hospital-level formulary administrators) and end users have access only to their own formularies. The organizational entity may access and maintain any of the sub-entity formularies.

If you have questions regarding your entity or sub-entity account setup, please contact your account representative.

Single Facility Administrators

If you are an administrator for an individual or single facility, your formulary setup is fairly simple. You just need to decide if you will create one formulary for all end users, or multiple formularies based on a criteria like formulary type, unit, etc. See diagram 3.

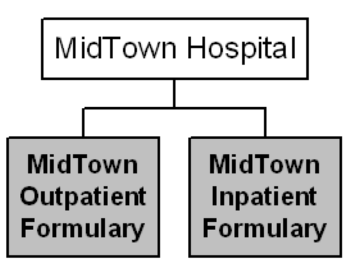


Diagram 3

List the formulary names that will be used within your facility or organization in the table below. Select one formulary as the default formulary for your users. The default formulary simply controls what the end user sees first in the list of available formularies.

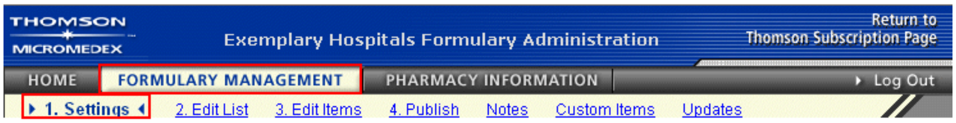
Formulary Name (alphanumeric 40 characters maximum)	Default Y/N
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

See "*Chapter 1: The Home Page*" in the "*Formulary Advisor® Administrator's Guide*" for step-by-step instructions when you are ready to define your formularies.

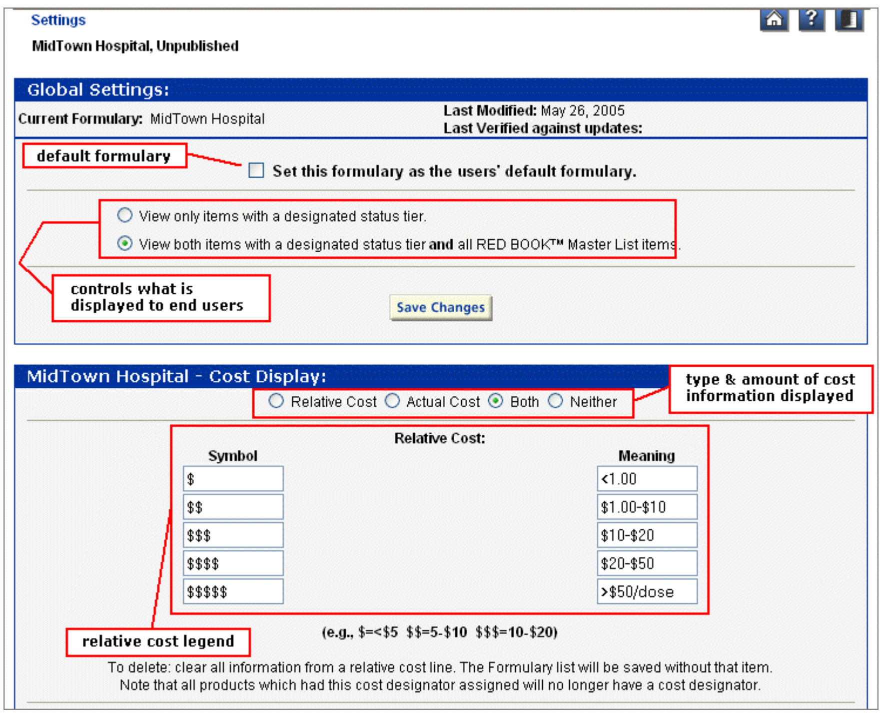
CHAPTER 2: FORMULARY SETTINGS

SETTINGS

When you import, copy, or create a formulary (See "Create the First Formulary" on page 15), you are presented with the Settings page immediately after naming the formulary. You can define the settings at that time, or return to Settings later through the Formulary Management tab.



Settings are defined for each formulary you create for your organization.

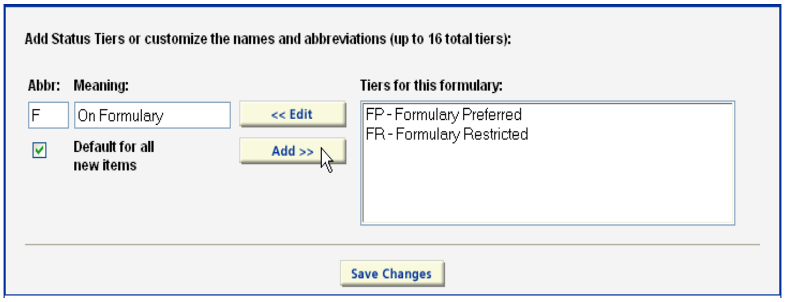


Settings control such functions as:

- The default formulary - if a formulary is designated as the default formulary and more than one formulary exists, the default formulary is displayed first in the dropdown list.
- How much information to show end users - the administrator can select from: Show all items (items with a formulary status as well as items from the RED BOOK™ Master List), or show only items with a formulary status.
- How much cost information to show end users - administrators can select from: Show Relative Cost only, show Actual Cost only, show both Relative and Actual Cost, or show no cost information to the end user.

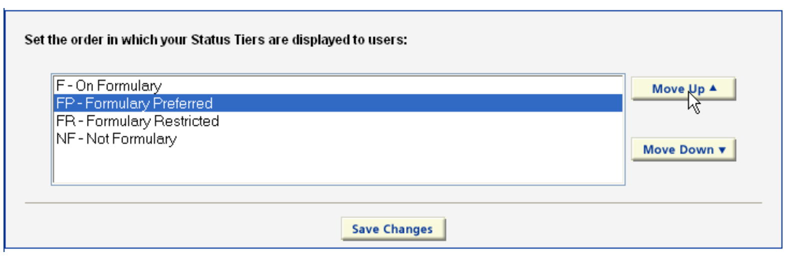
- The Relative Cost Legend - if relative cost information is to be shown to end users, administrators can create and use their own symbols and definitions to denote the relative costs assigned to products.
- Status Tiers - the status of items within your formulary

Status Tiers



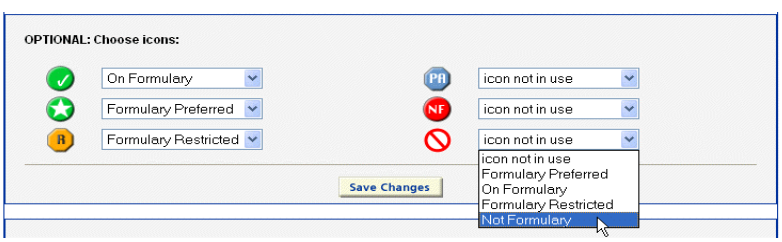
Formulary administrators can define up to 16 different status tiers for items in the formulary. Formulary Advisor comes with the 'On Formulary' default status already defined. You may keep, change or delete this status. Any item added to your formulary, by default, has the 'On Formulary' status associated. The default status tier can be changed to a different status tier. See '*Chapter 2: The Formulary Management Page - Settings - Status Tiers*' in the Administrator's Guide for more information and step-by-step instructions for creating and maintaining status tiers.

Status Tier Order



The formulary administrator defines the hierarchy or order of the status tiers. The order set on the settings page controls the order that formulary items are displayed to the end user.

Status Tier Icons



Formulary administrators have the option of associating a status tier with a picture icon to make recognition even faster and easier. Use of the icons is completely optional. If icons are not associated with a status tier, formulary end users see the 1- or 2-character status abbreviation.

Use the following tables and fill in your setting designations for each formulary in your organization.

Settings for the:____ formulary

Default formulary (Y/N) _____

Show (select only one):	**Select**
All Items (both On and Off Formulary)	
Only items with a formulary status	

Show (select only one):	**Select**
Relative Cost*	
Actual Cost	
Both Relative and Actual Cost*	
No cost information	

*** Relative Cost Legend (required only if Relative Cost will be shown to end users)**

Symbol:	**Definition**

Status Tiers

Rank	**2-char Abbrev**	**Status Tier Definition**	**Rank**	**2-char Abbrev**	**Status Tier Definition**
1.			9.		
2.			10.		
3.			11.		
4.			12.		
5.			13.		
6.			14.		
7.			15.		

Status Tiers

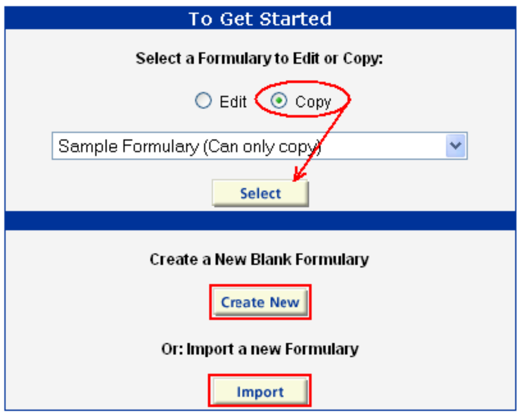
Ran k	2-char Abbrev	Status Tier Definition	Ran k	2-char Abbrev	Status Tier Definition
8.			16.		

See "*The Formulary Management Page - Settings*" in Chapter 2 of the "*Formulary Advisor® Administrator's Guide*" for step-by-step instructions when you are ready to define settings for your formularies.

CHAPTER 3: CREATE THE FIRST FORMULARY

IMPORT, COPY, OR CREATE FORMULARIES?

The next important step is determining which method to use to create your formularies.



Setting up your formularies can seem like a big job, but the Formulary Advisor Administration application offers several different options to help you accomplish this task quickly and easily.

Note: New formularies and changes to existing formularies are not available to your clinicians on their desktop PCs or for download to their PDA (handheld device) until *after* the formulary has been published.

Import

Probably the fastest setup method is importing your formulary directly into Formulary Advisor based on NDCs (National Drug Codes). Items are added to the formulary in one quick batch process. The import feature matches your list of NDCs against the RED BOOK™ drug compendia and adds product details such as drug name, route, strength, and form. Additional information such as: status tier, therapeutic interchange, note, relative and actual cost can also be added to the import file and brought into the formulary during the import procedure.

Basic Steps to Import a Formulary

A brief and summary overview of importing a formulary is covered in this section. For more information and detailed, step-by-step instructions, see "*Import a New formulary*" in Chapter 1 of the "*Formulary Advisor® Administrator's Guide*".

1. Create and verify a pipe-delimited (|) ASCII text file containing your formulary information.
2. Create and verify a pipe-delimited (|) ASCII text file containing your notes (optional).
3. From the Formulary Advisor Administration Home page, click the Import button.

4. Type the formulary name, then select the additional information that is included in the import file (i.e., individual status tiers, notes, therapeutic interchange information, etc.)
5. Enter formulary 'Settings'.
6. Enter the location of the Notes import file (optional).
7. Enter the location of the formulary import file
8. When the import has finished, click the Display button to view a report of the items in the import.
9. Save the report to your computer. This report shows which items were loaded into the application, and which items were rejected.
10. If errors are reported, it is recommended you correct the errors and re-import the entire formulary. Alternatively, you can research the errors and add them individually via the Edit List page on the Formulary Management tab.

Copy

A formulary can be copied and used as the beginning basis for another formulary. For example, if the Outpatient formulary is basically the same as the Inpatient formulary with a few exceptions: create one, then copy and modify the second one to reflect the differences.

The Formulary Advisor Administration application comes with a *Sample Formulary* that is available for copying. The Sample Formulary was created for you to use as necessary. Feel free to copy the Sample Formulary then modify it to reflect the items on your formulary if desired. To print the Sample Formulary see "*Export a formulary*" in Chapter 2 of the "*Formulary Advisor® Administrator's Guide*".

Basic Steps to Copy a Formulary

A brief and summary overview of copying a formulary is covered in this section. For more information and detailed, step-by-step instructions, see "*Copy a formulary*" in Chapter 1 of the "*Formulary Advisor® Administrator's Guide*".

1. From the Formulary Advisor Administration Home page, click the Copy option, then select the formulary you want to copy from the dropdown list. Click the Select button to start the copy process.
2. Type the new formulary name in the '*Copy To:*' box and select the checkbox if the new formulary should be the default formulary. Click the Create New button.
3. Enter the Formulary Settings. See "Formulary Settings" on page 11 for more information.

Create New

If NDC numbers for items on your formulary are unknown, and the Sample Formulary cannot be used to get started, you may need to create your formulary from an empty or blank formulary. The administrator must add each item and all details individually. This method is the most time-consuming and labor-intensive method of the three.

Another alternative may be to contact your Thomson Micromedex Sales Representative or local distributor to discuss the option of having Micromedex enter your first formulary for you.

Basic Steps to Create a New/Blank Formulary

A brief and summary overview of creating a New/Blank formulary is covered in this section. For more information and detailed, step-by-step instructions, see "*Create a New Blank formulary*" in Chapter 1 of the "*Formulary Advisor® Administrator's Guide*".

1. From the Formulary Advisor Administration Home page, click the Create New button.
2. Type the new formulary name and select the checkbox if the new formulary should be the default formulary. Click the Create New button.
3. Enter the Formulary Settings. See "Formulary Settings" on page 11 for more information.

Add/Modifying/Remove Items

After the formulary has been created, you may need to add, change, or remove items. See "*Edit List*" and "*Edit Items*" in Chapter 2: Formulary Management of the "*Formulary Advisor® Administrator's Guide*" for more information and step-by-step instructions.

To Add or Remove: Go to the Edit List page and perform a search for the item. Find and highlight the item in the search results.

To Edit (Modify) Items: With the item selected, go to the Edit Items page and change as appropriate. Click Save Changes.

Attach Notes to Items

The Notes feature in Formulary Advisor enables you to attach a Note to an item. Go to the Notes page and click Create New to begin. After saving the note, it must be attached (linked) to the drug.

Note: You can assign a note to more than one drug, but a single drug or item can only have one note assignment.

See "*Notes*" in Chapter 2: Formulary Management of the "*Formulary Advisor® Administrator's Guide*" for more information and step-by-step instructions.

Custom Drugs

If you have custom drug items, add them to your formulary via the Custom Items page. Begin by clicking the Create New button and follow the prompts. Save your changes when information has been entered.

See "*Custom Items*" in Chapter 2: Formulary Management of the "*Formulary Advisor® Administrator's Guide*" for more information and step-by-step instructions.

Feel free to use the table below as a worksheet for items you wish to add individually to a formulary. Photocopy this page if more items exist.

Products for the: ____Formulary

Name	**Form/Route/Strength**	**Status Tier**	**Actual Cost**
	Relative Cost	**Note (Title/ Text)**	Therapeutic Int
Name	**Form/Route/Strength**	**Status Tier**	**Actual Cost**
	Relative Cost	**Note (Title/ Text)**	Therapeutic Int
Name	**Form/Route/Strength**	**Status Tier**	**Actual Cost**
	Relative Cost	**Note (Title/ Text)**	Therapeutic Int
Name	**Form/Route/Strength**	**Status Tier**	**Actual Cost**
	Relative Cost	**Note (Title/ Text)**	Therapeutic Int
Name	**Form/Route/Strength**	**Status Tier**	**Actual Cost**
	Relative Cost	**Note (Title/ Text)**	Therapeutic Int
Name	**Form/Route/Strength**	**Status Tier**	**Actual Cost**

Products for the: ____**Formulary**

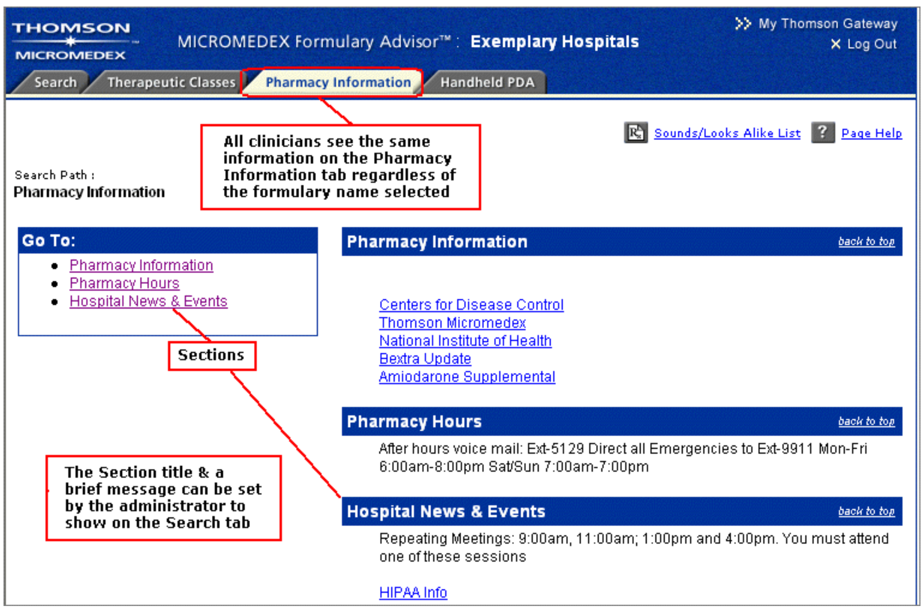
Name	Form/Route/Strength	Status Tier	Actual Cost
	Relative Cost	**Note (Title/ Text)**	Therapeutic Int
Name	**Form/Route/Strength**	**Status Tier**	**Actual Cost**
	Relative Cost	**Note (Title/ Text)**	Therapeutic Int

CHAPTER 4: PHARMACY INFORMATION

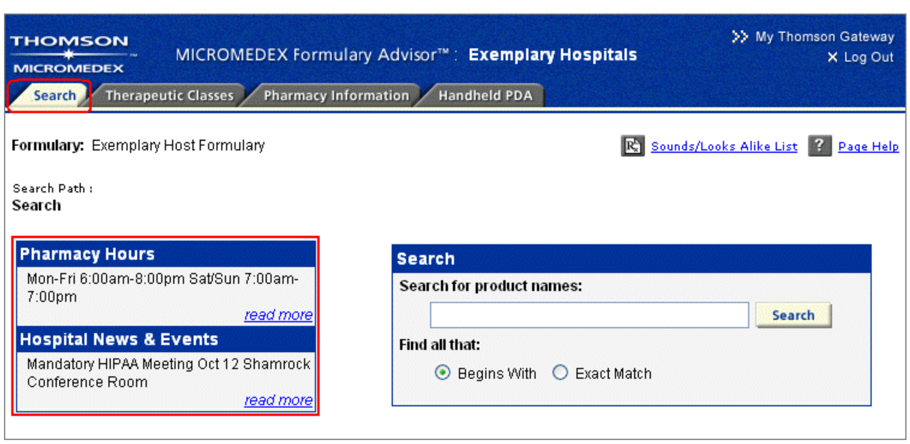
DISTRIBUTE NEWS & INFORMATION TO YOUR PRESCRIBING CLINICIANS

The Pharmacy Information feature is fully customizable and provides administrators with the ability to post information such as: pharmacy policy and procedures, guidelines, news, alerts, even links to documents and other Web sites from Formulary Advisor.

The Pharmacy Information tab contains all the information for your organization, regardless of the formulary chosen by the end user.



Administrators can set up a title and brief description and designate them as visible on the SEARCH tab (main page in the Formulary Advisor application). This feature ensures that all your prescribing clinicians see the information. Details for the information can be obtained by the clinician by clicking the link beside the description.

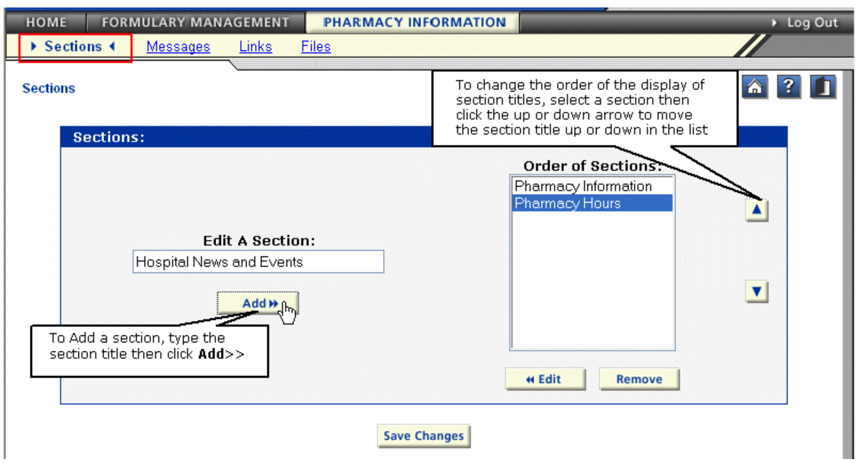


Basic Steps for Creating Pharmacy Information

A brief and summary overview of setting up Pharmacy Information is covered in this section. For more information and detailed, step-by-step instructions, see "*The Pharmacy Information Page*" in Chapter 3 of the "*Formulary Advisor® Administrator's Guide*".

Sections

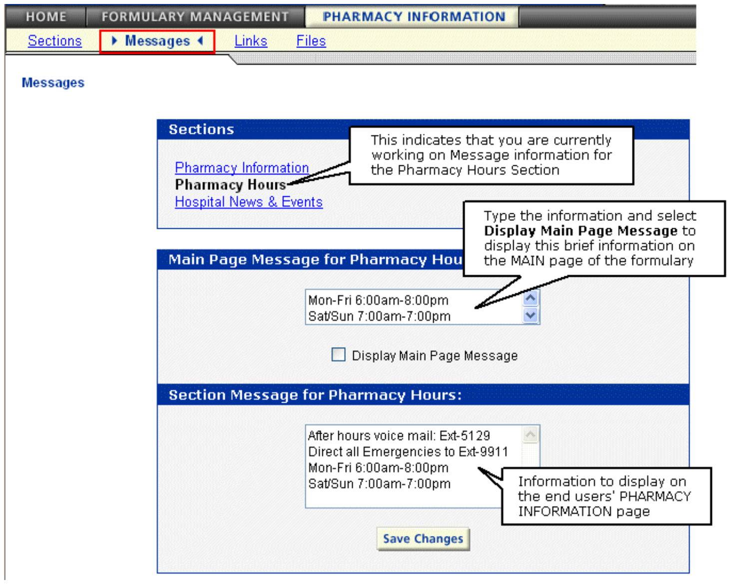
1. From the Pharmacy Information tab, select the Sections link.
2. Type a section name and click the Add >> button.
3. Repeat, until all sections have been entered.



4. Reorder sections: Highlight the name and use the up ▲ and down ▼ arrows to place the section title in the correct order.
5. Click the Save Changes button.

Messages

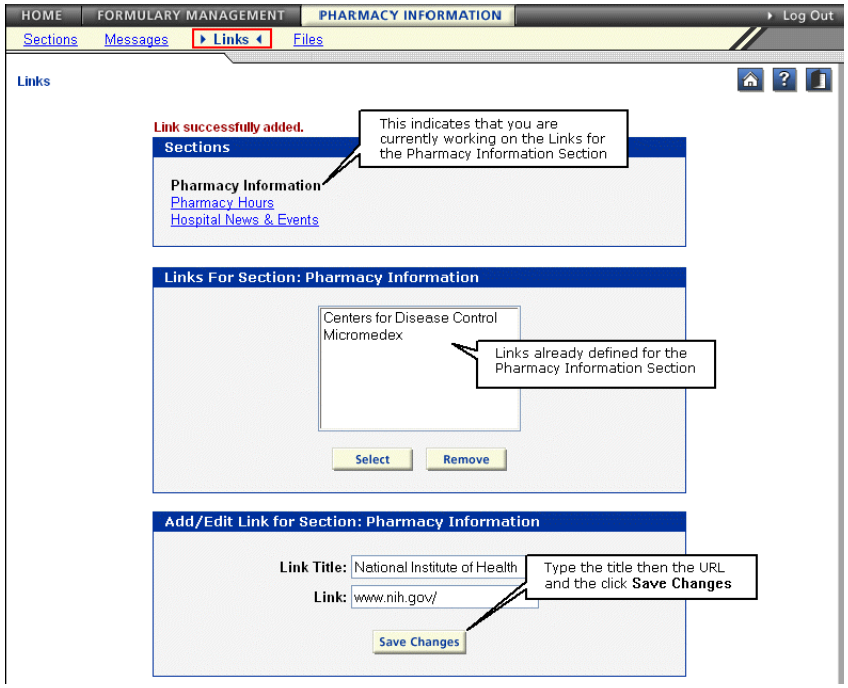
1. From the Pharmacy Information tab, select the Messages link.
2. Click the section name link.
3. (Optional) To display a brief message below the section name on the main search page, type the message and select the "Display Main Page Message" checkbox.



4. Type the section message up to 300 characters maximum. Click the Save Changes button.

Links

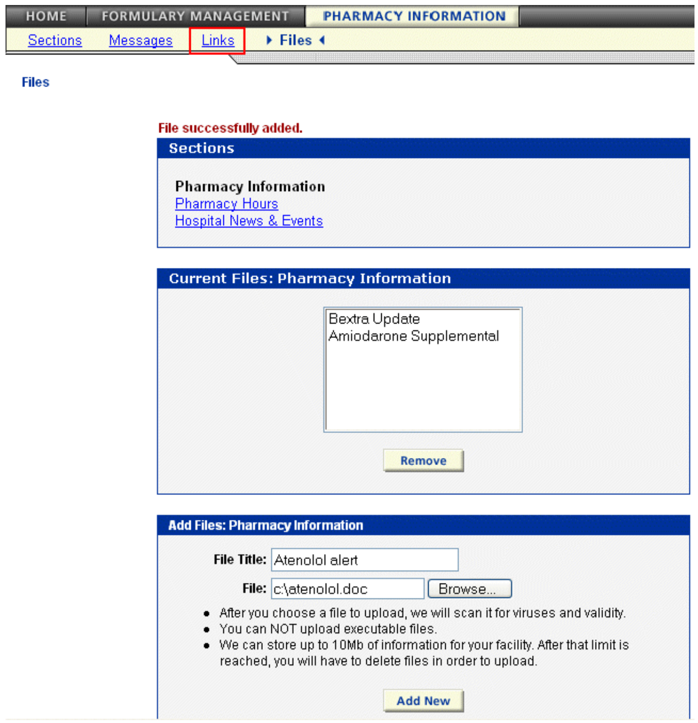
1. From the Pharmacy Information tab, select Links.
2. Click the link of the section name for which you wish to add a link.
3. Type a description of the link in the '*Link Title*' field.



4. Type the full URL (Internet address) including the http:// in the '*Link*' field and click Save Changes.

Files

1. From the Pharmacy Information tab, select the Files link.
2. Click the link of the section name for which you wish to add files.
3. Type a description of the file or document in the '*File Title*' field.



4. Type or Browse... to the file location on your local hard drive or network server.
5. Click Add New.

The following tables and forms are provided for your convenience to assist you in designing the Pharmacy Information page. Photocopy the pages if more forms are needed. For more information and detailed, step-by-step instructions, see "*The Pharmacy Information Page*" in Chapter 3 of the "*Formulary Advisor® Administrator's Guide*" when you are ready to enter this information in the Formulary Administration area.

Sections

Order (#)	Section Name (40 characters maximum):

Messages

For Section #		Main Page? Y/N
	Main Page Message (80 characters maximum):	
	Full Message (300 characters maximum):	
	Main Page Message (80 characters maximum):	
	Full Message (300 characters maximum):	
	Main Page Message (80 characters maximum):	
	Full Message (300 characters maximum):	

Messages

For Section #		Main Page? Y/N
	Main Page Message (80 characters maximum):	
	Full Message (300 characters maximum):	

Links

For Section #	Links
	Link Title (40 characters maximum):
	Internet Address (URL):
	Link Title (40 characters maximum):
	Internet Address (URL):

Links

For Section #	Links
	Link Title (40 characters maximum):
	Internet Address (URL):
	Link Title (40 characters maximum):
	Internet Address (URL):
	Link Title (40 characters maximum):
	Internet Address (URL):

Files

For Section #	Files:
	Display File Title (73 characters maximum):
	Location of the File (Example: C:\My Documents\Atenolol.doc)
	Display File Title (73 characters maximum):
	Location of the File (Example: C:\My Documents\Atenolol.doc)
	Display File Title (73 characters maximum):
	Location of the File (Example: C:\My Documents\Atenolol.doc)
	Display File Title (73 characters maximum):
	Location of the File (Example: C:\My Documents\Atenolol.doc)
	Display File Title (73 characters maximum):
	Location of the File (Example: C:\My Documents\Atenolol.doc)

HOW TO CONTACT THOMSON REUTERS

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Ann Arbor, MI 48108
USA

Colorado Office

6200 South Syracuse Way, Suite 300
Greenwood Village, CO 80111-4740
USA

Customer/Technical Support: www.micromedex.com/support/request

Web site: www.micromedex.com

United States & Canada:

Phone: 1-877-843-6796 (Speak the product name and select the *Support* menu option)
Fax: 303-486-6450

Outside the United States & Canada:

Phone: 1-651-244-4000
Fax: 303-486-6450

For more information on our products and services, visit our Web site at:

http://www.micromedex.com or contact your local distributor.

Customer or Technical Support: www.micromedex.com/support/request