



Advice and Guidance for Ultrasound Manufacturers Visits for Servicing & Maintenance, Demonstration, and Installation

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This advice and guidance is written to support both ultrasound service providers and equipment manufacturers in the demonstration, installation and maintenance of ultrasound equipment.

It is recognised that the procurement, maintenance and servicing of equipment is essential to ensure service continuity in the long term. Visiting representatives from manufacturers play an important part in making this process fair and efficient, without disrupting service delivery or patient flow. Representatives are welcome to be present to help expedite the procurement process before, during or after clinical evaluations, ideally by prior arrangement with the customer.

Visiting staff play a valuable role in ensuring the continued safe use of ultrasound equipment. Customers are encouraged to support manufacturers in enabling this access to clinical sites wherever practical.

The aim of this document is to support safe, sensible working practices for both on-site employees and visiting staff / engineers.

In the first instance, manufacturers should refer to their own company procedures and follow the guidance provided by their employer.

Each individual service provider (the customer) may wish to undertake its own risk assessment based on local needs and circumstances.

General Principles for all visiting staff in a clinical setting:

Departments should provide an appropriate means of recording the presence of manufacturer representatives, for reference should this ever be needed.

- Company ID should be carried at all times.
- Visitors should be mindful of higher-risk clinical areas and follow local site protocols before entering these zones.
- Where on-site demonstration or applications support is required, visiting staff should have access to PPE appropriate to the setting should this be required. This should be provided by the customer.
- Visitors should follow local site guidance on appropriate clothing or attire when moving between sites or clinical areas.
- Visitor numbers should be kept sensible and proportionate, with consideration given to minimising disruption within the clinical environment. In high risk areas (e.g. theatres) visitors should be easily identifiable.

- Visitors undertaking patient facing duties should always maintain patient privacy, confidentiality and be compassionate to the needs of the patient. Consideration of the responsibility of the health care professional to the needs of the patient is paramount.
- Where convenient, electrical safety testing of ultrasound equipment may be carried out within the clinical department, close to where the equipment evaluation is taking place.

Servicing & Maintenance visits

- Equipment should be appropriately cleaned in line with local infection control practice prior to being attended to by the visiting engineer.
- Advance notice should be given to all planned maintenance to facilitate the smooth running of the service. Equipment should be available upon arrival of the company representative.
- Where possible, visiting staff should be given a suitable area in which to work.
- If attendance within a clinical setting is necessary, visiting staff should have access to PPE appropriate to the setting, provided by the customer.

Demonstrations

- Online or webinar demonstrations of equipment can be a convenient option where suitable. Where an in-person demonstration is preferred, this can be arranged with key members of the customer team, on a clinical or non-clinical site as appropriate.
- Patients should give their consent to have their ultrasound performed on a demonstration machine with a third party present in the room.
- Equipment used in a clinical setting for demonstration purposes should be cleaned before and after use, ideally by a trained member of staff from the clinical department using the equipment.
- Patient identification should be removed from equipment before it leaves site.

Installation

- Manufacturers may wish to develop e-learning packages covering key features of their equipment, set-up procedures and other applications, so customers can complete these on site themselves.
- Remote login and support can be a useful way to assist with restricted access set-up.
- Where possible, manufacturers may install required presets and measurement packages off-site ahead of delivery.

This guidance is not exhaustive, and it is recommended that processes are agreed locally between customer and manufacturer representatives / engineers prior to any site visit. Individual customer sites may benefit from seeking advice from their local clinical engineering departments.

Disclaimer

The British Medical Ultrasound Society produces recommendations and guidelines as an educational aid to inform safe practice. They offer models and pathways associated with established clinical imaging techniques and best professional practice, based on published evidence.

BMUS recommendations and guidelines are designed to inform local protocols issued by employers, but are not intended to be inflexible or prescriptive. Therefore, the choice of imaging examination and subsequent management of all patients is ultimately a local decision based on agreed schemes of work, the clinical information provided, and the ultrasound practitioner's professional judgement.