

Patient training checklist: Virtual training

Self-measured blood pressure



Instructions: Use this checklist as a guide when training patients during a virtual encounter. Training may be done by many members of the care team using different telemedicine modalities 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.

Provide patient with the following materials (in advance of training when possible):

- [What is SMBP? \(PDF\)](#)
- SMBP infographic (PDF in [English](#) or [Spanish](#))
- SMBP recording log (PDF in [English](#) or [Spanish](#))
- SMBP training video ([English](#) or [Spanish](#))
- [SMBP cuff selection \(PDF\)](#)

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: Provide the "What is SMBP?" document.

Determine SMBP cuff size

- Locate and measure mid-upper arm circumference. Patient may need assistance from another person and will need a tape measure

Tip: Use [SMBP cuff selection](#) resource for more detail

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: Instruct patient to view [SMBP video](#) (also available in [Spanish](#)) and refer to the [SMBP infographic](#) (also available in [Spanish](#)).

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

Tip: Instruct patient to view [SMBP video](#) (also available in [Spanish](#)) and refer to the [SMBP infographic](#) (also available in [Spanish](#)).

- Arm relaxed with palm facing up

Teach patient how to use device* (if necessary for patient)

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

Tip: Have patient reference the device user 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 days)

Tip: Provide patient with link to [SMBP video](#) (also available in [Spanish](#)) and [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. Consider having patient download app and sync SMBP device during virtual encounter if assistance needed.
- If using paper [SMBP Recording Log](#) (also available in [Spanish](#)), complete the 'For office use', 'Report 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

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.