



IADC
WELLCAP

IADC's *WellCAP*®

HANDBOOK FOR ACCREDITATION

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Preamble

International Association of Drilling Contractors' Well Control Accreditation Program (*WellCAP*®) is a system designed to assist industry professionals in developing and delivering the recognized standards of well control training. Its guidelines and recommendations are made to help steer the user toward the proper professional approaches that should be used to establish a training program in well control.

WellCAP® calls for the training provider to identify the goals, curriculum and methodology that will be used in its well control training programs. To facilitate this, *WellCAP*® identifies concepts and skills essential to well control instruction.

As in any formal accreditation system, *WellCAP*® looks to the user for a clear explanation and justification of how the program they offer will accomplish the goals identified. *WellCAP*® is the road map for delivering consistent, quality well control instruction. It is the *WellCAP*® training provider's responsibility to identify specific details of how their program will comply along with how any alternate methods selected will fit into the overall quality of the well control training offered.

IADC established this program in 1995 to help develop a better way to reach employee competency the world over in managing well control activities on site. Training providers are encouraged to join this effort by developing programs in conjunction with the goals of *WellCAP*®, and by using it as a cornerstone for their own programs.

1 Introduction

1.1 How IADC Can Help

The Well Control Accreditation (*WellCAP*®) program is based on the principle that proper training—emphasizing the knowledge and practical skills critical to successful well control—produces competent rig crews. Working together with operators, drilling contractors, professional trainers, and well control specialists, IADC members have developed quality benchmarks.

WellCAP® offers the building blocks for a comprehensive well control culture throughout an organization. At the Introductory Well Servicing level, *WellCAP*® provides basic well control knowledge for floormen, derrick workers, and non-technical personnel. The Supervisory Underbalanced Drilling level *WellCAP*® is designed and recommended for Assistant Driller, Driller, Toolpusher, Superintendent, Onsite Drilling Consultant, and Underbalanced Equipment Supervisor.

WellCAP® ensures that well control training schools adhere to a core curriculum developed by industry. Accreditation is achieved only after an extensive review of a provider's curriculum, testing practices, faculty, facilities, and administrative and quality control procedures.

1.2 Objectives of the Program

The objectives of IADC's Well Control Accreditation Program are as follows:

1. Develop a core well control training curriculum applicable worldwide that accomplishes the following:
 - Identifies fundamental well control concepts
 - Emphasizes fundamental job skills other than those related to rig-specific equipment, maintenance, and safety training
 - Targets rig crews
 - Specifies performance criteria that encompass the following:

- Sufficient understanding of preventive well control measures
 - Measurement of current well parameters
 - Recognition of well control events
 - Proper response to observations and measurements
2. Provide guidelines and criteria (see Requirements for Accreditation) for achieving accreditation to ensure the following:
 - Facilities and equipment are conducive to learning the material.
 - Simulation and field exercises are appropriate and effective.
 - Class sizes are reasonable.
 - Instructors are qualified and experienced.
 - Curriculum is consistent among programs and includes exercises and a training manual.
 - Student testing criteria are consistent and allow for retesting.
 3. Provide a formal system of industry accreditation that recognizes:
 - Adherence to the concepts embodied in the well control training curriculum, guidelines, and criteria.
 - Demonstrated methodology for measuring individual proficiency to a prescribed minimum standard in the job skills identified in the well control training curriculum, guidelines, and criteria.

1.3 Standards for Accreditation

1.3.1 Creation of the Standards

The WellCAP® criteria for accreditation, as defined in this *Handbook for Accreditation*, as well as the curriculum for the course, were developed by IADC members acting through the Well Control Committee, with the approval of the IADC Board of Directors. These criteria include curriculum standards, as well as specific standards and requirements for accreditation of well control training programs.

All actions with respect to accreditation taken by IADC Accreditation and Certification Staff and the WellCAP® Review Panel shall be governed by the criteria for accreditation ("criteria") in force at the time an application for accreditation is submitted to IADC.

1.3.2 Updates to the Standards

The Well Control Committee and WellCAP® Review Panel will periodically reevaluate the requirements of this program and revise those requirements as circumstances dictate to ensure that they are reasonable and in the best interests of the public and the industry.

When the committee proposes a substantive change to the criteria and operating procedures, institutions that are currently accredited have an opportunity to comment on the change before it is implemented. Upon official acceptance of the program change, IADC issues a bulletin about the change and gives affected persons and institutions a specified amount of time to incorporate the change into their programs (not to exceed six months).

1.3.3 Updates to the Program Documentation

This version of the *Handbook* incorporates the original program requirements and all program changes made prior to the published date of this document.

Additional updates are provided, as needed, through bulletins and on the IADC website.

1.4 Courses and Levels

An institution may be accredited to offer a course that matches the level for which curriculum guidelines have been developed. IADC currently has established curriculum guidelines and accredits training providers to deliver training in the following areas:

- Well Servicing- Introductory level
- Underbalanced Drilling-Supervisory level

1.5 Required Program Fees

The costs of the accreditation program are met by application and annual fees, through program purchases of WellCAP® certificates of completions/wallet cards, by charges for audits paid by providers, and by contributions by IADC members or others. IADC periodically reviews all program fees and revises the schedule of fees as needed. The current fees and other prices are published as WCT-06 Schedule of Fees, which is available from the IADC website or Accreditation and Certification staff.

1.6 Organization of the Handbook

This *Handbook* is organized into four sections, with the Section 1 providing overall introductory information about the WellCAP® Accreditation Program.

Requirements for Accreditation provides a detailed explanation of all accreditation criteria.

Accreditation Process describes the accreditation process, including the review of the application and the decision to accredit.

Maintaining Program Integrity documents IADC's expectations of the accredited training provider.

1.7 Overview of the Process

To achieve and maintain accreditation, a training provider 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.
- Implement a training program that conforms to all WellCAP® criteria;
- Apply for accreditation and provide all requested supporting documentation and fees; and
- Upon achieving accreditation, continually adhere to all WellCAP® criteria and operating procedures.

1.7.1 Steps to Accreditation

The accreditation process begins with the training provider filling out the application, which can be downloaded from the IADC website or requested through the mail. If an application has been requested, IADC will send the application package appropriate to the course a provider plans to teach. This package lists all of the documentation that must be completed and provided before accreditation can be awarded.

After a training provider submits the application and pays the fee, the completed submittal package undergoes a technical review and the provider then receives a decision to accredit or not.

Course outline, manual, tests, and other relevant information for each course offered by an institution must be reviewed and approved separately by the *WellCAP®* Review Panel for that course to be recognized under *WellCAP®*.

After being awarded conditional or full accreditation status, providers must follow the approved curriculum, maintain quality controls, provide information to auditors, and keep all required records.

1.7.2 Anticipated Timeline

WellCAP® accreditation may take from three to six months to achieve, depending upon the completeness of the application package submitted and IADC staff's ability to determine appropriateness of materials provided. Each applicant is encouraged to be thorough in documenting its training program for which accreditation is being sought. Delay in supplying required information to IADC will delay the accreditation decision.

Incomplete applications received or excessive delays in providing requested information will result in closing the application request. Incomplete applications will be held in active status no more than three months. Upon closing an incomplete application, the applicant will forfeit the application fee, and must reapply if they wish to continue pursuing *WellCAP®* accreditation.

2 Requirements for Accreditation

2.1 General Requirements

In applying for accreditation under the *WellCAP*® program, the applicant company must comply with the criteria and operating procedures outlined in this and the following sections. The applicant is expected to supply evidence of compliance that will be verified at the time of the audit.

IADC acknowledges that training providers may employ innovative methods and technologies and that they may have legitimate reasons to do so. However, the core criteria contained here shall be regarded as a minimum standard for course design, delivery, administration, and quality control.

General requirements for accreditation are as follows.

- Well control training operations should be directed by qualified persons employing suitable methodology.
- All well control training instructors should be suitably qualified by training and experience in well control training procedures. (See Instructor Qualifications, Section 2.8.)
- The Curriculum Guidelines for the *WellCAP*® courses shall serve as the core curriculum for establishing the accreditable well control training program.
- The applicant or accreditable unit shall observe any and all statutes and governmental regulations that bear upon its activities including, but not limited to, the prevailing standards of instruction, instructor qualifications, and health, labor, and safety requirements of the country, state, and community in which it is located.
- Membership in IADC or membership in any association or organization shall not be required as a condition for gaining or maintaining accredited status under the *WellCAP*® program.
- To initiate the accreditation process, a training provider must submit an application (Form WCT-03 or WCT-03WSI), curriculum cross-reference form, accreditation fee, agreement form, and supporting documentation.

2.2 Governing Principle

The company or training organization that seeks *WellCAP*® accreditation must prove compliance with the criteria. Therefore, the applicant seeking accreditation must prepare the application with a degree of thoroughness to withstand extensive technical review by IADC staff, technical reviewers, the *WellCAP*® Review Panel, and, ultimately, by the auditor(s).

In addition, the applicant must be prepared to supply further evidence of conformance with program requirements as requested during the review process.

IADC staff and members of the Review Panel may provide consultative guidance to programs inquiring about or undergoing the accreditation process.

2.3 Curriculum

Applicants for accreditation must incorporate into their curriculum the IADC *WellCAP*® curriculum guidelines for the appropriate course and level of instruction. Training providers are advised to verify their adherence to the minimum course content requirements during their detailed self-review and application preparation, and be prepared to demonstrate adherence during any audits required in the accreditation application process.

Table 1 lists courses for which standard curriculums are available and provides the different course options available for each course type.

Table 1. Course Levels and Stack Qualifications Available

Course	Course Level		
	Introductory		Supervisory
Well Servicing	√		--
Underbalanced Drilling	--		SO

SO = Surface stack only

Information detailing the curriculum and method of delivery for each topic must be reported as part of the program application using the curriculum cross-reference form, WCT-2UBS-X for Underbalanced Drilling and, WCT-03WSI for Introductory Well Servicing.

The approximate duration in which the subject matter and the simulation/practical exercises are covered must be specified in the cross-reference form and must meet or exceed minimum overall course duration. Included in this breakdown must be the time mixture of lecture, simulation, audiovisuals, etc. to ensure the minimum content is delivered.

Table 2 summarizes the minimum time requirements for WellCAP® courses.

Table 2. Time in Hours Required for Course and Course Combinations

Course	Minimum Hours Required		Simulation Required
	Stand-Alone (Introductory)	Stand-Alone (Supervisory)	
Well Servicing	8	--	--
Underbalanced Drilling	--	20 (Supervisory)	√

2.3.1 Stand-Alone Courses

The applicant for WellCAP® accreditation may design the well control course to meet the needs of its employees or customers provided all WellCAP® curriculum topics are addressed and minimum time allocations and other delivery restrictions are met. Copies of WellCAP® curriculums may be obtained from IADC staff or the IADC website: <http://www.iadc.org/wellcap/index.html>.

The Introductory Well Servicing course requires a minimum of eight (8) hours of instruction, and the Supervisory Underbalanced Drilling course requires a minimum of twenty (20) hours of instruction.

Training in conventional well control is a prerequisite for students participating in an underbalanced well control course.

2.3.2 Instruction Time

Course delivery is expected to be a combination of methodologies, including (but not limited to) lecture, classroom exercises, audiovisual aids, and simulation (if applicable).

The training day may not exceed a maximum of nine (9) hours of instruction per day (where instruction includes lecture, practical exercises and simulation, but excludes student assessment time).

2.4 Facilities and Equipment

All well control training courses to be included in the accreditation and facilities of the accreditable unit must be described in the application and evaluated. The applicant must provide facilities and equipment information to satisfy every criterion.

Large commercial organizations having separate divisions, especially when located in different geographical areas and having separate administrative centers, will be required to submit a separate application for each division or geographic location.

If applicable, simulators or test wells, as well as other techniques and technologies, must be provided to test the performance of students in the specific job skills related to kick detection, well shut in, and well control procedures.

2.4.1 Facility Floor Plans

Facility floor plans shall be provided for all classrooms and other rooms utilized for simulation exercises. The floor plans should provide a sketch of classroom and simulator room layout inclusive of dimensions and class layout. Space should be adequate for the number of students and simulators specified for the course.

The floor plan must match the actual physical characteristics of the facility during the program's audit. If the facility and floor plan change, IADC must be notified of these changes.

The facility must have adequate lighting, ventilation, and space for the students to be positioned at a reasonable distance apart during classroom activities and testing.

When another facility is utilized for testing, whether operated by the same training provider or operated by a third party that has been previously identified and approved as a *WellCAP*® Test Administrator, the applicant must report where the testing will take place and must provide assurance of the adequacy of the facility for testing. (See Section 2.9.1 for more information about obtaining Test Administrator authorization.)

2.4.2 Mechanical or Electronic Well Control Simulators

Either a mechanical or electronic simulator, or a live test well, shall be used to provide student hands-on learning and assessment. The equipment must be operational for delivering the required well control exercises. The number of simulators must be provided on the application along with the name and model of each. Applicants should specify whether they are using a full-scale rig floor or portable simulator.

Ideally, simulator exercises and assessments should be conducted in a separate classroom from lecture and other class activities. If the simulator exercises and assessments must be conducted in the same classroom as lecture, these activities cannot run concurrently with other classroom activities.

A simulator may be operated in the classroom to supplement the lecture or lesson with a demonstration of a well control procedure. See Section 2.6 for guidelines in classroom management and simulator use.

2.4.3 Live Test Wells

Live test wells are recommended, but not required. The program's application should indicate whether a live test well would be used, as well as the functional status of the

live well. Should a live test well be utilized, a description of the test well, its capabilities and its limitations should be provided as part of the application.

2.4.4 Miscellaneous Equipment

Additional educational aids and equipment, if utilized for instruction, should be reported to IADC. The following are examples of additional equipment:

- Visual aids, such as models of well components (e.g., BOP, pumps)
- Tubing, rings, flanges, connections, etc.
- Software, photos, diagrams

2.5 Class Size

The applicant requesting accreditation must indicate the maximum number of students that will be trained and tested in each course. The maximum class size approved for each course submitted will be affected by the number of well control simulators, the number of participants per simulator group, number of instructors, classroom space, course length, course content, etc.

Eighteen (18) participants is the maximum number of participants that may attend a single course taught by one instructor. However, the maximum class size may be adjusted to allow more students when additional resources (e.g., instructors, simulators, class hours, etc.) are added. An Exception Form (Form WCT-14) will be required.

The accompanying table provides general guidelines for maximum class size when one instructor is available, with each participant completing two practice simulator exercises, and the course designed to meet only the minimum time requirements as specified in the criteria.

**Table 3. Maximum Class Size for One Instructor
(based on Minimum Course Length)**

Number of Simulators	Maximum Number of Students Per Simulator Group	Maximum Class Size
1	3	6
2	3	12
3	3	18

Note: These limits are based on a course taught in the minimum time required for that type of course.

When submitting an application for accreditation, the training provider should specify the maximum class size for which the course is designed and the total duration of the class. If an applicant wishes to request a variance from the maximum class size limits, a detailed explanation of class management, including instruction, student exercises, simulation, and testing, must be provided. The Review Panel may request additional information regarding class management practices to verify that the increased class size does not adversely affect the learning environment.

2.6 Course Delivery, Practice Exercises, and Simulation

Course delivery should be managed in such a way as to ensure that the students have optimum conditions for developing the required skills identified in the curriculum. A blend of lecture, audiovisual aids, practical exercises, simulation, assessments, and other methodologies should be utilized.

Detailed explanation of classroom activities, including student activities, should be provided as part of the application. These details are to be reported in the curriculum cross reference document.

At a minimum, the applicant must incorporate into its program:

- Practical exercises (i.e., kill sheet calculations, etc.)
- Simulator or test well exercises (does not apply to Introductory Well Servicing)
- Other techniques and technologies as appropriate

These are the minimum techniques required to develop and test the performance of students in the specific job skills.

Practice exercises must be provided to give participants hands-on experience in implementing and completing the well control technique(s) taught in lecture.

The simulator or test well facility, etc. being used must provide realistic responses and scenarios that a student would encounter in the field.

A simulator may not be operating in the same room where a lecture or other form of lesson is in progress except to supplement the lecture or lesson with a demonstration of a well control procedure or while working kill sheets.

A minimum of two simulated well control practice exercises must be provided for each participant, excluding the Introductory Well Servicing course. Exercises should model the type operation for which the student is being certified. At the Supervisory level, exercises should include well circulating and kill methods.

During each simulator exercise, each participant must perform those specific skills in which he/she is to be tested. Practice simulations should be similar in design to final testing assessment.

An exercise team is limited to a maximum of three (3) participants when using well control training simulators and five (5) participants when using live well or rig site training exercises. The applicant must specify the maximum number of participants that will participate in each type of practical and simulator exercise proposed. The appropriateness of the number of participants specified in the application will be evaluated during the application review process, and will be based on the training equipment type, proposed exercises, space requirements, etc.

Other techniques and technology will be evaluated based on the merits of the program submitted.

2.7 Training Manual

At the start of the course, a printed training manual is to be provided to each student to use during the class and to keep for future reference. (This requirement is optional for Introductory courses.)

An electronic version (e.g., CD-ROM) may be provided in lieu of the printed manual to the student after the course.

The training manual must include materials (subject matter) appropriate for the course in conformance with the *WellCAP*® curriculum guidelines. Unless otherwise noted, it must also include the following:

- Table of Contents
- Chapters
- Page numbers
- Glossary of terms (may be provided as a separate reference)
- Index (optional, but recommended)

The manual(s) used must be submitted to IADC as part of the application.

2.8 Instructor Qualifications

Instructors employed or otherwise utilized by IADC-accredited well control training providers must be qualified and approved to teach the subject matter he/she will present. An application form and resume must be submitted for each instructor. Specific requirements are based on the course for which the instructor is requesting approval.

Submit WCT-05, or WCT-05I (for Introductory course instructors only), for each instructor.

Either the provider or an instructor may submit an application for *WellCAP*® instructor approval. The instructor application (Form WCT-05 or WCT-05I) should indicate in the space provided if the individual instructor has been previously approved as a *WellCAP*® instructor.

Once approved as a *WellCAP*® instructor, the instructor is expected to maintain his or her approval by demonstrating continuing retention and advancement of well control knowledge and skills. **Instructors must be recertified every 2 years.**

Approved *WellCAP*® instructors may teach for multiple accredited training providers. To be linked to multiple training providers, the instructor must submit the Instructor Transfer Form (WCT-30).

Qualifications required for instructor approval are detailed below.

2.8.1 Requirements for Introductory-Level Instructors

The training provider or instructor applicant for an Introductory course will be required to provide at least two of the following:

- Copy of valid well control certificate at the Supervisory level. The certificate must meet each of the following:
 - Be issued by an industry-recognized training provider
 - Be issued by a provider other than the one submitting the instructor for approval
 - Have resulted from well control training in an instructor-led classroom course
- Evidence of presentation skills or relevant teaching experience
- Evidence of relevant operational experience or technical skills

2.8.2 Requirements for Supervisory-Level Instructors

Requirements for instructors of a Supervisory-level course differ depending upon the status of the instructor applicant. Different requirements exist for the initial instructor applicant, upgrading instructor status, maintaining instructor approval, and reinstating instructors previously approved.

Requirements for *WellCAP*® instructor approval at the Supervisory level follow.

-
- Exceptions:
- 1) These requirements are not applicable to Introductory well control training.
 - 2) Underbalanced (UB) course instructors who have a certificate from a different training provider are not required to have a supervisory UB course certificate at this time.
-

2.8.3 Initial Instructor Approval

First time *WellCAP*® instructor applicants must have each of the following:

- Well Control Certificate—The initial instructor applicant must have a current well control certificate from an outside provider that is an IADC recognized school as defined by the IADC Well Control Committee. The certificate must be for a course or course level that is equal to or greater than the qualification being requested and have resulted from well control training in an instructor-led classroom course. Documentation must be provided to demonstrate the applicant obtained an 85% or higher score on the written test and passed the simulator exam during the process of obtaining this certificate.
- Well Control Lecture—The initial instructor applicant must have delivered a minimum of 60 hours of well control lecture, at the highest level for which the applicant is requesting approval. This lecture time must have been monitored by a *WellCAP*® instructor approved for at least the course level for which the applicant seeks approval. The 60 hours must be obtained in the previous 12 months before submittal of instructor application.
- Simulator Instruction—The initial instructor applicant must have provided 20 hours of well control simulator instruction at the highest level for which the applicant is requesting approval. This instruction time must have been monitored by any *WellCAP*®-approved instructor.

In addition, the initial instructor applicant must also meet one of the following:

- Minimum of a Bachelor's degree or equivalent degree—with at least 6 months drilling, production, or well service experience.
- Minimum of 2 years field experience as a Service Company Supervisor, Driller, or higher position.
- Minimum of 2 years as a certified instructor (certifying credentials must be supplied as evidence).
- Professional certification as a teacher with minimum of 2 years classroom experience (certifying credential[s] must be supplied as evidence).

Well control and simulator instruction should be documented on the instructor application. Evidence of satisfying the Well Control Certificate requirements must also be submitted with the application.

For first-time *WellCAP*® Program applicants, conditional approval of instructors may be granted at the discretion of IADC to provide the applicant's instructors time to meet instruction time requirements (if they are not already fully compliant with these criteria).

2.8.4 Upgrading Instructor Approval Status

An approved instructor seeking to upgrade his or her qualifications from the original approval level to a new course or level qualification must demonstrate the necessary technical skills for the new course or level of approval.

All applicants must have the following:

Well Control Certificate—A current Well Control Certificate from an outside provider that is an IADC-recognized school as defined by the Well Control Committee. The certificate must be for a course or course level that is equal to or greater than the qualification being requested and have resulted from well control training in an instructor-led classroom course. Documentation must be provided to demonstrate the applicant obtained an 85% or higher score on the written test and passed the simulator exam.

Well Control Lecture—A minimum of 24 hours of well control lecture delivered at the highest level or subject for which the applicant is requesting upgrade approval. This lecture time must have been monitored by any WellCAP®-approved instructor and documented with the WellCAP® Instructor Evaluation Form.

2.8.5 Maintaining Approved Instructor Status

To maintain approved instructor status, the WellCAP® instructor must meet certain requirements during the 2-year period following certification from IADC. Renewal every 2 years thereafter is also required.

Currently approved instructors must meet the maintenance criteria described below within 2 years +/- 90 days of the initial approval date or the latest recertification date.

Note: Failure to meet these requirements will result in loss of approved instructor status and will require the instructor to resubmit for IADC WellCAP® approval under the requirements specified in Reinstating Previously Approved WellCAP® Instructors (Section 2.8.6) below.

To maintain approved status, the instructor **must** meet any **two** of the following:

Well Control Lecture—Deliver a minimum of 120 hours of well control lecture in the period prior to renewal. Documentation may be provided by WellCAP® class roster sheet.

Continuing Education—To enhance technical or instructional skills, attend a minimum of 40 classroom hours of a continuing education course(s) in the period prior to renewal. Documentation of completion must be provided. (To ensure that the course meets IADC expectations, ACD recommends that the WellCAP® instructor submit the course curriculum for review before attending the course.)

Examples: The WellCAP® Facilitator Certification course, well control conferences, professional development conferences, and WellCAP® Roundtables are acceptable forms of continuing education.

Well Control Paper—Author and submit one original well control-related paper or case history for review by the WellCAP® Roundtable or WellCAP® Review Panel.

Professional Paper—Author a paper for publication and/or present a paper at a professional conference.

Examples: IADC, SPE, AADE, ASTD, etc. (Documented evidence required.)

Well Control Certificate—Maintain a current Well Control Certificate from an outside provider that is an IADC recognized school as defined by the Well Control Committee. The certificate must be for a course or course level that is equal to or greater than the qualification currently held and have resulted from well control training in an instructor-led classroom course. Documentation must be provided to demonstrate the instructor obtained an 85% or higher score on the written test and passed the simulator exam.

If status has not been maintained, the instructor will have to seek reinstatement.

2.8.6 Reinstating Previously Approved WellCAP® Instructors

For a previously approved WellCAP® Instructor who has not maintained approved status, all of the following qualifications must be met to achieve reinstatement as an Approved WellCAP® Instructor:

- Earned a current Well Control certificate from an outside provider that is an IADC-recognized school as defined by the Well Control Committee.

The certificate must be for a course or course level that is equal to or greater than the qualification being requested and must have resulted from well control training in an instructor-led classroom course.

Documentation must be provided to demonstrate the applicant obtained an 85% or higher score on the written test and passed the simulator exam.

- Delivered a minimum of 24 hours of well control lecture at the highest level for which the applicant is requesting approval.

This lecture time must have been monitored by any WellCAP® approved instructor and documented with the WellCAP® Instructor Evaluation Form. The lecture hours must be obtained in the previous 12 months before submittal of instructor application.

- Provided 4 hours of well control simulator instruction that has been monitored by any WellCAP® approved instructor.

2.8.7 Instructor Trainees

Instructor trainees may observe and participate in delivery of WellCAP® training as long as a certified instructor is present and leading the classroom lesson or activity.

2.9 Student Assessment

WellCAP® has been developed with an expectation toward a high standard of testing of well control knowledge and measuring proficiency in identified job skills.

Written testing is not required at the Introductory level. However, a training provider must include in its application: 1) a description of how the instruction will be delivered, and 2) the criteria for determining and documenting how a student has successfully completed the course.

At the Supervisory level, at least fifty percent (50%) of the identified job skills must be specifically included in the testing process.

2.9.1 Test Administrator

Test Administrators must be included on the application and approved by IADC; the course Instructor or Facilitator is not automatically assumed to be the Test Administrator. If a third party will be utilized as a WellCAP® Test Administrator, the person must be identified in a school's original application, or in an amendment to its program.

2.9.2 Written Test

A written test must be used as the means of assessing a student's retention of knowledge acquired from the training.

The examination may take place at the facility where the original instruction was delivered, at another facility operated by the same training provider, or at a facility

operated by a third party that has been previously identified and approved as a WellCAP® Test Administrator.

Exams must be rewritten at least once every 2 years. Evidence that this has been accomplished must be provided to IADC as part of the annual report. A statement of safeguard procedures to protect tests from being inappropriately copied and disbursed must be included in the submittal. (See Section 2.12.3 for more details.)

Testing Protocol

WellCAP® written testing must strictly adhere to the following testing protocol.

- All final WellCAP® examinations must be “closed book.”
- Course quizzes and intermediate examinations may be “open book” format provided the final examination is comprehensive and closed book.
- If intermediate examinations are to form a final composite score of a student’s course performance, all intermediate examinations must be “closed book.” Collectively, the intermediate examinations must provide a comprehensive assessment of the student’s knowledge and understanding of the specific WellCAP® course content for which assessment is being conducted.
- Test candidates should have only permissible items available to them during the test. (See below)
- The seating arrangements to be used for written examinations should reasonably ensure the privacy of each candidate’s examination paper.
- Examinations should be properly labeled (i.e., Introductory Well Servicing or Supervisory Underbalanced Drilling).
- Time allowed for any test should be clearly specified at the beginning of the exam period, with reasonable means for candidates to monitor remaining time available.
- All written examinations are to be supervised by a responsible person.
- In normal circumstances, only one candidate at a time should be permitted to leave the examination room while the test is in progress.

Training providers should ensure that the above protocol is in place whenever a written examination is conducted.

The Test Protocol permits test candidates to have the following items available for use during the written test:

- Formula sheet supplied by the training provider—The formula sheet must be supplied as a separate document, and may not be part of the course manual or other handout or reference document. It is to be a standard formula sheet prepared by the training provider and available to each test candidate. It is not to be a formula sheet of the test candidate’s creation.
- Blank kill sheet(s) supplied by the training provider
- Reference tables, charts—Reference tables and charts may be supplied in the form of a reference document as the Halliburton “Red Book.” They should not be part of the course manual or course handouts that contain information other than reference tables and charts.
- Handheld calculator—Calculators should be the non-programmable type, preferably supplied by the training provider.

Additionally, this listing of available materials clearly excludes use of the course manual, homework assignments, class notes and other technical reference materials during testing.

To pass the course, a student must score a minimum of seventy percent (70%) on the written and simulator (if applicable) tests. For those students who will use their WellCAP® certificate as qualifications for WellCAP® instructor approval, a minimum test score of 85% is required.

If a participant fails to complete any portion of the testing, the student has the option of retaking the test within forty-five (45) days of the original test date. The retest must be of equivalent difficulty and length as the original test.

General Logistics

The training provider or test administrator managing the delivery of the examination must ensure that the facility has adequate lighting and ventilation, and that students are spaced a reasonable distance apart. Additionally, they should employ appropriate measures to verify the identity of the students taking the exam.

A description of how tests are administered to students (especially including how security of the test is maintained) must be provided in the application for accreditation. In the case of simultaneous written and simulator testing, an additional Test Administrator must be provided to proctor the test.

The applicant shall indicate how test scores shall be determined and how specific skills are to be tested. Examples of the exams or tests that will be given to students must be included in the submittal.

Written exams should test the required WellCAP® subject matter and take at least one and one half (1½) hours for the average student to complete.

Tests must be secured before, during, and after the scheduled testing time, and they must be rewritten every two (2) years.

2.9.3 Skills Assessment

Skills assessment must be conducted for the Supervisory Level Underbalanced Drilling course. Specific skills to be assessed are defined in the course curriculum, with students to demonstrate skills utilizing a well control simulator or test well.

A minimum of thirty (30) minutes should be allocated for each skills assessment. This time excludes the time required for preparation of the kill sheet. Additional testing time should be provided when special-situation training is being delivered.

If multiple students are assigned to a simulator or test well during skills assessment, students must rotate positions so that each student can be individually assessed.

An additional test administrator must be present to proctor tests if written and skills assessments are being conducted simultaneously.

Introductory Course

Simulation or other practical exercises are not required for the Introductory-level course, but may be used at the program's discretion.

Supervisory Courses

The Supervisory level course requires skills to be evaluated. The following are the minimum simulator or test well assessments that must be performed:

- Recording circulating pressures for slow pump rate
- Detecting kick and shut in well
- Reading, recording, and reporting drillpipe or tubing and annulus pressures

- Demonstrate bringing pump on and off line while manipulating choke and while maintaining bottom hole pressure
- Determine the correct initial circulating pressure when circulating or killing the well (as appropriate)
- Maintain the correct bottomhole pressure while circulating or killing the well

2.9.4 Retesting Policy

If a student does not satisfactorily pass the written or simulator / test well skills assessment, one retest **must** be made available to the student for either the written test or the skills assessment. The student may opt to take the retest or not. The retest shall not be identical to the original test. It should include, however, the same knowledge and skills failed in the original test, and must be of at least equal difficulty as the original.

The retest may be taken at the site where the original test was given; at another facility operated by the same training provider; or at a facility operated by a third party that has been previously identified and approved as a *WellCAP*® Test Administrator.

If the student chooses to retest, the retest must be completed within forty-five (45) days of the original test date or the entire course must be retaken. Failure to pass any retest examination will require the student to attend the full course again, at which time the student will be required to complete all parts of the examination process as required for a full course.

2.10 Administration and Process Control

Accredited programs must adhere to program administration requirements, policies, and procedures defined by IADC.

2.10.1 Verification of Student Identity

The applicant should have in place a process for checking and verifying student identity. In-house training programs may rely upon employment processes and records, however third-party training providers must establish a process for confirming the identity of the individual requesting and receiving training.

A *WellCAP*® certificate should only be issued to, and in the name of, the individual receiving the training.

2.10.2 *WellCAP*® Quality Statement and Comment Policy

The Quality Statement and Comment Policy (Form ACD-67) must be distributed to each student during the *WellCAP*® course.

The Policy is designed to advise participants of IADC's commitment to quality training. It also requests those participating in *WellCAP*® training to communicate directly to IADC any comments or concerns they may have about the instruction received. Options for contacting IADC are via post, phone, fax, or e-mail.

The Policy must be provided in the language in which the course is being taught.

2.10.3 Attendance Policy

Accredited programs must adopt a policy to ensure that a student miss no more than a total of four (4) hours of instruction before he or she is required to retake the entire course. If a student misses any portion of the course, the missed portion(s) must be made up before any final written test is administered to that student. (Exception to this is for course suspension as noted in Course Suspension Policy.) The missed, and made

up, portion(s) must be documented in the student's record. If a student does not make up the missed portion within forty-five (45) days of the missed date, the final test may not be given and the entire course must be repeated.

The following stipulations apply to this policy:

- The student must schedule the missed portion of the course with the same training provider as the original course.
- Missed portions must be completed within 45 days of the originally scheduled completion date.
- If this provision is used, it must be promptly reported to IADC on Form WCT-13.

2.10.4 Certificate Issuance

All trainees that successfully complete an accredited course level shall receive a *WellCAP*® certificate as evidence of the successful course completion. A *WellCAP*® 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 both written and simulator assessments. 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. Records that support the *WellCAP*® certificates issued (e.g, rosters, knowledge and skills assessments and scores, and other records of student information) shall be retained.

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

2.10.5 Records

All accreditation correspondence, rosters, and student records should be kept secure at the primary place of business whenever feasible. "Primary place of business" can be the location where classes are normally conducted, or a designated central administrative office. Records of any courses conducted at remote or satellite locations must also be kept at the primary place of business. This also applies to training providers with multiple sites.

Training providers must indicate as part of their application where these records will be kept.

A request to retain records at a location other than the primary place of business may be submitted at the time of application. The applicant must show good cause for the satellite records location and must demonstrate that good records control measures are in place. In addition, these records should be readily available to the auditor conducting an audit of the program (within 2 hours of the auditor's requesting records). Approval may later be withdrawn if an audit report indicates the alternate location hampers the accessibility or security of the records.

The criteria the auditor will use will show whether the records are 1) accessible, 2) complete, 3) accurate, and 4) secure. To be deemed "accessible," an auditor must be provided access to all records at the designated location upon 2-hours' notice. This notice must be given between 8 a.m. and 5 p.m. local time, local weekends and holidays excluded.

Student Records

Student records consist of student information and attendance logs, copies of written tests, simulator evaluations, kill sheets used to assess student performance, and a copy of the certificate issued.

Student records must be kept for each student. Records documenting the performance and course completion of individual students may be kept in either hard copy (paper) or electronic (scanned original) format. These must be retained during the time the certificate issued to the student remains valid, or longer if required by local regulations. (*WellCAP*® Supervisory certificates are valid for two years.) In the case of *WellCAP*® Introductory level certificates, which have no expiration date, IADC recommends a minimum of 5-year retention of these records.

Student records must include the following:

- Copy of certificate including certificate number
- Student Information as applicable:
 - Student's full name
 - Employer
 - Contact address
 - Phone number
 - Job title
 - Student's identification number (employee number, passport number, national identification number, etc.)
 - Course dates
- Written and simulator test scores (and retests)
- Kill sheet completed and signed by student (if applicable)

Each subsequent well control course taken by a student requires the completion of a new set of the above.

Class Roster

A class roster must be completed for each *WellCAP*® course taught by the training organization. The class roster must include the following:

- Type of course (Introductory Well Servicing or Supervisory Underbalanced Drilling)
- Course dates
- Instructor(s)
- Location
- All student names with identification numbers and daily attendance information
- Test scores

Note: Course rosters must be kept for a minimum of 4 years.

Permanent Records

Records must be securely maintained, but many are no longer required to be stored permanently. Unless a timeline is specifically stated in this section, records should be kept permanently. Permanent records may be kept in electronic format.

Certificate Records

Records of *WellCAP*® certificates issued are to be retained and reported to IADC using the electronic spreadsheet ("Log Sheet") supplied by IADC when certificates or numbers are ordered. IADC Log Sheets containing student identity and certificate issued to each

student must be retained for a period of at least 4 years for the Supervisory level course, and 10 years recommended for the Introductory course.

All fields on the spreadsheet must be filled out. (See below for possible exceptions.) Log sheet data includes certificate number, student name, course level and description, date and location of course, instructor name, and expiration date. Columns for Course Level, Course Type, Course Length, and Stack Qualification must be completed with the appropriate codes listed in the *WellCAP*® Course Codes Listing, Form WCT-11. This form is also available from IADC's website at <http://www.iadc.org/wellcap/index.html>.

Other general guidance is as follows:

- The name of the person authorizing the records must be included at the top of the spreadsheet.
- Complete social security numbers or other numbers that may potentially compromise the security of an individual's identity are not to be reported to IADC. Records containing such information will be rejected.
- Date of birth is acceptable as an alternate form of student ID number.
- In cases and regions where individuals normally go by only one name, that name is to be reported as the last name. Providers should attempt to obtain the student's full name whenever possible.
- Only one name should be listed as instructor for each certificate. While it is acceptable for more than one instructor to be involved in conducting a course, for records reporting purposes one individual should be identified as the "lead instructor."
- Voided certificates should be marked VOID in the First Name column. Other fields may be left blank.

Data contained on the IADC Log Sheets is to be provided to IADC within 30 days of the completion of the course. Data should be supplied using the form provided by IADC when certificates or certificate numbers are ordered.

Repeated failure on the part of a training provider to report certificate records in a timely manner or to adhere to records formatting requirements will be brought to the attention of the *WellCAP*® Review Panel for possible disciplinary action up to and including revocation.

2.10.6 Retraining

WellCAP® is based on the philosophy that retraining on a periodic basis is required for proper maintenance of well control related skills. Experience has shown that repetition of instruction is required regularly if skills are to be maintained. *WellCAP*® procedures require the full course at the Supervisory level be repeated every 2 years to maintain a current well control certificate.

Retraining for the Introductory *WellCAP*® course is not required for individuals who have already completed this training. Accredited training providers who choose to conduct *WellCAP*® Introductory course retraining may provide retraining at a frequency that fits the needs of their personnel. Issuance of Certificates of Completion for the Introductory course retraining is optional. If a training provider chooses to issue the Certificate of Completion, student records must be retained by the provider and reported to IADC within 30 days of completion of training.

To maintain a valid well control certificate, a student may complete a retraining course anytime earlier than the second anniversary date of their last Supervisory course. If training is not completed within the 2-year period, the student's certificate will expire. No extension will be granted. Introductory certificates do not expire.

2.10.7 Course Suspension Policy

When, in the judgment of the training provider, it is necessary in the interest of safety to suspend a WellCAP® course due to severe and unavoidable circumstances (e.g., tropical storm or natural disaster), the WellCAP® program permits such suspension with resumption of the course later.

If fewer than four (4) hours of instruction, for Introductory, or ten (10) hours of instruction, for Underbalanced Drilling, have been given at the time of suspension, the course may be resumed by the original training entity and missed portions completed within 45 days of the date of the course suspension.

A WellCAP® program must notify IADC as soon as possible if it chooses to exercise this option (Form WCT-13).

2.11 Audits

All accredited training providers will be required to undergo an initial audit as well as other periodic audits. IADC reserves the right to request an audit of the applicant's program at any time.

For more information on audits, please refer to Section 3.4.4 in this handbook.

2.12 Quality Control

An accredited Program should have quality control processes in place to assure integrity of the Program and strict adherence to the WellCAP® accreditation criteria. At a minimum, the following processes should be implemented:

- Verification of student identity and control of any records retained to assure those records remain strictly confidential
- Control of student and other records
- Security of tests, answer sheets, and required records
- Responding to non-conformities identified during audits and assuring corrective and preventive measures are fully implemented in a timely manner
- Monitoring of IADC program updates and assuring updates are implemented

Other processes should be developed, as needed, to help assure adherence to accreditation criteria.

2.12.1 Verification of Student Identity

Program administrators should employ appropriate measures to verify the identity of the students taking an exam. The following guidelines apply:

- Providers should attempt to obtain the student's full name whenever possible. In cases and regions where individuals normally go by only one name, that name is to be reported as the last name.
- Assign each student a unique student identification number and retain this information as part of each student's personal training record.
- Date of birth or a unique number generated by the training provider is acceptable as a form of student identification number.
- Social security number or other number that may potentially compromise the security of an individual's identity are not to be reported to IADC. Records containing such information will be rejected.

2.12.2 Control of Student and Other Records

All required records are to be retained such that they are as follows:

- Secured to prevent alteration or compromise of the data contained in each record
- Readily available during the program's audit or upon request by IADC
- Legible and easily understood

2.12.3 Security of Tests

The accredited training provider should limit and control access to its *WellCAP*® examination materials, including examination masters, answer sheets and completed student tests, to ensure integrity of the *WellCAP*® exam. All testing procedures and control measures in place will be reviewed during the audit.

2.12.4 Responding to Non-Conformities

The accredited training provider is responsible for responding in a timely manner to program non-conformities identified during an audit or other audit processes. Actions and timelines to resolve a non-conformity must be appropriate for the issue identified, and agreed to by ACD's Quality Assurance/Quality Control (QA/QC) staff and the training provider.

Planned timelines must be strictly met; otherwise, the accredited training provider will be subject to disciplinary action. Continued failure to address non-conformities will ultimately result in revocation of accreditation.

For more information about responding to non-conformities, see Corrective Actions (CAs), which addresses the corrective action process.

2.12.5 Monitoring & Implementation of Program Changes

Any training provider that is accredited or awaiting accreditation must notify IADC of any program changes that will affect the accreditation. Changes that must be reported include change in business structure, change in content or delivery of the *WellCAP*® course, change in instructors, or changes initiated by IADC due to changing program requirements. Form WCT-03M should be sent to IADC within 30 days of implementing the change.

Business unit changes that must be reported include change in program administrator, change in contact information, addition or deletion of a training location, and name change or other structural changes to the business model (i.e., merger with another company).

Changes to course content or delivery that must be reported include revision of course manual, updating the exam, addition or change in simulator equipment, removal of an instructor, and renovation of training facility. Any change, even those that improve and enhance the *WellCAP*® curriculum delivery must be reported if it is a deviation from or an alteration of the initial program application. Addition of a new instructor or new course must first be approved by IADC before implementing this type of program change.

Changes to the *WellCAP*® program criteria must also be implemented by the accredited training provider. Upon making a change in criteria, IADC will notify every accredited provider of the change, the timeframe within which the change must be implemented, and whether or not evidence of implementation must be provided to IADC. If evidence of implementation is required by IADC, any provider failing to supply evidence of implementation is subject to having their training program being placed on Probation. Continued failure to implement requested changes and supply evidence of implementation would result in Revocation of the accreditation.

2.12.6 Logo Usage and Other Processes

Any training provider accredited under the *WellCAP*® program receives certain privileges of accreditation, including the right to promote its accreditation and to use the *WellCAP*® name and logo in the promotion of the accredited course(s). All accredited training providers are charged with appropriately representing its accreditation to its students and its customers, and should have processes in place to assure that all representatives of the organization (e.g., instructors, administrative and marketing staff) appropriately represent the *WellCAP*® program. Failure to do so will result in revocation of accreditation. See Disciplinary Actions against Training Providers for more details.

2.13 Schedule of Fees

The following fees are required:

- Initial application fee
- Annual fee
- *WellCAP*® Course Certificate / Card of Completion or Certificate Number (for use on custom certificate/card)
- Audit fees—Expenses associated with the conduct of each *WellCAP*® audit are to be reimbursed by the accredited training provider. Audit expenses include the auditor's fee plus reasonable travel expenses.

Initial and annual fees as well as Certificate/Card of Completion charges differ for course level (Introductory and Supervisory) and for IADC member status.

WellCAP® fees are reviewed every three years and updated as applicable. The current Schedule of Fees is published as Form WCT-06: Schedule of Fees that can be downloaded from the IADC website.

2.14 Accreditation Agreement

The applicant must sign and submit the *WellCAP*® Accreditation / Audit Agreement Form (Form WCT-04). In submitting this form, the authorized representative of the program agrees to certain conditions that include, but are not limited to, the following:

- Accept IADC's accreditation standards and submit necessary information for participation as an accredited program in accordance with procedures set forth in this handbook.
- Abide by the decision of the *WellCAP*® Review Panel as to the compliance or noncompliance of the Program with applicable accreditation standards.
- Follow and be controlled by all IADC operating procedures and rules.
- Assure that the services it provides fully comply with the applicable accreditation standards at all times.
- Submit to audits, as required, requested, or otherwise deemed necessary or desirable by IADC.
- Promptly comply with any requests of IADC staff or the Review Panel for necessary information if a claim of noncompliance with accreditation procedures or standards is filed against the Program.
- Reimburse IADC for any expenses related thereto, unless the claim was filed by another Program and is found to be without merit, in which case the charging Program shall reimburse IADC.
- Reimburse IADC for expenses incurred in connection with a meritless charge that it files.
- Indemnify and hold harmless IADC, *et al.*, from all liability, loss, damages, costs, or expenses, including reasonable attorney's fees, which may be incurred.

Note: IADC may terminate this Agreement for causes set forth in this Agreement.

2.15 Exceptions and Variations to These Criteria

IADC acknowledges that certain training providers may employ innovative methods and technology, and may have legitimate reasons to depart from some of the general specifications contained here.

A program may request a variance from these specifications by submitting a request to IADC. The request for variance (Form WCT-14) will be reviewed by the *WellCAP*® Review Panel. The program will be required to explain or demonstrate how the requested variance will result in successful development and performance of the skills identified in the *WellCAP*® curriculum. If satisfied that the proposed variance maintains the overall philosophy and intent of *WellCAP*®, the Review Panel may allow the exception and variation. The Review Panel reserves the right to impose specific conditions, either permanent or temporary, in order to ensure the training quality is not compromised in such a program.

3 Accreditation Process

3.1 Purpose of Accreditation

The WellCAP® Review Panel ("Panel"), under the auspices of the Well Control Committee ("Well Control Committee") of the International Association of Drilling Contractors ("IADC"), accredits training programs in the field of well control for the oil and gas exploration and production industry. The purpose of accreditation is to provide the following:

- A means of ensuring that well control training providers have a curriculum based on the core elements for well control training as identified by the industry and delivered through existing and innovative training techniques.
- A valid and objective evaluation of this curriculum as a service to industry.

3.2 Accreditable Unit

IADC accredits active well control training programs for the oil and gas exploration and production industry. For this purpose, an creditable unit is defined as any public or private institution, organization, or agency operating a well control training program.

The appropriate administrative entity making application is the creditable unit, and its well control training programs and facilities are evaluated to determine accreditation status. **All well control training programs and facilities of the creditable unit must be included in the application and evaluated.**

The institution seeking accreditation from IADC may have well control training operations conducted at one or more institutionally owned facilities located away from the primary site. These are called separate or satellite facilities. If the separate (satellite) facilities share administration, personnel, budget, equipment, etc., that facility is considered integral to the main well control training program. Therefore, the separate facilities are considered part of the creditable unit with the primary unit accountable for their operations. **If the management and operation of the separate facilities are not integral to the primary unit, they are considered separate and must seek separate accreditation.**

Institutions may not change their organizational structure, as defined in the Application for Accreditation or as amended after accreditation, to remove deficient facilities from evaluation. The program may decide, however, to reassign an existing facility to activities other than well control training.

3.3 Application Requirements

To begin the application process, a training provider must first request, or download from the IADC website, the appropriate application form(s). In their initial request, applicants must submit either WCT-03 for Supervisory-level accreditation or WCT-03WSI for Introductory-level accreditation.

The Application for Accreditation must be completed and returned to IADC with the required fee. Further information about the application and the fee can be found on the IADC website: <http://www.iadc.org/wellcap/index.html>.

The application must be organized in accordance with guidelines furnished by IADC. The topics in the application follow the sequence of the accreditation criteria and afford the program the opportunity to document in detail how it complies, in its own unique fashion, with the criteria.

Providers submitting an initial application for accreditation should also submit an application for each instructor, unless already an approved WellCAP® instructor. Each

new instructor's qualifications should be documented on Form WCT-05 (for Supervisory level) or Form WCT-05I (for Introductory only instructors), with one form submitted for each instructor. If the program already has approved *WellCAP*® instructors, those instructors should be identified in Form WCT-03 or Form WCT-03WSI, the Application for Accreditation. See Section 2.8 for more information on instructor qualifications.

To add other instructors to a *WellCAP*® program, submit either Form WCT-05 or WCT-05I (for individuals who would be qualified to teach at the Introductory level) to request their approval, or submit Form WCT-30 to request that an already approved instructor be linked to the program.

The applicant is encouraged to check the application(s) for completeness before submitting the provider's application package.

3.3.1 Application Submission Requirements

In addition to the registration fee, a training provider must submit to IADC the completed application(s), related forms, and supporting documentation. The application should provide the following information:

- Name and address of the training provider with phone and e-mail information
- Name of the Program's manager with primary responsibility for the program, identified as the "Primary Contact," as well as the person having ultimate authority over the accreditation program (known as the "Authorizing Person")
- Location of any satellite facilities/operations where well control instruction will be conducted
- List of instructors previously approved by IADC (if applicable)
- Well control training certification by governmental regulatory agency, if any
- A signed Accreditation/Audit Policy Agreement (WCT-04), which defines the Program's accreditation duties and IADC's right to audit Program activities
- Copies of all facilities' floor plans (primary and satellite facilities) that will be used for well control training
- A copy of its detailed well control course outline (one for each course to be included in the accreditation)
- Relevant cross-reference tool for each course to be accredited describing the following:
 - Overall topics of instruction and method of instruction, such as the following:
 - Organization of activities and types of presentation
 - Approximate time allocated to classroom training, group discussion, simulator exercises, and other activities
 - Description and examples of training materials and instructional equipment used (handouts, textbooks, audiovisual aids, simulators, etc.)
 - Description and examples of procedures used to evaluate student performance against specified job skills; checklist to identify how each content area is presented, and how each job skill is evaluated.
- Training manual and examples of other student handouts
- Copy of one test

A completed application package and application fee may be forwarded to the office of IADC Accreditation and Certification Department (ACD) at any time. While supporting documents may be forwarded to ACD after the application has been submitted, ACD advises the applicant to submit all documents at the same time.

Incomplete applications will only be held by ACD for one month. After that time, the applicant will forfeit the application fee and will need to resubmit a complete application later if achieving WellCAP® accreditation remains his/her aim.

3.3.2 Primary Contact and Signatories of the Application

The Application for Accreditation (WCT-03) and the Attestation Agreement (WCT-04) must be signed by a representative of the company authorized to make legal agreements on behalf of the company. Known as the “Authorizing Person,” this person may designate another company representative (e.g., the director or manager of any academic department wherein the program may be located or an administrator of the program) to be the primary contact (“Primary Contact”) for the accreditation program. The Primary Contact and the Authorizing Person may be the same person or different representatives of the company. If different from the Authorizing Person, the Primary Contact should have authority to manage all aspects of the accreditation program.

The Primary Contact will become the principal point of contact between ACD and the accredited training provider, except in cases of disputed issues or 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.

3.4 Application Review

Reasonable efforts shall be taken to ensure timely processing of an application through all phases of the review process. Processing of a completed application is expected to take no more than 90 days. Circumstances may extend this timeline, especially if the program being reviewed consists of many courses and/or instructors or materials are submitted in a language other than English. Requests for additional information may occur at any stage of the review process, and can add to the processing time.

A high degree of professional judgment is required in the review of applications, in the conduct and reporting of audits, and in the deliberations of the Review Panel. Professional judgment must be used in evaluating the extent of compliance by a program with each individual criterion. This includes the technical reviewers and auditors in making their overall recommendation to the Review Panel, and the Panel in reaching its final decision. Thus, there is no minimum “score” of the number of criteria with which a program must be in compliance to be accredited. Rather, an overall judgment is exercised as to whether, in light of the mode and degree of compliance with each criterion, the program is acceptably fulfilling publicly stated objectives.

3.4.1 IADC Staff Review

ACD oversees all aspects of the WellCAP® accreditation program from the time the application is submitted, through determination of accreditation status, to ongoing maintenance of the accreditation program and quality control after accreditation is achieved.

An application that has been submitted to ACD undergoes internal review by ACD staff before going through the technical review process. Staff reviews the application for completeness and appropriateness of information provided. Once the application is determined to be complete and the application fee payment has been confirmed, the application is forwarded to an external technical reviewer.

3.4.2 Technical Review

ACD staff assigns the completed application to a designated technical reviewer. The technical reviewer may be a member of the WellCAP® Review Panel or a third party qualified as a well control instructor or operations professional. The technical reviewer examines the application for adherence to all technical criteria of the WellCAP® program.

Before making a recommendation, the technical reviewer may request additional information from a program if clarification may be required for any criteria-related topic in the application guidelines.

The technical reviewer makes a recommendation to the WellCAP® Review Panel as to the disposition of the application. The technical reviewer's recommendation may be to accredit based on his or her determination that the application seems to meet the criteria. Alternately, the technical reviewer may recommend not to accredit, citing failure of the applicant to demonstrate compliance with significant numbers of the WellCAP® accreditation criteria.

The training provider's documents and the technical reviewer's report with recommendation are returned to ACD staff for forwarding to the WellCAP® Review Panel.

3.4.3 WellCAP® Review Panel

The WellCAP® Review Panel functions as the primary decision-making body for the WellCAP® program. The Panel also has the following responsibilities:

- Develops data-gathering instruments necessary to carry out this principal function
- Provides consultation to programs
- Interacts with other elements of the governance structure of IADC on matters related to administration and quality control
- Takes such actions as required to maintain integrity of the WellCAP® program

Review Panel members are to exercise professional judgment in making accreditation and other WellCAP® program decisions and in offering guidance to accredited programs and ACD staff alike.

Membership

The Review Panel consists of at least five members appointed for staggered 3-year terms; from these, one member is elected by the Panel as chairperson. The membership of the Panel shall be nominated by the Well Control Committee and approved by IADC. A member of IADC Staff ("Staff") serves as an *ex officio*, non-voting member.

Alternate Review Panel members may be designated to serve on the Panel in the absence of a regular Panel member. An alternate Panel member stepping into the

position of an absent member will have the same voting authority as the member he or she represents.

Quorum

Majority of the voting members constitute a quorum for making a decision. When a Review Panel member has withdrawn from a portion of the meeting, that position is not counted in determining a quorum unless an Alternate member is available to step into the position. The vote of the majority of the Review Panel members is required to make an accreditation decision.

Avoidance of Conflict of Interest

Should a member of the Review Panel be in possible conflict of interest with respect to any program scheduled for review by the Review Panel at any particular meeting, that member is expected to excuse himself or herself from the discussion and decision on that program. If a member does not voluntarily excuse himself or herself from the program deliberations and the Review Panel determines, through a majority vote of members present, that a member is in possible conflict of interest, the member will be asked to withdraw from discussion of, and decision on, a particular program.

3.4.4 Audits

An initial audit will be conducted to verify that the applicant's program is fully implemented and in conformance with accreditation criteria.

Audits will be conducted by IADC staff, an individual auditor (or team of auditors), or professional audit company representing IADC. The *WellCAP*® Review Panel, Well Control Committee members, or other representatives of IADC may also participate in the audit.

The timing of an audit will be specified by IADC with input from the auditors and the training provider.

While an audit is required prior to issuance of full accreditation, conditional accreditation may be awarded by the Review Panel based on the merits of the application and supporting documentation without first requiring completion of the audit. It is presumed that the program granted conditional accreditation would maintain the highest degree of compliance with the *WellCAP*® criteria during the conditional accreditation period.

The Quality Assurance/Quality Control (QA/QC) staff has the responsibility for administering all aspects of the audit and audit process, including auditors. QA/QC approves and assures auditors are appropriately qualified and trained. In addition, QA/QC reviews auditor(s) written reports and feedback from the training provider following the audit as a means of monitoring the accreditation process and assuring satisfactory quality controls are in place.

Making Arrangements for and Conducting the Audit

When an audit is required, requested, or otherwise deemed necessary or desirable, QA/QC staff notifies the training provider's Primary Contact of the pending audit, identifying the auditor(s) who will conduct the audit. Detailed arrangements for the audit are coordinated through direct contact between the training provider and the auditor(s).

Refusal of an audit by an applicant for accreditation will result in immediate closure of the accreditation request. If an accredited training provider declines an audit and one cannot be scheduled to the mutual agreement of the auditor and the training provider,

QA/QC staff will note the failure as a non-conformance, issue a Corrective Action Form, and place the accredited provider on probation.

To be familiar with the training provider's program, before the audit, the auditor(s) will review the program's course materials, the curriculum being taught, and records.

During the audit, the auditor will utilize the Audit Report Form (WCT-61) for conducting the audit. The training provider will receive a copy of this form in advance of the audit. Whenever possible, the audit will consist of the following:

- Interviews of staff, instructors, and students of the program
- An examination of student and administrative records
- Inspection of facilities and equipment
- Observations of instructors delivering training and administering the student assessment (whenever feasible)
- Examination of other aspects of the program's operations

The audit process will not disrupt classroom activities should *WellCAP*® training be underway.

IADC reserves the right for the auditor to examine student folders, class rosters, the original application, any updates to the application, *WellCAP*® program records, and any relevant correspondence. To ensure that all criteria are followed, IADC and its representatives must be allowed access to these records. The records will be examined outside the classroom so as not to interfere with quality of training.

The auditor(s) will form professional judgments about the program's degree of compliance with the criteria. Any non-conformity identified during the audit will be discussed with the training provider. At the conclusion of the audit, the auditor will ask the training provider to acknowledge the findings have been reviewed.

Report of the Auditor(s)

A written report ("Report") of the auditor's findings is prepared upon completion of the audit. The Report documents observations made during the audit, commends the training provider for noteworthy processes, provides recommendations for opportunities for improvement, and identifies nonconformities with the *WellCAP*® criteria. The report also documents the auditor's recommendation for awarding accreditation (for initial application), change in accreditation status to be awarded (as appropriate), or continuation of accreditation for the training provider.

The written Report is submitted to the QA/QC staff, where it is reviewed for appropriateness of findings and clarity. After review, the QA/QC staff sends the official copy of the audit report to the training provider for the provider's record.

In the event a non-conformity with *WellCAP*® criteria is identified, the auditor issues a Corrective Action (CA) Form, which spells out the issues that the provider must correct. The training provider must report to QA/QC staff the cause and extent of the problem, as well as the actions to be taken to correct and prevent future occurrence of the problem.

3.5 Decision on Accreditation

Before rendering a decision to determine accreditation status, the *WellCAP*® Review Panel reviews all documents, reports, and recommendations submitted to them by ACD staff. The following may be included:

- The application package
- Technical reviewer report and recommendation

- The most recent audit report (if available), any corrective actions issued, and the program's response to these reports
- Other relevant materials and the program's comments on these materials

The Review Panel may make a decision or it may defer action in order to obtain more information on which to base a decision.

Decisions require a vote of the majority of the Review Panel members when a quorum is available.

The Review Panel may make such a decision at a meeting of the Panel in which a quorum is present, or via a ballot system (if it is not practical or possible to schedule a meeting at which a quorum may be present).

The *WellCAP*® Review Panel must also approve *WellCAP*® instructors following similar review and decision processes followed for the program application.

3.5.1 Accreditation Status

The Panel may award the following accreditation status depending upon whether the decision is for a new application or a request for change in status of an existing accredited provider.

- **Full Accreditation**—Full accreditation may be granted to any program that, in the exclusive judgment of the Panel, meets the criteria in a satisfactory manner as evidenced by information available about the program and confirmed by an initial audit.
- **Conditional Accreditation**—Conditional accreditation may be granted to programs making initial application that, in the exclusive judgment of the Panel, meet the criteria, but for which an audit has not yet been performed. The Panel may rely on the program's history of operation and may request business or other references in awarding conditional accreditation.
- **Reject** the application because, in the opinion of the Review Panel, the applicant has not adequately provided evidence of meeting the criteria or the application is determined to not meet the criteria for accreditation.

3.5.2 Notification of Panel Decision

The decision of the Review Panel will be communicated to the Authorizing Person or Primary Contact of the accredited program no later than one month following the decision.

ACD issues a Certificate of Accreditation when the training provider achieves full accreditation status. Each approved instructor is also issued an Approved Instructor Certificate identifying type of instruction for which the instructor has been approved. A Certificate of Accreditation will not be issued for conditional accreditation.

In the event the Review Panel rejects the application, it advises the program in writing of the reasons for its rejection, citing the criteria the program did not meet. Once the application has gone through the review process, any fees paid are non-refundable regardless of the accreditation decision made.

3.5.3 Withdrawal of Application

At any time before the Review Panel takes action to grant or refuse accreditation to an applicant program, the Authorizing Person may withdraw the application without prejudice.

3.6 Period of Accreditation

Award of full or conditional accreditation is effective as of the date of the Review Panel's decision. Accreditation is valid for 7 years.

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

4 Maintaining Program Integrity

Once accredited, a program, its administrative staff, instructors, and facilitators must focus on adherence to the WellCAP® accreditation criteria and delivering well control training to the WellCAP® standard of quality.

4.1 Privileges of Accreditation

Upon receipt of the formal WellCAP® Certificate of Accreditation, an applicant may publicly stipulate the Program's compliance with the WellCAP® accreditation procedures and standards. The accredited Program may publicly display said certificate only during such period as the Program complies with the accreditation procedures and standards.

4.1.1 Promotion

IADC promotes accredited programs through the following methods:

- Web listing of accredited training providers
- WellCAP® flyers
- Notice of accreditation decisions in IADC's monthly newsletter, *Drill Bits*

Information about WellCAP®-accredited training providers may also be distributed at conferences and communicated through advertisements or other means. Regardless of means of promotion, each listing of WellCAP®-accredited training providers will include all providers accredited at the time of publication.

IADC shall periodically publish additions to or deletions from the directory of WellCAP®-accredited training providers.

Should errors occur in publishing a company's accreditation status, IADC shall take action to correct any errors of fact or possible misleading statements in a timely manner.

4.1.2 IADC Logo

The accredited training provider may use the WellCAP® logo on course materials and in promotion of the course.

When reference is made to the Program accreditation at any time, only the following shall be referred to or used:

- The term "IADC Accreditation Pending" may be used by a program that has submitted an application for accreditation, until that time it is notified of the Review Panel's decision regarding accreditation.
- The term "IADC Accredited" may be used by Program that has been notified that it has received either conditional or full accreditation.
- A WellCAP® logo and trademark may be used. The nonexclusive use by Program is hereby licensed to Program upon official notification that it has received full accreditation. Guidelines for logo usage are published by IADC and should be strictly followed (Form ACD-15).

Note: IADC shall have the right to notify the Program of any material used or issued by the Program that IADC considers misleading to the public about any reference to IADC or to the Program's accreditation. The Program agrees, on receipt of notice from IADC, to terminate use of such materials and take steps IADC may deem appropriate in the public interest. Failure to comply will result in disciplinary actions up to and including revocation of accreditation.

4.2 Confidentiality of Training Provider Information

IADC assures accredited training providers that their program application and records will be held in strict confidentiality to protect the products and customers of the program. All official forms submitted are held for the duration of the active accreditation. Documents submitted in support of the accreditation application may be held by ACD or returned to the applicant at the conclusion of the accreditation process.

The records of the application review process are retained by ACD. These include staff reviews, reports of the technical reviewer and auditor, and the decisions of the Review Panel.

All records relating to accreditation shall be kept confidential except:

- Listings of all categories of accredited programs that are published, as specified above.
- Disclosure is made in those instances in which IADC or its representative is legally required to disclose information.
- Information on a specific accredited training provider, upon request of the Authorizing Person, may be made available to other parties including accrediting agencies by which the institution has been accredited or whose accreditation it is seeking.

4.3 WellCAP® Program Changes

From time to time, the *WellCAP*® accreditation criteria or standard operating procedures may be changed. Although ACD provides notification to accredited training providers when changes are made, each accredited training provider remains responsible for keeping apprised of and implementing any *WellCAP*® program changes IADC initiates. Therefore, providers are advised to periodically monitor the *WellCAP*® program website for program updates.

4.4 Voluntary Withdrawal from the Program

An accredited training provider may request its removal from the *WellCAP*® accreditation program at any time. Such request must have been submitted in writing, on official company letterhead, and signed by the accredited provider's Authorizing Person. Upon receipt of written notification, ACD will promptly comply with that request by officially closing the program. At a subsequent time, the program may reapply for accreditation without prejudice.

4.5 Audits

Audits are important steps in awarding and in maintaining *WellCAP*® accreditation. They give verification of the program's full implementation and conformance with accreditation criteria. They also provide valuable interaction between experienced professionals, appropriate administrative officials of the applicant or accredited training provider, and ACD staff.

Audits include the initial audit required for full accreditation and periodic follow-up audits performed by an auditor, as well as records and other administrative audits periodically performed by ACD staff.

Audits may be either comprehensive or limited in scope. Other types of program audits may be conducted from time to time, at the discretion of IADC.

The conduct of the audit follows ACD Standard Operating Procedures. The process was briefly described in Section 3.4.4. For more information about audits, contact QA/QC.

4.6 Complaints

In the event a complaint is received that affects a *WellCAP*® accredited training provider, QA/QC will investigate the complaint and implement corrective actions as appropriate. QA/QC will make a good faith effort to ensure that all measures within its control are exercised to expeditiously resolve every complaint.

A complaint may be against an accredited training provider, an instructor, an auditor, a technical review, a Panel member, a product supplier, or ACD staff.

The following are examples of complaints that may be reported:

- Disputes or dissatisfaction between a student/customer or his/her employer and an accredited training provider
- Disagreements or disputes between training providers
- Dissatisfaction with ACD service, such as inadequate work, unacceptable delay or failure to deliver a service, etc.
- Disputes between the accredited training provider and ACD regarding policy, procedures, or activities
- Discourtesy or unhelpfulness on the part of ACD staff

Anyone may submit a complaint; however, the complainant must provide detailed information and follow specific procedures in submitting the complaint. To be considered by QA/QC, the complaint must:

- Be written and signed by the complainant
- Identify the individual, group or legal entity represented by the complainant
- Present substantial evidence that the subject person(s) or program is not in compliance with one or more of the criteria in use at the time referred to in the complaint
- In the case of internal complaints—e.g., instructor against training provider—demonstrate, when reasonably possible, that serious effort has been made to achieve resolution within the existing structure of the program
- Grant ACD permission to send the complaint, in its entirety, to the accredited training provider

Receipt of a complaint meeting these requirements will be acknowledged by QA/QC staff. From there, QA/QC staff will follow formal procedures defined in ACD operating procedures to investigate and seek resolution of the complaint. In all instances, QA/QC should consider the potential effect of its action upon the interests of the public and the industry and upon the integrity of the *WellCAP*® program.

The person(s) or program indicated in the complaint will be afforded ample opportunities to respond to or counter the complaint.

Upon conclusion of the investigation, QA/QC staff may take the following actions:

- Deny the complaint, thereby sustaining the person(s) or program indicated in the complaint.
- Sustain the complaint, thereby requiring corrective action, reprimand, or release of the person(s) or program indicated in the complaint.
- Decide to pursue the matter further, either by additional correspondence with the parties involved, by means of a special audit, or other fact-finding effort, to provide additional information on which to reach a decision.

Should a special audit be conducted and the complaint is determined to be warranted, the person(s) or training provider will be responsible for reimbursing ACD for audit costs. If, on the other hand, the audit is conducted and it is found that the complaint had no merit, the complainant may be asked to reimburse ACD for audit expenses.

Failure to resolve a complaint in a reasonable amount of time will result in disciplinary actions. Disciplinary actions against an accredited training provider who is unresponsive to a legitimate complaint are defined in Disciplinary Actions against Training Providers. Unsuccessful resolution of a complaint against a supplier (i.e., auditor, vendor, etc.) will be grounds for removal of the person or company from the ACD Approved Supplier and Vendor List. Complaints against staff or program volunteers will be dealt with through grievance and internal IADC disciplinary procedures.

QA/QC will communicate the disposition of the complaint, in writing, to both the complainant and the person(s) or program against whom the complaint has been brought.

If, in the course of processing a complaint, QA/QC finds that the party against which the complaint is filed is involved in litigation over the same issue, QA/QC, upon advice from legal counsel, may exercise its discretion in determining the most appropriate action to take in the case before it.

4.7 Corrective Actions (CAs)

A Corrective Action (CA) will be issued when a training provider is found to be in non-conformance with accreditation criteria or ACD standard operating procedure. QA/QC manages the Corrective Action process according to Standard Operating Procedures.

Once a CA has been issued to a training provider, the training provider will be given a specified time within which to develop and report a plan for correction of the non-conformity and prevention of recurrence. The written plan will include not only specific actions to be taken but also the timeframe within which the actions are to be completed. In addition, the response must include an explanation of cause and extent of the non-conformance. Actions and timelines must be agreed to by the provider and QA/QC.

Failure to resolve a CA in the allotted time will lead to disciplinary actions.

4.8 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.

4.8.1 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*® 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.

4.8.2 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*® test codes, must cease delivery of *WellCAP*® training immediately, and must refrain from issuing *WellCAP*® 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*®-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).

4.8.3 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®-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® test codes allocated to the Provider. IADC will not reimburse Providers for the remaining unused test codes in their WellCAP® account.

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

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

4.8.4 Miscellaneous

Resolution of Disputes and Forum Selection Clause

Any dispute arising from or relating to the IADC WellCAP® 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.

4.9 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

4.9.1 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.

4.9.2 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.

4.9.3 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® Instructor's Certificate.

4.9.4 Miscellaneous

Resolution of Disputes and Forum Selection Clause

Any dispute arising from or relating to the IADC *WellCAP*® 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

4.10 Sending Comments to IADC

IADC is committed to ensuring that its accredited training providers offer quality instruction and adhere to high standards of conduct as they deliver *WellCAP*® accredited training. One of the ways IADC can continue to improve the accreditation system is by listening and responding to the views of training participants. IADC wishes to ensure that:

- Making a comment is as easy as possible.
- Unfavorable comments regarding accredited training providers are treated seriously.
- ACD respond in the right way—for example, with an investigation, an explanation, or collection of further information before taking appropriate action.
- ACD learn from comments received and improve the quality of the accreditation program.
- Accredited training providers learn from comments received and use them to improve the quality of the instruction they provide.

Accredited training providers, their instructors and students, the student's employer (if different from the training provider), and the public are encouraged to provide comments about the *WellCAP*® Program or its administration. Comments may be made in person, in writing, by fax, by e-mail, by telephone, or through a form on the IADC *WellCAP*® website. IADC contact information is provided in the Table 4.

Direct all comments to Quality Assurance/Quality Control.

Please provide sufficient detail concerning the course experience or other suggestion to permit IADC to collect further information as needed (course date, location, training

provider, etc.) or to otherwise act upon the suggestion. Providing contact information is optional, but will assist IADC if follow-up communications are required.

Table 4. Alternate Ways to Contact IADC's Accreditation and Certification Department

In Person:	IADC Headquarters 3657 Briarpark Drive, Suite 200 Houston, TX 77042 USA
In Writing:	IADC – ACD Quality 3657 Briarpark Drive, Suite 200 Houston, TX 77042 USA
By Fax:	+1.713.292.1946
By Telephone:	+1.713.292.1945
By E-mail:	quality@iadc.org
By Internet	http://www.iadc.org/accreditation/iadc-accreditation-programs/request-an-application-or-more-information/

4.11 Conformance with Other Standards

The WellCAP® program may satisfy the requirements of other industry or governmental standards. In the event WellCAP® training is conducted in a way to satisfy both WellCAP® and other standards, the accredited training provider must operate the program in conformance with both programs' standards. IADC may, in certain cases, assist with the verification of conformance to both standards

Appendix A: WellCAP® Program Documents and Forms Available for Training Provider Use

WCT-01	WellCAP® Handbook for Accreditation
WCT-02WSI	Introductory Well Servicing Curriculum
WCT-02UBS	Underbalanced Drilling Supervisor Curriculum
WCT-02UBS-X	Underbalanced Drilling Supervisor Cross-Reference Application Tool
WCT-03	Application for Accreditation – Fundamental/Supervisory
WCT-03WSI	Application for Accreditation – Introductory Course (Well Servicing)
WCT-03F	Facility Floor Plan
WCT-03M	Program Modification Form
WCT-04	Accreditation/Audit Policy Agreement
WCT-05	Instructor Application –Supervisory Course
WCT-05I	Instructor Application – Introductory Course
WCT-05A	Teaching/Simulator Hours Tracking
WCT-06	Schedule of Fees
WCT-10	Application Process Flowchart
WCT-11	Course Codes
WCT-13	Student Missed Portions Policy
WCT-14	Program Exceptions & Variations
WCT-30	Instructor Transfer Form
WCT-61	Audit Report