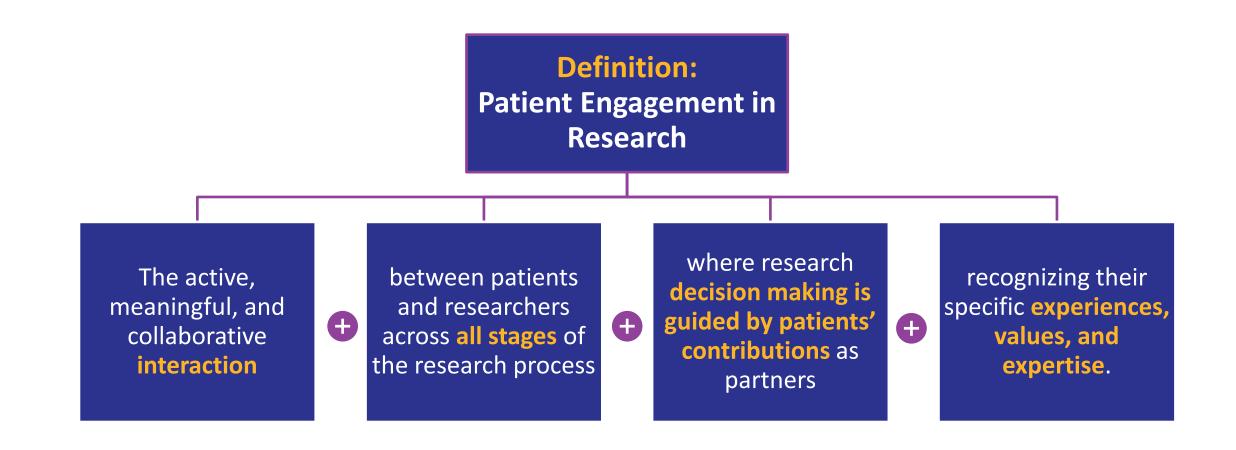
"Whole Health" Value Assessment: Universal Survey Framework for Integrating Patient Experience Data in Health Technology Assessment

Kimberly Westrich, Chief Strategy Officer, NPC



# Patient Insights Should Guide Research and Decisions (IAD)

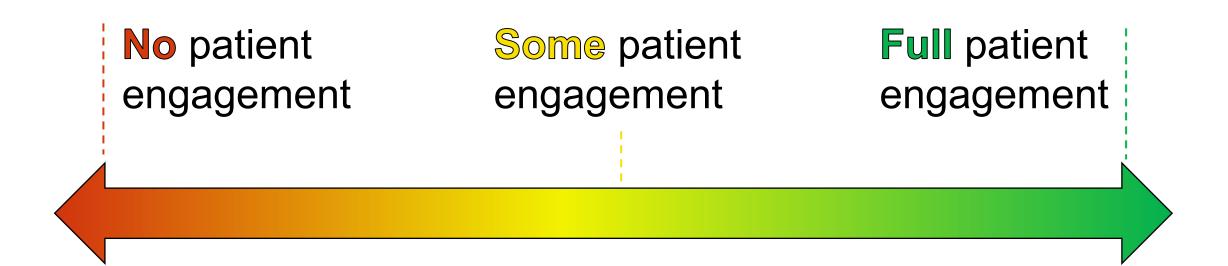




Harrington, Rachel L. et al. Defining Patient Engagement in Research: Results of a Systematic Review and Analysis: Report of the ISPOR Patient-Centered Special Interest Group. *Value in Health*, Volume 23, Issue 6, 677 - 688

## Integrating the Patient Experience Into Healthcare Decisions Occurs Along a Continuum

Don't let perfect be the enemy of good; some engagement is better than no engagement





## Patient Experience Can Inform a Range of Decision-Making Contexts





# A Spectrum of US Value Assessment Approaches

Patient engagement intensity varies across US value assessment approaches

#### NCCN EVIDENCE BLOCKS CATEGORIES AND DEFINITIONS



E = Efficacy of Regimen/Agent S = Safety of Regimen/Agent Q = Quality of Evidence C = Consistency of Evidence A = Affordability of Regimen/Agent







# **ICER's Approach to Patient Engagement Has Evolved Over Time**

No patient	
engagement	t
program	

**70 YEA** 

2014

	2017	2020	2023
t ent	Informal Approach to Patient Engagement	ICER Implements Formal Patient Engagement Program	ICER Expands Patient Engagement Program
	<ul> <li>Following release of 2017 VAF, ICER revised its Patient</li> </ul>	<ul> <li>ICER engages select patient groups prior to topic announcement</li> </ul>	<ul> <li>Revised "share your story" form</li> </ul>
	<ul> <li>Engagement Guide</li> <li>Informal outreach to patients and patient groups</li> </ul>	<ul> <li>Potential to include patients in key informant interviews</li> </ul>	<ul> <li>Formalized small-group patient and caregiver</li> </ul>
	patients and patient groups "as appropriate to learn		discussions after the scoping
	about the patient perspective"	<ul> <li>Dedicated report chapter on patient experience</li> </ul>	<ul><li>phase</li><li>Compensate patient</li></ul>
	Informal policy of including     patient representatives in	<ul> <li>Inclusion of a patient representative as</li> </ul>	representatives for their time
	patient representatives in the public meeting and	an <b>expert reviewer</b>	Creation of a Patient Council
	policy roundtable	<ul> <li>Inclusion of patient representatives in the public meeting and policy roundtable</li> </ul>	<ul> <li>Publish "ICER Snapshot for Patients" resources</li> </ul>
		<ul> <li>Potential to debrief with key patient organizations following the public meeting</li> </ul>	

# **ICER's Patient Engagement Program: Opportunities For Improvement**





# Advancing "Whole Health" Value Assessment





Kayleigh Majercak, MS Joe Vandigo, MBA, PhD



Brett McQueen, PhD



Mitigating Evidence Gaps: A Survey Template to Inform Patient-Centered Value Assessment

Kayleigh Majercak, PhD, MS PhD Student University of Maryland Baltimore, School of Pharmacy



ISPOR Annual May 7, 2024 1:45 PM - 2:45 PM ET



## Acknowledgements

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#### Committee:

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Asthma and Allergy Foundation of America



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- Value Initiative Advisory Board
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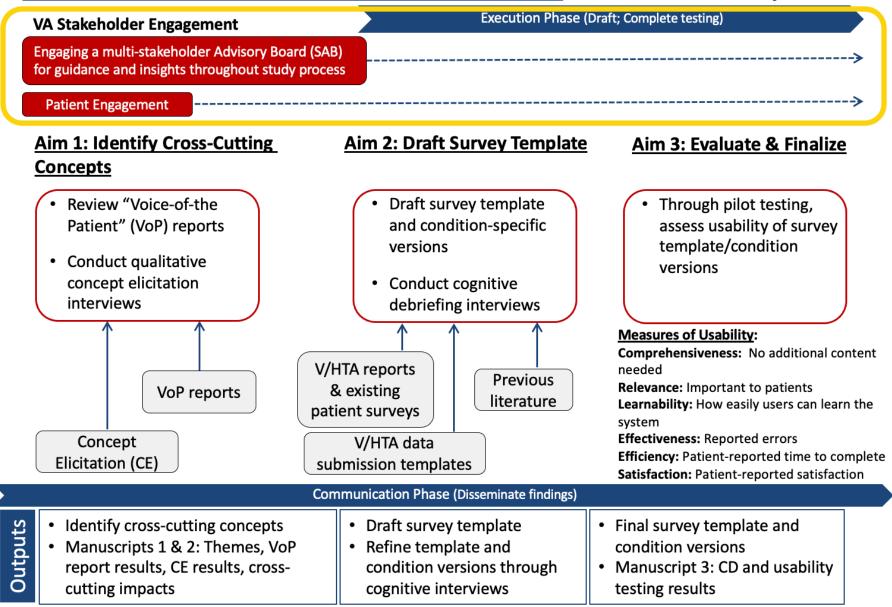
Disclosure: This project is supported by the National Health Council as part of the NHC Pre-Doctoral Fellowship award.



# **Study Objective**

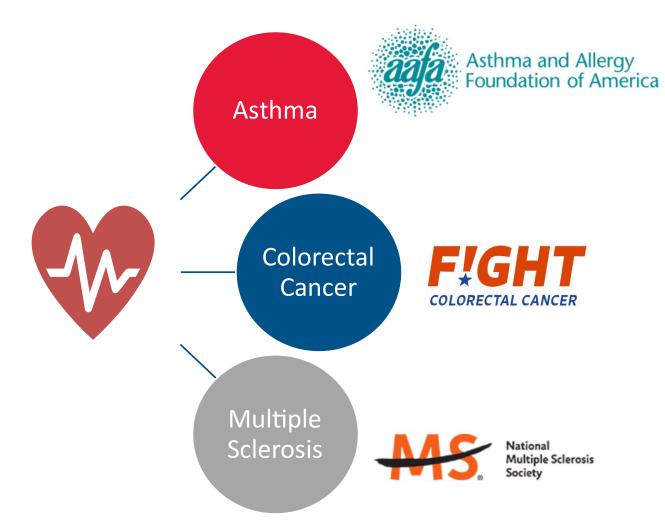
 Using a mixed-methods approach, identify patient experience data (PED) concepts common across conditions (i.e., cross-cutting PED concepts) to co-develop a disease-agnostic survey template that informs a standardized approach to fill patient-centered evidence gaps in value/health technology assessment. Preparation Phase (Gather and collect information; Synthesize)

#### **Outline of Project Flow**



CD: Cognitive Debriefing, V/HTA: Value/Health Technology Assessment, VoP: Voice of the Patient

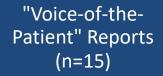
## **Three Conditions for Development and Testing**





- Supported by patient group partners
  - AAFA
  - FightCRC
  - NMSS
- Recruitment targets for population characteristics
  - Concept elicitation
  - Cognitive interviewing
  - Usability testing

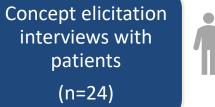
#### **How Were the PED Cross-cutting Concepts Identified?**





 Randomly selected reports to obtain a balance of rare (n=8) and prevalent (n=7) conditions based on a 200,000/population threshold







 Generate list of impacts reported across conditions while noting condition-specific impacts



List of commonly reported impacts across conditions

 List created using a 70% threshold or retained if reported as most bothersome for further evaluation

Follow-up meetings with subset of patients (n=12)



 Narrowed down the list to the most important impacts & understanding the aspect(s) of the impact that makes it important (concepts)

### For Patients, With Patients: Development and Testing

- Adopted/adapted survey items from existing surveys
- Developed new items
- Revisions based on stakeholder advisory board, patient advisors, and expert input



Drafting the

survey template

- Preference for format (matrix vs single-item)
- Phrasing (words used by patients)
- Appropriate response options (options resonate/missing options)

Usability testing with patients (n=16)

- Additional revisions (examples/items/options, formatting)
- Time to complete
- Usability metrics



- Final survey template: 31 items (+ sub-items)
- Three examples of how survey tailored for asthma, CRC, and MS

## **Survey Template Item Content**

- Symptoms
- Impact of symptoms on daily functioning
- Treatment and treatment-related experiences
- Ability to work
- Wellness
- Financial impact
- Healthcare utilization
- Condition stability

- Treatment preferences
- Healthcare and provider experiences
- Access to healthcare services and treatment
- Experiences living with the condition
- Impact on life
- Support from others
- Impact on others
- Additional patient insights

### **Survey Template Item-Response Scales**

#### • Severity responses:

None / Mild / Moderate / Severe / Very Severe

#### • Difficulty responses:

No difficulty / Mild difficulty / Moderate difficulty / Severe difficulty / Very severe difficulty / Unable to do\*

#### • Interference responses:

None / Less than a day / 1 - 2 days / 3 - 4 days / 5 - 6 days / 7 days

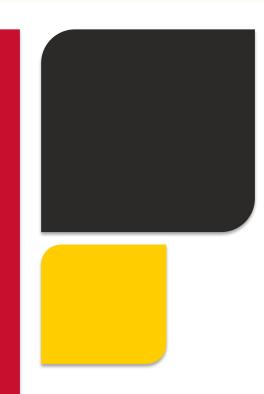
### Level of agreement responses:

Does not apply / Strongly disagree / Disagree / Neutral / Agree / Strongly Agree

• Other items response scales: Based on specific patient experiences

# How Patient Engagement Shaped the Survey Template

**CASE EXAMPLES** 



2.1 Think about the last seven days and your experiences with MS and treatments.

Treatment includes any medications taken as part of your MS treatment plan or regimen.

In the last seven days, did you experience any of the things below related to MS and treatments? If experienced, do you know if it was from your MS, treatment, or both? Choose all that apply.

Try to think about your AVERAGE experience over the last seven days.

Interrupted sleep

	Did not experience	Not sure	MS condition	MS treatment	Both condition and treatment	Other condition or treatment
FATIGUE Examples include but are not limited to: -Feeling tired -Exhausted -Drained -Not having energy -Weakness						
PAIN Examples include but are not limited to: -Discomfort -Burning -Soreness -Cramps -Aches (body, muscle head, stomach) -Pressure						
TROUBLE SLEEPING Examples include but are not limited to: -Difficulty falling asleep						

## Case Example #1: Matrix vs Single-item Formatting

- Preference for the matrix-style format
- Easier to respond
- Able to see the full list of items

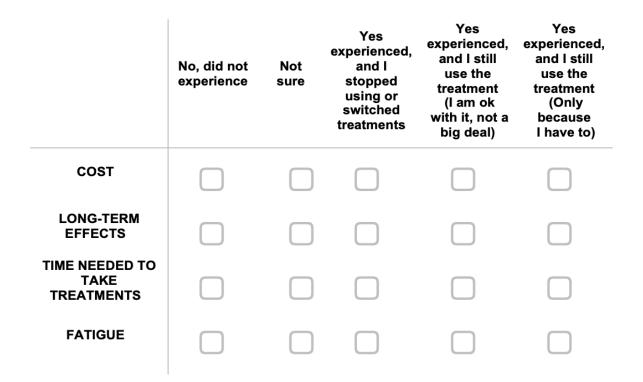
7.1 There may be things you like and dislike with your MS treatments.

Treatment includes any medications taken as part of your MS treatment plan or regimen.

#### Dislikes may include:

- Side effects (short-term or long-term)
- The time needed to take treatments
- The needed devices or equipment that interfere with daily life
- Other not so good things about the treatment

Did <u>YOU</u> have a problem or experience any of the things below because of your <u>MS</u> treatments? Choose all that apply.



## Case Example #2: Phrasing and Response Options

- Combined two questions
- Avoid formal language, just ask the question or state the response
  - Draft felt mechanical
- Distinguish between using the treatment
  - Ok, not a big deal
  - Only because I have to
- Rearranging order of items, i.e., cost
  - Confirmed spontaneously by participant after modification

#### Draft |

7.1 Do your current multiple sclerosis treatment(s) have any **<u>important disadvantages or</u>** <u>drawbacks</u>?

Disadvantages or drawbacks of treatment may include:

- Side effects
- The time needed to take treatments
- The needed devices or equipment that interfere with daily life
- Other not so good things about the treatment

You may experience some downsides but try to think about the <u>most important</u> disadvantages or drawbacks. The most important are the disadvantages or drawbacks that greatly affect your daily life.

	No	Not sure	Yes
Do your current multiple sclerosis treatment(s) have any important disadvantages or drawbacks such as <u>FATIGUE</u> ?	0	0	0

7.1B If you experienced an important disadvantage or drawback, are you willing to continue the treatment or are you still using the treatment?

	Yes, I am willing to continue, or I am still using the treatment	No, I am not willing to continue, or I am no longer using the treatment	
FATIGUE	0	0	

#### Final

7.1 There may be things you like and dislike with your MS treatments.

Treatment includes any medications taken as part of your MS treatment plan or regimen.

#### Dislikes may include:

- Side effects (short-term or long-term)
- The time needed to take treatments
- The needed devices or equipment that interfere with daily life
- Other not so good things about the treatment

Did <u>YOU</u> have a problem or experience any of the things below because of your <u>MS</u> treatments? Choose all that apply.

	No, did not experience	Not sure	Yes experienced, and I stopped using or switched treatments	Yes experienced, and I still use the treatment (I am ok with it, not a big deal)	Yes experienced, and I still use the treatment (Only because I have to)
COST					
LONG-TERM EFFECTS					
TIME NEEDED TO TAKE TREATMENTS					
FATIGUE					

6.1

Think about your past and current MS treatments and what you would like to see in new treatments.

Treatment includes any medications taken as part of your MS treatment plan or regimen.

Based on <u>YOUR</u> experience, are there things you want future MS treatments to help with or be helpful for?

	Does not apply	No	Not sure	Yes	
FATIGUE	0	0	0	0	
PAIN	0	0	0	0	
TROUBLE SLEEPING	0	0	0	0	
TROUBLE CONCENTRATING	0	0	0	0	

### Case Example #3: "Meaningful treatment benefit" does not resonate with patients

- One of the more challenging items to find the right phrasing
  - Terms
    - Meaningful benefit/improvement
    - □ Important benefit/improvement
    - □ Significant improvement
    - Improvement that makes a difference
    - □ Noticeable improvement
  - Answering question as intended
- Reverse engineered to go about asking in a different way
  - Combined two questions

#### Draft | Final

6.1 Do your current multiple sclerosis treatment(s) provide an <u>important benefit</u> with the symptoms or activities listed?

An *important benefit* means that the treatment makes a difference to you. You may experience some benefit (such as a partial benefit), but the benefit may not be enough to be important or meaningful to you. Instead, try to think about a benefit that is important to you.

For example, the treatment may stop you from experiencing a certain symptom that is important to you.

	No, my treatment does <u>NOT</u> provide an important benefit	Not sure	Yes, my treatment provides an important benefit
FATIGUE	0	0	0
6.1B If you did <u>NOT</u> exp experience.	perience an important benef	it, choose which	best describes your
	Treatment do provide benefi sympto	t for this	Treatment does not provide enough benefit to be important to me
FATIGUE	0		0

6.1

Think about your past and current MS treatments and what you would like to see in new treatments.

Treatment includes any medications taken as part of your MS treatment plan or regimen.

Based on <u>YOUR</u> experience, are there things you want future MS treatments to help with or be helpful for?

	Does not apply	No	Not sure	Yes	
FATIGUE	0	0	0	0	
PAIN	0	0	0	0	
TROUBLE SLEEPING	0	0	0	0	
TROUBLE CONCENTRATING	0	0	0	0	

# **Differences in Condition-versions of the Survey**

- Symptoms and physical activity examples
- Response option anchor of "unable to do" for difficulty item for MS and CRC versions
- Formatting
  - Asthma: Do not repeat question with item, i.e., list only symptom or activity
  - MS: Repeat the question for each item to help remember and focus
- Response options
  - Number of days hospitalized, missed days of work for CRC
- Condition stability item
  - MS: Flares/relapse
  - Asthma: Flares/attacks
  - CRC: remission/NED

#### MS

4.1 Think about the last seven days and your experiences with MS and treatments.

Treatment includes any medications taken as part of your MS treatment plan or regimen.

In the last seven days, rate your experience with the symptoms below related to MS and treatments. Choose on a scale from none to very severe.

Try to think about your AVERAGE experience over the last seven days.

	None	Mild	Moderate	Severe	Very Severe
In the last 7 days, rate your experiences with FATIGUE.	0	0	0	0	0
In the last 7 days, rate your experiences with <b>PAIN</b> .	0	0	0	0	0

#### Asthma

4.1 Think about the last seven days and your experiences with asthma and treatments.

Treatment includes any medications taken as part of your asthma treatment plan or regimen.

In the last seven days, rate your AVERAGE experience with the symptoms below related to asthma and treatments. Choose on a scale from none to very severe.

In the last 7 days, rate your experiences with...

	None	Mild	Moderate	Severe	Very Severe
FATIGUE	0	0	0	0	0
DISCOMFORT	0	0	0	0	0

# **TEMPLATE FOR SUCCESS**

HOW A UNIVERSAL SURVEY TEMPLATE CAN CONTRIBUTE TO V/HTA

JOE VANDIGO PRINCIPAL SCIENTIST & DIRECTOR OF VALUE APPLIED PATIENT EXPERIENCE





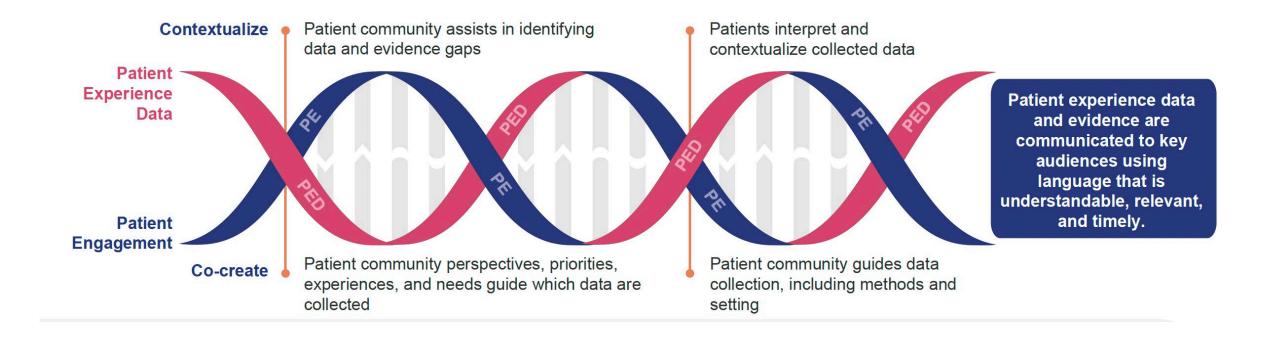
# Value (Health Technology) Assessment

Value assessment advises whether a health service (e.g., drug, device, surgery) should be used, and if so, how it is best used in the health care system, and which patients are most likely to benefit from it.

Assessments vary, but most look at the health benefits and risks of using the treatment or technology. They can also look at costs and any other wider impacts it may have on a population or on a society.

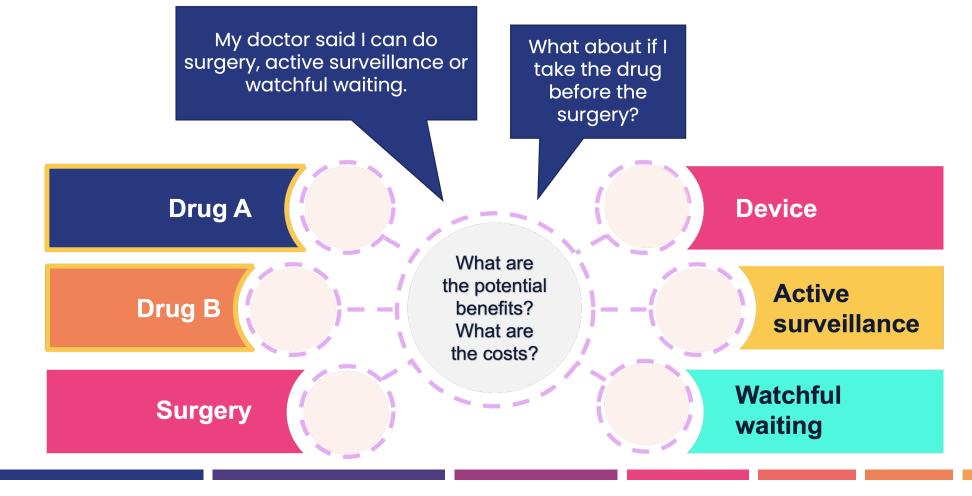


# Patient input guides data collection and communication



**Source:** Adapted from PFMD PED Navigator [Link]; figure from AppliedPX/NHC/PFMD Infographic

# Learn which comparators are relevant by speaking with patients



# Learn which outcomes to measure by speaking with patients

#### **PATIENT-CENTERED OUTCOMES:**

"Outcomes that people who represent the population of interest notice and care about"

Disease	Patient Input	Patient-Centered Outcome
Lung cancer	When asked to discuss the tradeoffs, a <b>majority appeared to</b> value prolonging life above all other factors.	Survival
Hemophilia A, Hemophilia B, von Willebrand Disease and Other Heritable Bleeding Disorders	<b>Joint damage and/or pain</b> as having the most significant impact on their or their loved one's daily life. One participant told of having "six joint replacements – both knees, both elbows, one ankle, and one hip."	Joint damage Pain
Hereditary Angioedema	54% of the participants present in the room and 40% of the webcast participants reported that it <b>took 10 years or greater for them to receive the correct diagnosis</b> .	Time to Diagnosis



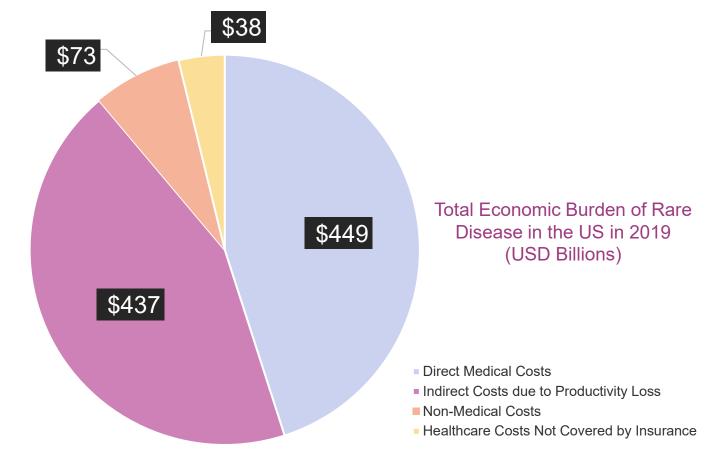
Source: Adapted from PCORI; FDA Voice of the Patient Reports

# Learn which costs to measure by speaking with patients

#### OUT-OF-POCKET COSTS "The portion of payments for *covered* health services required to be paid by the enrollee, including copayments, coinsurance, and deductibles."

- Academy of Managed Care Pharmacy Managed Care Glossary

Is this consistent with how insured members or patients would define "out-of-pocket costs"?





Source: Yang G, Cintina I, Pariser A, Oehrlein E, Sullivan J, Kennedy A. The national economic burden of rare disease in the United States in 2019. [Link]

# Examples of costs that are important to patients but <u>not</u> covered by insurance



Experimental, alternative, or non-traditional treatments



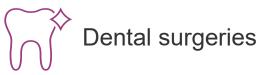
Over-the-counter drug therapies



Paid daily care



Necessary home modification



Medical foods

E S

Necessary special equipment at home or on a personal or family vehicle



Transportation costs



Special education



Source: Yang G, Cintina I, Pariser A, Oehrlein E, Sullivan J, Kennedy A. The national economic burden of rare disease in the United States in 2019. [Link]

# **Getting the Context Right**

Factors important to patients when considering treatment options

Insurance coverage and costs	Mobility to access care	"Track record" or years of use	Interactions with other treatments or comorbidities	
Side effects and risks	Quality of care	Time until treatment is effective		
Impact on symptoms, QoL, and functioning	Trust in health care provider	How invasive is a treatment or surgery	Personal responsibilities, family support, and mental health	
Geographic location	Convenience, lifestyle, and preferences	Whether a treatment is addictive		



Source: Project sponsored by the National Health Council: "Identifying essential questions for patients to ask health care providers."

## **Example: Global Heart Hub IPEC**

Insights from People living with Elevated Cholesterol



Source: Global Heart Hub IPEC Study

# When should PED data be collected during the product lifecycle?



Health Authority Review and Marketing Authorization

Postmarketing

Source: BIO. Framework for the Use of Patient Experience Data Throughout the Product Lifecycle [Link]

# When should PED data be collected during the product lifecycle?

Research and Discovery

Preclinical Development Clinical Development Health Authority Review and Marketing Authorization

#### Postmarketing

apx

Source: BIO. Framework for the Use of Patient Experience Data Throughout the Product Lifecycle [Link]

## **Emerging approach to consolidate the patient perspective: The PED Dossier Template**

Template for patient groups to consolidate patient experience data from a variety of sources

Consistent format across patient groups, but patient experience data is disease-specific

#### Living document that is updated over time

#### **POTENTIAL TOPICS**

- Symptoms and natural history of the disease
- Patient-centered outcomes or impacts
- Prevalence and important subgroups
- Impact on functioning and daily life
- Caregiver burden
- Experiences with available treatments
- Costs to patients and caregivers

#### **POTENTIAL SOURCES**

- Patient-Focused Drug Development Meetings
- Patient registries or surveys
- Patient-centered core impact sets
- Patient experience mapping
- Qualitative studies
- Patient preference studies
- Economic burden studies





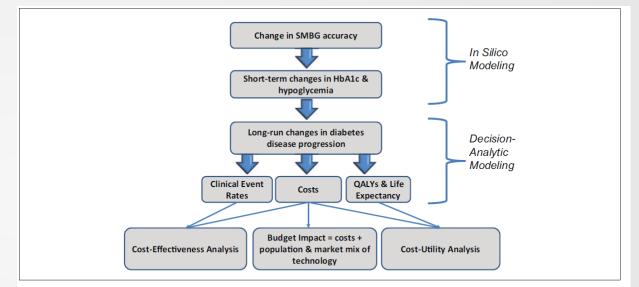
UNIVERSITY OF COLORADO ANSCHUTZ MEDICAL CAMPUS Whole Health Value Assessment: Universal Survey Framework for Integrating Patient Experience Data in Health Technology Assessment R. Brett McQueen, PhD

Associate Professor Director, Pharmaceutical Value (pValue)



# Role and purpose of modeling in value assessment

- "…analytic methodology that accounts for events over time and across populations, … to estimate the effects of an intervention on valued health consequences and costs."\*
- Aid to a specific decision context
- Links intermediate outcomes to longrun outcomes\*\*



**Figure 1.** Evidence flow chart. Differences in the accuracy of self-monitoring blood glucose devices (SMBG) are associated with changes in HbAIc and hypoglycemia.<sup>3</sup> The analysis links these changes in hemoglobin AIc (HbAIc) and hypoglycemia to long-run diabetes disease progression. Disease progression in turn impacts costs, clinical event rates, and quality-adjusted life years (QALYs). Cost-effectiveness, budget impact, and cost-utility analyses are performed to investigate the long-run impact of accuracy differences in blood glucose monitoring devices.

\*Weinstein MC, O'Brien B, Hornberger J, Jackson J, Johannesson M, McCabe C, Luce BR; ISPOR Task Force on Good Research Practices--Modeling Studies. Principles of good practice for decision analytic modeling in health-care evaluation: report of the ISPOR Task Force on Good Research Practices--Modeling Studies. Value Health. 2003 Jan-Feb;6(1):9-17 \*\*McQueen RB et al. Economic value of improved accuracy for self-monitoring of blood glucose devices for type 1 diabetes in Canada. JDST 2015.

Skaggs School of Pharmacy and Pharmaceutical Sciences UNIVERSITY OF COLOFADO ANSCHUTZ MEDICAL CAMPUS

# Do we need to model everything?

- Quantifiable information from primary/secondary sources
  - Cost and cost offsets (numerator)
  - Validated preference-based instruments for long-term composite QoL outcomes (denominator)
    - Potential extension to non preference-based instruments in cost-efficiency frontier
- Qualitative information in a deliberative setting is impactful\*
  - Additional qualitative information from patient or caregivers
  - Societal contextual considerations

\*Trenaman L, Pearson SD, Hoch JS. How Are Incremental Cost-Effectiveness, Contextual Considerations, and Other Benefits Viewed in Health Technology Assessment Recommendations in the United States? Value Health. 2020 May;23(5):576-584



# Importance of treatment effects in modeling

- Crucial to isolate the effect of the treatment on the numerator and denominator (e.g., randomized environment)
- Introducing a new instrument requires validation, consideration of scaling, and weighting for importance
- Without validation, avoid "scoring" therapies



# Where can a universal survey help modelers?

Validate the model structure/conceptual framework

Contribute to selection of appropriate inputs or instruments that highlight aspects of disease most important for a treatment

Out of pocket expenses when a "treatment effect" is measured



# Conceptual framing for modeling endometriosis

- Trial effects were not based on the patient experience with endometriosis
- We used patient experience input to calculate a combined metric for response to pain

Markov model; one specific to dysmenorrhea-related pain and the other to nonmenstrual pelvic pain, as these correlated measures were reported as separate outcomes in the clinical trials and there was no explicit way to aggregate their effects without access to patient-level data. However, during the draft report public comment phase, stakeholders strongly suggested combining response for dysmenorrhea and response for nonmenstrual pelvic pain into one combined response metric and thus one version of a decision tree and Markov model. This feedback has been integrated into this report. We calculated a weighted average of response based on an average menstrual cycle

Atlas S, McQueen RB, Campbell JD, Whittington MD, Ollendorf DA. Institute for Clinical and Economic Review (ICER). Evidence Report: Elagolix for Treating Endometriosis. August 3, 2018. Accessed at: <a href="https://icer.org/wp-content/uploads/2020/10/ICER\_Elagolix\_Final\_Evidence\_Report\_080318.pdf">https://icer.org/wp-content/uploads/2020/10/ICER\_Elagolix\_Final\_Evidence\_Report\_080318.pdf</a>.



# Health-related quality of life inputs in multiple myeloma

- Patient input was crucial in understanding the benefits of staying "off treatment"
- Utility inputs were chosen based on the biggest spread in values

Parameter	Ide-Cel	Cilta-Cel	CAR-T Comparator Market Basket
Progression-Free Survival, Median	8.8 Months	Not reached; 12 month % PFS used	3.4 Months
Overall Survival, Median	19.4 Months	NR	9.2 Months
Progression-Free on Therapy and Responding Utility	0.78		
Progression-Free Off Therapy and Responding Utility	0.82	0.82	N/A
Progressed Disease/Not Responding to Therapy Utility	0.71		

Modeling team lead: Lee SJ, McQueen RB, Beinfeld M, Fluetsch N, Whittington MD, Pearson SD, Ollendorf DA. Anti B-Cell Maturation Antigen CAR T-cell and Antibody Drug Conjugate Therapy for Heavily Pre-Treated Relapsed and Refractory Multiple Myeloma; Final Evidence Report. Institute for Clinical and Economic Review, May 11, 2021. <u>https://icer.org/wp-content/uploads/2020/10/ICER\_Multiple-Myeloma\_Final-Report\_Update\_09102021.pdf</u>.



# Health-related quality of life for women experience vasomotor symptoms from menopause

- Severity vs. frequency of vasomotor symptoms from menopause
- Not only were treatment effects consistent, but patient input was crucial in this assumption

Assumption	Rationale	
Relative treatment effects are consistent across baseline	There is limited evidence on relative treatment effects	
VMS severity and frequency.	across starting levels of VMS severity and frequency,	
	therefore we will not adjust treatment effects in subgroup	
	analyses that may change the baseline severity or frequency	
	of VMS.	

Beaudoin FL, McQueen RB, Wright A, Yeung K, Moradi A, Herron-Smith S, Gutierrez E, Rind DM, Pearson SD, Lin GA. Fezolinetant for Moderate to Severe Vasomotor Symptoms Associated with Menopause: Effectiveness and Value; Final Evidence Report. Institute for Clinical and Economic Review, January 23, 2023. <u>https://icer.org/wp-content/uploads/2022/06/ICER\_Menopause\_FinalReport\_01232023.pdf</u>.



# How can uptake of universal survey instruments increase in value assessment?

- Modelers are already using patient input for assumptions and input selection
- Quantification of instruments into models requires validation and treatment effects
- Potential mapping (i.e., participants fill out both on same followup visits) with EQ-5D may increase uptake in short-run













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