TCCN Pilot: Blood Pressure Monitoring Standard Operating Procedure (SOP)

Purpose: This pilot aims to improve the workflow standardization of blood pressure monitoring and trend review within an EHR in order to improve guideline concordant hypertension identification, treatment, and follow-up.

Best Practice Recommendation:

The best practice recommendation is to follow the 2025 AHA Clinical Practice Guideline for the Prevention, Detection, Evaluation, and Management of High Blood Pressure in Adults, including recommendations for accurate BP measurement, diagnosis confirmation, treatment thresholds, and follow-up intervals. EHR tools should be used to systematically capture, trend, and report blood pressure data and related treatment actions and apply quality measure and population health resources to identify patients requiring timely monitoring, follow-up, and intervention.

Pilot Design & Implementation:

This SOP will be implemented as a 2 month pilot in selected charitable clinics. Pilot activities include:

- Baseline assessment of BP documentation (*completed via survey*).
- Customization of the below SOP for participating clinics as well as standardized organization and access for future SOPs.
- Training of MAs, nurses, and clinicians on standardized BP workflows and clinical guidelines.
- Activation of EHR decision support tools (quality tab).
- Feedback and modification for finalized grant best practice recommendation.

Customization

1. Customize the below SOP
    a. Who needs to be involved in creating this? _____
    b. Who needs to approve this SOP? _____
    c. Who will this SOP impact (staff/volunteers): _____
    d. Do we have any internal documents that need to be reviewed related to this SOP? _____
2. Determine how to organize SOPs taking into consideration who need to access, how to access, and ease of access for future reference.

a. List of individuals that need to access this SOP (consider clinic leadership, nurses, MAs, clinicians, volunteers): _____
b. How to access (ex. Sharepoint in Folder X): _____

Training

3. Train staff/volunteers on SOP
    a. Who needs to be trained? _____
    b. When can training be completed? _____
4. Train staff/volunteers on clinical guidelines
    a. Who needs to be trained? _____
    b. When can training be completed? _____
    c. Resource for overview of 2025 AHA guidelines or complete guidelines
    d. Resource for correct BP measurement technique: Clinic powerpoint for training staff, clinic printout (to post in triage room), home monitoring handout

Activation

5. Activate pertinent quality measures by going to Gear > Clinicals > Quality Management > Clinical Guidelines. Two suggested quality measures are listed below:

	Guideline	Program	Description	Frequency	Age
edit | hide	Hypertension: BP control 130/80 ⓘ	Hypertension Guidelines	Measure identifies patients 18 and older with hypertension whose most recent blood pressure is less than 130/80 mmHg.	N/A	18 to 999

	Guideline	Program	Description	Frequency	Age
edit | hide	Blood Pressure Screening ⓘ	Adult Preventive Care Guidelines	Recommendation identifies patients 18 years of age and older with a blood pressure measurement recorded in the last 12 months.	N/A	18 through 999

Feedback

6. Consider a brief post-implementation survey for clinical staff such as:

Do you find having a standard SOP for Blood Pressure helpful?

Since the training, have you changed how you document and/or review blood pressure readings within the EHR?

By reviewing the current 2025 AHA guidelines, do you anticipate it will have an impact on the patient care you provide?

Blood Pressure Monitoring
Standard Operation Procedure

Effective Date / Review Date

- Effective: *1/2026*
- Next Review: *7/2026 (suggesting a 6-month review process for a new SOP and annual for established SOPs).*

Version History

Version	**Date**	**Description**	**Author**
1	1/2026	Clinical Workflow	TCCN

1. Purpose

To ensure consistent and accurate collection and documentation of blood pressure readings, optimize EHR utilization, and support evidence-based hypertension diagnosis and treatment.

2. Scope

Applies to all Medical Assistants, Nurses and Clinicians performing blood pressure monitoring at the clinic, and Clinicians interpreting and determining hypertension treatment.

3. Definitions & Abbreviations

- **BP** – Blood pressure
- **Hypertension –** Reference the 2025 AHA Guideline for the Prevention, Detection, Evaluation and Management of High Blood Pressure in Adults for the classification of BP and Hypertension stages
- **EHR –** Electronic Health Record

4. Responsibilities

- **Medical Assistants and Nurses:** Perform and record vitals, notify clinicians when thresholds are met.

- **Clinicians:** Review BP trends and quality alerts, patient assessment, diagnosis and treat hypertension per guidelines, appropriately document assessment in plan in EHR.

5. Required Equipment & Supplies

Blood pressure cuff with appropriate band size, EHR workstation.

6. Procedure (Step-by-Step Instructions)

1. Prior to assessing blood pressure, ensure the following:
    a. Use a validated blood pressure device (validatebp.org).
    b. Use the correct cuff size on a bare arm.
    c. The patient relaxed, seated with feet flat on floor, legs uncrossed, back supported and arm supported at heart level for more than 5 minutes of rest.
2. Monitor blood pressure by taking 2 or more blood pressure measurements at least 1 minute apart. Average the readings and enter into structured EHR vital fields.
3. Notify RN/clinician immediately if vitals are out clinic defined threshold (ex. 160/100) or patient shows concerning symptoms. **Determine clinic-specific guidance.**
4. Clean equipment per infection-control guidelines.

7. Safety & Infection Control Considerations

Do not place BP cuff over an open wound. Disinfect equipment between patients.

8. Documentation Requirements

All vitals must be entered in the EHR under the Vitals tab before the clinician sees the patient. BP readings must be entered as structured data. Repeat measurements and patient positioning must be documented when elevated readings occur.

9. Quality Assurance & Compliance Metrics

Trends: Blood Pressure trends can be reviewed within the EHR by selecting the Flowsheet icon under the Vitals tab. It can be viewed in graph or table (preferred) form.

Quality Measures: List the quality measures the clinic has “turned on” in the system to flag clinicians.

Reporting: list any applicable reports that are run and purpose

10. References & Attachments

2025 AHA Guideline for the Prevention, Detection, Evaluation and Management of High Blood Pressure in Adults