

NHS Abdominal Aortic Aneurysm Screening Programme

Guidance and example of prompts for completing trainee screening technician clinical observations

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This is a list of assessment criteria and prompts for assessors and expert witnesses to help them record comments in the AAA trainee screening technician logbook.

Once you have confirmed the main assessment criteria you are reviewing, look to see if the learner has covered any other mandatory unit assessment criteria noted below. Example prompts are included under each sub criteria.

Performance comments should relate to how the screener met the assessment criteria and should include a written document of specific examples of the learner's practice.

Welcome the individual

This relates to section 16.3.1: welcome the individual to the screening session including introducing self and confirming the individual's identity.

2.2.1 Demonstrate how to establish the communication and language needs, wishes and preferences of individuals

Did the learner need to adapt their communication style?

2.4.2 Demonstrate ways to maintain confidentiality in day-to-day communication

What specific examples of implementing data protection has the learner demonstrated today?

4.8.1 Demonstrate use of agreed procedures for checking the identity of anyone requesting access to: premises, information

Did the learner demonstrate they ensured security for access to the premises and of data?

4.8.2 Demonstrate use of measures to protect own security and the security of others in the work setting

How did the learner demonstrate they protect themselves, their colleagues and service users in clinic?

6.2.1 Work with an individual and others to find out the individual's history, preferences, wishes and needs

Did factors from an individual's request or history, change how the learner worked today?

8.2.2 Demonstrate practices that ensure security when storing and accessing information

When accessing the scanning software how does the learner ensure security? How did the learner demonstrate maintaining confidentiality? What manual and electronic processes did they use?

8.2.3 Maintain records that are up to date, complete, accurate and legible

How did the learner do this?

8.3.1 Support others to understand the need for secure handling of information

Consider the data protection policies. Has the learner experienced a situation when others have not followed secure handling of information? How did you or they support them in correcting this poor practice going forward?

8.3.2 Support others to understand and contribute to records

Consider patient records and the impact of them being inaccurate. How does the learner support the administration team to ensure that the patient records are as accurate as possible?

Performance comments

Assessors or expert witnesses should look to document specific examples of how the learner:

- ensures access to the clinic area is secure
- communicates with patients
- confirms the individual's identity or personal details

- identifies the patient's specific care needs
- adapts to meet patient needs
- amends patient data
- provides the receptionist of outreach clinics with a known list of attendees
- prevents tailgating between department rooms
- updates patient data when inaccurate

This could include:

- reviewing clinic lists or databases
- ratifying patient history versus patient identity
- working with the patient or administration team to update a patient's personal data
- liaising with community-based staff to ensure venue security
- liaising with carers and/or family members to support a successful screen
- using personal passwords or identity cards to access clinic areas and/or computers

Use the correct scanning position

This relates to section 16.1.3: use the correct scanning position to minimise the risk of work-related upper limb and musculoskeletal disorders.

4.2.1 Use policies and procedures or other agreed ways of working that relate to health and safety

Has the learner demonstrated correct positioning of themselves and the man to avoid work related musculoskeletal injuries?

4.2.2 Support others to understand and follow safe practices

Has the learner demonstrated any safe practices that encourage others (patient or staff) to work in the same way?

4.2.6 Access additional support or information relating to health and safety

Who would the learner contact if a patient fell ill during your clinic or if an accident occurred? Would a Datix (internal report) be needed?

4.4.3 Demonstrate ways to ensure that own health and hygiene do not pose a risk to an individual or to others at work

What does the learner need to do to ensure their hygiene does not pose a risk to others?

7.2.3 Implement agreed ways of working

What policies did the learner implement particularly well?

Performance comments

Assessors or expert witnesses should look to document specific examples of how the learner:

- checks couch is clean and ready to use
- checks the couch is at the appropriate level
- uses manual handling techniques
- washes their hands
- uses personal protective equipment (PPE)
- follows good personal hygiene

This could include:

- following local hand hygiene protocols
- following local infection prevention and control protocols
- repositioning self and height of couch to enable optimal scanning position to avoid repetitive strain injuries
- use of step stool safely
- alternating scanning hand
- sharing clinics with colleagues to enable regular breaks or rest periods within clinic day
- referring larger individuals to a clinic with hoist availability as per internal protocol

Upload worklist

This relates to section 16.2.1: upload worklist to ultrasound machine.

8.2.2 Demonstrate practices that ensure security when storing and accessing information

When accessing the equipment how does the learner ensure security?

8.2.3 Maintain records that are up to date, complete, accurate and legible

How did the learner do this?

Performance comments

Assessors or expert witnesses should look to document specific examples of how the learner:

- accesses, and correctly uses, the imaging software.
- protects the security of patient data

This could include:

- logging in using personal passwords
- using the software accurately as per local protocol
- switching software off when not in use
- shredding/securely disposing of documents with patient ID/confidential information on
- updating the worklist regularly

Assess the environmental conditions

This relates to section 16.2.2: assess that the environmental conditions for optimal image capture are appropriate.

4.2.3 Monitor and report potential health and safety risks

Consider how the learner set the clinic out, at the start of the day. What areas did they check and how did they ensure that the room was set up safely?

4.2.4 Use risk assessment in relation to health and safety

Did the learner need to complete any checklists before clinic?

4.2.5 Demonstrate ways to minimise potential risks and hazards

Did the learner need to alter the clinic room today to minimise risk?

4.5.3 Move and handle equipment and other objects safely

Did the learner demonstrate correct manual handling techniques to ensure they were not harmed when carrying out tasks?

4.7.4 Ensure that clear evacuation routes are maintained at all times

Did the learner ensure this? Were they aware of evacuation routes? Did they consider wheelchair users?

Performance comments

Assessors or expert witnesses should look to document specific examples of how the learner:

- checks the clinic area for health and safety hazards
- removes health and safety hazards prior to clinic starting
- optimises the lighting and layout of the room to support the screening process
- handles the screening equipment appropriately
- transports the screening equipment between clinics

This could include:

- manipulating the screening equipment and/or environment to gain improved images
- correctly following manual handling techniques when moving heavy screening equipment
- incident reporting of identified hazards
- adapting the environment to ensure image capture is optimised
- where clinic is remote, consider fire safety procedures and local staffing support
- avoiding lone working and make sure has access to phone/personal alarm as required

Check the ultrasound equipment is functioning correctly

This relates to section 16.2.3: check the ultrasound equipment is functioning correctly prior to each screening session as per national guidance.

4.7.2 Demonstrate measures that prevent fires from starting

Has the learner performed any checks which ensure equipment will not cause fire?

7.2.2 Access full and up-to-date details of agreed ways of working

How did the learner demonstrate ways of accessing local policies?

Performance comments

Assessors or expert witnesses should look to document specific examples of how the learner:

- checks the screening equipment is safe to use prior to clinic
- reports faulty equipment to relevant personnel
- checks the clinic area for health and safety hazards, such as electrical faults, fire hazards

This could include:

- completing quality checks
- checking for up-to-date portable appliance testing (PAT) tests
- switching off equipment after use

Explain the AAA screen

This relates to section 16.3.2: explain the abdominal aortic aneurysm screen to the individual and check their understanding using open questions.

2.2.3 Demonstrate a range of communication methods and styles to meet individual needs

What specific examples of communication methods did the learner use?

2.2.4 Demonstrate how to respond to an individual's reactions when communicating

How has the learner adapted communication methods, given that personal protective equipment (PPE) can affect communication within the clinical setting?

Answer/reassure a man who has questions/concerns about the screening including what his personal data is used for.

2.3.3 Demonstrate ways to overcome barriers to communication

Did the learner use any communication methods to ensure the patient understood. How did they do this?

2.3.4 Demonstrate strategies that can be used to clarify misunderstandings

Did the learner ask the individual to repeat back information given in order to check they understood?

3.2.2 Show interaction with individuals that respects their beliefs, culture, values and preferences

Did the learner adapt their practice to ensure inclusivity? Consider examples where they may have included support for an individual with a disability, language need, time restraint concerns for working individuals and so on.

3.3.1 Demonstrate actions that model inclusive practice

How did the learner do this?

3.3.2 Demonstrate how to support others to promote equality and rights

Has the learner needed to adapt their practice to support an individual with a disability, language need, preferred gender identity or positive screening result, today?

6.2.2 Demonstrate ways to put person centred values into practice in a complex or sensitive situation

Has the learner needed to adapt their practice to support an individual with a disability, language need, preferred gender identity or positive screening result, today?

6.2.3 Adapt actions and approaches in response to an individual's changing needs or preferences

In what specific way or ways did the learner do this?

6.4.2 Work with an individual and others to agree how active participation will be implemented

Has the learner involved any other team members to achieve this screening episode? As an example – were administration staff involved in changing venue, booking appointments, or was a different appointment time offered, such as weekend or evening?

6.4.3 Demonstrate how active participation can address the holistic needs of an individual

Did the learner provide alternative options for screening, such as a different venue or different appointment time to encourage attendance for next visit?

6.4.4 Demonstrate ways to promote understanding and use of active participation

Did the learner signpost or provide further information to the individual?

6.5.1 Support an individual to make informed choices

Did the learner provide further information or explanation to the individual, which facilitated obtaining consent?

6.5.2 Use own role and authority to support the individual's right to make choices

Did the learner provide up to date and relevant information to the individual that supported them giving consent?

7.2.3 Implement agreed ways of working

What policies did the learner implement particularly well?

7.3.2 Demonstrate ways of working that can help improve partnership working

Is the learner aware that information leaflets can be accessed via GOV.UK which include translated versions and 'easy read' versions of the patient advice leaflet?

7.3.4 Demonstrate how and when to access support and advice about: partnership working, resolving conflicts

Has the learner needed to review findings or seek support from any other professionals today? This could be in relation to queries from the venue or the man screened.

13.2.5 Explain the screen to an individual or carer and check their understanding using open questions

What specifically did the learner do?

[Performance comments](#)

Assessors or expert witnesses should look to document specific examples of how the learner:

- communicates with patients
- builds a rapport with patients and/or carers and/or families
- conveys a friendly disposition
- confirms the patient's identity or personal details
- identifies the patient's specific care needs
- adapts to meet patient needs
- responds to patient questions and offers support and guidance with respect to the screening information during the consent process
- delivers positive results and offers information regarding next steps that works for the patient's individual needs
- works with colleagues to escalate queries and/or concerns in relation to the patient's screen

This could include:

- clear and accurate explanation of the screening process and onward referral as required

- ascertaining the most appropriate method of communication with each patient
- delivering positive interactions with patients and/or carers, and/or family members
- going above and beyond to support a patient's needs to enable screening to be successful
- acting as a positive role model in strained situations
- working with family members to enable ongoing patient care
- working with colleagues and/or other healthcare professionals to overcome clinic challenges
- working with administration teams to update patient information
- referring patients to a line manager and/or patient advice and liaison service (PALS) when a complaint is presented

Facilitate personal informed choice

This relates to section 16.3.3: facilitate personal informed choice and gain consent for the screening episode.

6.3.2 Establish consent for an activity or action

What examples of gaining consent did the learner demonstrate?

13.2.6 Facilitate personal informed choice and gain consent from an individual or carer for the screening episode

What examples of facilitating informed choice did the learner demonstrate?

Performance comments

Assessors or expert witnesses should look to document specific examples of how the learner:

- remains unbiased whilst presenting information about the screening process
- communicates with the patient and/or carers and/or family members
- gains consent through involving the patient in the consenting process
- responds to patient questions
- delivers positive screening results

This could include:

- prompting equality and rights of a diverse patient demographic
- being inclusive of others
- facilitating informed consent for screening and data capture using all possible tools available, such as visuals and leaflets, to consider patient need
- managing complex and sensitive circumstances
- working with others
- promoting active participation
- working in partnership with others to enable consent to be gained – carer, translator; secure handling of data; facilitating questions

Gain consent for the use of data

This relates to section 16.3.4: gain consent for the use of the individual's personal and screening episode data.

13.2.7 Gain consent from the individual or carer for the use of personal and healthcare data

What examples of gaining consent did the learner demonstrate?

Performance comments

Assessors or expert witnesses should look to document specific examples of how the learner:

- remains unbiased whilst presenting information about the screening process
- communicates with the patient and/or carers and/or family members
- gains consent through involving the patient in the consenting process
- responds to patient questions
- delivers positive screening results

This could include:

- prompting equality and rights of a diverse patient demographic
- being inclusive of others
- facilitating informed consent for screening and data capture using all possible tools available, such as visuals and leaflets, to consider patient need

- managing complex and sensitive circumstances
- working with others
- promoting active participation
- working in partnership with others to enable consent to be gained – carer, translator; secure handling of data; facilitating questions

Correct positioning on the couch

This relates to section 16.3.5: check that the individual is correctly positioned on the couch.

Are they comfortable? Are they in the best position to optimise the scan? Is the couch at an appropriate height?

Performance comments

Assessors or expert witnesses should look to document specific examples of how the learner follows local protocols for ensuring the patient is comfortable and positioned correctly.

Confirm the identity with the national IT software

This relates to section 16.3.6: confirm the identity of the individual matches that recorded on the national IT software.

Did the individual provide the learner with their personal details? Did the learner check to make sure these details matched those on the screen in front of them?

Performance comments

Assessors or expert witnesses should look to document specific examples of how the learner follows local protocols for ensuring the identity of the patient matches that on the national IT system.

Apply the transducer to the abdomen

This relates to section 16.4.1: apply the transducer to the abdomen, manoeuvring it to obtain images in both transverse and longitudinal planes.

4.4.2 Demonstrate the recommended method for hand washing

Was this completed as per local policy?

4.6.2 Demonstrate safe practices for: storing hazardous substances, using hazardous substances and disposing of hazardous substances and materials

Did the learner transport cleaning and disinfecting products safely?

9.5.1 Demonstrate correct use of PPE

Was this completed as per local policy?

9.6.2 Demonstrate good hand washing technique

Was this completed as per local policy?

[Performance comments](#)

Assessors or expert witnesses should look to document specific examples of how the learner:

- Follows local screening protocols
- Washes their hands
- uses PPE
- follows good personal hygiene
- stores and uses ultrasound gel correctly
- stores and uses cleaning and disinfecting products correctly

This could include:

- manipulating the equipment to ensure accurate results
- following local dress codes
- following local hand hygiene protocols
- following local infection prevention and control protocols

[Manipulate the equipment controls to optimise the image](#)

This relates to section 16.4.2: manipulate the equipment controls to optimise the image whilst scanning the abdominal aorta, to include depth, gain, focus, dynamic range.

How did the learner do this?

Performance comments

Assessors or expert witnesses should look to document specific examples of how the learner follows local protocols.

Interpret an ultrasound image

This relates to section 16.4.3: interpret an ultrasound image to correctly identify the abdominal aorta using appropriate anatomical landmarks.

How did the learner do this? Did they do this correctly?

Performance comments

Assessors or expert witnesses should look to document specific examples of how the learner follows local protocols for ensuring anatomical landmarks are used appropriately to facilitate interpretation.

Image the abdominal aorta

This relates to section 16.4.4: image the abdominal aorta from the proximal extent to level of the bifurcation.

How did the learner do this? Did they do this correctly?

Performance comments

Assessors or expert witnesses should look to document specific examples of how the learner follows local protocols.

Position the electronic callipers and measure maximum aortic diameter

This relates to section 16.4.5: position the electronic callipers and measure maximum aortic diameter from the inner anterior wall to the inner posterior wall as per national protocols.

How did the learner do this? Did they do this correctly?

Performance comments

Assessors or expert witnesses should look to document specific examples of how the learner follows local protocols for ensuring accurate measurement for small, medium and large aneurysms can be measured correctly.

Capture an ultrasound image at the widest point

This relates to section 16.4.6: capture an ultrasound image at the widest point as per national guidance.

How did the learner do this? Did they do this correctly?

Performance comments

Assessors or expert witnesses should look to document specific examples of how the learner follows local protocols.

Interpret an ultrasound image

This relates to section 16.4.9: interpret an ultrasound image to correctly identify an abdominal aortic aneurysm.

How did the learner do this? Did they do this correctly?

Performance comments

Assessors or expert witnesses should look to document specific examples of how the learner follows local protocols for ensuring accurate measurement for small, medium, and large aneurysms can be visualised.

Record and store the results

This relates to section 16.5.1: record and store the results of the screening event on the national IT software.

8.2.2 Demonstrate practices that ensure security when storing and accessing information

How did the learner ensure results were stored against the correct individual's record?

8.2.3 Maintain records that are up to date, complete, accurate and legible

How did the learner do this?

Performance comments

Assessors or expert witnesses should look to document specific examples of how the learner:

- uses the software correctly
- updates patient details when inaccurate
- saves images correctly
- provides clarity of detail to professional colleagues, such as clinical skills trainer (CST)

This could include:

- logging in using personal passwords
- using the software accurately as per local protocol
- highlighting where the aorta is not visualised and referral required
- switching software off when not in use
- adding appropriate notes on SMaRT to highlight any issues encountered during scan that may assist when assessing images/results/queries

Upload to the national IT software

This relates to section 16.5.2: upload the ultrasound images to the national IT software according to local protocol.

8.2.3 Maintain records that are up to date, complete, accurate and legible

How did the learner do this?

Performance comments

Assessors or expert witnesses should look to document specific examples of how the learner:

- accesses, and correctly uses, the imaging software.
- protects the security of patient data

This could include:

- logging in using personal passwords
- using the software accurately as per local protocol
- switching software off when not in use

Determine the correct pathway to follow

This relates to section 16.6.1: determine the correct pathway to follow based on the outcome of the screening event.

How did the learner do this? Did they do this correctly?

Performance comments

Assessors or expert witnesses should look to document specific examples of how the learner follows local protocols.

Inform the individual

This relates to section 16.6.2: inform the individual of the results and appropriate next steps.

6.5.3 Manage risk in a way that maintains the individual's right to make choices

Has the learner completed a screening episode, while maintaining the individual's wishes?

6.6.3 Support an individual in a way that promotes their sense of identity, self-image and self-esteem

Was the learner able to convey the positive aspects of attending screening to an individual's care today?

6.6.4 Demonstrate ways to contribute to an environment that promotes well-being

Was the learner able to signpost the individual or give information leaflets about other services which would benefit them?

Performance comments

Assessors or expert witnesses should look to document specific examples of how the learner:

- communicates with patients
- builds a rapport with patients and/or carers and/or families
- conveys a friendly disposition
- responds to patient questions and offers support and guidance with respect to the screening information during the consent process
- delivers positive results and offers information regarding next steps that works for the patient's individual needs

This could include:

- clear and accurate explanation of the screening process and onward referral as required
- ascertaining the most appropriate method of communication with each patient
- delivering positive interactions with patients and/or carers, and/or family members
- going above and beyond to support a patient's needs to enable screening to be successful
- acting as a positive role model in strained situations

Check the individual's understanding

This relates to section 16.6.3: check the individual's understanding of results and next steps using open questions.

2.2.3 Demonstrate a range of communication methods and styles to meet individual needs

What specific examples of communication methods did the learner use?

2.2.4 Demonstrate how to respond to an individual's reactions when communicating

How has the learner had to adapt communication methods to ensure the man's understanding, given that PPE where used can affect communication within the clinical setting?

2.3.4 Demonstrate strategies that can be used to clarify misunderstandings

Did the learner ask the individual to repeat back information given in order to check they understood?

6.2.2 Demonstrate ways to put person centred values into practice in a complex or sensitive situation

Has the learner needed to adapt their practice to support an individual with a disability, language need, preferred gender identity or positive screening result today?

6.2.3 Adapt actions and approaches in response to an individual's changing needs or preferences

What specifically did the learner do?

6.4.2 Work with an individual and others to agree how active participation will be implemented

Has the learner involved any other team members to achieve this screening episode? As an example – were administration staff involved in changing venue, booking appointments, or was a different time offered, such as a weekend or evening?

6.4.3 Demonstrate how active participation can address the holistic needs of an individual

Did the learner provide alternative options for screening, such as a different venue or different appointment time to encourage attendance for next visit?

6.4.4 Demonstrate ways to promote understanding and use of active participation

Did the learner signpost or provide further information to the individual?

6.5.2 Use own role and authority to support the individual's right to make choices

Did the learner provide up to date and relevant information to the individual that supported them giving consent?

7.3.4 Demonstrate how and when to access support and advice about: partnership working, resolving conflicts

Has the learner needed to review findings or seek support from another professional today?

[Performance comments](#)

Assessors or expert witnesses should look to document specific examples of how the learner follows local protocols.