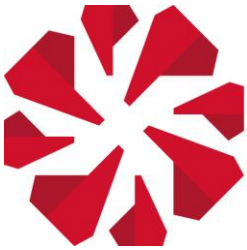

IADC WELLCAP PLUS

WellCAP® PLUS

HANDBOOK FOR ACCREDITATION

This document supersedes all program bulletins and other versions of this document issued prior to the date below.

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OVERVIEW

This document describes the basic requirements and procedures for well control training providers that wish to participate in the WellCAP® Plus program.

WellCAP® Plus Providers must have Internet access in order to obtain IADC documents and forms from IADC's website (www.iadc.org) and to work within the *ACD* Database system (https://accreditation.iadc.org/login.php)—e.g. to schedule classes, pay for certificate codes, print trainee certificates.

WellCAP® Plus is intended to supplement the existing WellCAP® Supervisor Level program by providing a program designed to promote a discovery process to improve critical thinking and problem-solving skills. It is designed to encourage participation among multiple levels of decision makers including drilling superintendents, operations engineers, rig superintendents, rig managers, and all other qualified individuals who have attended several typical well control supervisory courses and are seeking a unique learning experience to challenge their well control skills to a higher level. (**NOTE**: WellCAP® Plus is not intended to replace site-specific training. Site-specific training for all stakeholders is encouraged when the anticipated characteristics and challenges of a particular well (e.g., deepwater, HPHT) warrant additional pre-planning measures and focused mitigation procedures.)

The suggested minimum level for participation is driller or equivalent position.

The minimum course duration is four days, to be structured as described in the following section. Class size is limited to a maximum of 16 persons and a minimum of six persons (as the goal of the program is to promote interactions between teams, there will be no exceptions allowed to the minimum number).

PARTICIPANT REQUIREMENTS

All participants must be able to provide evidence of having previously obtained at least two internationally recognized qualifying supervisory level well control certificates and either:

a) one of these certificates must be currently valid, or
b) the participant must be currently involved in relevant operations (i.e. employed as a toolpusher, drilling engineer, drilling superintendent, workover supervisor, etc.)

Participants must take an entrance exam (an approved supervisory level IADC WellCAP® exam meeting all existing WellCAP® guidelines). Participants failing this exam may participate in the course, but will be given a certificate only if they successfully pass a re-test before the end of the WellCAP® Plus course.

Optionally, participants may "pre-qualify" with a supervisory level test (of the same language) taken at up to 90 days in advance. In this case, the test must be administered by an approved WellCAP® instructor at a location operated by a WellCAP® accredited provider. Alternatively, a student that has completed a WellCAP® supervisory course within the prior 90 days (and who meets the other prerequisites) is considered pre-qualified and may also be admitted to a WellCAP® Plus course. If either the prequalification test or supervisory course was taken at a different training provider than that giving the WellCAP® Plus course, the student is responsible for obtaining documentation from the accredited WellCAP® training provider certifying a passing score for that test or course.

Students successfully completing the program will be awarded a WellCAP® Plus Certificate at those course type classifications being currently held (e.g., drilling, workover/completion, wireline, etc.). Upon completing the WellCAP® Plus course the certification issued will be at the same level and type coverage as the current supervisor certificate; No upgrades to course types (i.e., Drilling, Workover & Completion, etc.) will be allowed. Also, once taken, the WellCAP® Plus course cannot be repeated until three years later.

COURSE STRUCTURE

The entrance examination will be conducted on day one of the course.

The remaining portion of the first day will be used to cover the expectations of the course and provide students with the necessary skills (using of a problem solving model) to successfully complete the program. The model will be introduced though a "mini-Exercise."

In the event that all participants have "pre-qualified" by testing prior to the course, then the first part of day one will consist of defining the expectations of the course and completion of the mini-Exercise as discussed in the aforementioned paragraph. The latter part of day one then can be used to present the initial Exercise and progress to Decision Point 1 or to a logical break point, to allow more time to complete the Exercises to be given over the remainder of the course.

Days two, three, and four will be entirely devoted to well control Exercises, with each day focusing on a different, and progressively more challenging, scenario. Each day, participants will be assigned to three-to five-person teams that will work together on the Exercise for that day. Each Exercise should be based on realistic situation. The Exercises are to be divided into at least two decision points. These decision points should be timed appropriately within the Exercise, such as when an important decision needs to be made to affect a positive outcome to the event. The first decision point, for example, may be limited to information concerning the initial well shut-in and kick details. Each Exercise to be used must be developed with complete and relevant well data. When possible, the introduction of the data for each case should be of a novel and interesting format that attempts to replicate some of the reality associated with the type of event being portrayed.

At each decision point the work teams will gather separately and spend sufficient time (one to two hours) to develop their recommended plan of action and to identify resources required for successful implementation. The teams will re-group and make presentations of their findings and will then be enlightened by the Facilitator as to what actually happened. The teams will be presented a well status update relative to the timetable of the Decision Point just completed for consideration when working the next decision point. A team may have recommended the use of

the Driller's method, for example, at the first decision point but the actual people who lived the event may have done something different causing the situation to worsen and hence decision point two.

There will be no exit exam but students can fail the course by lack of participation or by demonstrating poor team-working skills or attitude issues, as documented by the course Facilitator(s). *Attendance at all course segments is mandatory, and must be documented in the course roster.*

ACCREDITATION ELIGIBILITY

Only training providers that have a current WellCAP® accreditation at the supervisory level will be eligible to participate in WellCAP® Plus. WellCAP® Plus is a voluntary program; there is no requirement for a WellCAP® provider to participate.

While WellCAP® Supervisory accreditation is a requirement, WellCAP® Plus will be considered a specific type of accreditation with unique requirements for application, review, record keeping and auditing. Providers will be issued a WellCAP® Plus Program ID number to be used on all certificates and records.

WellCAP® accredited programs can apply for WellCAP® Plus accreditation only in those areas currently approved (e.g., Drilling programs can only get WellCAP® Plus approved in Drilling; Drilling and Workover & Completions programs can likewise receive similar WellCAP® Plus approval for both areas; Well Servicing only programs can only get WellCAP® Plus accreditation in Well Servicing, etc.). If a program has stand-alone WellCAP® approval for all three categories, then the training institution can receive WellCAP® Plus approval for all three stand-alone categories.

ADMINISTRATION AND PROCESS CONTROL

Primary Contact and Signatories of the Application

The Primary Contact will become the principal point of contact between ACD and the accredited training provider, except in cases of disputed issues or a pending revocation of accreditation. Additional contacts may be designated for specific purposes (e.g., purchasing, records) and should be reported to ACD. ACD staff request additional contacts in the event that one or all of the contacts listed leave the company. It is the Provider's responsibility to ensure that IADC has the current and correct contact information for the Primary Contact.

In addition to serving as ACD's principle point of contact, the person designated as the Primary Contact has the following responsibilities toward maintaining the accreditation:

1. Ensuring that ACD has the program's correct contact information and updating that information, as needed (e.g., email, phone number, Contact name)
2. Monitoring updates communicated by ACD (e.g., ACD Bulletins, Notices, or other communications) and updating the program, as needed
3. Periodically visiting the ACD webpage(s) to ensure the program is utilizing the current versions of documents and forms (and other information sources)

If IADC contacts the Primary Contact regarding a program- or instructor-related question/issue and does not receive a timely response after three attempts, IADC will initiate the program-closure process. A "timely" response is defined as within 2 weeks.

APPLICATION PROCESS

The WellCAP® Plus accreditation process is to be completed in two steps.

Step 1: The applicant must complete a WellCAP® Plus application supplying basic information regarding company details and existing WellCAP® accreditation. The application form can be acquired from IADC website or will be provided on request. The completed application must be submitted to IADC along with a non-refundable application fee. Once the application and fee is received, IADC will send a complete submittal package to the applicant. The applicant will also be authorized to nominate students to take part in a WellCAP® Plus Facilitator Certification Course if so desired.

Step 2: Once the applicant receives the submittal package, it must be completed in full and returned to IADC for review and processing (see Review Process below). The submittal package sent to the applicant will include a full example Exercise for the applicant's use in developing required Exercises as noted below.

Items that will be required from the applicant include, but are not limited to:

A. Copy of entrance written examination.
B. List of certified Facilitator/Instructors (see "Facilitator Requirements" below).
C. Course or workshop generalized agenda that describes how the applicant plans to handle pre-qualification requirements.
D. One complete Exercise (to be developed by the applicant and separate from that included in the submittal package) with at least two Decision Points must be submitted. (Decision Points being defined must be clearly within the definition of the Problem Solving Template.)

Note: A minimum of one Exercise **must** be developed by the submitting institution and presented as part of the submittal. This Exercise will become available to other WellCAP® Plus providers through a central IADC library once approved. For course use, two Exercises can be chosen from the IADC Database and can be selected from a list supplied. Should an applicant choose to develop the three Exercises in full, two Exercises can be designated as proprietary by the applicant and they will be returned to the applicant once reviewed and approved for use (*i.e.*, they will not be added to IADC library). In the event an applicant submits for program approval and a sufficient number of Exercises of like type for the program are not contained within the library, the applicant will be required to develop Exercises up to the minimum three required for the course.

E. Defined Course & Performance objectives.
F. Complete definition for all scripts, props, delivery methods, materials, handouts, etc. as specified within the Facilitators Guide and Exercise template.
G. If a school elects to produce its own certificates (using certificate numbers obtained from IADC), the certificate design must be submitted for prior approval.

When applying for accreditation, the training provider MUST submit Exercises that are representative in type for the courses to be taught, e.g., drilling, workover & completion, coiled tubing, snubbing, etc., or a combination thereof.

Facilitator Requirements

An applicant for WellCAP® Plus accreditation must provide evidence of at least one Facilitator with current certification from an approved IADC Train-the-Trainer Facilitation Certification Course (see separate document describing this course).

A minimum of one certified Facilitator and one approved Well Control Instructor are required at all times while conducting WellCAP® Plus training; the WC Instructor may not facilitate more than 25 percent of the training and must always have Facilitator oversight while doing so.

An approved program found not adhering to the above Facilitator requirements will be subject to disciplinary action, including "Probation" or revocation of accreditation, depending on the extent or nature of the infraction(s).

Maintaining Requirements

All WellCAP® Plus training providers are required to submit one additional "new" Exercise for the public domain every two years to maintain accreditation.

In order to continue accreditation upon the program expiration date, accredited providers must meet the following requirements:

- Pay program annual fees on or before their due date.
- Be in good standing with program invoices and student records. (IADC's payment terms are net 30 days.)
- Successfully complete a program audit

REVIEW PROCESS

All materials and exercises submitted will be thoroughly examined by the WellCAP® Review Panel, a group of subject matter experts and well control trainers comprised of operators, drilling contractors, and university faculty. (Members of the Review Panel are nominated by the IADC Well Control Committee.) For more information, see WellCAP® WCT-01, *Handbook for Accreditation*. IADC will initiate the review process once the submittal is received and forwarded for action by the existing WellCAP® Review Panel, which will be responsible for all decisions regarding WellCAP® Plus accreditation. The Review Panel will provide a response no later than 120 days following receipt of the submittal. Should further clarification of Exercises or materials contained within the submittal be required, the Review Panel may request personal clarification (via personal appearance or by phone or e-mail).

The Panel will be empowered to award "**Conditional**" WellCAP® Plus accreditation based on a positive evaluation of an application submission by a reviewer(s) in the absence of a Field Audit. Under Conditional accreditation, a training provider can begin facilitating courses so a full audit may be completed. **Note:** The training provider can issue course certificates of completion with "Conditional" accreditation while awaiting the audit and full accreditation approval.

Once a Field Audit has taken place and the provider found to be in full compliance, the Review Panel may then grant "**Full**" accreditation.

RECORD KEEPING

Course records must consist of the following for each WellCAP® Plus course given:

- Course Attendance Roster
- Copies of previous qualifying certificates

- Participant entrance or a pre-qualification written test (or certification of prior test taken 90 days prior to the course)
- Participant Final Evaluation Form (completed by Facilitator(s))
- Participant Feedback Form

Course and student records must be retained in accordance with standard WellCAP® requirements (see WCT-01).

CERTIFICATE ISSUANCE

All trainees that successfully complete an accredited course level shall receive a WellCAP® Plus certificate as evidence of the successful course completion. A *WellCAP® Plus* Certificate of Completion will be electronically issued through the *ACD* Database to, and in the name of, only the individual receiving the training and passing any assessment(s) given. The training provider will provide the trainee with a printout of his or her certificate immediately upon successful completion of the assessment(s).

When a certificate is issued, the training provider shall retain a copy of the certificate and copies of all training records supportive of issuing the certificate.

IADC maintains a record of the certification. This certification record is used for future verification of individual's training.

Training providers, once accredited, will be provided with information and training on how to use (how to manage their courses in) the *ACD* Database. Failure of the training provider to follow the protocols required for using the database may be grounds for disciplinary actions, up to and including revocation (closure) of accreditation.

COURSE AUDITS

To be eligible for Full Accreditation under WellCAP® Plus, the applicant program must undergo a Course Audit performed by an authorized WellCAP® Plus Course Auditor. Programs to be audited will be responsible all expenses related to the Course Audit (audit fees, travel expenses, etc.).

When a Course Audit is completed, the Course Auditor(s) will prepare a report to be provided to the WellCAP® Review Panel. The Review Panel will use this report to make decisions regarding the award, withholding, or rejection of WellCAP® Plus accreditation.

Participant Feedback Form – All schools are to utilize the WellCAP® Plus Participant Feedback Form following a WellCAP® Plus course. Schools must provide copies of all Participant Feedback Forms to IADC within 30 days of course completion. Based on trends or potential areas of concern identified in the Participant Feedback Forms, the WellCAP® Review Panel may choose to conduct an additional Course Audit(s) on specific programs. In such cases, the program to be audited will be accountable for all expenses incurred in the audit as mentioned above.

DISCIPLINARY ACTIONS AGAINST TRAINING PROVIDERS

IADC may, at its sole discretion, bring disciplinary action against any IADC-accredited training provider (Provider). Disciplinary action may be for a specified time period or indefinite. Disciplinary actions include, but are not limited to, Probation, Suspension, and/or Revocation. Disciplinary actions are not meant to be sequential. IADC may, at its sole discretion, move directly to Suspension or Revocation, depending on the severity of the infraction.

IADC may return the Provider to the accreditation status held before the disciplinary action after the issues prompting disciplinary action are resolved. IADC, at its sole discretion, may choose not to return the Provider to the accreditation status held before the disciplinary action and may temporarily or permanently Revoke accreditation. If the disciplinary action is Probation or Suspension, failure of the Provider to take remedial actions required by IADC will result in additional disciplinary action taken against the Provider. Ultimately, Revocation of accreditation will result if the Provider fails to act or takes insufficient steps to resolve the issue in the timeframe specified.

Reasons for disciplinary actions include, but are not limited to, the following:

- Provider fails to abide by accreditation standards.
- Provider fails to submit necessary supporting information requested by ACD staff, technical reviewer, Review Panel, or auditor.
- Provider fails to resolve a complaint issued against the Provider.
- Provider makes significant changes in the nature, structure, location, or operation of an accredited Program that, in the opinion of IADC, significantly undermines the quality of the program.
- Provider refuses to submit to an audit or fails to satisfactorily address Corrective Actions issued by IADC.
- Provider fails to pay appropriate fees in a timely manner.
- Provider fails to make required curriculum adjustments.
- Provider fails to meet the approval requirements of instructors.
- Provider fails to follow quality control procedures.
- Provider fails to respond to IADC requests for information after three attempts.
- Provider cheats, conducts components of the program fraudulently, and/or compromises the quality of the program.

If IADC contacts the Primary Contact regarding any of the issues listed above and does not receive a timely response after three attempts, IADC will initiate the program-closure process. It is the Provider's responsibility to ensure that IADC has the current and correct contact information for the Primary Contact. A "timely" response is defined as within two weeks. IADC staff will immediately notify the company when a decision to revoke accreditation has been made. The accredited company's name will be removed from the website

Probation
Any Provider may be placed on Probation by IADC at any time. A Provider on Probation may continue with classes scheduled prior to the Probation date. Providers are not permitted to purchase *WellCAP® Plus* test codes after the date the Provider is placed on Probation.

Placing a Provider on Probation is a warning that, if the Provider does not correct all deficiencies noted by IADC, the Provider will be subject to further disciplinary actions up to and including revocation of accreditation.

To be considered for return to full accredited status, the Provider must resolve all issues identified in the disciplinary action and supply IADC evidence of such actions.

Suspension
Any Provider may be suspended by IADC at any time for cause, and cause shall be determined by the IADC in its sole judgment. During Suspension, the Provider will not be permitted to purchase *WellCAP® Plus* test codes, must cease delivery of *WellCAP® Plus* training immediately, and must refrain from issuing *WellCAP® Plus* certificates. Access to the *ACD* database for Providers will be suspended for the duration of the Suspension.

In addition, IADC will remove the Provider's listing on IADC's *WellCAP® Plus*-Accredited Training Provider webpage.

The Provider must resolve all issues identified in the disciplinary action and supply IADC evidence of such actions. Upon resolving all issues, IADC may reinstate the Provider's prior accreditation status.

Failure to resolve all issues for which the Suspension is in place will result in the training provider's accreditation being Revoked (closed).

Program Closure
Any Provider's accreditation may be Revoked (closed) by IADC at any time. IADC will immediately notify the Provider when a decision to Revoke (close) their program accreditation has been made. Following notification, IADC will remove the Provider's listing on the IADC's *WellCAP® Plus*-Accredited Training Provider webpage and will remove their access to the *ACD* database.

ACD will officially close the Provider's file and void outstanding *WellCAP® Plus* test codes allocated to the Provider. IADC will not reimburse Providers for the remaining unused test codes in their *WellCAP® Plus* account.

Upon Revocation of accreditation, the training Provider must do as follows:

- Cease all *WellCAP® Plus* operations immediately upon notification of closure.
- Destroy the ACD-issued *WellCAP® Plus* Certificate of Accreditation
- Remove the *WellCAP® Plus* logo and registered trademark from their course materials, brochures, Provider website, and all places the logo or trademark is used.
- Cease referring to *WellCAP® Plus* accreditation when marketing or promoting the Provider's course.

Miscellaneous

Resolution of Disputes and Forum Selection Clause

Any dispute arising from or relating to the IADC *WellCAP® Plus* Program, its policies and procedures, or its administration shall be resolved in the following manner:

1. First, by notifying IADC of the dispute in writing and by requesting non-binding mediation. The mediation shall take place in Houston, Texas, unless otherwise agreed to by IADC. The mediation request shall include a brief narrative explaining the basis for the dispute, list of three neutral mediators, and the relief requested. IADC shall have twenty (20) days from receipt of a Mediation Request to pick a mediator from the list provided. The costs and expenses of any such mediation, including compensation and expenses of the mediator, shall be the responsibility of each party to the mediation.
2. Next, if the dispute cannot be resolved within sixty (60) days of the notice of mediation, then the dispute may be brought in the courts of the State of Texas. Specifically, the venue shall be in Harris County, Texas.

Limitation of Liability

In no event shall IADC be responsible for any consequential damages arising out of any disciplinary action, including, but not limited to, alleged lost profits, lost business opportunity, loss of reputation, punitive damages, and/or attorneys' fees. This limitation applies to any claim or cause of action, however alleged or arising, unless otherwise prohibited by law, including, but not limited to, negligence, breach of contract, or any other claim, whether in tort, contract, or equity,

regardless of whether IADC has been advised of, knew of, or should have known or anticipated such loss or damages.

DISCIPLINARY ACTIONS AGAINST INSTRUCTORS

IADC may, at its sole discretion, bring disciplinary action against any IADC-approved Instructor. Disciplinary action may be for a specified time period or indefinite. Disciplinary actions include, but are not limited to, Probation, Suspension, and/or Certificate Revocation. Disciplinary actions are not meant to be sequential. IADC may, at its sole discretion, move directly to Suspension or Revocation, depending on severity of the infraction.

IADC may return the Instructor to the certificate status held prior to the disciplinary action after the issues prompting disciplinary action are resolved. IADC, at its sole discretion, may choose not to return the Instructor to the certificate status held prior to the disciplinary action and may temporarily or permanently revoke the Instructor's certificate. If the disciplinary action is Probation or Suspension, failure of the Instructor to take remedial actions requested by IADC will result in additional disciplinary action taken against the Instructor. Ultimately, revocation will result if the Instructor fails to act or takes insufficient steps to resolve the issue in the timeframe specified.

Reasons for Disciplinary Actions include, but are not limited to, the following:

- Failure to abide by accreditation standards
- Failure to resolve a complaint issued against the Instructor
- Failure to follow quality control procedures
- Cheating, conducting components of the program fraudulently, and/or compromising the quality of the program

Probation
Any Certified Instructor may be placed on Probation by IADC at any time. An Instructor on Probation may continue teaching classes scheduled during the Probation period.

Placing an Instructor on Probation is a warning that, if the Instructor does not correct all deficiencies noted by IADC, the Instructor will be subject to further disciplinary actions up to and including Revocation of certification.

The Instructor must resolve all issues identified in the disciplinary action and supply IADC evidence of such actions.

Suspension
Any Instructor may be suspended by IADC at any time. A Suspended Instructor will not be permitted to teach at any IADC accredited Training Provider. A Suspended Instructor's access to all IADC databases will be suspended for the duration of the Suspension.

The Suspended Instructor must resolve all issues identified in the disciplinary action and supply IADC evidence of such actions. Upon resolving all issues, IADC may reinstate the Instructor.

Failure to resolve all issues for which the Suspension is in place will result in the Instructor's Certification being permanently revoked.

Instructor Revocation
Any Instructor may have his or her certificate revoked by IADC at any time. IADC will immediately notify the Instructor when a decision to revoke his or her certificate has been made. Following notification, IADC will remove the Instructor's access to the ACD database.

Upon revocation of certification, the Instructor must do as follows:

- Cease all IADC-related teaching activities immediately upon notification of revocation.
- Destroy the ACD-issued *WellCAP® Plus* Instructor's Certificate.

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1. First, by notifying IADC of the dispute in writing and by requesting non-binding mediation. The mediation shall take place in Houston, Texas, unless otherwise agreed to by IADC. The mediation request shall include a brief narrative explaining the basis for the dispute, list of three neutral mediators, and the relief requested. IADC shall have twenty (20) days from receipt of a Mediation Request to pick a mediator from the list provided. The costs and expenses of any such mediation, including compensation and expenses of the mediator, shall be the responsibility of each party to the mediation.
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In no event shall IADC be responsible for any consequential damages arising out of any disciplinary action, including, but not limited to, alleged lost profits, lost business opportunity, loss of reputation, punitive damages, and/or attorneys' fees. This limitation applies to any claim or cause of action, however alleged or arising, unless otherwise prohibited by law, including, but not limited to, negligence, breach of contract, or any other claim, whether in tort, contract, or equity, regardless of whether IADC has been advised of, knew of, or should have known or anticipated such loss or damages.