

# Patient training checklist: In-person encounter

## Self-measured blood pressure



Instructions: Use this checklist as a guide when training patients during an in-person encounter. Training may be done by many members of the care team and steps can occur in different sequences. This checklist can serve as a template and help to ensure the necessary steps and components are covered.

### Gather supplies

- Tape measure
- [What is SMBP? \(PDF\)](#)
- SMBP infographic (PDF in [English](#) or [Spanish](#))
- SMBP recording log (PDF in [English](#) or [Spanish](#))
- [SMBP device accuracy test \(PDF\)](#)  
*This can be used to calibrate a patient's BP measurement device when needed.*
- [SMBP Cuff selection tool \(PDF\)](#)
- BP measurement device and upper arm cuff

### Provide background information on SMBP to patient

- Explain how SMBP allows the physician and other providers to get a more accurate and complete picture of the patient's blood pressure outside of the office (more measurements, over a longer period of time, in the patient's usual environment)  
*Tip: Hand out the "What is SMBP?" document.*

### Determine SMBP cuff size

- Locate and measure patient's mid-upper arm circumference using a tape measure  
*Tip: Use [SMBP cuff selection tool](#)*

### Teach patient how to properly prepare for self-measurement

- Avoid caffeine, smoking and exercise for at least 30 minutes before measurement
- Empty bladder if full
- Take BP measurements before blood pressure medications  
*Tip: Show [SMBP training video](#) (also available in [Spanish](#)) and/or the [SMBP infographic](#) (also available in [Spanish](#)) to train patients.*

## Teach patient the proper positioning for self-measurement

- Feet flat on the floor or supported on a firm surface
- Legs uncrossed
- Seated with back supported
- Cuff placed on bare upper arm
- Arm supported with middle of cuff at heart level

*Tip: Use [SMBP training video](#) (also available in [Spanish](#)) and/or the [SMBP infographic](#) (also available in [Spanish](#)) to teach these points and save time.*

- Arm relaxed with palm facing up

## Teach patient how to use SMBP device\* (if applicable)

- How to turn on device
- How to start measurement
- How to troubleshoot
- Calibrate device if needed

*Tip: Refer to device manual as needed.*

## Teach patient how to properly self-measure

- Rest quietly for five minutes
- Take two measurements each time with one minute in between measurements
- Avoid conversations and electronic devices during preparation and measurement time
- Perform SMBP using this process twice a day (once in the morning and once in the evening) for the duration that SMBP has been recommended (optimally for seven consecutive days)

*Tip: Show [SMBP training video](#) (also available in [Spanish](#)) and/or the [SMBP infographic](#) (also available in [Spanish](#)) to reference later.*

## Teach patient how to record SMBP measurements and how and when to share results

- Educate patient on what to do if blood pressure measurements are above or below specified ranges
- If using mobile application, portal or other digital health tool, ensure patient is able to use technology to collect and share results. If possible, assist patient in downloading app and syncing SMBP device.
- If using paper [SMBP Recording Log](#), complete the 'For office use,' 'Report back results by' and 'Important information' sections

This resource is part of AMA MAP BP™, a quality improvement program. Using a single or subset of AMA MAP BP tools or resources does not constitute implementing this program. AMA MAP BP includes guidance from AMA hypertension experts and has been shown to improve BP control rates by 10 percentage points and sustain results.