* **Red Flag:** The patient’s blood pressure was not at goal (165/78).
* **Probe**: The provider asked the patient if they were able to take their medications as prescribed.
* **No Contextual Factor:** The patient said he was. When the provider further asked him if he was having any challenges taking it recently or that morning, the patient responded that, no, he wasn’t having any difficulty.
* **Contextual Plan of Care:** No contextual plan of care was necessary. The provider appropriately increased the medication dosage.
* **Red Flag:** The patient declined the flu vaccine.
* **Probe:** The provider asked the patient to explain why he was declining the vaccine.
* **No Contextual Factor Discovered by Probing:** He said he had a sore throat and a documented slight fever. He deferred getting the shot until his next visit.
* **No Contextual Plan of Care made:** Since the reason the patient declined the vaccine was biomedical, no contextual plan of care was necessary.
* **Red Flag:** The patient mentioned that he had recently become the caregiver for his mother who needs a lot of help.
* **Probe:** The provider asked the patient whether this change was impacting his ability to manage his own health and healthcare.
* **No Contextual Factor Discovered by Probing:** The patient replied that the change in his responsibilities was not negatively impacting his ability to manage his own health and healthcare.
* **No Contextual Plan of Care made:** The provider appropriately asked about the impact of new caretaker responsibilities on the caretaker. Fortunately he learned that the Veteran feels he is managing well.
* **Red Flag:** The patient commented that he was “so-so” about knowing how to take his medications.
* **Probe:** The provider asked him if he was taking them correctly and he replied that he thought so but wasn’t sure. They went over his meds and it turned out he was actually taking them as prescribed.
* **No Contextual Factor Discovered by Probing:** The provider’s probe did not uncover an underlying contextual factor.
* **No Contextual Plan of Care made:** Not all “contextual red flags” turn out to be indicators of a contextual factor, but since there is no way to know without asking, probing anyways was the right thing to do.
* **Red Flag:** The patient’s records in CPRS indicated that he should have run out of his prescribed Naproxen (the order had not been refilled in the expected amount of time).
* **Probe:** The provider asked the patient if he was taking his medications as prescribed.
* **No Contextual Factor Discovered by Probing:** The patient responded that he had switched to taking his Naproxen over the counter as it was cheaper for him.
* **No Contextual Plan of Care Necessary:** There was no contextual issue discovered, and the provider indicated in the notes that the patient was currently obtaining the medication OTC.
* **Red Flag:** The patient mentioned that his wife was critically ill and that he was her primary caregiver.
* **Probe:** The provider asked the patient if he was able to manage his own health needs and if he needed assistance.
* **No Contextual Factor Discovered by Probing:** The patient responded that he was able to manage on his own and had enough support from family and friends.
* **No Contextual Plan of Care Necessary:** Since the patient was managing a difficult situation on his own without it impacting his ability to manage his health, there was no need for a contextual plan of care. But assessing the situation was nevertheless essential given his comment.
* **Red Flag:** The patient had been to the ER/urgent care two times in the past four months.
* **Probe:** The provider asked the patient why he had been to the ER/urgent care instead of coming to primary care.
* **No Contextual Factor Discovered by Probing:** The patient pointed out that both times he had been experiencing physical symptoms that were concerning and couldn’t wait. The provider concurred.
* **No Contextual Plan of Care Necessary:** In this case, the patient is using the ER/Urgent Care clinic appropriately, but assessing the situation was a good idea in case the patient was having issues scheduling primary care visits.
* **Red Flag:** The patient commented repeatedly during the encounter, when talking about health care and health maintenance, “I’m getting older…”
* **Probe:** The provider commented, “I hear you talking about your age, how is that affecting you?”
* **No Contextual Factor Discovered by Probing:** The patient responded that he was just being light hearted and that he actually felt pretty good about himself.
* **No Contextual Plan of Care Necessary:** In this case, the patient’s attitude about his age wasn’t impacting his ability to manage his health, but it was a good idea to follow up on his repeated comments as it might have been a significant issue.
* **Red Flag:** The patient declined a flu vaccine.
* **Probe:** The provider asked the patient if there was any reason for declining it and offered to provide information about the vaccine.
* **No Contextual Factor Discovered by Probing:** The patient responded that he understood how the vaccine does not cause the flu, and that the flu can be serious, but just prefers to take his chances and skip the vaccine.
* **No Contextual Plan of Care Necessary:** In this case, the patient’s reason for declining the shot was preference; there was no contextual reason to address. This practitioner provided the number to the clinic in case the patient changed his mind in the future.
* **Red Flag:** A patient mentioned during the visit, without being asked, that he had not followed-up with an appointment to his cardiologist as planned and ordered by his PCP.
* **No Probe:** The provider did not comment or ask the patient if something in his life circumstances had prevented him from following-up with the cardiologist. Missed opportunity to prevent future missed appointments.
* **Red Flag:** A patient declined to be tested for HIV following his providers recommendation that he be tested.
* **No Probe:** The provider did not ask the patient why he declined being tested for HIV. He moved on to another topic. Possible contextual reasons could be fear of what the results might show (Emotional State), a misunderstanding of what testing involves and the benefits of being tested if he turns to be positive (Skills, Abilities and Knowledge). This was a missed opportunity to prevent future missed screenings.
* **Red Flag:** The patient’s blood pressure was not at goal.
* **Probe**: The provider asked the patient if they were able to take their medications as prescribed.
* **No Contextual Factor:** The patient said he was. When the provider further asked him if he was having any challenges taking it recently or that morning, the patient responded that, no, he wasn’t having any difficulty.
* **Contextual Plan of Care:** No contextual plan of care was necessary. The provider appropriately increased the medication dosage.
* **Red Flag:** The patient’s blood pressure was not at goal.
* **Probe**: The provider asked the patient if they were able to take their medications as prescribed.
* **No Contextual Factor:** The patient said he was. When the provider further asked him if he was having any challenges taking it recently or that morning, the patient responded that, no, he wasn’t having any difficulty.
* **Contextual Plan of Care:** No contextual plan of care was necessary. The provider appropriately increased the medication dosage.

(This case is just to illustrate that not all care issues require addressing a contextual factor)

* **Red Flag:** The patient’s blood pressure was not at goal.
* **Probe**: The provider asked the patient if they were able to take their medications as prescribed and discussed his eating habits.
* **No Contextual Factor:** The patient responded that he was taking his medications as prescribed and following a low-salt diet.
* **Contextual Plan of Care:** No contextual plan of care was necessary. The provider appropriately increased the medication dosage.
* **Red Flag:** A patient with dementia attended a primary care appointment with his caregiver who the doctor mentioned also was elderly.
* **Probe**: The provider asked the caregiver if she was able to manage taking care of the patient at home.
* **No Contextual Factor:** The caregiver responded that she had figured out how to juggle responsibilities with help from others and had sufficient support to care for the patient.
* **Contextual Plan of Care:** The provider took the important step of asking about contextual factors based on the red flags and, fortunately, determined that no interventions were needed.
* **Red Flag:** A patient stated that since his wife had died “things at home have become very emotional.”
* **Probe**: The provider asked the patient if he was still able to manage his health and daily activities, and walked patient through them.
* **No Contextual Factor:** The patient clarified that he was managing well at home; he was grieving but functioning.
* **No Contextual Plan of Care Necessary:** The provider took the important step of asking about contextual factors based on the red flag comment and, fortunately, determined that no interventions were needed.
* **Red Flag:** The patient mentioned that he had been experiencing side-effects from a new medication but waited for his visit to discuss them (contextual red flag).
* **Probe**: The provider asked the patient if the reason why he hadn’t informed anyone was because he didn’t know who he could call (contextual probe).
* **No Contextual Factor:** The patient clarified that the side effects had only recently started and didn’t seem serious. He wanted to wait to see the provider in person. The patient also responded that he knew how to contact someone if he were to have issues in the future.
* **No Contextual Plan of Care Necessary:** The provider took the important step of asking about contextual factors based on the red flag comment and, fortunately, determined that no interventions were needed.
* **Red Flag:** The patient stated that he was down to 2 pills on most of his medications and was about to run out. When the provider looked in CPRS they saw that the patient had refills available.
* **Probe**: The provider asked the patient if he knew how to reorder his medications.
* **No Contextual Factor:** The patient clarified that he knew how to reorder his medications and would be able to take them as prescribed, not missing any days.
* **No Contextual Plan of Care Necessary:** Not all “contextual red flags” turn out to be indicators of a contextual factor, but since there is no way to know without asking, probing anyway was the right thing to do.
* **Red Flag:** The patient missed three scheduled appointments in the past four months.
* **Probe**: The provider asked the patient why.
* **No Contextual Factor:** The patient replied that he had been too ill to come in for his appointments but had since recovered.
* **No Contextual Plan of Care Necessary:** The patient had a biomedical reason to miss the appointments. Not all “contextual red flags” turn out to be indicators of a contextual factor, but since there is no way to know without asking, probing anyway was the right thing to do.
* **Red Flag:** While talking about medications, the patient stated, “There are things going on in my life.”
* **Probe**: The provider asked the patient to elaborate, asking, “Can you manage everything okay?”
* **No Contextual Factor:** The patient replied that he was busy lately, but he was able to manage all of the things he needed to do to stay healthy including take all of his medications as prescribed.
* **No Contextual Plan of Care Necessary:** Not all “contextual red flags” turn out to be indicators of a contextual factor, but since there is no way to know without asking, probing anyway was the right thing to do. It’s possible that the patient had competing responsibilities that were interfering with his ability to take his medications that could be addressed by the provider.
* **Red Flag:** During an outpatient visit, the patient mentioned that he was down to his last two pills.
* **Probe**: The provider asked the patient, “Do you know how to order your medications (in time)?”
* **No Contextual Factor:** The patient replied that, yes, he knew how. However he figured he’d be seeing his doctor before running out so didn’t bother to do it over the phone.
* **No Contextual Plan of Care Necessary:** In this case, the patient did not have any contextual factors impacting his ability to order his medications, but it was still a good idea to ask since the patient’s comment was a “contextual red flag” that he might have a problem.
* **Red Flag:** The patient’s A1C was 9.7
* **Probe:** The pharmacist asked the patient what his biggest hurdle was to managing his diabetes.
* **No Contextual Factor:** The patient responded that he knew he needed to change his eating habits. He said he had good access to healthy foods, but couldn’t resist junk foods.
* **No Contextual Plan of Care Necessary:** The pharmacist and patient discussed at length ways for the patient to remain motivated and continue to improve his eating habits.
* **Red Flag:** A patient mentioned that he had experienced episodes of low blood sugar since his last visit, and showed the logged data.
* **Probe**: The provider asked about life circumstances that could impact the patient’s ability to manage his blood sugar including diet and medication changes.
* **No Contextual Factor:** The patient replied that he had been eating the recommended diet and taking his medications as prescribed.
* **No Contextual Plan of Care Necessary:** The provider did not discover any contextual factors impacting the patient’s ability to manage his diabetes and appropriately adjusted down the dosing of his medications.
* **Red Flag:** A patient with multiple health conditions had not been in to see a primary care provider or follow up with specialists in over a year.
* **Probe**: The physician asked the patient why he hadn’t come in as recommended.
* **No Contextual Factor:** The patient stated that he was just “lazy.”
* **No Contextual Plan of Care Necessary:** The patient didn’t reveal any barriers to access. “Lazy” is a patient preference. On the other hand it does warrant reviewing specific risks of not having health needs addressed. This was a challenging patient with a history of substance abuse.
* **Red Flag:** A patient mentioned that he was not taking a medication as prescribed.
* **Probe**: The physician resident asked the patient why he wasn’t taking the medication as had been discussed in the past.
* **No Contextual Factor:** The patient replied that he was experiencing side effects from and that wanted to discuss options at this visit to avoid them.
* **No Contextual Plan of Care Necessary:** Since there were no contextual factors (life circumstance related challenges) this turned out to be a straightforward case of working around a medication side effect rather than, for instance, not taking a medication because of inability to afford it.
* **Red Flag:** The patient’s A1C was not at goal.
* **Probe**: The provider asked the patient if they were able to take their medications as prescribed and reviewed diet recommendations.
* **No Contextual Factor:** The patient stated that he was taking his medications as prescribed and had recently changed his diet to better comply with recommendations discussed previously.
* **Contextual Plan of Care:** No contextual plan of care was necessary. The provider appropriately increased the medication dosage.
* **Red Flag:** A patient, when asked, said he was experiencing some pain and – also when asked -- acknowledged he was not taking pain medications prescribed for him.
* **Probe**: The provider explored why the patient was not taking these medications.
* **No Contextual Factor:** The patient stated that his pain was manageable and that he preferred to deal with it without using the medications since he didn’t like side effects.
* **Contextual Plan of Care:** No contextual plan of care was necessary. The patient expressed an informed preference for not taking his prescribed pain medication.
* **Red Flag:** The patient mentioned that he has ongoing memory problems.
* **Probe**: The provider asked the patient how he was managing his care, including remembering when to take his medications.
* **No Contextual Factor:** The patient replied that his son monitored his meds and appointments.
* **Contextual Plan of Care:** No contextual plan of care was necessary as the patient was already receiving social support to help with his memory issues.
* **Red Flag:** When a provider recommended starting medication for high cholesterol, the patient replied that he’d rather not take it.
* **Probe**: The provider asked him why he was declining, saying that it was recommended for patients with his clinical situation.
* **No Contextual Factor:** The patient replied that he understood but still preferred to hold of and continue to try diet and exercise to if he could avoid adding more medication.
* **Contextual Plan of Care:** No contextual plan of care was necessary. The patient expressed an informed preference for not starting a recommended medication.
* **Red Flag:** The patient’s A1C was 9.5.
* **Probe**: The provider asked the patient about his diet and his medicine regime, making sure he was taking his medications as prescribed.
* **No Contextual Factor:** The patient replied that he was sticking to the recommended diet and taking his medications as prescribed.
* **Contextual Plan of Care:** No contextual plan of care was necessary. The provider appropriately adjusted the patient’s medication regimen.
* **Red Flag:** The patient mentioned that he hadn’t received results in the mail from recent tests he had done.
* **Probe**: The provider confirmed that the patient’s address and contact information was correct in CPRS. The provider also asked if the patient had received any letters with results in the past.
* **No Contextual Factor:** The patient replied that the VA had the correct contact information and that he had received previous letters from the VA. They agreed to see whether the problem occurs again.
* **Contextual Plan of Care:** No contextual plan of care was necessary. This sounded like a one-time glitch in the mail system.
* **Red Flag:** A patient who commented that she was experiencing a lot of anxiety and having other issues with her moods, declined to schedule an appointment with her current mental health provider when the doctor suggested she do so.
* **No Probe:** The doctor didn’t ask her why. Perhaps, for instance, she is not comfortable with her mental health provider and would follow-up if given another option. Without asking what is going on her doctor may have missed an opportunity to get her help she may need.
* **Red Flag:** The patient mentioned that he was not currently using his CPAP machine at night.
* **Probe**: The provider asked the patient why.
* **No Contextual Factor:** The patient replied that he was experiencing a painful ear infection that was being treated and the CPAP exacerbated the pain.
* **Contextual Plan of Care:** No contextual plan of care was necessary since the patient was experiencing a temporary biomedical condition that should resolve.
* **Red Flag:** When told that his blood pressure was elevated (152/83), the patient replied that maybe all his BP meds were making it high.
* **Probe:** The provider asked the patient to explain what he meant, and also confirmed that he was taking each one as directed.
* **No Contextual Factor**: The patient responded that he was joking that just keeping track of all those meds could drive up BP, but he was doing fine.
* **No Contextual Plan of Care:** No contextual plan of care was necessary, but it was important the physician checked. They then increased the dosage of one of them BP meds.
* **Red Flag:** A patient showed up for his appointment two hours early.
* **Probe**: The provider asked the patient why he’d arrived so early.
* **No Contextual Factor:** The patient responded that it was in the hopes that the provider might see him before his scheduled appointment if he had openings, but that it wasn’t essential, since his friend would drive him home either way.
* **No Contextual Plan of Care:** No contextual plan of care was necessary (the doctor had no openings), but it was worthwhile to have come out to the waiting area and checked. It is possible that this patient had received the wrong information from the VA, or was only able to get transportation at a certain time of day.
* **Red Flag:** The patient’s blood pressure was not at goal (178/94).
* **Probe**: The provider asked the patient if they taking their medications as prescribed, after confirming the patient knew the correct dosage.
* **No Contextual Factor:** The patient confirmed he was. When the provider further asked him if he was having any challenges taking it recently or that morning, the patient responded that, no, he wasn’t having any difficulty and had taken it.
* **Contextual Plan of Care:** No contextual plan of care was necessary. The provider appropriately increased the medication dosage after appropriately ruling out contextual factors first.
* **Red Flag:** A patient lost a significant amount of weight since the last visit (over 20 pounds).
* **Probe**: The provider asked the patient if anything had changed in his life that would cause the weight loss.
* **No Contextual Factor:** The patient replied that the weight loss was intentional, and that he has been eating better and exercising regularly.
* **Contextual Plan of Care:** No contextual plan of care was necessary as the weight loss was related to a more healthy lifestyle. Obtaining this important information about the patients life situation prevented an unnecessary medical work up.
* **Red Flag:** A patient with diabetes had an A1C of 10.5.
* **Probe**: The provider asked the patient if anything in their life was impacting their ability to manage care, including his diet and medication adherence.
* **No Contextual Factor:** The patient replied that he was able to take his medications as prescribed, and described how he was following the recommended diet.
* **Contextual Plan of Care:** The provider did not discover any contextual factors impacting the patient’s ability to manage his diabetes and appropriately adjusted the dosing of his medications.
* **Red Flag:** During the course of a primary care appointment, the provider notices that the patient lives over an hour and a half away.
* **Probe**: The provider asked the patient if they want to get their care closer to home.
* **No Contextual Factor:** The patient replies that while it is far, he really likes getting his care here and fortunately has a car and doesn’t mind the drive.
* **Contextual Plan of Care:** No contextual plan of care was necessary as the patient was able to receive care even with the long drive – but it was important to ask as it could be a significant barrier.
* **Red Flag:** The patient’s blood pressure was not at goal (161/116).
* **Probe**: The provider asked the patient if they were taking their medications as prescribed, after confirming the patient knew the correct dosage.
* **No Contextual Factor:** The patient confirmed he was. When the provider further asked him if he was having any challenges taking it recently or that morning, the patient responded that, no, he wasn’t having any difficulty and had taken it.
* **Contextual Plan of Care:** No contextual plan of care was necessary. The provider appropriately increased the medication dosage after ruling out contextual factors first.
* **Red Flag:** The patient who is on many medications mentioned that he was developing memory issues.
* **Probe**: The provider asked the patient if he was able to manage his medications now that he was experiencing issues. The provider asked if he had a pill box to organize his medications or if there was anyone that could help him.
* **No Contextual Factor:** The patient replied he had help from family and a pill box so that his memory issues were not affecting taking his medications.
* **Contextual Plan of Care:** Not all “contextual red flags” turn out to be indicators of a contextual factor, but since there is no way to know without asking, probing anyway was the right thing to do.
* **Red Flag:** A patient with diabetes has an A1C of 9.5.
* **Probe**: The provider asked the patient to describe how he was taking his medications and whether his diet had changed.
* **No Contextual Factor:** The patient responded that he was taking all of his medications as prescribed and had not modified his diet, which followed recommendations to avoid juices and other carbs.
* **Contextual Plan of Care:** Physicians increased his insulin. Not all “contextual red flags” turn out to be indicators of a contextual factor, but since there is no way to know without asking, probing anyway was the right thing to do.
* **Red Flag:** A patient had lost a significant amount of weight since his last visit.
* **No Probe:** The provider did not ask the patient about his food intake, including if anything in his life circumstances was impacting his access to food, and instead ordered a series of tests to look for various cancers. It is possible that this patient had lost access to food, was depressed and eating less, or had lost social support and needed help with food preparation. It’s possible that these or other contextual reason for the weight loss could be addressed if present, saving the expense and inconvenience of a battery of tests, and a delay in addressing social issues.
* **Red Flag:** During a medical history patient mentioned that he works the 2nd shift and gets around 5 hours of sleep when he goes to bed.
* **Probe**: The provider asked the patient if his work hours were impacting his ability to get enough sleep and if he knew the recommendations for good sleep hygiene.
* **No Contextual Factor:** The patient responded that he was used to working the 2nd shift and knew what to do: keeping the room dark, stay away from screens, minimizing noise, and use the bedroom for sleep only. He also said he takes brief naps during break periods. He said he feels fine
* **Contextual Plan of Care:** In this case, there were no contextual factors to address. Not all “contextual red flags” turn out to be indicators of a contextual factor, but since there is no way to know, it was good to inquire.
* **Red Flag:** The patient had visited the ER three times in the past four months.
* **Probe:** The provider asked the patient to describe why he went to the ER instead of seeing a primary care provider.
* **No Contextual Factor Discovered by Probing:** The patient described several significant acute unexpected medical problems for each of the ER visits that occurred after hours or on weekends.
* **No Contextual Plan of Care Necessary:** In this case, the patient’s visits to the ER were appropriate. Nevertheless it was good to check with that patient as ER visits are often avoidable.
* **Red Flag:** A patient arrived at his visit 90 minutes early.
* **Probe:** The clerk asked the patient if there was a reason he had arrived so early for his appointment.
* **No Contextual Factor:** The patient replied that he had decided to take an earlier bus just in case it was running late. Even though there was no contextual factor discovered, it was a good idea to ask the patient why he was there so early in case he misunderstood his schedule or was in the wrong clinic, which happens quite often.