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.

Switching medication from a generic or branded medication to a specific brand SOP V6.0

Rationale

Prescribing medicines by generic rather than brand name can improve cost-effectiveness and is encouraged. However, there are some circumstances in which continuity of the same product is important for patient safety and prescribing a specific manufacturer's product (brand or generic) is preferred. Prescribing a specific brand ensures that patients get the same brand regularly.

These include:

- Where there is a difference in bioavailability between brands of the same medicine, particularly if the medicine has a narrow therapeutic index.
- Where modified-release preparations are not interchangeable.
- Where there are important differences in formulation between brands of the same medicine.
- Where administration devices (e.g., inhaler or self-injection) have different instructions for use and patient familiarity with one product is important.
- Where the product is a biological rather than chemical entity.
- Where products contain multiple ingredients and brand-name prescribing aids identification.
- Where there are differences in licensed indications.

Additional reasons may be:

- Idiosyncratic individual patients
- For reasons of cost efficiency, provided the following conditions are met,
    - Clinical equivalence to brand leader
    - Acceptable to patients, primary and secondary care clinicians
    - Not at odds with formulary
    - Supply guarantee approved with manufacturer
    - Significant and sustained price differential from brand leader/Drug Tariff (price guarantee) – which may be by way of rebate scheme
- NP8 – not in part 8 of Drug tariff
- When a brand leader copy exists but the prescribing indication is still patented
- Where the patent is due to expire

Medicines which may be affected by a change in brand include:
Adrenaline pre-filled syringes, aminophylline, carbamazepine, ciclosporin, lithium, methylphenidate MR, morphine MR, mycophenolate, phenytoin, tacrolimus and theophylline.

Safety –

- Follow NICE/NHS England/MHRA to ensure the switch is appropriate.
- If warnings are displayed on EMIS or Systm1 when the switch is made, ensure that these are considered and that it is safe to continue. If you have any doubts, contact pharmacist or prescriber at the practice before taking any action.
- If the patient has any recorded hypersensitivities or allergies, ensure that the medicine that is to be prescribed is free from the substances listed. Check in the Summary of Product Characteristics for the medicine to be supplied.

- The product to be supplied must be used within its product licence.

Quality – enhance patient's quality of life and ensure consistency of product.

Formulary adherence – this switch would be expected to follow local formulary guidance.

Exclusions

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

Compare products to ensure excipients are the same. If an allergy to an excipient is noted, refer to pharmacist. Also check the new product does not include any of the following if an allergy is recorded in patient notes. Excipients are listed in the SmPC.

- Nut allergy recorded in allergy status box (including any below)
  - Peanut / Peanut oil
  - Pine nut / Rosen
  - Sesame oil
- Soy allergy recorded in allergy status box (including any below)
  - Soy lecithin
  - Soy oil
  - Soy phosphatidylcholine
  - Soybean
- Egg allergy recorded in allergy status box (including any below)
  - Egg protein / ovalbumin
  - Egg lecithin / phospholipids
- Fish allergy recorded in allergy status box (including any below)
  - Protamine
  - Fish oil
- Gelatin allergy recorded in allergy status box.
- Milk allergy recorded in allergy status box (including any below)
  - Casamino acids
  - Casein
- Cow's milk allergy recorded in allergy status box (including any below)
  - Lactalbumin
  - Lactose144
  - Lactulose
- Shellfish allergy recorded in allergy status box (including any below)
  - Glucosamine
  - Iodine

If this workstream is being carried out in response to practice specific reports eg generic prescribing, the search will need to be built in your individual practice.

- 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 this 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 rational) including-
    - Drug history
    - Journal / consultations
    - Letters
    - Summary
    - Allergy box

For all eligible patients:

- Select the correct patient's record. Add the new drug to the patients repeat medication list. (alternatively where appropriate & if available the generic/ trade switch button may be used on Emis Web or Toggle on SystmOne).
- 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 the medication list with a brief note to record reason for switch e.g., Product 1 switched to Product 2 as agreed by practice.
- 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 as agreed by practice.
- 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 message
    - Letter (appendix c)
- Refer any required patients to the pharmacist or prescriber.

Appendix a

Practice Consent

Practice Name: ……

SOP Name:
Changing medication from a generic or branded medication to a specific brand

Specify Product ……..

Tick appropriate method of communication:

- ○ **Practice requires SMS message sent to patient**
  SMS message:
  In line with local guidance, your **Product X** has been changed to the equivalent **Product Y.** Please see attached letter for further details. **Very Important -This link will expire 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.

NHS
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Appendix c

SWITCH letter

DO NOT USE MOT HEADER ON PRACTICE LETTERS TO PATIENTS

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. INSERT detail eg: condition, reasoning as applicable

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

Your new branded product contains the same quantity of active ingredients as the last product that you have previously received from the practice. It may appear different from your previous item but still contains exactly the same active ingredient in the same amount.

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

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

Yours sincerely

The practice