

# Patient training checklist: Loaner device

## Self-measured blood pressure



Instructions: Use this checklist as a guide when training patients for use of a loaner device. 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
- [Cuff selection tool \(PDF\)](#)
- SMBP loaner device
- SMBP loaner device with BP cuff(s)
- Batteries or power cord
- [What is SMBP? \(PDF\)](#)
- [SMBP infographic \(PDF\)](#) (available in English, Spanish, and Vietnamese)
- [SMBP recording log \(PDF\)](#) (available in English and Spanish)
- [SMBP loaner device agreement \(PDF\)](#) (available in English and Spanish)

### Update “SMBP loaner device inventory management” sheet

### Provide background information on SMBP to patient

- Explain how SMBP allows the physician or other provider 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 (refer to [SMBP cuff selection](#) resource for more detail)

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

- Avoid caffeine, tobacco 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](#) and/or the [SMBP infographic](#) to train patients.*

Teach patient the proper positioning for self-measurement

- Feet flat on 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
- Arm relaxed with palm facing up

*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.*

Teach patient how to use loaner device\*

- How to turn on device
- How to start measurement
- How to troubleshoot

*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 duration that SMBP has been recommended (optimally seven days)

*Tip: Pr [SMBP training video](#) and/or the [SMBP infographic](#) to reference later.*

Complete SMBP loaner device agreement

Ensure all necessary office paperwork is complete

Provide patient with paper SMBP recording log, teach how to use log and how and when to share results

- Educate patient on what to do if blood pressure measurements are above or below specified ranges
- Complete the 'For office use,' 'Receive back results by' and 'Important information' sections

Use teach back or return demonstration methods to ensure patient understands education provided and address any additional questions or concerns from patient

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