



Please note that this document has not been updated for the 2026-27 incentive scheme. Standard Operating Procedures (SOPs) for medicines optimisation switches/reviews, along with other supporting materials, were originally developed for use by Medicines Optimisation Team staff within NHS South Yorkshire Integrated Care Board (ICB). Other organisations or groups choosing to use this resource does so at their own risk and NHS SY ICB accepts no liability for its use or application.

Formulation change SOP V4.0

Rationale

To change the form of all eligible patient's medication between tablets, capsules, effervescent tablets, or liquids of the same product where the equivalent dosage can be maintained. To maintain a consistent method of changing patients medication form. To promote cost effective and safe prescribing in line with local formularies.

Safety:

This piece of work requires confirmation that it is safe to do e.g., bioavailability of alternatives, narrow therapeutic range, site of action etc. If this work has been set as a piece of QIPP work, this will have been considered.

The following websites gives advice around this and considerations to be made

<https://www.sps.nhs.uk/articles/considerations-when-switching-between-solid-doses-and-liquids/>

https://www.panmerseyapc.nhs.uk/media/2575/switching_safety.pdf

<https://www.hweclinicalguidance.nhs.uk/all-clinical-areas-documents/download?cid=1468&checksum=cec6f62cfb44b1be110b7bf70c8362d8>

Exclusions:

- Patients who are recorded as being at end of life
- Previous prescriptions for drug switching to stating intolerance or side effect

Referral to Pharmacist/Prescriber:

- Enteral Feeding/Patients who crush tablets before taking
- Patient's allergy status should be checked whilst in the patient record, and if any allergy is stated to a product or excipient of the product being switched to, refer.

Considerations:

- Learning Disability recorded (the PCN/Practice may choose to include this cohort of patients so please check with Pharmacist/Prescriber)
- Whether a compliance issue such as swallowing difficulties would impact on your ability to make this switch. This would depend on the medication and the form involved.
- Whether the dose is available in the same strength in another form or if 2 different strengths would be needed. In this case, cost would need to be considered as well as pill burden.
- Vegan/Vegetarian/Religious beliefs if switching to a product containing gelatine.



- Shelf life of liquids. Consider if more would need supplying due to shelf life which would counteract the financial saving.
- Medication that should be prescribed by brand (as per MPD)
- Intolerance to colourings

For information only Search criteria included as follows :-

- Medication
- Current
- Repeat / Acute / Automatic / Repeat dispensing (EMIS WEB)
- Repeat (System1)
- List of Products included
- Excluded products
- Exclusions (as listed at the beginning of the document if possible to include on search) **Please do a manual search for gelatine**

If this work does not have a central search, the search will need to be built in your individual practice. Refer to search guides if assistance is needed.

- Inform the local community pharmacies when the work is approved to support their stock management processes. This can be undertaken by phone/email or in person.
- **Use exclusions/referral criteria listed at the beginning of document and determine patients who fall into those categories.**
- Review the patient record for the last 6 months to check for the exclusions or referral required (as detailed in the rationale) including the:
 - Drug history
 - Journal / consultations
 - Letters
 - Summary
 - Allergy box

For all eligible patients:



Switching:

- For all eligible patients, enter each individual patient's record consider if where appropriate the generic/ branded switch or Toggle button may be used if not appropriate add a new drug to the patient's repeat medication list as a new item.
- If added as a new drug 'Problem link' the new drug to the same disease as the item being replaced (where possible).
- Check the correct new preparation, quantity and pack size have been entered
- Remove the original item from current medication list with a brief note to record reason for switch e.g. Product 1 switched to Product 2.
- Create consultation / journal entry & add Snomed code SCTID: 408374000 – 'Drug changed to cost effective alternative' to patients record with note Product 1 switched to Product 2
- **At this point there may be patients who require exclusion:** -If item not suitable for switch add a brief note saying patient reviewed but not switched, including reason.
- Inform the patient by method agreed with practice:
 - SMS /Text / AccuRx message
 - Letter (appendix c) **AMEND letter as appropriate**



Appendix a

Practice Consent

Practice Name:

SOP Name: **[Enter Name as per title]**

Tick appropriate method of communication:

- ☐ **Practice requires SMS / AccuRx message to be sent to patient**

Switch message:

Your **Product X** has been changed to a different formulation and is now prescribed as..... Please see attached letter for further details. **Very important this link expires in 7 days.**

- ☐ **Practice requires letter to be sent to patient**

Practice Representative Name Consent given: Yes / No

Practice Representative Signature..... Date.....

Please note that the practice representative signing this protocol agrees that:

- The practice will take responsibility for the notification of all relevant practice staff.
- The practice has made patients aware that their records are accessed by staff for these purposes e.g. via practice leaflet, website or other communication and that the practice has applied appropriate restriction to the records of patients who have withdrawn consent.





SWITCH letter

Practice header

Dear Patient

As a practice, we are always reviewing our repeat prescriptions to make sure our patients are getting the best, most cost-effective treatment.

NHS South Yorkshire has asked healthcare professionals to prescribe only from a list of carefully chosen products. The idea is to stick to using products which have a proven track record, are good value for money and are in line with local formulary guidance.

INSERT product name have been chosen as the first line treatment option. Therefore your repeat has been changed to this formulation.

Your current form of **AMEND AS APPROPRIATE**
has been changed to **AMEND AS APPROPRIATE**

Your repeat prescription will be changed automatically. You should carry on using your present form until they are finished.

If you have a medical concern, please contact the practice in your usual way.

The practice