

POSITION STATEMENT

Estrogen and progestogen use in peri- and postmenopausal women: September 2003 position statement of The North American Menopause Society

The termination of the estrogen-progestogen trial of the Women's Health Initiative (WHI) study in July 2002 was a milestone in the history of postmenopausal hormone therapy. In response, The North American Menopause Society (NAMS) convened an expert Hormone Therapy (HT) Advisory Panel to prepare a report on hormone therapy. After approval from the 2001-2002 NAMS Board of Trustees, the report was released in October 2002 (*Menopause* 2003;10:6-12).

Due to the subsequent influx of new clinical trial data regarding postmenopausal hormone therapy, the NAMS Board of Trustees convened a second HT Advisory Panel to develop another report. The overall objective was to present clinical recommendations for use of hormone therapy in peri- and postmenopausal women. As with the previous analysis, all relevant evidence was considered. After approval from the 2002-2003 NAMS Board of Trustees, this position statement was released on September 17, 2003.

Panel Members

The 2003 HT Advisory Panel was composed of acknowledged clinical and research experts (both NAMS members and nonmembers) from relevant areas of menopause-related health care, including investigators from the WHI and other key trials. All Panel members provided disclosure of interests during the past 2 years (presented at the end of the paper).

NAMS is grateful to the following individuals who served on the Panel, advising the NAMS Board of Trustees.

Panel Chair: Wulf H. Utian, MD, PhD, FACOG – Arthur H. Bill Professor Emeritus of Reproductive Biology and Obstetrics and Gynecology, Case Western Reserve University School of Medicine; Consultant in

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Methodology

The 2003 Panel utilized the 2002 Hormone Therapy Advisory Panel report as a starting point. A two-part set of clinical questions was developed by the Panel. The first set related to items for which complete agreement was previously reached; the second set related to areas of previous nonconsensus. Each Panelist completed the questionnaire on a blinded basis (ie, unaware of the responses of the other Panelists). The responses were collated in the NAMS Central Office, again into two lists: those with consensus and those without. All responses were distributed to the entire Panel.

The Panel reviewed all of the responses by telephone conference call in an attempt to reach consensus. Further development of the report through multiple drafts was conducted through the internet. The clinical recommendations indicate where consensus was achieved as well as where opinions differed. The latter clearly indicates some of the areas needing future research.

The primary clinical question was to differentiate the risk-benefit ratio of postmenopausal estrogen therapy (ET) and estrogen-progestogen therapy (EPT) for both

disease prevention and treatment of specific menopause-related symptoms. The Panel recognized that a woman's willingness to accept certain risks of HT will vary when therapy is used to treat existing symptoms as opposed to long-term use to prevent a future problem. Moreover, recognition had to be given to the fact that prevalence of disease outcomes is dependent on age. That is, HT is more likely to be acceptable for symptom reduction when therapy is planned to be short-term in a population that is younger with lower prevalence of risk outcomes. In contrast, the absolute risks of either use in older women or long-term therapy may make HT less acceptable. The Panel was required to take these issues into consideration when developing its recommendations.

This position statement focuses on the use of government-approved prescription ET/EPT products available in the United States and Canada, not custom ET/EPT preparations, selective estrogen-receptor modulators (SERMs), or hormones available without a prescription (including phytoestrogens).

Key references used in reaching these recommendations are listed at the end of this report. This is not a complete reference list, but it includes the most significant recent randomized, controlled clinical trials, meta-analyses, and review articles. The level of evidence indicated for each study is based on a grading system that evaluates the scientific rigor of the study design, as developed by the US Preventive Services Task Force. A synopsis of the levels is presented at the end of the reference list.

The position statement was reviewed and approved by the NAMS 2002-2003 Board of Trustees.

Recommendations for Clinical Practice: Areas of Consensus

The Panel agreed on the following clinical recommendations for postmenopausal hormone therapy:

- A strong recommendation was made for uniform and consistent terminology for menopause-related therapies, as indicated below:

ET	estrogen therapy
EPT	combined estrogen-progestogen therapy
HT	hormone therapy (encompassing both ET and EPT)
CC-EPT	continuous-combined estrogen-progestogen therapy (daily administration of both estrogen and progestogen)

CS-EPT	continuous-sequential estrogen-progestogen therapy (estrogen daily, with progestogen added on a set sequence)
systemic ET/EPT	preparations of ET or EPT that have a systemic, not solely vaginal, effect
local ET	preparations of ET that have a predominantly vaginal, not systemic, effect
progestogen	encompassing both progesterone and progestin

- Treatment of moderate to severe menopause symptoms (ie, vasomotor symptoms, sleep disruption from vasomotor symptoms) remains the primary indication for systemic ET and EPT. Every systemic ET/EPT product is government approved for this indication.
- Every systemic and local ET/EPT product is government approved for treating moderate to severe symptoms of vulvar and vaginal atrophy, such as vaginal dryness, dyspareunia, and atrophic vaginitis. When hormones are considered solely for this indication, local ET is generally recommended.
- The primary menopause-related indication for progestogen use is endometrial protection from unopposed ET. For all women with an intact uterus who are using estrogen therapy, clinicians are advised to prescribe adequate progestogen, in either a CC-EPT or CS-EPT regimen. Women without a uterus should not be prescribed a progestogen.
- Some women with an intact uterus who choose EPT may experience undesirable side effects from the progestogen component. However, there is insufficient evidence regarding long-term endometrial safety to recommend use of long-cycle progestogen (ie, progestogen every 3-6 months for 12-14 days), a progestin-containing intrauterine device (IUD), or low-dose estrogen without progestogen as an alternative to standard EPT regimens. If utilizing any of these approaches, closer surveillance of the endometrium is recommended, pending more definitive research.
- No EPT regimen should be used for primary or secondary prevention of coronary heart disease (CHD) or stroke.
- The effect of ET on CHD and stroke is not yet clear. ET does not have a significant effect on stroke risk in postmenopausal women with known ischemic cerebrovascular disease, but for healthy older women, effects of ET on stroke risk are not clear.

However, unless confirming data become available, ET should not be used for primary or secondary prevention of these conditions.

- Breast cancer risk is increased with ET and, to a greater extent, EPT use beyond 5 years. Progestogen appears to contribute substantially to that adverse effect. EPT and, to a lesser extent, ET increase breast cell proliferation, breast pain, and mammographic density. HT may impede the diagnostic interpretation of mammograms. One recent observational study suggests that the increase in incidence of breast cancer with oral, transdermal, and implanted estrogens varies little between specific estrogens and progestogens or their doses, or between continuous and sequential regimens. The observational data also suggest that breast cancer incidence may begin to increase slightly with less than 5 years HT use. Observational data from one study suggest that HT use may be associated with increased breast cancer mortality, but insufficient data exist to determine whether ET or EPT, or duration of use of ET or EPT, is associated with any increase in mortality.
- There is definitive evidence for EPT efficacy in reducing risk for postmenopausal osteoporosis fracture. There is, to date, no comparable evidence for ET. Many EPT and ET products are government approved for prevention of postmenopausal osteoporosis (ie, loss of bone mineral density) through long-term treatment. Because of the potential risks associated with HT, for women who require drug therapy for osteoporosis risk reduction (including women at high risk of fracture in the next 5-10 years), alternatives to HT should also be considered, weighing the risks and benefits of each. Recognition should be given to the fact that there are no published data on osteoporosis drug use beyond 7 years.
- Initiating EPT after age 65 cannot be recommended for primary prevention of dementia as it increases the risk of dementia during the ensuing 5 years in this population. The evidence is insufficient to either support or refute the efficacy or harm of ET/EPT for primary prevention of dementia when therapy is initiated during the menopause transition or early postmenopause. However, given other adverse events that may be expected to accrue during long-term HT use, it is by no means clear that theoretical dementia benefits would outweigh known risks. HT does not appear to convey direct benefit or harm for secondary prevention (ie, symptomatic treatment) of dementia due to Alzheimer's disease.

- The effects of HT on risk for breast cancer and osteoporotic fracture in symptomatic perimenopausal women have not been established in randomized clinical trials. The findings from trials in different populations (eg, WHI) should, therefore, be extrapolated with caution. There is, however, no evidence that symptomatic women differ from asymptomatic women in cancer or bone outcomes.
- Data from studies such as the WHI and the Heart and Estrogen/progestin Replacement Study (HERS) should be extrapolated only with caution to women younger than 50 years of age who initiate HT. WHI and HERS involved women aged 50 and over (with mean ages of 63 and 67, respectively), and HERS was conducted solely in women with known coronary artery disease. The data should not be extrapolated to women experiencing premature menopause (<40 years of age) and initiating HT at that time.
- Premature menopause and premature ovarian failure are conditions associated with earlier onset of osteoporosis and CHD, but there are no clear data as to whether ET or EPT will reduce morbidity or mortality from these conditions. The benefit-risk ratio may be more favorable for younger women.
- Use of ET and EPT should be limited to the shortest duration consistent with treatment goals, benefits, and risks for the individual woman, taking into account symptoms and domains (eg, sexuality, sleep) that may have an impact on quality of life.
- Lower-than-standard doses of ET and EPT should be considered (ie, daily doses of 0.3 mg conjugated estrogens tablet, 0.25-0.5 mg micronized 17 β -estradiol tablet, 0.025 mg 17 β -estradiol patch, or the equivalent). Many studies have demonstrated nearly equivalent vasomotor and vulvovaginal symptom relief and preservation of bone mineral density. Lower EPT doses are better tolerated and may or may not have a more positive safety profile than standard doses; however, lower doses have not been tested for outcomes (including endometrial safety) in long-term trials.
- Nonoral routes of administration of ET/EPT may offer advantages and disadvantages, but the long-term benefit-risk ratio has not been demonstrated. Differences would be related to the role of the first-pass hepatic effect, the hormone concentrations in the blood achieved by a given route, and the biologic activity of component ingredients. There is some evidence that transdermal 17 β -estradiol does not increase the level of C-reactive protein, and also that it may be associated with lower risk of deep venous thrombosis than oral estrogen. A large observational study has shown similar increased risks for breast cancer with both oral and transdermal estrogens.
- Extended use of ET or EPT is acceptable under the following circumstances, provided the woman is well aware of risks and there is strict clinical supervision:
 - For the woman for whom, in her opinion, benefits of symptom relief outweigh risks, notably after failing an attempt to withdraw HT. Attempts should be made over time to reduce and cease HT.
 - For women with moderate to severe menopause symptoms who are at high risk for osteoporotic fracture. Attempts should be made over time to lower the dose or cease HT and introduce alternate bone-sparing therapy.
 - For prevention of osteoporosis in a high-risk woman when alternate therapies are not appropriate for that woman.
- Prior to consideration of any therapeutic regimen, including HT, all women should have a complete health evaluation, including a comprehensive history and physical examination. More specific examinations, such as bone densitometry, should be considered on a case-by-case basis.
- The Panel acknowledged that the absolute risks published thus far regarding ET/EPT are small (eg, the EPT arm of the WHI), as are the benefits for bone and reduction in colon cancer risk. For women younger than 50 or those at low risk for CHD, stroke, osteoporosis, breast cancer, or colon cancer, the absolute risk or benefit from EPT is likely to be smaller than demonstrated in WHI, although the relative risk may be similar. An individual risk profile is essential for every woman contemplating any regimen of EPT or ET. Women should be informed of known risks.

Areas Where Insufficient or Conflicting Evidence Precludes Consensus

The Panel could not reach consensus on the following issues:

- *What are the currently acceptable definitions of “short-term” and “long-term” HT?* The Panel could not reach a consensus regarding definitions of these terms, agreeing that delineating specific time periods is arbitrary and that no uniform time can be broadly applied to all women. The Panel rec-

ognized that this question is an attempt to assign a “safe window” for HT. The dilemma is that current data suggest that the risk of breast cancer is significantly increased beyond 5 years use, with a lower elevation in risk before 5 years, whereas there is evidence of potential early CHD and thromboembolism risk within the first 2 years of use and conflicting evidence of early risk of ischemic stroke. Moreover, there are emerging data showing no association of early increase in CHD events in young (ie, average age 53), healthy postmenopausal women with HT during the first 2 years of treatment. However, deep venous thrombosis is slightly increased from an expected annualized rate of 0.3 per 1,000 to 0.9 per 1,000. It is therefore difficult to define any “safe window,” and an individual risk-benefit profile needs to be considered for every woman considering commencement of HT.

- *Is HT associated with early risk of CHD?* Panelists were divided on the issue as to whether there is definitive evidence for early increased risk of CHD with HT. For women similar to participants in the EPT arm of WHI (average age 63 years; range from 50 to 79 years), the WHI data are the best estimate of early harm from EPT. The WHI demonstrated that EPT may increase the risk of CHD among generally healthy postmenopausal women during the first year after initiation of hormone use. There is also evidence that early harm within 2 years of use may not pertain to healthy menopausal women using ET/EPT for menopause symptom management.
- *How long should HT be prescribed for symptom relief?* No consensus could be reached, although a general guiding principle should be for the shortest time at the lowest possible dose. The Panel recognized that symptoms can recur when therapy is discontinued, independent of age and duration of HT use. Useful information regarding the consideration of reinstating HT is anticipated from the terminated EPT arm of the WHI, as trial participants are being followed for outcomes after termination. The Panel agreed that the decision to reinstitute HT should be individualized based on severity of symptoms, current risk/benefit considerations, and the woman’s preference. Reinstating therapy at a lower dose may facilitate future attempts at discontinuing.
- *Is there a best way to discontinue HT?* Panelists were divided in their recommendations, including both abrupt therapy cessation and tapering the dose. Past history of severe symptoms may favor taper-

ing, but no specific protocols could be recommended. Some gradually decrease the dose, while others lengthen the time between doses. Matrix transdermal HT patches can be trimmed to provide smaller doses. Current data are inadequate to suggest that one method is better than the other.

- *Is it possible to make general conclusions about all members of the estrogen and progestogen families?* The majority opinion was that it is not possible to extrapolate conclusions from the study of one compound directly to another. It was acknowledged that estrogen and progesterone agonists share some common features and effects, and the only way to establish definitively the net clinical outcome for any given agent (alone or in combination) is through randomized clinical trials. In the absence of clinical trial data for each estrogen and progestogen, the clinical trial results for one agent probably should be generalized to all agents within the same family, especially with regard to adverse effects.
- *Does a continuous-combined EPT regimen (CC-EPT) have an effect different from continuous estrogen with sequential progestogen (CS-EPT)?* There are some indications that continuous progestogen in the dosages administered in studies such as WHI and HERS may be related to these trials’ adverse cardiovascular and breast outcomes, but conflicting data preclude a consensus.
- *Does HT enhance quality of life (QOL)?* There is a lack of consensus on the impact of HT on QOL. This has largely been due to a lack of agreement in the scientific community regarding how best to obtain an appropriate evaluation of QOL, including the domains to be incorporated into any survey instruments. There is consensus that validated instruments for determining the impact of HT, or indeed any menopause-related therapy, on QOL should be incorporated into future studies.

Need for Future Research

On the basis of this review, the Panelists identified the following areas requiring further research. Two overarching dimensions of the agenda are the following:

Further study of the positive and negative effects of hormone therapy and the mechanisms by which they occur:

- Long-term benefits/risks of ET.
- Long-term benefits/risks of estrogen and progestogen preparations, dosages, and regimens and routes

of administration other than oral CEE and oral MPA.

- Long-term benefits/risks of lower-than-standard doses of ET and EPT expressed as disease outcomes.
- Mechanism for early harm from EPT, including pharmacogenomics, polymorphisms, and prothrombosis.
- Cause for increase in CHD, stroke, and breast cancer adverse events with EPT in order to better understand the pathophysiology of these events, identify potential new treatments and ways to prevent their occurrence, and to identify a subgroup for whom HT would be less toxic.
- Effects of endogenous levels of estradiol and/or estrone on benefit and/or risk.
- Mechanisms supporting the difference in benefits/risks of ET versus EPT.
- How to factor QOL issues into the benefit-risk profile for EPT/ET.
- The benefit-risk profile of CS-EPT compared with CC-EPT or other HT regimens.
- Endometrial effects from alternatives to standard progestogen regimens, such as a progestin-releasing intrauterine device or long-cycle progestogen regimens.
- Long-term effects of ET/EPT on Alzheimer's disease risk and other forms of dementia, particularly when therapy is initiated before age 65.
- Short- and long-term effects of ET/EPT on neuropsychiatric disorders, such as Parkinson's disease, depression, and schizophrenia.
- Long-term effects of ET/EPT on primary and secondary prevention and progression of ophthalmologic disorders, such as cataract and age-related macular degeneration.
- Health outcomes with ET/EPT for women experiencing early or premature menopause.
- Health outcomes with osteoporosis drugs over the long term (>10 years).
- The effects of ET/EPT on atheromatosis development/progression, especially if initiated immediately after menopause.
- Impact of HT on cardiovascular and brain risk/benefit when initiated at the time of menopause.
- Role of progestogens (eg, type, regimen) in breast cancer and cardiovascular risk.
- Efficacy of nonpharmacologic methods of managing hot flashes.
- The benefit-risk profile associated with an abrupt versus a tapering discontinuation of HT regimens.

Further study of the natural history of the menopause transition:

- Course of symptoms with spontaneous menopause versus course of symptoms after discontinuing HT.
- Incidence and course of chronic disease in women experiencing early or premature menopause.
- How women can best be identified for risk of deep venous thrombosis and pulmonary embolism, as well as hypercoagulability responsiveness to estrogens in general.
- Stricter evaluation of domains of QOL.

Panelist Disclosures

Chair, Wulf H. Utian, MD, PhD, FACOG – Industry consulting fees (Berlex, Eli Lilly, Endeavor, Pfizer, Roche, Warner Chilcott); direct industry lecture fees (none disclosed); industry research support (Amylin, 3M, Barr, Berlex, Bristol-Myers Squibb, Eli Lilly, Endeavor, Forest, Neurocrine Biosciences, Novartis, Novo Nordisk, Organon, Pfizer, Pharmacia, Procter & Gamble, Roche, Sepracor, Solvay, Wyeth, Yamanouchi). *Peter Collins, MD, FRP* – Industry consulting fees (Eli Lilly, Novartis, Pfizer); direct industry lecture fees (Akzo Nobel, Merck, Novartis, Novo Nordisk, Schering, Wyeth); industry research support (Eli Lilly, Protein Technologies, Merck). *Bruce Ettinger, MD, FACP* – Industry consulting fees (Berlex, Eli Lilly, Procter & Gamble, Tap); direct industry lecture fees (Berlex, Eli Lilly, Merck, Procter & Gamble, Tap); industry research support (Eli Lilly, Merck, Procter & Gamble). *J. Chris Gallagher, MD* – Industry consulting fees (Aventis, Endeavor, Pfizer, Roche, Wyeth); direct industry lecture fees (Aventis, Organon, Pfizer, Roche, Wyeth); industry research support (Endeavor, Organon, Pfizer, Roche, Wyeth). *Margery L.S. Gass, MD* – Industry consulting fees (Eli Lilly, GlaxoSmithKline, Merck, Procter & Gamble); direct industry lecture fees (Aventis); industry research support (Eli Lilly, GlaxoSmithKline, Merck, Pfizer, Procter & Gamble, Wyeth). *Morrie M. Gelfand, CM, MD* – Industry consulting fees (none disclosed); industry lecture fees (none disclosed); industry research support (Pfizer). *Victor W. Henderson, MD, MS* – Industry consulting fees (Wyeth); direct industry lecture fees (Wyeth); industry research support (none disclosed). *David M. Herrington, MD, MHS* – Industry consulting fees (none disclosed); direct industry lecture fees (Eli Lilly, Organon, Pfizer, Wyeth); industry research support (Eli Lilly, Pfizer). *Marian C. Limacher, MD* – Industry consulting fees (none disclosed); direct industry lecture fees (none dis-

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Progestogen Added to ET

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Hormone Effects on the Skeleton

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Hormone Effects on the Brain

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Heart and Estrogen/progestin Replacement Study follow-up (HERS II)

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Hormone Effects on Breast Cancer

Heart and Estrogen/progestin Replacement Study follow-up (HERS II)

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Nanda K, Bastian LA, Hasselblad V, Simel DL. Hormone replacement therapy and the risk of colorectal cancer: a meta-analysis. *Obstet Gynecol* 1999;93:880-888. Level of evidence: III.

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Description of the levels of evidence*

- Level I Properly randomized, controlled trial.
- Level II-1 Well-designed controlled trial but without randomization.
- Level II-2 Well-designed cohort or case-control analytic study, preferably from more than one center or research group.
- Level II-3 Multiple time series with or without the intervention (eg, cross-sectional and uncontrolled investigational studies); uncontrolled experiments with dramatic results could also be regarded as this type of evidence.
- Level III Opinions of respected authorities that are based on clinical experience; descriptive studies and case reports; reports from expert committees.

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*Preventive Services Task Force. *Guide to Clinician Preventive Services: Report of the US Preventive Services Task Force*. 2nd ed. Baltimore, MD: Williams & Wilkins; 1996.

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