

**UBO & MPD Committee Meeting**

**October 05-06, 2023**

**In Person – Grand Hyatt Denver**

**(1750 Welton Street. Denver, CO)**

**Agenda**

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| **Thursday, October 5th** | |
| 08:00 - 12:00 | **Maroon Peak Meeting Room**  *\*Meeting times are based on Mountain Daylight Time (MDT), Denver, Colorado*   * 08:00 - 8:15: Initiate Event / IT Reminders / Meeting Format * 08:15 - 08:20: Safety Moment * 08:20 - 08:25: IADC Anti-Trust Guidelines * 08:25 - 08:30: Volunteer for meeting minutes * 08:30 - 09:00: Announcements   + - Introduction of new liaison person with API, Katie Burkle, Senior Program Manager.     - Update on development of API RP 79-2 (Tripping Operations for MPD Operations) - Contact Katie Burkle [burklek@api.org](mailto:burklek@api.org) and Ahmed Shimi [ahmed.shimi@weatherford.com](mailto:ahmed.shimi@weatherford.com) for any matters related to this project. * 09:00 - 10:00: Session with IOGP Representative – Diana Kathun * 10:00 – 11:00: Sub Committee Updates:   + - * UBO – Antonio Torrealba / Martyn Parker       * MPD – Andre Alonso Fernandes / Anthony Spinler       * DGD – Bing Yang / Jon Thain       * RGH – Oscar Gabaldon / Mike Vander Staak       * HSE & Training – Matt Kvalo / Stuart McCallum * 11:00 - 11:30: Review 2023/2024 meeting schedule   + - * Q4 ’23 Committee meeting (Dec 5-7): NOV Offices. Houston, TX.       * Q1 ’24 Committee meeting: TBD       * Q2 ’24 Committee meeting: TBD       * Q3 ’24 Committee meeting: Rio de Janeiro, Brazil.       * Potential venue/city for the IADC UBO&MPD Conference in 2025 – Decision to be made in our Q4 ’23 Committee meeting. * 11:30 - 12:00: Float and AOB   \*If time permits, we can address any new open items today. If not, a general session can be included on the agenda tomorrow to discuss those items. |

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| **Thursday, October 5th** | |
| 12:00 - 13:00 | Lunch |
| 13:00 - 16:00 | Breakout Work Session   * + - UBO – Antonio Torrealba / Martyn Parker     - MPD – Andre Alonso Fernandes / Anthony Spinler     - RGH – Oscar Gabaldon / Mike Vander Staak     - HSE & Training – Matt Kvalo / Stuart McCallum |

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| **Friday, October 6th** | |
| 08:00 - 11:30 | Breakout Work Session   * + - UBO – Antonio Torrealba / Martyn Parker     - MPD – Andre Alonso Fernandes / Anthony Spinler     - RGH – Oscar Gabaldon / Mike Vander Staak     - HSE & Training – Matt Kvalo / Stuart McCallum |
| 11:30 - 12:30 | Lunch |
| 12:30 - 15:00 | Regroup, Subcommittees update full Committee.  Close Meeting |

Topics not on the agenda must be deferred until a later meeting. Meeting minutes will be posted on the Committee’s website following endorsement by Committee leadership and meeting attendees. Attendees should be aware that: 1. There may be audio recordings of meetings, for purposes of facilitating capture of meeting minutes; and 2. The final published minutes will include a record of who attended the meeting. The audio recordings shall be destroyed immediately following endorsement of the minutes.

IADC Committee activities are governed by IADC’s Antitrust Policy and Guidelines. [Click here for information on the policy and guidelines.](https://iadc.org/wp-content/uploads/IADC-Antitrust-Guidelines-Rev-6.pdf)

2023 Q3 UBO&MPD Committee Meeting - Denver

**Main Session (Oct 5 – Morning)**

 Leiro opened the meeting. IT Comments. Venue safety moment by Leesa. Safety moment by Leiro Medina

* + Oscar volunteered for minutes

* **Announcements:**
  + Katie Burkle ([burklek@api.org](mailto:burklek@api.org)), Senior Program Manager is replacing Roland Goodman as API liaison for Standards development
  + Update on API RP 79-2
    - Group has been meeting regularly every three weeks
    - Using API RP 79-1 as guiding principle.
    - Covers tripping with hydrostatically underbalanced mud within API RP 92M
    - Open for volunteers to collaborate
  + Group working on AP RP 65-4 Managed Pressure Cementing
    - No update available at the moment
    - Grayson Ridgway ([ridgwayg@api.org](mailto:ridgwayg@api.org)) is the API responsible person. Contact him for volunteering
  + Breakout session room assignment
    - Meeting groups: MPD, HSE & Training, Riser Gas Handling, API 16RCD, UBO
  + Need to build a calendar to review/reaffirm our API documents
    - E.g., API RP92U was issued in 2008, reaffirmed in 2013. It's been 10 years
    - 92M was not reaffirmed when releasing the Influx Management Annex. The original document was issued in 2017.
      * Katie Burkle (API): the publication of the annex resets the clock for the 5 year period.
      * Committee agreed to proceed with reaffirming process for 92M and 92S. This will require a ballot
        + Action: Coordinate with Katie B. for proceeding (Leiro and Andre)

* **Subcommittee Updates**
  + UBO (Antonio): Continue with review of the document
    - Consolidated 4 sections of the document
    - By Q4 should have a full document to share with the main committee
    - Several annexes pending: e.g., Two-phase drilling, Coiled Tubing, RMD, others.
      * To decide what to take on for work within the s/committee
    - In need of volunteers, only 4 working members
    - Katie Burkle should be invited to all meetings discussing API documents
  + **MPD (Andre):** 
    - Concluded the Software Guidance document in last meeting
    - API is not interested in publishing the Software Guidance
      * Katie B was not involved in those discussions. Roland Goodman was involved, early June 2023
      * Control systems 16D is available as an API document, for well control software
      * Not defined where the document will be published instead
      * Action: Resume discussions with API for publication of Control Software (Leiro and Andre)
    - Will discuss IOGP's position on Well Control events classification
    - Starting December will reach out for suggestions for revisions for API RP 92M/S
  + **Dual Gradient (Roger):**
    - Reviewed last round of comments on the 92C document last meeting
    - Feedback to refine the depiction of the technology
    - To be submitted to API at the end of this week
    - Action: Will take the discussion directly with Katie B for proceeding with publication (Roger)
  + **Riser Gas (Oscar):**
    - RGH Guidelines were published Aug 2023 as standalone chapter of the IADC Drilling Manual (link in the Committee website)
    - Released the Riser Gas Tolerance Worksheet during the 2023 UBO&MPD Conference. Available in the Committee website
    - Continue working on the underlying principles, additional topics related to riser gas handling process and guidelines
  + **HSE & Training (Matt):**
    - Meeting weekly to discuss question bank
    - Will start beta testing of the question bank
    - Aiming to provide to IADC by Oct 2023

* **IOGP Representative (Andrew Parkinson, Chairman of the IOGP Chair of IOGP’S Well Control Incidents Subcommittee)**
  + Presented IOGP's classification of well control incidents
  + In their classification, an unintended influx taken during MPD operations qualifies as a Level 3 Well Control Incident
    - A dynamic pore pressure test does not qualify as a well control incident, as a carefully planned data gathering event
  + Follow-up discussion after Andrew Parkinson left the virtual meeting
  + More discussion will take place during MPD S/committee breakout session

* **Meeting Schedule**
  + Committee agrees that for 2024, we will have three Committee meetings in the US (likely Houston), plus one international location (Q3 in Rio de Janeiro)
  + Agreed: Will implement hybrid mode for morning of first day of committee meeting
  + Q4 '23 Meeting: Houston Dec 5-7 NOV.
  + Q1 '24 Meeting:
    - Consideration: IADC/SPE International Drilling Conference in Galveston March 5-7, 2024
    - Date: Feb 28-Mar 01.
      * Action: Check IADC, Weatherford, Blade (Leesa, Ahmed, Oscar)
      * Note from Leiro: In a subsequent discussion, it was agreed that the venue for this meeting will be the IADC HQ offices in Houston
  + Q2 '24 Meeting:
    - Date: June 4-6
      * Action as above: Check IADC, Weatherford, Blade (Leesa, Ahmed, Oscar)
  + Q3 '24 Rio de Janeiro, Brazil
  + Q4 '24 Meeting:
  + Possible venues for 2025 MPD&UBO Conference
    - Suggestions: Calgary, Mexico City, Pittsburgh, Bogota. Houston?
      * Sponsored venue is ideal for budgeting purposes
  + Action: poll a larger audience for expected attendance to Committee meetings outside the US (Leiro and Leesa)
    - Promote more international participation

* **Other Business:**
  + Mike: Continuous Circulation Systems. Are there gaps in recommended practices for CCS systems?
    - Do we need a task group/subcommittee?
    - Do we need to consider an amendment to API 92 documents, or a new specific RP for CCS?
    - Action: Halliburton will review internally, and consider bringing their position to the Q4 meeting (Mike Vander Staak)
  + Leiro: Feedback from the Conference?
    - **Roger: Attendance from students was significant** 
      * Action: Evaluate if (and how) we should plan activities for students around our Conference? (Intro to MPD, Ask Me session, etc. Leiro)
        + Offer a paper/presentation slot for a student/group. Encourage submissions and select the top entry. Perhaps undergrad and grad students
    - **Topics and categories: Do we need to encourage specific categories?**
      * Consideration for 2024 Conference Organizing Committee (Action: Bring the topic back for the meeting. Leiro & Leesa)
      * Incident awareness time? (Action: Include as discussion topic for Q4 meeting. Leiro and Antonio)

Notes from Subcommittees (Post-Session)

**MPD**

* Discussed IOGP’s presentation and request to weigh into their well control incidents classification versus API 92M.
* The consensus was that not all influxes should be classified as WCI Level 3 as MPD brings the benefit of dealing with small influxes in a safer manner without the need to resort to using the BOPs.
* It was agreed that any influx due to a failure (procedure, operator, software or equipment) should be classified as WCI level 3.
* It was agreed that in case of a failure (procedure, operator, software or equipment) of the MPD system without influx, it should be classified as a WCI level 4.
* The group understood that some influxes could be classified as a WCI level 4, the majority of the group understood that an MPD level 4 influx should be “small”. The definition of what “small” is still pending a consensus.
* The majority of the participants agreed that an influx to be classified as WCI level 4 could not depend on the limits of the matrix, that can vary within different companies.
* The discussion ended without reaching a criteria of what would classify an influx as level 3 or 4 with MPD.
* In the meanwhile, Leiro and Andre will present to the IOGP to reach consensus with that association on not classifying every influx as a WCI Level 3.

**UBO (from Antonio Torrealba)**

* During last week meetings we had planned to consolidate sections 5 to 8 into the document, only being able to accomplish Section 5.
* Committee review/revision of section 5
  + Continuous circulation systems included under 5.1.5
  + Martyn Parker discussed w/ Chris S.(BP) proper usage of Max allowable surface pressure(MASP) vs. Max. anticipated surface pressure(MASP).
  + Discussion over potential merge of section 5.1.4/5.1.5
  + Extended considerations for junk catcher usage.
  + 5.1.8 – simplified considerations for flow measurement.
  + 5.1.9- made adjustments to Piping wording, specifically related to temporary piping and removing NPT connections from the flow path.
  + Clarified definition on potential certification requirements for piping and pressure vessels.
  + Discussed/re worded - Selection of the Separation Equipment.
  + 5.1.11 – modified definition of pump lines
  + Simplified and removed redundancies from Equipment Specification section.
  + Provided clarification on BOP control system requirements and ancillary BOP equipment.
* Between now and Q4 meeting we will work on integrating sections:
  + Section 6 - Drill String
  + Section 7 - Drilling Fluids
  + Section 8 - Well Control
* During Q4 Meeting the plan will be to work on section 9 as a group.

**RGH (from Oscar Gabaldon)**

* Identified a few modifications to the Riser Gas Tolerance Worksheet.
* Discussed a few modifications, improvements and clarifications to the Riser Gas Handling Guidelines
  + Will need to identify the adequate means and opportunity to amend and submit to IADC for update
* Will discuss how to address the impact of riser gas handling (guidelines, concepts, terms, worksheets, etc.) on API RP92S
  + Propose how to reference in the IM annex or main document
* Additional discussion on the scope and topics to be included on the upcoming document to be worked by the subcommittee

**API 16RCD (from Micah Spahn)**

Technical work for Addendum 2 has been completed to address an RFI that was submitted to address missing application of the footnotes on Table 5. Addendum 2 also includes a cleanup up the terminology change from Bearing Assembly to Sealing Assembly. SRRR form has been completed and submitted to API for approval to release Addendum 2 to the 3rd Edition.

**HSE & Training**

Continued the revision of test questions. The team was able to revise 50 questions during the breakout sessions and we continue to meet on a weekly basis to review these questions.