International Association of Drilling Contractors

WellSharp®
Global Well Control Training & Assessment Standard

HANDBOOK FOR ACCREDITATION

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Preamble

The International Association of Drilling Contractors' Well Control Accreditation Program was originally designed in 1995 to assist industry professionals in developing and delivering well control training that conforms with industry-recognized standards. In 2015, the program transitioned from *WellCAP*® to *WellSharp*, commencing a new generation of well control training that comprises standardized tests, metrics for continuous improvement, and quality controls that ensure consistency worldwide. The industry-defined requirements, guidelines, and recommendations provide a clear pathway and the resources needed to build and maintain a successful program. The goal of *WellSharp* is to produce qualified personnel who have a position-specific comprehension of well control concepts and who have demonstrated effective well control skills.

The *WellSharp* Program identifies the knowledge and skills essential to well control instruction for courses applicable to Drilling Operations (DO) and Well Servicing (WS) personnel. Rather than increasing in difficulty and complexity, the curricula in each training track (DO and WS) identify the well control knowledge and skills essential to well control in the context of a specific job position or role. Therefore, personnel are expected to renew their training credentials in the course designed for their current job position. Content delivery requirements and recommendations seek to maximize learning and knowledge retention.

This *WellSharp Handbook for Accreditation* and any bulletins distributed before publication of the next version, comprise the current well control training and assessment standard for *WellSharp*. To achieve *WellSharp* accreditation, a training provider must develop a program that conforms with this standard. As in any formal accreditation system for training, *WellSharp* looks to each training provider for a clear explanation of how the training they offer meets the requirements identified in this Handbook. To maintain their accreditation, training providers must consistently adhere to the course content and the program policies and procedures that were approved during the application process.

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Definitions and Acronyms

Definitions of curriculum significant or uniquely used terms contained in this document are included in this list to ensure that all parties developing the *WellSharp* well control training use the terminology consistently and recognize the inclusion of basic, proven educational principles in designing the training materials.

Term	Definition
ACD	Accreditation and Credentialing Division, a division of IADC that manages the delivery of the *WellSharp* accreditation program.
Accreditable unit	An organization that is accredited to teach well control to the *WellSharp* standard. Normally called a "training provider," the accreditable unit can be a company, educational establishment, or a training department within a company.
Assessment	The process of reviewing and evaluating a trainee's level of mastery of the learning objectives.
Assessment criteria	The established standards by which a trainee's knowledge and skills are evaluated, as well as the evidence required to meet the standard.
Certificate of Completion	A certificate given to the trainee upon successful completion of a *WellSharp* well control course.
Computer-based training (CBT)	A form of e-Learning training that is completed on a computer, whether through self-contained training modules or otherwise.
Criteria	Typically referring to "accreditation criteria," the standards (principles) on which a well control training program is evaluated for accreditation status. Criteria are based on program requirements and guidelines.
Curriculum	The documented plan, scope, and content for training delivery in a course or courses.
Distant Learning	A course taught using a virtual learning platform to deliver real-time instruction with a live instructor.
e-Learning	A training strategy wherein a trainee receives all or part of a training module via a computer, workstation, or other means of electronic delivery.
Grace period	A set period of time given to a person or organization to comply/conform with new regulations/rules/criteria (beyond the established deadline).
ILT	Instructor-led training comprising lecture in combination with other training strategies (for example, hands-on exercises, demonstration, video, etc.) delivered by a trainer interactively in real time in a face-to-face classroom environment.

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Term	Definition
Instructor Knowledge Test	IADC standardized electronic knowledge test that *WellSharp* instructors must pass, with an 85% or higher, before gaining IADC approval.
IOGP	International Association of Oil and Gas Producers, headquartered in London, which, according to their website, represents the interests "of the upstream industry before international regulators and legislators."
Knowledge	An employee or trainee's clear and practical understanding of the concepts, information, facts, or processes needed to perform his or her job successfully and efficiently. Knowledge can be tested through written or verbal assessments.
Learning objective	A statement, written in measurable terms, that captures the intended outcome of a learning topic.
Learning styles	The method(s) by which an individual trainee processes (learns) the information in a training lesson. In the most basic form, these include visual, auditory or verbal, and kinesthetic (hands-on), but they also involve social and solitary learning. Teaching strategies should correspond to learning styles to the extent possible.
Observed teaching	A requirement for instructor approval that involves the "trainee" instructor being observed and assessed, by a *WellSharp*-approved instructor, while teaching a number of well control classes for which he/she is seeking approval.
Proctor	An independent person who administers the knowledge assessment and monitors trainees as they complete the knowledge assessment to ensure integrity of the assessment process.
Recommendation	An expression in the content of a document conveying that, among several possibilities, one is recommended as particularly suitable, without mentioning or excluding others, or that a certain course of action is preferred but not necessarily required, or that (in the negative form) a certain possibility or course of action is deprecated but not prohibited. *SOURCE: The International Organization for Standardization.*
Requirement	An expression in the content of a document conveying criteria to be fulfilled if compliance with the document is to be claimed and from which no deviation is permitted. *SOURCE: The International Organization for Standardization.*
Self-paced study	A program of study based outside of a normal classroom environment. Content may be delivered through books, audio, video/TV, electronic delivery (CBT/e-learning) or a combination of these.

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Term	Definition
Skills	A trainee's aptitude to perform well control tasks successfully and efficiently as demonstrated using simulator exercises.
Skills assessment	A test involving a simulator to assess that the learning objectives have been met. Criteria for the assessment are documented on a skills assessment checklist.
Standard vs. standards	IADC uses Standard with a capital "S" in referring only to an internationally or regionally accepted model or document providing a program's requirements, guidelines, or characteristics. In contrast, the use of "standard" with a lowercase "s" refers to a program's recommendations, requirements, and criteria developed by IADC and its committees with the goal of gaining wider acceptance and, eventually, the status of "Standard." The use of the plural "standards" typically denotes the individual principles that form a standard or Standard.
Supplement	Additional training beyond the course's required curriculum that is based upon an approved curriculum and additional assessment requirements. Successful completion of a supplement will be recognized on a trainee's course Certificate of Completion.
Training module	Related material that is taught together as a unit. In terms of curriculum, a module is a topic or lesson or a set of topics or lessons that enhance a trainee's knowledge, skills, and/or behavior in regard to the overall subject (e.g., well control). Training modules typically include an assessment at the end of the lesson(s) to determine the trainees' retention of the material.
Train-the-Trainer	A required program of study that teaches a "trainee" instructor the techniques of good, learner-centered instruction.
WellSharp	IADC well control accreditation standard.
***WellSharp* Review Panel**	Panel of selected industry Subject Matter Experts who review applications for *WellSharp* accreditation.
Written assessment	A test involving written questions to assess that the trainee has met course learning objectives.

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1 Introduction

IADC expects its accredited training providers to make all reasonable efforts to avoid any interaction with countries, groups, and individuals subject to sanctions or embargoes imposed by the US Government. Although compliance with this policy is difficult to monitor, IADC specifically prohibits nationals who are normally resident in any of the sanctioned countries from attending an IADC-accredited course. IADC intends for training providers to avoid willful violation of any US sanction applicable to such entities. IADC will not accredit companies or training organizations in countries under comprehensive sanction by the US Government. Additionally, IADC prohibits accredited companies and training organizations from delivering training within such sanctioned countries and to residents of such sanctioned countries.

Training providers should verify each trainee's identity by requiring proof of residence that includes a photo of the trainee, such as a passport or driver's license. Additionally, training providers should incorporate residency questions into candidate trainee applications or enrollment forms.

We highly encourage all training providers to examine the full nature and scope of U.S., EU, and UN sanctions, as well as any other sanction laws applicable to them, or otherwise consult with counsel specializing in such sanctions. Information about Sanctions Programs and Country Information can be found on the US Resource Center webpage.

1.1 How IADC Can Help

The *WellSharp* program is based on the principle that proper training—emphasizing the knowledge and practical skills critical to successful well control—is a foundational necessity for producing competent rig crews. Working together with operators, drilling contractors, professional trainers, and well control specialists, IADC members have developed quality benchmarks.

WellSharp 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.

WellSharp offers the building blocks for a consistent, effective well control culture throughout an organization. *WellSharp* comprises the Drilling Operations and the Well Servicing Tracks of well control training.

1.1.1 Drilling Operations Track

The Drilling Operations Awareness-level training is aimed at support personnel who are not directly involved with well control. At the Drilling Operations Introductory level, *WellSharp* provides basic well control knowledge for floorhands, derrick workers, and non-technical personnel. The Drilling Operations Driller level addresses practical well control skills for derrick workers, assistant drillers, and drillers. Drilling Operations Supervisory-level *WellSharp* is designed and recommended for toolpushers, superintendents, and drilling foremen. This track also offers content for the Surface and Subsea Stacks, as well as an optional Workover Supplement, at the Driller and Supervisor levels.

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1.1.2 Well Servicing Track

The Well Servicing Track comprises training for service company personnel, including but not limited to, field hands, equipment operators, and oil and gas Operator Representatives who are involved in workover and well intervention activities.

The Introductory course is designed for service company personnel and Oil and Gas Operator Representatives personnel. The Equipment Operator courses are designed for, e.g., Workover Contractors; Hydraulic Intervention Contractors and Supervisors; Crew Chiefs; and Snubbing, Wireline, and Coiled Tubing Company Personnel. The Oil and Gas Operator Representative course is designed for, e.g., Operator Company Representatives, Superintendents, and Production Engineers. A Subsea Supplement is available for the Workover and Oil and Gas Operator Representative courses.

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-specific well control skills, rather than skills related to rig-specific equipment, maintenance, and general safety.
   - Targets rig crews.
   - Specifies performance/learning objectives that encompass the following:
     - Comprehension, analysis, and application of preventive well control techniques.
     - Measurement of current wellbore parameters.
     - Recognition of well control event indicators.
     - Proper response to observations and measurements.
2. Provide guidelines and criteria (see Section 2) 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.

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1.3 Standards for Accreditation

1.3.1 Creation of the Standards

The *WellSharp* criteria for accreditation, as defined in this *Handbook for Accreditation*, as well as the curricula for each course, were developed by IADC members acting on behalf of 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 Credentialing Staff and the *WellSharp* 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, *WellSharp* Advisory Panel, and *WellSharp* 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

IADC currently has established curriculum guidelines and accredits training providers to deliver training in the following areas:

Drilling Operations Track:

- Awareness
- Introductory
- Driller (Surface, Subsea, or both stacks)*
- Supervisor (Surface, Subsea, or both stacks)*

*Optional **Workover Supplement** for the Driller and Supervisor courses

Well Servicing Track:

- Introductory
- Coiled Tubing
- Snubbing
- Wireline
- Workover*
- Oil and Gas Operator Representative Course*

*Optional **Subsea Supplement** for the Workover and the Oil and Gas Operator Representative Courses

These courses shall be delivered independently. For example, the Driller and Supervisor Drilling Operations shall no longer be combined.

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1.5 Required Program Fees

The costs of the accreditation program are met through application and annual fees, purchases of *WellSharp* test codes, charges for audits, and contributions by IADC members and others. IADC periodically reviews all program fees and revises the schedule of fees as needed. The current fees and other prices are published as WSP-06 Schedule of Fees, which is available from the IADC website or Accreditation and Credentialing staff.

1.6 Organization of the Handbook

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

Section 2 provides a detailed explanation of all accreditation criteria.

Section 3 describes the accreditation process, including the review of the application and the decision to accredit.

Section 4 documents IADC's expectations of the accredited training provider.

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1.7 Overview of the Process

To achieve and maintain accreditation, a training provider must:

- Maintain Internet access in order to (1) obtain necessary IADC documents and forms from IADC's website (www.iadc.org/wellsharp/) and (2) work within the *WellSharp* Database system (https://iadc.wellsharp.org/login)—e.g., to schedule classes, pay for certificate codes, print trainee certificates.
- Create a training program that conforms to all *WellSharp* criteria.
- Apply for accreditation and provide all requested supporting documentation and fees. See Section 2.
- Upon achieving accreditation, continually adhere to all *WellSharp* criteria and operating procedures. See Section 3.

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2 Requirements for Accreditation

This section provides the requirements for gaining *WellSharp* accreditation, including the policies and procedures that must be in place before applying for accreditation. The core criteria contained in this section shall be regarded as a baseline standard for course design, content, delivery, administration, assessment, and quality control.

2.1 Accreditable Unit

WellSharp accreditation is available to an "accreditable unit," which is a company or organization—or an entity within a company or organization—that has the following required components:

- A clearly designated authority figure, i.e., a director, manager, or head of the unit who has primary authority over and operational oversight responsibilities for the training entity seeking *WellSharp* accreditation and who has the authority to manage the activities of the well control training entity in accordance with this standard.
- A primary management and administrative location where the unit's accreditation and training records are stored.
- Administrative and process controls (e.g., clearly communicated policies and standard operating procedures) that govern the well control training activities of the entire unit.

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 satellite facilities. If the satellite facilities share administration, personnel, budget, equipment, etc., that facility is considered integral to the main well control training program. Therefore, the satellite facilities are considered part of the accreditable unit with the primary unit accountable for their operations. If the operation of the satellite facilities is not managed by the primary unit, they are considered separate and must seek separate accreditation.

Accreditable units may not change their organizational structure, as defined in the Application for Accreditation or as formally amended thereafter, nor may they remove deficient facilities from evaluation.

In applying for accreditation under *WellSharp*, the accreditable unit (hereafter referred to as the training provider) must conform to the criteria and operating procedures outlined in this section. The applicant is required to supply evidence of conformance during the application process that will be verified at the time of the audit.

2.2 Pre-Application Considerations

General requirements for accreditation are as follows:

- Training providers shall agree to employ adult-learning-based training methodologies.
- All well control training instructors who will be delivering course material must possess well control subject matter expertise for the course(s) to be delivered and shall be suitably qualified through training and experience as well as in educational principles. (See Section 2.10 for more details).

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- The curriculum defined for each *WellSharp* course shall serve as the core curriculum for accredited well control training (see the course-specific WSP-02 documents for details). The curriculum and related assessments will vary according to level and stack qualification.
- The training provider shall observe any and all statutes and governmental regulations that bear upon its activities including, but not limited to, the prevailing standards of well control training content, and health, labor, and safety requirements of the country, state, and district in which it is located.

Membership in IADC or membership in any association or industry organization shall not be required as a condition for gaining or maintaining accredited status under this well control training program. However, it is beneficial to become a member for a variety of reasons, including the opportunity to take advantage of member-pricing on the *WellSharp* Schedule of Fees.

2.3 *WellSharp* Training Tracks and Course Types

WellSharp curricula and associated training delivery requirements are designed to be relevant to the trainee's role and well control responsibilities. Therefore, a person's job role or function defines the course/training level the trainee should complete.

WellSharp has two tracks of training: Drilling Operations and Well Servicing.

2.3.1 Drilling Operations Track

A training provider may be accredited to offer one or more of the following four (4) well control courses for the Drilling Operations track:

- Awareness Course—Well Control Awareness
- Introductory Course—Introduction to Well Control
- Driller Course—Well Control for Drillers of Drilling Operations
- Supervisor Course—Well Control for Supervisors of Drilling Operations

These four (4) IADC well control courses for Drilling Operations are described in Section 2.4. Further curricula details are provided in the appropriate WSP-02-DO document for each course.

2.3.2 Well Servicing Track

A training provider may be accredited to offer one or more of the following six (6) well control courses for the Well Servicing track:

- Introductory Course—Introduction to Well Control
- Service Company Equipment Operator courses (each as a standalone course):
  - Coiled Tubing Well Control
  - Snubbing Well Control
  - Wireline Well Control
  - Workover Well Control
- Oil and Gas Operator Representative Workover & Intervention Well Control

These six (6) IADC well control courses for Well Servicing are described in Section 2.5. Further curricula details are provided in the appropriate WSP-02-WS document for each course.

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2.4 Drilling Operations Track Course Descriptions

2.4.1 Awareness Course

This course is the *WellSharp*-recommended training for persons in positions identified as needing an awareness of well control operations. See Appendix A for a list of personnel for whom the course is recommended. The course should be available to personnel in support roles (e.g., for all personnel working near or in support of the drilling, workover, or completion operations, including office and non-drilling rig personnel). See the WSP-02-DO-A curriculum document for details.

Instructor led training (ILT), self-paced study workbook, or e-Learning (e.g., computer-based training [CBT], web-based training, or other electronic delivery) may be used for delivery of the *WellSharp* Awareness course's content. If delivered through ILT, the course must be taught separately from the other *WellSharp* courses and must be at least 4 hours in length. If other delivery methods are used, the course length will vary based on the learner's pace of study, but all course content must be covered.

A written knowledge assessment is optional. Certificate of Attendance shall be issued to trainees completing a *WellSharp* Awareness course. Recertification at this level is not required.

2.4.2 Introductory Course

This course emphasizes kick prevention and detection and is recommended training for personnel identified in Appendix A. This course curriculum incorporates both surface and subsea topics, with the majority of the topics being relevant to both surface and subsea operations. See the WSP-02-DO-I Curriculum for details of the course content.

ILT, self-paced study workbook, or e-Learning (e.g., CBT, web-based training, or other electronic delivery) may be used for delivery of the *WellSharp* Introductory course. If delivered through ILT, the course will be a minimum of 12 hours and must be taught separately from the other *WellSharp* courses. If delivered through self-paced study workbook or e-Learning, the course length will vary based on the learner's pace of study, but all course content must be covered.

Completion of a *WellSharp*-approved knowledge assessment is required. Simulator exercises and assessment are not required for this course. The accredited training provider must ensure each trainee's completion of the study material (whether through completion of the ILT course or other delivery methods) before providing the trainee an opportunity to take the knowledge assessment.

Training providers shall issue a Certificate of Completion to each trainee upon successful completion of the course. Continuation of certification for the target audience should be maintained, with certificates remaining valid for 5 years.

Demonstration of Introductory course knowledge is recommended of drilling contractor personnel before they are permitted to enroll in the Driller course for the first time. (See Section 2.6.4 for details on how to satisfy the Driller course prerequisite.)

2.4.3 Driller Course

The Driller course is designed for personnel who are engaged in drilling operations that have responsibility for detecting a kick and shutting in the well. This course focuses specifically on the Driller's primary responsibilities rather than on advanced calculations and well control methods. It includes kick prevention, influx detection, well monitoring, introduction to barrier management, and well shut-in. See the WSP-02-DO-D Curriculum for details of the course content.

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The course is recommended training for the target audience identified in Appendix A.

This course must be delivered as ILT. Simulator exercises are required. A *WellSharp* knowledge assessment and simulator assessment are also required.

All persons taking the Driller level course for the first time must provide evidence of having passed the Introductory course knowledge assessment before enrolling for the Driller course. (See Section 2.6.4 for further details.)

The Driller course must be delivered separately from any other *WellSharp* course. However, trainees requiring a Surface Stack and those requiring a combined Surface and Subsea Stack certification may take the Driller Surface Stack portion of the course together. (See Section 2.6.8 for details.)

Training providers shall issue a Certificate of Completion to each trainee upon successful completion of the course. Continuation of certification for the target audience should be maintained, with certificates remaining valid for 2 years.

The Driller course is a prerequisite for drilling contractor personnel entering the Supervisor course for the first time.

2.4.4 Supervisor Course

The Supervisor course addresses more advanced well control topics such as well kill operations and well control risk management. It builds upon the kick prevention, influx detection, introduction to barrier management, and well monitoring content of the Driller course; therefore, successful completion of the *WellSharp* approved Driller course is recommended for drilling contractor personnel before taking the Supervisor course. See the WSP-02-DO-S Curriculum for details of the course content.

The Supervisor course is recommended training for the target audience as defined in Appendix A.

This course must be delivered as ILT. Simulator exercises are required. A *WellSharp* knowledge assessment and simulator assessment are also required.

The Supervisor course must be delivered separately from any other *WellSharp* course. However, trainees requiring a Surface Stack and those requiring a combined Surface and Subsea Stack certification may take the Supervisor Surface Stack portion of the course together. (See Section 2.6.8 for details.)

Training providers shall issue a Certificate of Completion to each trainee upon successful completion of the course. Continuation of certification for the target audience should be maintained, with certificates remaining valid for 2 years.

2.4.5 Drilling Operations Supplements

Well control training supplements may be added to Drilling Operations Driller and Supervisor course curricula. These supplements provide standard content for specialized topics that certain trainees may require over and above the material covered in the course. A supplement will not replace existing course content, but will be in addition to, and an enhancement of, existing course content. Supplements are not available as a standalone course.

Additional training time will be required for each supplement, with the amount of additional time dependent upon the topic of the supplement.

A trainee's *WellSharp* Certification of Completion will reflect not only the name of the course completed but also will list the name of all supplements completed in conjunction with the course.

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2.5 Well Servicing Track Course Descriptions

2.5.1 Introductory Course

This course emphasizes kick prevention and detection and is recommended training for personnel identified in Appendix A. This course curriculum incorporates both surface and subsea topics, with the majority of the topics being relevant to both surface and subsea operations. See the WSP-02-WS-I Curriculum for details of the course content.

ILT, self-paced study workbook, or e-Learning (e.g., CBT, web-based training, or other electronic delivery) may be used for delivery of the *WellSharp* Introductory course. If delivered through ILT, the course will be a minimum of 14 hours and must be taught separately from the other *WellSharp* courses. If delivered through self-paced study workbook or e-Learning, the course length will vary based on the learner's pace of study, but all course content must be covered.

Completion of a *WellSharp*-approved knowledge assessment is required. Simulator exercises and assessment are not required for this course. The accredited training provider must ensure each trainee's completion of the study material (whether through completion of the ILT course or other delivery methods) before providing the trainee an opportunity to take the knowledge assessment.

A Certificate of Completion shall be issued to each trainee successfully completing the course. Continuation of certification for the target audience should be maintained, with certificates remaining valid for 5 years.

2.5.2 Service Company Equipment Operator Courses

The following four specific courses are designed for service company equipment operators:

Coiled Tubing

The Coiled Tubing course addresses topics such as risk awareness and management, well control principles and calculations, barriers, influx fundamentals, gas characteristics, fluids, wellbore equipment, rigging, pressure control equipment, well kill in preparation for well intervention, complications, testing, and related policies. See the WSP-02-WS-CT-EO Curriculum for details of the course content.

The Coiled Tubing course is recommended training for the target audience as defined in Appendix A. This course must be delivered as ILT. A *WellSharp* knowledge assessment is required.

The Coiled Tubing course must be delivered separately from any other *WellSharp* course. (See Section 2.6.1 for details.)

A Certificate of Completion shall be issued to each trainee successfully completing the course. Continuation of certification for the target audience should be maintained, with certificates remaining valid for 2 years.

Snubbing

The Snubbing course addresses topics such as risk awareness and management, well control principles and calculations, barriers, influx fundamentals, gas characteristics, fluids, wellbore equipment, snubbing equipment, well kill in preparation for dead well intervention, testing, and related policies. See the WSP-02-WS-CT-EO Curriculum for details of the course content.

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The Snubbing course is recommended training for the target audience as defined in Appendix A. This course must be delivered as ILT. A *WellSharp* knowledge assessment is required.

The Snubbing course must be delivered separately from any other *WellSharp* course. (See Section 2.6.1 for details.)

A Certificate of Completion shall be issued to each trainee successfully completing the course. Continuation of certification for the target audience should be maintained, with certificates remaining valid for 2 years.

Wireline

The Wireline course addresses topics such as risk awareness and management, well control principles and calculations, barriers, influx fundamentals, gas characteristics, fluids, wellbore equipment, pressure control equipment, reasons for wireline operations, surface equipment, subsurface equipment, well kill in preparation for well intervention, testing, and related policies. See the WSP-02-WS-CT-EO Curriculum for details of the course content.

The Wireline course is recommended training for the target audience as defined in Appendix A. This course must be delivered as ILT. A *WellSharp* knowledge assessment is required.

The Wireline course must be delivered separately from any other *WellSharp* course. (See Section 2.6.1 for details.)

A Certificate of Completion shall be issued to each trainee successfully completing the course. Continuation of certification for the target audience should be maintained, with certificates remaining valid for 2 years.

Workover

The Workover course addresses topics such as risk awareness and management, well control principles and calculations, barriers, influx fundamentals, gas characteristics, fluids, wellbore equipment, rigging, pressure control equipment, well kill in preparation for well intervention, testing, well control drills, and related policies. See the WSP-02-WS-CT-EO Curriculum for details of the course content.

The Workover course is recommended training for the target audience as defined in Appendix A. This course must be delivered as ILT. A *WellSharp* knowledge assessment is required.

The Workover course must be delivered separately from any other *WellSharp* course. (See Section 2.6.1 for details.)

A Certificate of Completion shall be issued to each trainee successfully completing the course. Continuation of certification for the target audience should be maintained, with certificates remaining valid for 2 years.

2.5.3 Oil and Gas Operator Representative Workover and Intervention Well Control (“Wellsite Leader”) Course

The Oil and Gas Operator Representative Workover and Intervention Well Control (“Wellsite Leader”) course addresses topics such as risk awareness and management, well control principles and calculations, barriers, influx fundamentals, gas characteristics, fluids, wellbore equipment, well control risks in wireline operations, pressure control equipment, snubbing equipment, coiled tubing operations, well kill in

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preparation for well intervention, testing, well control drills, and related policies. See the WSP-02-WS-OGO Curriculum for details of the course content.

The Oil and Gas Operator Representative Workover & Intervention Well Control course is recommended training for the target audience as defined in Appendix A. This course must be delivered as ILT. A *WellSharp* knowledge assessment is required.

The Oil and Gas Operator Representative Workover & Intervention Well Control course must be delivered separately from any other *WellSharp* course. (See Section 2.6.1 for details.)

A Certificate of Completion shall be issued to each trainee successfully completing the course. Continuation of certification for the target audience should be maintained, with certificates remaining valid for 2 years.

2.5.4 Subsea Supplement

This Subsea Supplement is designed as an optional add-on for the Oil and Gas Operator Representative Course and for the Workover Service Company Equipment Operator Course. This curriculum identifies a body of knowledge and a set of job skills that can be used to provide well control knowledge and skills development for Well Servicing subsea operations.

2.6 Course Design and Delivery

IADC recognizes that training delivery methods that provide higher trainee involvement enhance knowledge retention and are, therefore, considered highly preferable to lecture-focused methods only. Training providers are encouraged to build courses using a variety of adult learning strategies, including scenario-based and simulation methodologies, and to consider differences in trainees' learning styles and generational learning preferences in the course design and delivery. IADC encourages the training provider to employ innovative methods and technologies to deliver the well control training.

2.6.1 General Course Design

In designing their courses, training providers are expected to adhere to the baseline expectations and content requirements provided in this section and in the curriculum documents for each course (WSP-02 and the cross-reference tools submitted to IADC during the application process). Consideration must be given to the target audience, prerequisites, course length, and instruction time allocations.

Drilling Operations Awareness and Introductory Courses: These two courses comprise broad, high-level well control topics specific to stack type. Trainees from surface or subsea rigs can attend the same course. Therefore, certificates do not include a stack type designation.

Drilling Operations Driller and Supervisor Courses: These two courses are intended for position-specific drilling rig workers and require time for topics specific to stack type. Trainees from surface or subsea rigs can attend the same course. The course curriculum defines what content must be delivered for each stack type. In a combined stack course, the training provider shall manage course delivery in a way that assures both stack types are adequately addressed, and delivery is in conformance with specific instructions given in the course curriculum document. Additional course time will be required. Refer to Section 2.6.8 and the course curriculum for instructions regarding how to combine stack type within one course.

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Well Servicing Introductory Course: This course is designed for service company and oil and gas company field personnel. This course comprises broad, high-level well control topics related to coiled tubing, snubbing, wireline, and workover operational support of well control.

Well Servicing Equipment Operator and Oil & Gas Operator Representative Courses: These courses are designed for equipment operators and oil and gas operator representatives. They are discipline-specific standalone courses, and the Workover and Oil and Gas Operator Representative courses have an optional Subsea supplement.

2.6.2 Target Audiences for Courses

The target audiences for the *WellSharp* courses are specified in the course curriculum documents (i.e., WSP-02 forms). These target audience listings include the common job functions/roles, but they may not be all-inclusive. Many optional job titles may exist for each of the job functions. If there is any doubt as to the course an employee should take, the employer should contact IADC for guidance. See Appendix A for a list of recommended course attendees by position.

2.6.3 Course Length and Assessment Requirements

Table 1 and Table 2 define course length and assessment requirements for *WellSharp* courses. Course length provided is the minimum time required. Training providers may increase the amount of time given to each course but may not deliver an accredited course with less than the required amount of time.

Table 1: Course Length and Assessment Requirements for the Drilling Operations Track of Training

Course	Minimum Course Length*	Skills Assessment (Simulator)	Written Knowledge Test
Awareness	4 hr.	–	–
Introductory	12 hr.	–	Required
Driller courses			
Driller, Surface Stack only	24 hr.	Required	Required
Driller, Subsea Stack only	24 hr.	Required	Required
Driller, Combined Surface/Subsea Stack	29 hr.	Required	Required
Workover Supplement (optional)	+8 hr.		Required
Supervisor courses			
Supervisor, Surface Stack only	24 hr.	Required	Required
Supervisor, Subsea Stack only	24 hr.	Required	Required
Supervisor, Combined Surface/Subsea Stack	29 hr.	Required	Required
Workover Supplement (optional)	+8 hr.		Required

* For Driller and Supervisor courses, course length includes simulator assessment time. Knowledge assessment (test) time and time allocated for lunch and breaks are outside this course length calculation.

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Table 2: Course Length and Assessment Requirements for the Well Servicing Track of Training

Course	Minimum Course Length*	Written Knowledge Test
Introductory	14 hr	Required
Service Company Equipment Operator course		
Coiled Tubing	32 hr	Required
Snubbing	32 hr	Required
Wireline	32 hr	Required
Workover	35 hr	Required
Oil and Gas Operator Representative Workover & Intervention course	36 hr	Required
Subsea Supplement	15 hr	Required

* Knowledge assessment (test) time and time allocated for lunch and breaks are outside this course length calculation.

The maximum number of training hours per day shall be limited to 9 hours for each *WellSharp* course, except in countries where governmental regulations limit daily training hours to fewer than 9 hours per day. This time limit applies to any combination of instruction, simulation, exercises, and simulator assessment.

Remediation (or requested time for individual trainees) and time required for homework is in addition to the maximum hours of instruction time; however, trainees are not required to remain in class for more than the maximum time.

2.6.4 Course Prerequisites

The Drilling Operations Awareness and Introductory courses are designed to be standalone courses, and therefore, do not require that a lower level course be completed before enrolling in these courses. Currently, the Well Servicing courses are also considered standalone and do not require a prerequisite. However, the Well Servicing Subsea supplement does require a prerequisite.

The Drilling Operations Driller and Supervisor courses build upon the content of the previous-level course; therefore, they have prerequisites that should be satisfied before enrolling in these courses. Training providers are required to communicate the prerequisites and their purpose to trainees. IADC's policy states that trainees are expected to take the course designed for their current position initially but then can take the next course upon returning to renew their credentials. For example, after a Driller has taken the Driller course, he or she may then choose to take the Supervisor course. This policy is important because, rather than being true "levels," the courses are designed for specific positions. If personnel fail to take the course for their specific position, they will not be assessed on the knowledge and skills required for that position.

Trainees who choose to take the course without having met the prerequisite must sign and return a statement that they understand the requirement. See more information about this option below. **These prerequisite requirements apply to drilling contractor personnel only.** See below for details of these requirements.

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The Well Servicing Subsea Supplement requires that trainees have a valid *WellSharp* Service Equipment Operator Workover Certificate of Completion or Oil and Gas Operator Representative Certificate of Completion before he or she is allowed to take the course supplement.

Drilling Operations Driller Course Prerequisite

Drilling contractor personnel/trainees enrolling in the Driller course for the first time must demonstrate that they possess the foundational knowledge communicated in the Introductory course. Completion of the Introductory course is not required but is recommended.

Two pathways are available for satisfying this Driller course prerequisite:

- Complete the Introductory course, pass the course knowledge assessment, and provide a copy of a valid industry recognized Introductory Course Certificate of Completion when enrolling for the Driller course. The certificate must be less than 1 year beyond the certificate's expiration date. (For other internationally recognized non-*WellSharp* certificates, the training provider must check the validity of the certificate.)
- To receive a Certificate of Completion, the trainee must attend and pass the Introductory course. At time of enrolling for the Driller course, provide evidence of passing the Introductory course knowledge assessment within the past 45 days. This could be considered a "Test out Option," but the trainee would not receive an Introductory certificate upon passing the test.

Drilling Operations Supervisor Course Prerequisite

When enrolling for the Supervisor course, drilling contractor personnel/trainees must provide evidence of holding a valid industry recognized Driller Course Certificate of Completion or evidence of having successfully completed a Supervisor course. (For other internationally recognized non-*WellSharp* certificates, the training provider must check the validity of the certificate.)

If Course Prerequisites NOT Met

When it is determined that the trainee does not meet the course prerequisite requirement through the course-specific optional pathways given, but the trainee insists upon enrolling in the course, the training provider must take the following steps:

1. Inform the trainee that he or she does not meet the course prerequisite.
2. Give the trainee a copy of the **IADC *WellSharp* Course Prerequisites Policy Statement for Trainees** explaining IADC expectations for meeting course prerequisites. Please see Appendix B.
3. Retain a signed copy of **Trainee's Acknowledgement of *WellSharp* Course Prerequisite Requirement**. The training provider may make an acknowledgement form specific to their company, in place of the IADC form.

The training provider may enroll the trainee in the higher-level course but must retain documentation containing the following information about the trainee:

1. Trainee's name
2. Trainee's employer

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Well Servicing Operations Subsea Supplement

When enrolling for the Subsea Supplement, trainees must provide evidence of holding a valid *WellSharp* Service Equipment Operator Workover Certificate of Completion or Oil and Gas Operator Representative Certificate of Completion. The training provider must retain a copy of the Well Servicing Workover or Oil and Gas Operator course certificate as evidence. If the trainee is taking the Service Equipment Operator Workover or Oil and Gas Operator Representative Course in conjunction with the Subsea Supplement, a Certificate of Completion is not required for enrolling in the course.

If Course Prerequisites NOT Met

When it is determined that the trainee does not meet the course prerequisite requirement, the training provider cannot allow enrollment in the course. The Subsea Supplement is not a stand-alone certificate. The supplement can only be an additional training added to the Service Equipment Operator Workover Course/ Certificate or the Oil and Gas Operator Representative Course/Certificate.

2.6.5 Content Delivery Methods

A number of course content delivery methods are available and permitted depending upon the course level. Delivery methods may include one or more of the following:

- Instructor-led training (ILT), which includes lecture and other activities that require instructor interaction directly with the trainees during those activities (for example, demonstrations, short videos [and other media presentations], and hands-on practical exercises).
- e-Learning, which is the broad category of learning that includes CBT and other electronic media; the trainee interacts directly with the electronic media and works independently of the instructor.
- Self-paced study workbook, which does not typically include ILT.
- Simulator as a supplement to the instruction to demonstrate a well control procedure.
- Virtual Instructor Led training, which is defined as a course taught using a virtual learning platform to deliver real-time instruction with a live instructor.

The delivery methods may be employed singly or in combination to enhance the learning experience. IADC requires that training providers utilize multiple methodologies for the higher-level courses, provided the time allocations for the various methodologies remain within prescribed time limits. See the next section for time allocations.

Throughout the course, the Instructor should clearly communicate the course Learning Objectives to trainees, so the trainees understand what knowledge they are expected to retain and skills they are expected to demonstrate.

2.6.6 Instruction-Time Allocations by Delivery Type

The minimum course time must be allocated among the various methodologies a training provider may use in delivering course content: lecture, demonstration, practical hands-on exercises, simulator exercises, simulator assessment, etc. At a minimum, the allocation of course time must meet the following requirements:

- Be a reasonable balance between ILT, simulator exercises, other "active" learning and skills development activities, e-Learning, and other methodologies.

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- Simulator Exercises (for courses requiring these exercises):
  - Must not be less than 30% of minimum required course duration. (Simulator assessment time is not included in this percentage.)
  - Require trainees to operate the simulator individually and as part of a team.
  - During simulator exercises, those trainees who are not directly involved in the simulator exercises must spend that time engaged in other training activities. These may include kill sheet calculations, CBT, or other exercises.
- While CBT may be included in course delivery, individual trainees must not spend more than 4 hours of the minimum course time on CBT exercises.
- Instructor-led time:
  - Shall occupy the majority of the minimum-required course time.
  - Shall include simulator assessments (for courses requiring this assessment).
- Each trainee must be engaged in training or simulator assessment for the full course duration. They may not leave the training center as long as scheduled training activities are underway.

2.6.7 Class Sizes

The class size approved for each course (up to the maximum) will be determined by the number of well control simulators available, number of instructors participating in the course delivery, classroom space, course length, and course being delivered.

The maximum allowable class size for the Drilling Operations Track is as follows:

- Thirty-six (36) trainees in an Awareness course
- Eighteen (18) trainees in an Introductory course
- Eighteen (18) trainees in Driller and Supervisor courses, depending on the number of simulators. See Table 3 below for information about how simulator numbers determine class size at these levels.

Table 3: Maximum Class Size for Driller and Supervisor Courses.
(Based on One Instructor and Minimum Course Length)

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

The maximum allowable class size all Well Servicing Track courses is eighteen (18) trainees.

When applying for Accreditation, the training provider is required to specify the maximum class size for which the course is designed, the minimum course duration, and how the learning for trainees will be managed during simulator exercises, other exercises, and skills assessments.

Important: Trainees for different course levels may **not** be combined into one class.

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2.6.8 Combining Stack Types

WellSharp permits combining stack types within the same course in accordance with specific guidelines provided in the curriculum document for each course under the Drilling Operations track. The training provider is responsible for managing classes with "combined stack" trainees in a way that assures each stack type is adequately addressed in the course. Material from both stack types must be included, and additional course time is required for delivery of the combined stack content. See specific curriculum for details on additional training topics and additional time required for combining stack types.

Stack content may be delivered in a way that the surface and subsea topics are mixed throughout the course or the subsea topics are covered as discrete "modules" at some stage during the course. The training provider's Application for Accreditation must provide details of how the combined stack course is to be managed.

See Section 0 Training Assessment Process for guidance on the assessment options available to trainees in combined stack courses.

2.6.9 Well Control Training Supplements

Delivery of supplemental content requires that additional training and assessment time be added to the standard minimum course delivery time.

A Workover Supplement may be included in Drilling Operations Driller and Supervisor courses.

A Subsea Supplement may be included in the Well Servicing Service Equipment Operator Workover and Oil and Gas Operator Representative courses.

2.7 Training Manual Contents and Requirements

Training providers are required to submit their course training manual to IADC for review and approval. The approved training manual shall be provided to trainees at the beginning of the course, and trainees must be encouraged to keep a version of this manual for future reference. This requirement applies to all courses, except the Awareness-level course within the Drilling Operations track.

The training manual must include subject matter appropriate for the course level and stack type in conformance with the *WellSharp* curriculum requirements. It must also include the following:

- Table of Contents
- Chapters
- Page numbers
- Glossary of terms (may be provided as a separate reference)
- Key well control formulae for the specific training topic (may be provided as a separate reference)
- Index (optional, but recommended)

The training provider may include the full curriculum content in one manual or may include the primary curriculum content in one manual with separate documents/handouts for additional explanation, newly added topics, stack types, or supplemental content.

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The manual may be printed or provided in an electronic format but must have the capability of being displayed by each individual trainee during the course (e.g., on a computer or an electronic tablet). If a printed manual is used during the course and then is retrieved from the trainee at the end of the course, an electronic version (e.g., CD-ROM, Memory Stick, etc.) must be given to the trainee to keep after the course.

The manual(s) used must be submitted to IADC for review as part of the Application for Accreditation.

2.8 Simulation and Other Practical Exercises

For the Driller and Supervisor Drilling Operations courses, training providers must develop simulator and other practical exercises that complement the course content being delivered. Exercises shall model the type of operation for which the trainee will be assessed.

Each trainee must perform simulator and other practical exercises as required by the curriculum.

For the courses requiring simulation, the equipment used to provide each trainee with hands-on learning and assessment must have all of the functions listed in Section 2.8.1 below and must be approved by IADC.

The following provides specific requirements for conducting simulation exercises:

- Maximum of three-person teams on one simulator for simulator exercises.
- Minimum of three simulation exercises per team during relevant Drilling Operations courses.
- At least 30% of the minimum required course duration must be dedicated to hands-on simulator exercises for Drilling Operations courses (i.e., stand-alone course 7 hours and 12 minutes and combined course is 8 hours and 42 minutes).
- The 30% simulator exercise time does not include time spent on the skills assessment.
- Allocation of time to each individual exercise is at the discretion of the training provider; however, each trainee shall have sufficient time to practice identified skills on the simulator.

In each case above, an instructor will be in the simulator room for a number of hours, potentially separated from trainees who are not participating in the simulator exercises. Training providers must explain in their application how they will manage simultaneous activities and ensure that all trainees are engaged appropriately in multiple activities. For example, if half of the class is in the simulation room, the training provider must explain what activities the other half is engaged in (such as kill sheets, calculations, e-Learning, a video), as well as how the instructor ensures successful completion of all learning activities.

2.8.1 Simulator Capabilities

Simulators used in the Driller and Supervisor Drilling Operations courses must meet the following general requirements:

- A minimum of one (1) interactive workstation(s) per trainee who is directly manipulating controls.
- A minimum of 1 interactive or visual only workstation if other trainees are involved in the simulation.

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- Must be capable of simulating either surface stack, subsea stack or both stack types.
- Allow for real-time audible communication (two-way) between instructor and all trainee(s) involved in simulation.

  Examples

  - **In-person training environment** – Face-to-face interaction or two-way audible technology (Radios, speaker/mic, Audio/visual conferencing software, etc.)
  - **Remote training environment** – Two-way audible technology
- Allow for real-time monitoring & functioning by the instructor of all user interfaces.
- Allow for instructor analysis & recording of a trainee(s) performance from beginning-to-end of a simulation. Instructor must be capable of saving, either a printed or a digital file, all required data during the simulation.

Key data to be recorded must include drillpipe and casing/choke pressures, strokes per minute, pit level changes, casing shoe pressure, formation fluid pressure and bottomhole pressure, all of which must be scalable against time and/or strokes pumped.

In Well Servicing courses, simulation is used only for demonstration and practice. No skills assessment is required.

Simulator Operational Capabilities for Driller and Supervisor Courses

For *WellSharp* Driller and Supervisor Drilling Operations courses, detailed simulator operational capabilities are defined in Appendix C.

Simulator Operational Capabilities for Well Servicing Courses

For *WellSharp* Well Servicing courses, the simulators used for practical skills exercises must allow trainees to demonstrate the following, as applicable to course being delivered:

- Detailed forward circulating (e.g., Driller's method) operation.
- Maintenance of constant BHP while circulating an influx through the choke lines and choke.
- Detailed bullheading operation.
- Startup and shutdown procedures, including communication with pump operator.

Specific Well Servicing skills exercise requirements are defined in the course cross reference document.

Simulator Design Requirements

Detailed requirements regarding simulator design for conducting skills exercises and assessments are defined in Appendix C.

2.8.2 Other Practical Exercises

IADC encourages utilization of a variety of other practical exercises other than simulator exercises. The training provider will be asked to provide details of these exercises in the Application for Accreditation.

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Other practical exercises may include, but are not limited to, the following:

- Calculations
- Individual or team problem-solving
- e-Learning modules
- Individual small device simulations (e.g., computer- or tablet-based)
- Equipment inspection
- Teamwork involving case studies

2.9 Facilities and Equipment

All training facilities of the accreditable unit must be described in the Application for Accreditation. Training facilities may be located at the central location of the accreditable unit or may be located elsewhere but have strong management and administrative ties to the central location of the accreditable unit. (If needed, refer to Section 2.1 for a definition of "accreditable unit.")

The applicant must provide training facilities and equipment information to satisfy every criterion defined in this section. The facilities may be "fixed" (previously approved) facilities or offsite facilities (used by traveling schools).

2.9.1 Fixed-Facility Classrooms

All training facilities ("fixed facilities") used for course delivery must be described in the Application for Accreditation (WSP-03).

Facility floor plans (with dimensions) shall be provided for all classrooms and other rooms utilized for course delivery, simulation, and other practical exercises. The floor plans should include a sketch of classrooms and room layout, inclusive of dimensions and designation of simulator locations. Space should be large enough:

- For the trainees to be seated at a distance apart so that each trainee can carry out individual work during classroom activities and written assessment
- To place training equipment
- To allow room for the instructor to carry out duties
- To meet local/state/national regulations for access and egress requirements

Course administration areas do not have to be designated on the floor plan.

At time of the audit, the floor plan must be found to match the actual physical characteristics of the facility. If the facility or floor plans change during the application process or at any time after gaining accreditation, the training provider must notify IADC of these changes before the next audit.

The facility must have lighting and ventilation that meet local, state, or national regulations for a "general office" work area.

IADC recommend simulator exercises and assessments are conducted in a separate room from instruction or other training activities. If the simulator exercises must be conducted in the same classroom, the simulator(s) should be visually separated from trainees not engaged in the exercises (e.g., portable screen or other means of partitioning the room).

Other off-premises facilities may be used for administration of the written and simulator skills assessment if use of those facilities has been pre-approved by IADC. Whether

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operated by the same training provider or operated by a third party, these facilities must be identified in the Application for Accreditation.

When a separate facility is to be utilized for assessments, the applicant must report where the assessments will take place and must provide the minimum requirements the training provider will use in selecting the alternate facility.

2.9.2 Traveling Schools

Applicants for accreditation who plan to deliver *WellSharp* courses at locations other than the designated facilities identified and described in the application must define the minimum criteria for selection of remote training location facilities. The applicant must demonstrate that the selection criteria meet the intent of the *WellSharp* facilities requirement as defined above in Section 2.9.1. In addition, classes for traveling schools must be Scheduled in the *WellSharp* Database at least 2 weeks in advance of the exam date for that class.

2.9.3 Instructional Resources

Educational aids and equipment, if utilized for instruction, should be reported on the application. The following are examples of additional equipment that should be reported:

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

2.10 Qualifications of Instructors and Skills Assessors

Instructors employed or otherwise utilized by *WellSharp*-accredited training providers must be qualified and pre-approved by IADC to teach each *WellSharp* course individually. Specific requirements are based on the course level and stack type for which the instructor is requesting approval. Either the training provider or an instructor may submit an application for *WellSharp* instructor approval.

Instructor approval may take up to 90 days 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 evidence of meeting the requirements. Delay in supplying required information, or payment, to IADC will delay the approval processes and 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 3 months. Upon closing an incomplete application, the applicant will forfeit the application fee, and must reapply if they wish to continue pursuing Instructor approval.

The applicant is encouraged to check the application and other materials for completeness before submitting the application package to IADC.

Once approved as a *WellSharp* instructor, the instructor is expected to maintain his or her approval by demonstrating his or her knowledge and skills.

Approved *WellSharp* instructors may teach for multiple accredited training providers. Approved instructors are limited to affiliation with a maximum of four (4) training providers at a time. To be registered to teach for a specific training provider, the

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instructor must have been included in the training provider's Application for Accreditation or may be added as an approved instructor for the training provider at a later date. Training providers are responsible for requesting that IADC add instructors—who have been previously approved by IADC—to their instructor registry.

Maintenance of IADC instructor approval is achieved by instructors submitting to IADC evidence of their being actively engaged in delivery of *WellSharp*-accredited courses and supplying other documentation as specified in Section 2.10.6. **This "recertification of instructors" is required every 5 years.**

Sections 2.10.1 through 2.10.8 provide details of instructor approval requirements.

2.10.1 General Requirements

Requirements differ for new instructors seeking approval and current instructors seeking to maintain approval. The requirements also vary according to the course level(s) the instructor requests approval to teach.

Before embarking on the approval process, prospective new instructors for *WellSharp* courses will need to meet specific requirements based on their previous work and teaching experience, as well as well control knowledge. Their knowledge and previous experiences will dictate the course(s) they may be initially approved to teach.

After being initially approved at a specific course level, the instructor can then progress to teaching higher levels per the requirements in this section.

Further details of instructor requirements for initial approval are noted in Section 2.10.2 below. Sections 2.10.3 and 2.10.4 provide details on gaining approval for additional course levels and supplements. Section 2.10.5 defines the requirements for skills assessors who may be approved to deliver skills assessments in Drilling Operations courses only. Approval as skills assessor may be used as a stepping stone to full instructor approval, giving the individual time to gain classroom teaching experience and accumulate the required training hours.

All *WellSharp* instructors and skills assessors, once approved, are required to maintain their approval levels. See Section 2.10.6 for requirements for maintaining *WellSharp* approval.

2.10.2 Initial Approval of Instructors

Requirements for gaining initial approval to teach a *WellSharp* course are dependent upon the course for which approval is requested. The requirements each applicant must meet are defined in this section. See the subsection for the specific course to determine the requirements and evidence the applicant needs to submit with the Application for Instructor Approval (WSP-05).

Instructors who satisfy the initial requirements for any course level and are approved by IADC shall automatically be approved at all lower course level(s). Additional requirements or additional applications will not be required.

Instructor approval may take up to 90 days 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 evidence of meeting the requirements. Delay in supplying required information, or payment, to IADC will delay the approval processes and 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 3 months. Upon closing an incomplete application, the

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applicant will forfeit the application fee, and must reapply if they wish to continue pursuing Instructor approval.

The applicant is encouraged to check the application and other materials for completeness before submitting the application package to IADC.

Drilling Operations Awareness Course

Minimum requirements for instructors seeking approval to teach the Awareness course are defined in Table 4. The applicant for this level must satisfy each of the three requirements. Requirement 1 provides optional pathways for demonstrating that the applicant meets the requirement.

Table 4: Minimum Requirements for Initial Approval of Awareness Course Instructors

Drilling Operations Awareness Course Instructors
Requirement 1: Experience *(one of the following four options)*
1. Wellsite, rig, or oil industry experience—Worked 6+ months in oil-related industry. 2. Instructional experience—Worked 3+ months on rig with training as part of job function. * 3. Instructional or teaching experience—Have 12+ months experience as a fulltime vocational instructor or as a teacher in secondary education or higher level; rig experience not required. 4. Other work experience—Minimum 12+ months working in any industry and possessing a college degree in science/technical discipline or relevant vocational certification; rig experience not required.
Requirement 2: Well Control Knowledge *(Required)*
1. Provide evidence of holding a valid, industry-recognized well control certificate at Introductory level or higher.
Requirement 3: Other Training *(Required)*
1. Successfully complete an IADC-approved Train-the-Trainer classroom skills course.

*Job function: not a fulltime instructor but has training duties (for example, safety officer, H_2S specialist, or fire officer).

For details on how to upgrade from Awareness level to a higher course level, see Section 2.10.3 for details.

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Drilling Operations Introductory Course

Minimum requirements for instructors seeking approval to teach the Introductory course are defined in Table 5. The applicant for this level must satisfy each of the four requirements. Requirement 1 provides optional pathways for demonstrating that the applicant meets the requirement.

Table 5: Minimum Requirements for Initial Approval of Drilling Operations Introductory Course Instructors

Drilling Operations Introductory Course Instructors
Requirement 1: Experience *(Choose one of the following four options)*
1. Wellsite, rig, or oil industry experience—Worked 6+ months on rig-floor or in role that requires an Introductory or higher-level certification (as stated in Appendix A). 2. Instructional experience—Worked 12+ months on rig with training as part of job function. * 3. Instructional or teaching experience—Worked 18+ months as fulltime vocational instructor or as teacher at secondary education or higher level; rig experience not required. 4. Other work experience—Worked 24+ months in any industry and possessing a college degree in science/technical discipline or holds a relevant vocational certification; rig experience not required.
Requirement 2: Well Control Knowledge
1. Provide evidence of passing the IADC Instructor Well Control Knowledge Test at the Driller level or higher.
Requirement 3: Other Training (*Required)*
1. Successfully complete an IADC-approved Train-the-Trainer classroom skills course.
Requirement 4: Observed Teaching**
1. Teach the equivalent*** of **two (2)** full Introductory courses (classroom delivery) supervised by a *WellSharp* instructor approved for the Introductory course or level higher. This must be completed within 24 months prior to applying for *WellSharp* approval.

* Job function: not a fulltime instructor but has training duties (for example, safety officer, H2S specialist, or fire officer).

** Guidance on how to supply evidence of meeting Requirement 4: Observed Teaching is provided on WSP-05.

*** "Equivalent" means that the trainee teaches all course modules for the designated number of courses, but these may be delivered in multiple courses over the span of 24 months. The accumulative number of teaching hours should equal the number of required courses multiplied by the minimum course length for that course.

Instructors who satisfy the initial requirements for Introductory-level approval may also apply for approval at the Awareness level. No additional requirements need to be met for approval at the Awareness level.

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Drilling Operations Driller Course

Minimum requirements for instructors seeking approval to teach the Driller course are defined in Table 6. The applicant for this level must satisfy each of the four requirements. Requirement 1 provides optional pathways for demonstrating that the applicant meets the requirement.

Table 6: Minimum Requirements for Initial Approval of Drilling Operations Driller Course Instructors

Drilling Operations Driller Course Instructors
Requirement 1: Experience *(Choose one of the following six options)*
1. Wellsite, rig, or oil industry experience—Worked 6+ months in role that requires a Driller or Supervisor Certification (as stated in Appendix A).
2. Wellsite, rig, or oil industry experience—Worked 24+ months in a role that requires an Introductory or higher-level certificate (See Appendix A).
3. Wellsite, rig, or oil industry experience—Worked 24+ months in industry and possessing relevant technical degree.
4. Instructional experience—Worked 18+ months on rig with training as part of job function. *
5. Instructional or teaching experience—Worked 24+ months as fulltime vocational instructor or as teacher at secondary education or higher level; rig experience not required.
6. Other work experience—Worked 24+ months in any industry and possessing a college degree in science/technical discipline or holds a relevant vocational certification; rig experience not required.
Requirement 2: Well Control Knowledge
1. Provide evidence of passing the IADC Instructor Well Control Knowledge Test at the Driller level or higher course level.
Requirement 3: Other Training *(Required)*
1. Successfully complete an IADC-approved Train-the-Trainer classroom skills course.
Requirement 4: Observed Teaching**
1. Teach the equivalent*** of **two (2)** full Driller courses (classroom delivery, simulator exercises, and assessments) supervised by a well control instructor approved by *WellSharp* for the Driller or higher course. The approved *WellSharp* instructor and the trainee instructor must sign the assessment record and submit the records along with the other evidence. This must be completed within 24 months prior to applying for *WellSharp* approval.

* Job function: not a full-time instructor but has training duties (e.g., safety officer, H_2S specialist, or fire officer).

** Guidance on how to supply evidence of meeting Requirement 4: Observed Teaching is provided on WSP-05.

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*** "Equivalent" means that the trainee teaches all course modules for the designated number of courses, but these may be delivered in multiple courses over the span of 24 months. The accumulative number of teaching hours should equal the number of required courses multiplied by the minimum course length for that course.

Instructors who satisfy the initial approval requirements for Driller course level may also apply for approval at the Introductory and Awareness levels. No additional requirements need to be met for approval at the Awareness or Introductory level.

Drilling Operations Supervisor Course

Minimum entry-level requirements that instructors seeking approval to teach the Supervisor course must meet are defined in Table 7. The applicant for this level must satisfy each of the four requirements. Requirement 1 provides optional pathways for demonstrating the applicant meets the requirement.

Table 7: Minimum Requirements for Initial Approval of Drilling Operations Supervisor Course Instructors

Drilling Operations Supervisor Course Instructors
Requirement 1: Experience *(Choose one of the following four options)*
1. Wellsite, rig, or oil industry experience—Worked 24+ months in role that requires a Driller or Supervisor Certification (as stated in Appendix A). 2. Wellsite, rig, or oil industry experience—Worked 36+ months in role that requires an Introductory or higher-level certification (as stated in Appendix A). 3. Wellsite, rig, or oil industry experience—Worked 36+ months in industry and relevant advanced technical degree. 4. Wellsite, rig, or oil industry experience—Worked 60+ months and relevant technical degree.
Requirement 2: Well Control Knowledge
1. Provide evidence of passing the IADC Instructor Well Control Knowledge Test at the Supervisor course level.
Requirement 3: Other Training
1. Successfully complete an IADC-approved Train-the-Trainer classroom skills course.
Requirement 4: Observed Teaching**
1. Teach the equivalent*** of **two (2)** full Supervisor courses (classroom delivery, simulator exercises, and assessments) supervised by a well control instructor approved by *WellSharp* for the Supervisor course. The approved *WellSharp* instructor and the trainee instructor must sign the assessment record and submit the records along with the other evidence. This must be completed within 24 months prior to applying for *WellSharp* approval.

* Equivalent Job Position: any position identified as Target Audience for the Driller or Supervisor level certification.

** Guidance on how to provide evidence of meeting Requirement 4: Observed Teaching is provided on WSP-05.

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*** "Equivalent" means that the trainee teaches all course modules for the designated number of courses, but these may be delivered in multiple courses over the span of 24 months. The accumulative number of teaching hours should equal the number of required courses multiplied by the minimum course length for that course.

Instructors who satisfy the initial approval requirements for the Supervisor course level may also apply for approval at the Driller, Introductory, and Awareness course levels. No additional requirements need to be met for approval at the Awareness, Introductory, or Driller level.

Well Servicing Courses

The requirements for instructors seeking approval to teach the Well Servicing Courses are defined in Table 8 and Table 9.

Table 8: Minimum Requirements for Initial Approval of Well Servicing Introductory Course Instructors

Well Servicing Introductory Course Instructors
Requirement 1: Experience *(Choose one of the following four options)*
1. Wellsite, rig, or oil industry experience—Worked 6+ months on rig-floor or in role that requires an Introductory or higher-level certification (as stated in Appendix A). 2. Instructional experience—Worked 12+ months on rig with training as part of job function. * 3. Instructional or teaching experience—Worked 18+ months as fulltime vocational instructor or as teacher at secondary education or higher level; rig experience not required. 4. Other work experience—Worked 24+ months in any industry and possessing a college degree in science/technical discipline or holds a relevant vocational certification; rig experience not required.
Requirement 2: Well Control Knowledge
1. Provide evidence of passing the IADC Instructor Well Control Knowledge Test at the Introductory level.
Requirement 3: Other Training (*Required)*
1. Successfully complete an IADC-approved Train-the-Trainer classroom skills course.
Requirement 4: Observed Teaching**
1. Teach the equivalent*** of **two (2)** full Introductory courses (classroom delivery) supervised by a *WellSharp* instructor approved for the Introductory course or level higher. This must be completed within 24 months prior to applying for *WellSharp* approval.

* Job function: not a fulltime instructor but has training duties (for example, safety officer, H2S specialist, or fire officer).

** Guidance on how to supply evidence of meeting Requirement 4: Observed Teaching is provided on WSP-05.

*** "Equivalent" means that the trainee teaches all course modules for the designated number of courses, but these may be delivered in multiple courses over the span of 24 months. The accumulative number of teaching hours should equal the number of required courses multiplied by the minimum course length for that course.

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Table 9: Minimum Requirements for Initial Approval of Well Servicing Equipment Operator or Oil and Gas Operator Representative Course Instructors

Well Servicing Course Instructors
Requirement 1: Experience *(Choose one of the following four options)*
1. Wellsite, rig, or oil industry experience—Worked 24+ months in role that formerly required a WellCAP Well Servicing Fundamental or Supervisory level certificate or a *WellSharp* Well Servicing Equipment Operator or Oil & Gas Company Representative certificate (as stated in Appendix A).
2. Wellsite, rig, or oil industry experience—Worked 36+ months in role that formerly required a WellCAP Well Servicing Introductory level certificate (as stated in Appendix A).
3. Wellsite, rig, or oil industry experience—Worked 36+ months in industry and relevant advanced technical degree.
4. Wellsite, rig, or oil industry experience—Worked 60+ months and relevant technical degree.
Requirement 2: Well Control Knowledge
1. Provide evidence of passing the IADC Instructor Well Control Knowledge Test for the course to which the applicant is applying. (To teach all courses, the applicant must take and pass each test separately.)
Requirement 3: Other Training
1. Successfully complete an IADC-approved Train-the-Trainer classroom skills course.
Requirement 4: Observed Teaching**
1. Teach the equivalent*** of **two (2)** full course-specific Well Servicing courses (classroom delivery, simulator exercises, and assessments) supervised by a well control instructor approved by *WellSharp* for the specific course. The approved *WellSharp* instructor and the trainee instructor must sign the assessment record and submit the records along with the other evidence. This must be completed within 24 months prior to applying for *WellSharp* approval.

* Equivalent Job Position: any position identified as Target Audience for the Driller or Supervisor level certification.

** Guidance on how to provide evidence of meeting Requirement 4: Observed Teaching is provided on WSP-05.

*** "Equivalent" means that the trainee teaches all course modules for the designated number of courses, but these may be delivered in multiple courses over the span of 24 months. The accumulative number of teaching hours should equal the number of required courses multiplied by the minimum course length for that course.

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2.10.3 Upgrading Instructor Approval to a Higher Course Level

Instructors may seek approval to teach another course once they have achieved the initial *WellSharp* instructor approval. Advancing to a higher approval level can only be achieved one level at a time. Instructors seeking approval to teach higher level courses must submit the required paperwork to IADC and provide evidence of satisfying the requirements defined in Table 10.

Table 10: Minimum Requirements for Upgrading Instructor Approval

Requirement 1: Teaching at Current Approval Level
Teach equivalent of **two (2)** stand-alone course at the current level of approval before applying for a higher-level course approval (e.g., if an approved Introductory instructor, the Instructor must teach **two (2)** Introductory courses).
Requirement 2: Well Control Knowledge
Provide evidence of passing the IADC Instructor Well Control Knowledge Test for the course to which the applicant is applying.
Requirement 3: Observed Teaching
Complete required "Observed Teaching" requirements (course/classroom delivery and simulator assessment) for the next higher course level under supervision of a *WellSharp*-approved instructor at the new level.

The Train-the-Trainer course is generic across the courses and is to be taken only one time. It does not have to be repeated when seeking approval to teach a new course level.

2.10.4 Adding Approval for Supplements

Instructors requesting to teach Well Control Supplements (described in Section 2.4.5 and 2.5.4) must be a currently approved instructor at the Drilling Operations Driller or Supervisor level or the Well Servicing specific course and must satisfy the following additional approval requirements.

- Successfully complete the IADC Instructor Well Control Knowledge Test specifically designed for the required supplement.
- Submit required form (WSP-05) to IADC for approval.

2.10.5 Skills Assessors

For the Drilling Operations Driller- and Supervisor-level courses, training providers may employ persons who carry out only the skills (i.e., simulator) assessment elements of a course. To qualify as a skills assessor, an individual must meet all the requirements of an instructor approved for the same course level (as defined in Section 2.10.2), except that the skills assessor is not required to satisfy the classroom teaching hours.

The same procedures as stated in Section 2.10.3 minus the classroom instruction elements will apply for upgrading from Driller to Supervisor level. See Section 2.10.6 for requirements on maintaining approval.

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2.10.6 Maintaining Instructor and Skills Assessor Approval

WellSharp-approved instructors and skills assessors must renew their approval every 5 years. Requirements for renewing instructor approval are defined in Table 11. Table 12 lists requirements for renewing approval of skills assessors.

Renewal of approval for all course levels must be achieved at the time the initial approval is due for renewal. Instructors and skills assessors submitting a request for continued approval may continue to carry out their duties provided they have submitted their request for renewal before the expiration date.

Table 11: Requirements for Renewing Instructor Approval

Drilling Operations
Requirements for All Instructors
Provide evidence of having delivered well control instruction for the course(s) the instructor is approved to teach (since last *WellSharp* approval date) in accordance with the following: a. Awareness course Instructors must deliver 60 hours of instruction. b. Instructors at all other course levels must deliver a minimum of 360 hours inclusive of trainees' skills assessments, with the equivalent of at least three courses at the highest level of approval; records of 10 trainees' skills assessments must also be submitted.
Additional Requirements—Awareness Course Instructors (choose one of two options)
1. Provide evidence of holding a currently valid standard well control certificate. 2. Provide evidence of passing the IADC Instructor Well Control Knowledge Test no more than 3 months before date of renewal application.
Additional Requirements—Introductory, Driller, and Supervisor Course Instructors
Provide evidence of having passed the appropriate IADC Instructor Well Control Knowledge Test no more than 3 months before date of renewal application. ***Note***: Test shall be for the highest-level course, as well as stack types and supplements, the instructor is applying to teach.
Well Servicing
Requirements for All Instructors
1. Provide evidence of having delivered well control instruction for the course(s) the instructor is approved to teach (since last *WellSharp* approval date) in accordance with the following: a. Instructors at all course levels must deliver a minimum of 360 hours, with the equivalent of at least three courses at each level of approval. 2. Provide evidence of passing the course appropriate IADC Instructor Well Control Knowledge Test within 3 months of renewal application. **Note**: Test must be for each course and supplement the instructor is approved to teach.

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Table 12: Requirements for Renewing Skills Assessor-only Approval for Drilling Operations

Requirements for persons serving as a Skills Assessor only *(applies to Driller and Supervisor courses only)*
1. Provide evidence of having delivered well control skills training for a minimum of 10 full courses at each course level and stack type approved to assess. (The evidence should be for training delivered since the last *WellSharp* approval date*.)
2. Provide evidence of having delivered minimum of 50 trainee skills assessments for each course and stack type approved to assess and submit 10 assessment records for IADC review. (The evidence should be for assessments since the last *WellSharp* approval date*.)
3. Undergo skills assessment process review by IADC or their representative.
4. Provide evidence of passing the course appropriate IADC Instructor Well Control Knowledge Test within 3 months of renewal. **Note**: Test should be for the course(s), stack types, and supplements the Skills Assessor is approved to teach. If the skills assessor is approved for more than one course and stack type, a combined test should be taken.

* A sampling of assessment records should be submitted for IADC review.

2.10.7 Reinstating Previously Approved Instructors

Instructors whose approval has lapsed will be required to renew by meeting the initial approval requirements for the course level and stack type they want to teach.

2.10.8 Instructor Well Control Knowledge Test

All instructors and skills assessors applying for approval to teach IADC-accredited well control courses, except at the Awareness level, must demonstrate their well control knowledge by completing and passing the IADC Instructor Well Control Knowledge Test.

This test is an independently proctored, standardized, online exam comprising in-depth course-appropriate well control questions. The test is required for instructors teaching Well Servicing or Drilling Operations at all levels except the Awareness-level Drilling Operations course. It is also required for skills assessors engaged in the Drilling Operations Driller and Supervisor course delivery. The intent is to ensure instructors and skills assessors have an in-depth understanding of well control relevant to the curricula the instructor is to teach. Drilling Operations instructors who teach at a number of levels are required to test at the highest level. Well Servicing Instructors must successfully complete an exam for each course they are seeking approval to teach.

The passing score for each Instructor Knowledge Test is 85%.

Instructors and skills assessors teaching both surface and subsea stack types will take one combined stack test for each course at different course levels.

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2.11 Trainee Assessment Process

For the Drilling Operations courses, *WellSharp* requires a twofold assessment process that evaluates the trainee's well control knowledge and skills. For the Well Servicing courses, *WellSharp* requires only a well control knowledge assessment. All courses except the Drilling Operations Awareness course require trainee assessment. The assessments' type and level are course-dependent. Assessment requirements are identified by course in Table 1 and Table 2.

In the Drilling Operations track, the passing rate for the knowledge assessment is 75%, and simulator assessment is 75% for the courses requiring these assessments.

The knowledge assessment process requires each trainee to pass a proctored, standardized, centrally accessed, electronically delivered test. The instructor may be available to answer trainee questions about the testing process but not about the content of the questions.

Training providers and instructors shall not offer a guarantee that trainees will pass the knowledge or skills exams.

2.11.1 Paper Exams

A paper exam may **not** be administered as an alternative to the *WellSharp* Knowledge Assessment.

The only exception is as follows: If the *WellSharp* exam is not yet available in the **approved** language of the course, the training provider may request to use their own paper exam.

- Training providers who must use their own paper exam are required to submit three versions of a 75-question (minimum) knowledge exam to IADC for approval before use. The 75-questions applies to all levels above Introductory for both Drilling Operations and Well Servicing.
    - Training providers who offer a supplement exam, must submit three additional versions of a 30-question (minimum) knowledge exam, to cover the supplemental topics, to IADC for approval before use.
- Training providers who must use their own paper exam are required to submit three versions of a 30-question (minimum) knowledge exam to IADC for approval before use. The 30-questions applies to the Introductory Level exam for both Drilling Operations and Well Servicing.
- Once approved, ONLY these versions of the exam may be used to assess trainees' knowledge during the course.
- As with the online exams, these paper exams must be proctored.
- Paper assessments will cease once the exam is translated into the language of the course.

Important: The course must be taught in the language that the paper test will be administered in.

The language that is assigned when creating the student roster in the *WellSharp* Database must reflect the language in which the course is being taught by an IADC-approved well control instructor. For instance, if the test is set up to be administered in Chinese, the course must be taught in Chinese.

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2.11.2 General Assessment Guidelines

The knowledge assessment contains a set of standard core knowledge questions. These questions must be answered 75% correctly in order to pass the knowledge test.

For the Drilling Operations courses only, the skills (practical) assessment will be performed using the standardized processes (to include standardized assessment criteria and templates) and an approved well control simulator. The skills assessment may be administered by the instructor or by a skills assessor. The trainee must perform safety-critical skills correctly (receiving a 100% passing score on those skills) and must receive 75% passing score on all remaining skills checks.

For the Drilling Operations courses only, passing the course requires passing both the knowledge assessment and the skills assessment. For the Well Servicing courses, passing the course requires passing only the knowledge assessment.

Details on the testing protocol are provided in Appendix D – Testing Protocol.

2.11.3 Drilling Operations Stack Type Assessments

The stack type affects not only *WellSharp* Drilling Operations course content, but also trainee written and simulator assessments.

The Introductory Drilling Operations course contains content for both surface and subsea stack; therefore, the written assessment administered to trainees will be a combination surface and subsea stack assessment. A skills assessment is not required for this course.

WellSharp Drilling Operations offers two standalone assessment options that include stack type: Driller and Supervisor exams. These options affect the management and delivery of both the written and skills assessments. The options are described below.

Option 1: Surface-Stack Only Assessment—This option covers only surface-stack topics. All trainees must complete and pass the surface-stack written assessment and the surface-stack simulator assessment. The trainee passing both assessments will be issued a surface stack only Certificate of Completion.

Option 2: Subsea-Stack Only Assessment—This option covers subsea-stack topics as well as surface topics relevant to subsea operations. All trainees must complete and pass the subsea-stack written assessment and subsea-stack simulator assessment. The trainee passing both assessments will be issued a subsea stack only Certificate of Completion.

Option 3: Mixed Surface-Subsea Stack Assessment—This option provides for assessment of both surface and subsea stack types. The trainee must pass both a combined surface/ subsea written assessment and a subsea-only simulator assessment. The trainee passing both assessments will be issued a combination surface/ subsea stack Certificate of Completion.

Table 13 summarizes the assessment process for the multiple stack types.

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Table 13: Assessment Process for Surface and Subsea Stack Types for Drilling Operations

Training Option	Assessment Requirement
Option 1: Surface Stack course only	Written surface stack knowledge assessment and surface-stack simulator skills assessment
Option 2: Subsea Stack course only	Written subsea stack knowledge assessment and subsea-stack simulator skills assessment
Option 3: Combined Surface/Subsea Stack	Written combined surface/subsea stack knowledge assessment and subsea stack simulator skills assessment

2.11.4 Knowledge Assessments

Numerous groups of subject matter experts (representing all sectors of the industry) developed IADC's *WellSharp* assessments.

The following details apply to the assessments and their administration:

- All questions are stored in a central database owned and maintained by IADC.
- Computer-generated knowledge assessments are customized to course, supplement, and stack requirements.
- The tests are randomly computer-generated with each question's answers randomly shuffled. (Sample test questions are available at http://www.iadc.org/*WellSharp*/sample-*WellSharp*-exams/.)
- Tests are to be given online via computer, electronic tablet, or other electronic device unless local circumstances preclude this delivery. (IADC approval of alternate delivery is required. See Section **Error! Reference source not found.** for details.)
- Only training provider-issued computers may be used for the *WellSharp* Knowledge Assessments. A trainee's personal computer may not be used to take a *WellSharp* exam.
- An independent proctor shall observe all knowledge assessments for the Drilling Operations Driller and Supervisor courses, and for the Well Servicing Equipment Operator and Oil & Gas Operator Representative courses. In order to help ensure the presence of a proctor, the class must be *Scheduled* in the *WellSharp* Database at least 5 U.S. working days in advance of the exam date (at least 2 weeks in advance for traveling schools). The proctor is not required for the Drilling Operations Introductory or the Well Servicing Introductory course's written assessment. See *IADC's Proctor Guide for Training Providers* for more details.
- The knowledge assessment requires a 75% pass rate.
- Maximum time to complete the knowledge assessment is course-dependent. See Table 14 for Knowledge Assessment maximum time allocations.
- Trainees are permitted to ask for clarification regarding what a test question is asking.
- The Instructor must be available to provide clarification, if requested, and will provide clarification only under the supervision of the Proctor.
- Trainees shall be allowed to review missed questions following completion and submission of the test, when taken through the IADC database. A copy of the well

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control topics missed shall be made available to the trainee and/or the trainee's employer.

Table 14: Knowledge Assessments Requirements*

Test Level	Proctor Required	Maximum Time Allowed (hours)
Drilling Operations		
Awareness		Test not required
Introductory		1.5
Driller	✓	2.5
Supervisor	✓	3.5
Workover Supplement	✓	1.25
Well Servicing		
Introductory		1.5
Equipment Operator	✓	3.5
Oil & Gas Operator Rep.	✓	3.5
Subsea Supplement	✓	1.25

* Customers requiring a training provider to add additional test questions that cover their specific requirements (e.g., company specific or local content) are to be in addition to the above time allotments. The trainee's performance on the additional questions will not affect issuance of the *WellSharp* certificate.

All knowledge assessments for Driller and Supervisor Drilling Operations courses and Equipment Operator and Oil & Gas Operator Representative Well Servicing courses shall require an independent proctor to ensure fairness and integrity of the assessments. See Section 2.11.6 for details on proctor responsibilities and qualifications.

2.11.5 Skills (Simulator) Assessment

The Driller and Supervisor Drilling Operations courses require each trainee to complete a skills assessment on a simulator or "live" well. Criteria for performing the skills assessment have been developed by IADC and standardized for worldwide application.

The following details apply to simulator assessments.

- The IADC-approved instructor shall typically be the simulator assessor.
- A training provider may employ an IADC-approved Skills Assessor to carry out simulator skills exercises and assessments during a course only. See Section 2.10 Instructor and Skills Assessor Qualifications for details on *WellSharp* approval procedure for the Skills Assessor.
- No independent proctor is required for simulator assessments.
- Pass grade for simulator assessments is 100% for safety-critical questions and 75% for all remaining questions.

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- Assessments will incorporate a number of pass/fail criteria (e.g., shutting well in with pumps running, maximum kick size).
- Simulators shall store key data to assist with grading and audit. Copies of key data (commonly in graphical format versus time or strokes pumped) together with the Skills Assessment Template shall be available to the auditor during the *WellSharp* audit. Hard copy or electronic format is acceptable.
- Simulator assessment documentation must state the type of problem scenario given to the trainee for the assessment.
- All simulator assessment records are to be signed by the assessor, maintained as part of the trainee's record, and be available for *WellSharp* audit purposes.

The simulator assessment must be carried out in a separate room or in the same classroom that has been segregated by screening trainees who are being assessed from those trainees who are not being assessed. Lecture or discussion-type classroom activities cannot run concurrently with the assessment when the assessment is taking place in the classroom. Further details on the skills assessment are given in Appendix D.

2.11.6 Proctor Qualifications and Responsibilities

A proctor shall be independent of the training provider and any affiliate company, neither directly employed by the training provider nor related to any direct employee of, or contractor to, the training provider. A list of pre-approved proctors has been established by IADC's proctor-management company. Training providers are trained regarding the scheduling of classes.

The proctor's responsibilities include the following:

- Give instruction on test requirements (in conjunction with the training provider), start the test, and restart tests as needed due to any computer malfunctions or safety concern.
- Monitor trainees for cheating or other irregularities.
- Monitor instructor as he/she responds to trainee's requests for clarification of a test question. The proctor will assure trainee is not being directed or given an answer to a test question.
- Alert IADC about any irregularity, e.g., trainee found to be cheating, creating a disturbance, incorrect use of mobile devices.
- Observe the entering of grades for paper exams (where applicable).

Proctor qualification requirements are defined in Appendix E. See *IADC's Proctor Guide for Training Providers* for more details.

2.11.7 Reassessment Policy

An approved instructor or skills assessor must reassess a trainee who fails either the knowledge or skills assessment provided certain criteria are met. A proctor is required for the knowledge reassessment but not for the skills reassessment.

A trainee has passed the course if he or she scores 100% on all safety-critical questions (if required) and 75% or above on all remaining questions in both the knowledge and simulator skills assessments, if applicable.

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Criteria for Reassessment

- A trainee who scores less than 60% on the knowledge assessment fails the course and may not be reassessed. The trainee must repeat and pass the full *WellSharp* training course before being certified.
- If a trainee's knowledge assessment score is from 60% to 74%, one reassessment must be made available. The trainee does not pass the course unless he/she passes the reassessment.
- The trainee who qualifies for reassessment may be reassessed on the same day or may arrange another time for the reassessment.
- The trainee who qualifies for reassessment must complete the reassessment within forty-five (45) days of the original assessment date. Failure of the trainee to complete the reassessment within the allotted time will result in the entire course and full assessment (written and simulator, if applicable) needing to be retaken.
- If applicable, a trainee who does not satisfactorily pass the simulator skills assessment must be given an opportunity to complete one reassessment. The reassessment may take place during the current training course or at another time agreed to by the trainee and the training provider. If the trainee chooses to complete the practical reassessment at a later date, the reassessment must be completed within forty-five (45) days of the original assessment date.
- The reassessment shall not be identical to the original assessment. The computer-generated knowledge assessment will contain different questions. The skills assessment, if applicable, must use a different well scenario.
- The written or skills, if applicable, reassessment may be taken at the site where the original assessment was given or at another facility operated by the same training provider.

Results of Retest Failure

Upon retesting, trainees who again fail to meet the passing standard(s) are required to attend the full course again and then pass the assessments in order to achieve certification.

2.11.8 Testing Protocol

See Appendix D for detail on *WellSharp* testing protocol (procedure).

2.12 Recertification and Advancement

Personnel with well control responsibilities are required to maintain a valid well control certificate, achieving recertification at the course level commensurate with their current job position. For example, a driller is to successfully complete and maintain a Driller certification as long as he/she remains in a driller position. Refer to Table 15 for course-specific recertification frequencies.

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Table 15:
Recertification Requirements by Course

Course	Recertification Requirement (years)
Drilling Operations	
Awareness	None
Introductory	5
Driller	2
Supervisor	2
Well Servicing	
Introductory	5
Equipment Operator	2
Oil & Gas Operator Rep.	2

Personnel are expected to recertify before the expiration of their current well control certificate. There is no grace period for renewal of a *WellSharp* Certificate of Completion.

WellSharp trainees may take more advanced levels of well control training, but not at the exclusion of the level appropriate for the trainee's current position, role, and responsibilities. More advanced training may be taken in preparation for promotion. IADC recommends companies develop a strategy for managing the risks of field promotions that could occur before an employee has earned the appropriate higher-level *WellSharp* certificate.

2.13 Administration and Process Control

Accredited training providers must adhere to program administration requirements, policies, and procedures defined by IADC. These are defined below.

2.13.1 Quality Assurance

An accredited training provider shall have Standard Operating Procedures in place to assure integrity of the Program and strict adherence to the *WellSharp* accreditation criteria. At a minimum, the following processes shall be written and implemented, and the person (or job position) responsible must be identified:

- Verification of trainee identity.
- Verification of trainee eligibility to attend a *WellSharp* course, including maintenance of course prerequisite verification records.
- Control of trainee and other records to assure those records are secure and remain strictly confidential.
- Responding to non-conformities identified during audits and assuring corrective and preventive actions are fully implemented in a timely manner.
- Management of trainee assessments, both skills and knowledge test, and records of assessment.

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- Monitoring for *WellSharp* program updates and assuring updates are implemented.
- Monitoring instructors and trainees to ensure integrity of the *WellSharp* exam.

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

These procedures are to be defined by the training provider, with procedural documents retained and accessible by all employees having responsibility for a specific process.

In-house training programs may rely upon employment processes and records for checking and verifying the identity of the trainee; however, third-party training providers must establish a process for confirming the identity of the individual receiving training and completing the knowledge assessment, and they must adhere to that process.

2.13.2 Quality and Feedback Policy

IADC's Quality and Feedback Policy (ACD-67) must be distributed to each trainee at the beginning of a *WellSharp* course.

The Policy is designed to advise trainees of IADC's commitment to quality training. It also requests those participating in *WellSharp* training to communicate directly to IADC any comments or concerns they may have about the instruction received. Comments may be kept confidential upon request. Options for contacting IADC are via the knowledge testing database, mail, phone, fax, or e-mail.

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

2.13.3 Attendance Policy

Accredited training providers must adopt an Attendance Policy that ensures a trainee 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 trainee misses any portion of the course, the missed portion(s) must be completed before any final written test is administered to that trainee. The missed, and later completed, portion(s) must be documented in the trainee's record. (See Section 2.13.6 for details on managing missed portions.) If a trainee does not complete the missed portion(s) and the final assessments within forty-five (45) days of the initial end of course date, the entire course must be repeated.

2.13.4 Certificate Issuance

All trainees who successfully complete a course shall receive a *WellSharp* certificate as evidence of this successful completion. A *WellSharp* Certificate of Completion will be electronically issued through the *WellSharp* testing database to, and in the name of, only the individual receiving the training and passing the knowledge assessment and, if applicable, the skills assessment. The training provider will provide the trainee with a printout of his or her certificate immediately upon successful completion of the assessment(s).

Certificate and Supporting Records

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

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

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Using the *WellSharp* Database

Training providers, once accredited, will be provided with information and training on how to use (how to manage their course[s] in) the *WellSharp* 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.

2.13.5 Records

WellSharp-accredited training providers must maintain certain required records as evidence of adherence to the *WellSharp* program requirements.

Required records include the following:

- Accreditation records
- Trainee registration and training
- Course delivery and management records
- Quality control records
- Other records as required to document course suspension, missed portions of course, etc.

Unless another location has been approved by IADC before an audit is scheduled, all records must be maintained at the training provider's "primary place of business." The "primary place of business" is the location designated, in the Application for Accreditation, as the training provider's central administrative office. If the training provider chooses to designate a new primary location, this must be communicated to and approved by IADC through a formal program modification (WSP-03M) before an audit is scheduled. Records of any courses conducted at remote or satellite locations or multiple training locations must also be kept at the primary place of business and must be accessible to auditors.

Large commercial organizations having training facilities (referred to as "fixed facilities") located in different geographical areas and having separate administrative and records management centers will be required to submit an Application for Accreditation for each administrative center.

A training provider may request to retain records at a location other than the primary place of business. This request may be made at any time and must be approved by IADC before initiation of the alternate records location. The training provider must show good cause for the satellite records location and must demonstrate that good records control measures are in place. Approval, once granted, may be withdrawn at any time an audit report indicates the alternate location hampers the accessibility or security of the records.

All records should be: 1) complete, 2) accurate, 3) readily accessible at time of audit, and 4) secure. To be deemed "accessible," an auditor must be provided access to all requested records at the designated location upon 2-hours' notice.

Records may be retained electronically or as paper copy. Minimum retention time for records is shown in Table 16.

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Table 16: Required Records and Minimum Records Retention Time

Type of Record	Minimum Retention Time
Accreditation Records	Duration of *WellSharp* Accreditation*
Trainee registration & training records	Duration of the certificate of completion
Course delivery & management records	3 years**
Quality control records	3 years**
Other miscellaneous records	3 years**

* Retain only current versions of required documents (e.g., the current Certificate of Accreditation and letter notifying the training provider of accreditation). Not all versions of the required documents need to be retained.

** Retain until completion of next audit.

Accreditation Records

Accreditation records include, but are not limited to, the Application for Accreditation (WSP-03), IADC's notification of the *WellSharp* accreditation decision, program modifications and variances approved through WSP-03M and WSP-14, and the Certificate of Accreditation. Other records of important correspondence with IADC may also be helpful to retain. These records shall be retained for the life of the accreditation.

Trainee Registration and Training Records

Records must be kept for each trainee. Records documenting a trainee's registration, including evidence of satisfying any course prerequisites, as well as his/her performance and course completion may be kept in either hard copy (paper) or electronic (scanned original) format. These must be retained as long as the trainee's certificate remains valid, or longer if required by local regulations. See Table 15 for the length of time each certificate remains valid.

Trainee records must include the following:

- Trainee information:
  - Trainee's full name (as it appears on the trainee's legal government-issued identification card (ID)
  - Employer (company name)
  - Trainee's contact address (optional)
  - Trainee's email address (optional)
  - Phone number (optional)
  - Job title
  - Trainee's identification number (e.g., employee number, passport number, national identification number, or other ID number assigned by the training provider)

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  - Course attendance record (e.g., class roster or other record)
- Documented evidence of satisfying a course prerequisite (if applicable)
- Written and simulator assessments, if applicable, and reassessment scores (recommended but not required)
- A Skills Assessment Checklist and simulator assessment data record and graph, if applicable
  - The graph is to include trainee name, course level, date, and problem description. Both the trainee and assessor are to sign and date the graph.
- Copy of certificate of completion (optional)
- Records of retraining due to missed portions of the course (if applicable)

Each subsequent *WellSharp* course taken by a trainee requires the completion of a new set of training records containing the above data.

Course Delivery and Administrative Records

Records of course delivery and other administrative processes include any record that documents administrative process and shows the training provider's efforts to manage or control quality of the course delivery.

These records must be completed and retained for each *WellSharp* course taught.

Quality Control Records

IADC requires training providers, once accredited, to maintain records that demonstrate their commitment to quality control of the *WellSharp*-accredited training processes. At a minimum, the accredited training provider shall maintain the following quality control records:

- *WellSharp* and other client audit reports
- Corrective Actions (CA) issued to the training provider
- Record of the training provider's response to CA
- Evidence that an internal program review and instructor evaluation process are in place
- Management of Change for program updates and handling of non-conformities

Other Miscellaneous Records

The *WellSharp*-accredited training provider shall retain any other miscellaneous records that would be necessary to demonstrate adherence to the *WellSharp* accreditation criteria. Examples of such records include documentation of course suspensions, and records of trainees' missing portions of a course and later completing the course. When in doubt about the type of records to retain, contact IADC for guidance.

2.13.6 *WellSharp* Training Interruption Policies

Applicants for *WellSharp* accreditation shall have in place policies and procedures that govern situations that may result in training interruptions, whether a trainee's choice to interrupt/postpone training until a later date or the training provider's decision to suspend training deliver for reasonable cause (e.g., illness of instructor or natural disaster).

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These policies and procedures shall be written and accessible to training provider staff as well as *WellSharp* auditors for review at time of audit.

The following stipulations apply to these policies:

- The trainee must reschedule 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.
- The training shall be resumed at the beginning of the curriculum that was originally interrupted.
- If this provision is used, the training provider must promptly report training interruption to WellSharp@iadc.org on WSP-26.

Provider-Initiated Course Suspension

When, in the judgment of the training provider, it is necessary in the interest of safety to suspend a *WellSharp* course due to severe and unavoidable circumstances (e.g., tropical storm or natural disaster), the *WellSharp* program permits such suspension with resumption of the course at a later date. If an exam has been scheduled in IADC's *WellSharp* Database, that exam must be canceled, communicated through email to the proctor-management company, and rescheduled.

If the course is suspended prior to completion, the course may be resumed with the original trainees, and missed portions completed within 45 days of the date of the course suspension. New trainees may not be added to the class at this stage of the training. The trainees need to complete only the curriculum portions that were missed in the original course. The certificate issued to successful trainees will be dated for the day of the assessment.

If the suspended course was a combination course and the missed portions are later completed within 45 days of the suspension date, the trainees need to attend only the curriculum portions that were missed in the original combination course. The trainees passing the final assessments shall be issued a certificate that reflects successful completion of the combination course. The certificate issued to successful trainees will be dated for the day of the assessment.

IADC-Initiated Suspension

If IADC suspends a training provider's accreditation, any course already begun may not be completed. Refer to Section 4 for additional information on IADC-initiated suspension of accreditation.

2.14 Schedule of Fees

Fees include, but may not be limited to, the following:

- Initial Application for Accreditation fee
- Annual accreditation fee
- Initial Instructor and Skills Assessor application fee
- Instructor and Skills Assessor Renewal Fees
- Fee for additional course that is submitted as a separate application
- Program modification fee

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- Knowledge assessment (test code) fee per trainee
- Audit fees—Expenses associated with the conduct of each *WellSharp* audit are to be reimbursed by the accredited training provider. Audit expenses include the auditor's fee plus reasonable travel expenses.

WellSharp fees are published as WSP-06 Schedule of Fees and can be downloaded from the *WellSharp* website. Fees are periodically reviewed, and when changes are needed, the Schedule of Fees updated, placed on the *WellSharp* webpage, and the changes are communicated to providers.

Initial application and renewal application fees must be paid at the time of application submittal. The review process will not commence until the application or renewal fee is paid. Failure to provide payment within 30 days will result in cancellation of invoice and application. If the invoice for the application fee is canceled due to nonpayment, the training provider may not submit a new application for 90 days.

2.15 Accreditation Agreement

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

- Accept the *WellSharp* accreditation standards and submit necessary information or evidence to maintain accredited training provider status in accordance with procedures set forth in this Handbook.
- Abide by IADC's decision as to the conformance or nonconformance of the training provider with applicable accreditation standards.
- Follow and be controlled by all *WellSharp* operating procedures and rules.
- Assure that the services it provides fully conform to the applicable accreditation standard at all times.
- Ensure accurate and current contact information for the accredited Provider's designated Primary Contact at all times.
- Submit to audits, as required, requested, or otherwise deemed necessary or desirable by IADC.
- Promptly conform to any request of IADC for necessary information if a claim of nonconformance with accreditation procedures or standard is filed against the training provider.
- Monitor IADC's *WellSharp* webpage for any changes to program requirements.
- Reimburse IADC for any expenses associated with investigation of a complaint against the training provider, unless the claim was filed by another training provider and is found to be without merit, in which case the charging training provider shall reimburse IADC.
- Reimburse IADC for expenses incurred in connection with a meritless charge that it files against another accredited training provider.
- Indemnify and hold harmless IADC *et al.*, from all liability, loss, damages, costs, or expenses, including attorney's fees, which may be incurred.

Appendix F provides a list of all forms and documents available for the applicant seeking accreditation.

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2.16 Requested Exceptions and Variations

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 training provider may request a variance from or exception to these specifications by submitting a request to IADC using WSP-14.

A request for variance will be reviewed by IADC. The program will be required to explain or demonstrate how the requested variance meets the intent of the *WellSharp* program and will result in successful development and performance of the trainee's knowledge and skills identified in the *WellSharp* curriculum. If satisfied that the proposed variance maintains the overall philosophy and intent of *WellSharp*, IADC may allow the exception or variation. IADC reserves the right to impose specific conditions, either permanent or temporary, on the training provider in order to ensure the training quality is not compromised by a variance.

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3 Accreditation Process

IADC's Accreditation and Credentialing Division (ACD) brings together stakeholders in the area of well control training to provide input into program decisions. ACD staff facilitates *WellSharp* processes, including program development, program changes, development of resources, quality control, and decisions regarding programs and instructors.

3.1 *WellSharp* Program Decisions

The *WellSharp* Advisory Panel is responsible for high-level decisions regarding the *WellSharp* program (e.g., major curriculum changes, course types, content delivery requirements. IADC's Well Control Committee members then have an opportunity to comment and vote on program changes.

The *WellSharp* Review Panel, under the auspices of IADC's Well Control Committee, has the primary responsibility for decisions regarding accreditation of well control training programs. The Review Panel consists of subject matter experts who, typically, represent operators and drilling contractors. The Review Panel takes into consideration the recommendation of a technical reviewer, also a subject matter expert, who has reviewed materials submitted by the applicant. The final recommendation of accreditation status is submitted by the auditor, who confirms the validity of information provided on the application and submitted materials through evidence gathered at the training provider's primary location.

See Section 3.4 for more details regarding this process.

3.2 Accreditation Application Forms and Documents

To begin the application process, a training provider must first request the *WellSharp Handbook for Accreditation* and the appropriate application forms. The training provider can accomplish this by emailing wellsharp@iadc.org and providing the track and course(s) for which they intend to apply. All program documents and forms are proprietary, and their distribution is carefully monitored.

3.2.1 Initial Application Documents and Forms

The following documents and forms provided to training providers who are applying for accreditation:

- *WellSharp* Handbook for Accreditation (WSP-01)
- Track-specific (Drilling Operations or Well Servicing) Application for Accreditation (WSP-03…)
- Accreditation and Audit Agreement (WSP-04)
- Course-specific curriculum (WSP-02…)
- Course-specific curriculum cross-reference tools (WSP-02X…)
- Facility Floor Plan (WSP-03F)
- Instructor Application (WSP-05)
- Schedule of Fees (WSP-06)
- Simulator Assessment Templates (WSP-07)

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The Application for Accreditation and other forms listed above must be completed and returned to IADC with the required fee and other required training materials. Further information may be requested through the IADC website: http://www.iadc.org/*WellSharp*/request-information/

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 who is not already an approved *WellSharp* instructor. Each new instructor's qualifications must be documented on WSP-05, with one form submitted for each instructor. If the program already has approved *WellSharp* instructors, those instructors should be identified in WSP-03, the Application for Accreditation. See Section 2.10 for more information on instructor qualifications.

3.2.2 Applications to Add a Course/Instructor to an Existing Accreditation

Currently accredited training providers should use WSP-03A to request approval to add additional *WellSharp* courses to their accreditation. This new course will undergo the same review and decision process as the original application.

To add other instructors to a *WellSharp* program, submit WSP-05 to request their approval, or submit WSP-30 to request that an already approved instructor be linked to the program.

3.3 Applying for Accreditation

To initiate the accreditation process, a training provider must submit an application with the required documentation and payment of application fees.

The training provider that seeks *WellSharp* accreditation must be able to prove conformance with all accreditation criteria. Therefore, the applicant seeking accreditation must prepare the accreditation application with a degree of thoroughness to withstand extensive technical review and audit to verify full implementation of all program components.

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

WellSharp Program staff may provide consultative guidance to training providers inquiring about or undergoing the accreditation process but will not engage in completing any part of the application on behalf of the applicant. The application must be complete, and fees must be paid before the application can begin the review process.

All instructors who will deliver well control training, whether employed by or contracted to an accredited training provider, will require IADC approval. The requirements for instructor approval are defined in Section 2.10.

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3.3.1 Application Submission Requirements

In addition to the application fee, a training provider must submit to IADC the completed application(s), related forms, and supporting documentation. To be considered complete, the application must provide the following information:

- Name and address of the training provider with phone, fax, 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 (full address) and phone number of any satellite facilities 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 (WSP-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 at each level to be included in the accreditation)
- Relevant cross-reference tool for each course at each level 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 and checklists used to evaluate student performance against specified skills.
- Training manual and examples of other student handouts in all languages in which the course will be taught

A completed application package may be forwarded to IADC's Accreditation and Credentialing Division (ACD) through wellsharp@iadc.org or through the mail at any time. Once an application is received, IADC will send an application fee invoice. At that time, the application fee may be forwarded to IADC's Accreditation and Credentialing Division (ACD) through WellSharp@iadc.org or through the mail at any time.

Although 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 be held by ACD for 3 months. After that time, the applicant will forfeit the application fee (if it has been paid) and will need to resubmit a complete application if achieving *WellSharp* accreditation remains his/her aim.

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3.3.2 Primary Contact and Signatories of the Application

The Primary Contact will become the principal point of contact between ACD and the accredited training provider. Additional contacts may be designated for administrative rights 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 principal 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, Administrator 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. See Section 4.7.3 for information about the revocation of a program's accreditation.

The Application for Accreditation and the Accreditation/Audit Agreement (WSP-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 also must have authority to manage all aspects of the accreditation program.

3.4 Application Review Process

The accreditation process followed by ACD is illustrated in Flowchart WSP-10. This flowchart outlines the functions of IADC staff, the technical reviewer, the Review Panel, and auditors, as well as identifies the major actions that occur during the accreditation process. It also prescribes general rules and procedures for the operation of the accreditation program. IADC seeks to uphold due process throughout the review of applications and other materials.

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

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3.4.1 Steps to Accreditation

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

After a training provider submits the application and supporting documents and pays the fee, the completed submittal package undergoes an IADC internal review, a technical review, a Panel review, and an audit. Upon initial application, an institution must offer at least one course. Once a training provider has been accredited, IADC will provide a password for access to the remaining proprietary forms and documents.

The Training Provider's application and the Technical Reviewer's recommendation are sent electronically to be reviewed and approved separately by the *WellSharp* Review Panel for that course to be recognized under *WellSharp*. The provider then receives a decision on their accreditation. Additional course levels or types of courses may be added later (through an additional application and fee). For additional course recognition, the training provider must provide similar course materials and relevant information necessary for the *WellSharp* Review Panel to make a decision to recognize the additional course or level.

After being awarded accreditation, providers must follow the approved curriculum, maintain quality controls, provide information to auditors, pay all required fees, maintain all required records, and schedule/complete training on use of the IADC *WellSharp* Database.

Please refer to WSP-10 for a visual interpretation of the accreditation process.

3.4.2 Anticipated Timeline

WellSharp accreditation may take up to 90 days 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 processes and decision. The number of times ACD will review an application and allow necessary changes is limited to three. Staff will provide a courtesy review and allow needed changes twice. If the application is still incomplete or otherwise unsatisfactory upon the third review, the application will be rejected.

Incomplete applications and/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 3 months. Upon closing an incomplete application, the applicant will forfeit the application fee and must reapply if they wish to continue pursuing *WellSharp* accreditation. When an application is rejected for failure to pay the application fee or to respond to requests for additional information, the applicant must wait 90 days to submit a new application.

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 if 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 application processing time.

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Applicants are encouraged to familiarize themselves with the *Handbook for Accreditation* (WSP-01) and to check the application(s) and other materials for completeness before submitting the application package to IADC.

3.4.3 IADC Staff Review

ACD oversees all aspects of the *WellSharp* 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.

3.4.4 Technical Review

ACD staff assigns the completed application to a designated technical reviewer. The technical reviewer is a subject matter expert in the area of well control. The technical reviewer examines the application and submitted materials for accuracy and for adherence to all technical criteria of the *WellSharp* 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 ACD staff as to the disposition of the application.

The training provider's application(s) and the technical reviewer's recommendation are returned to ACD staff for sending the electronic ballot to the *WellSharp* Review Panel for final approval.

3.4.5 Review Panel Functions, Members, and Protocol

The *WellSharp* Review Panel 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 *WellSharp* program.

Review Panel members are to exercise professional judgment in making accreditation and other *WellSharp* program recommendations and in offering guidance to accredited programs and ACD staff.

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Membership

The Review Panel has three voting members. The Review Panel members are nominated by the Well Control Committee and approved by IADC. A member of IADC staff serves as a liaison and 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 in the interim 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 decision/vote, that position is not counted in determining a quorum unless an Alternate member is available to step into the position. At least three votes are required for a decision to be made. 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 recuse himself or herself from the discussion and decision on that program. If a member does not voluntarily recuse 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 required to withdraw from discussion of, and decision on, a particular program.

3.4.6 Audits

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

Audits may be conducted by IADC staff, an individual auditor (or team of auditors), or professional audit company representing IADC. The *WellSharp* 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.

ACD's Quality Assurance/Quality Control (QA/QC) staff has the responsibility for administering all aspects of the audit and audit process, including assigning 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.

See Section 4.5 for more information about audits.

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 person who will conduct the audit. Detailed arrangements for the audit are coordinated through direct contact between the training provider and the auditor(s).

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Refusal of an audit by an applicant for accreditation, or by an accredited organization, will result in immediate closure of the accreditation or application. 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 until the audit is completed.

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 training/assessment records.

During an audit, the auditor will utilize the Audit Report (WSP-61) to ensure that all criteria are met. 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 assessments (whenever feasible)
- Examination of other aspects of the program's operations

If *WellSharp* training is underway during the audit, the auditor will not disrupt classroom activities but must be allowed (by the training provider and instructor) to observe the training. If training is not underway, the auditor may require an instructor to explain or demonstrate certain aspects of the content delivery and related processes.

IADC reserves the right for the auditor to examine student folders, class rosters, the original application, any updates to the application, *WellSharp* 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 conformance to the criteria. Any non-conformity identified during the audit will be discussed with the training provider. At the conclusion of the visit, the auditor will ask the training provider to acknowledge that 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 non-conformities with the *WellSharp* 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 Report to the training provider for the provider's record.

In the event a non-conformity with *WellSharp* 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.

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3.5 Review Panel Recommendations

Before rendering a recommendation regarding accreditation status, the *WellSharp* Review Panel reviews the application(s) and recommendations submitted to them by ACD staff.

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

The Review Panel may make recommendations via a ballot system.

The *WellSharp* Review Panel also decides if an instructor applicant receives *WellSharp* Instructor approval or not.

3.6 Accreditation Status

IADC staff communicates via email the accreditation decisions listed below for a new application or for a program change requested by an existing accredited provider.

- **Full Accreditation**—Full accreditation may be granted to any program that, in the judgment of the Panel and IADC staff, meets the criteria in a satisfactory manner as evidenced by information available about the program and confirmed by an initial audit.
- **Accept** a program change request after review by the appropriate parties (Review Panel, IADC Accreditation staff, IADC QA/QC staff, Technical Reviewer).
- **Reject** the application or program change 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.

3.7 Notification of Accreditation and Approval Decisions

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

ACD issues a Certificate of Accreditation after completing a successful audit. Each newly approved instructor is also issued an Approved Instructor Certificate identifying the course(s) for which the instructor has been approved.

In the event that an application is rejected, IADC staff 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.

3.8 Withdrawal of Application

At any time before IADC takes action to grant or refuse accreditation to an applicant program, the Authorizing Person may withdraw the application without prejudice and is free to reapply in the future.

3.9 Monitoring and Implementing 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 means of delivery of the *WellSharp* course, change in instructors, changes initiated as a result of IADC's changing program requirements. E-mail or other written notification of implementation of change should be sent to the IADC program coordinator within 30 days of implementing the

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change except in cases where IADC specifies the response timeline(s) for compliance with new program requirements.

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 (e.g., merger with another company (by using the WSP-03M Modification Form)).

Changes to course content or delivery that must be reported include revision of course manual, addition or change in simulator equipment, removal of an instructor, change in simulator exercises or assessments, and renovation of training facility. Any change, even those that improve and enhance the *WellSharp* curriculum delivery, must be reported if it is a deviation from or an alteration of the program as approved by IADC. Addition of a new instructor or new course must first be reviewed and approved by IADC before being implementing by the training provider.

Accredited training providers are required to implement *WellSharp* program criteria changes initiated by IADC. 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 within the requested timeline is subject to having their training program placed on Probation. Continued failure to implement requested changes and to supply evidence of implementation would result in revocation of the accreditation.

3.10 Period of Accreditation and Renewal

Award of accreditation is effective as of the date of Panel approval. Accreditation is valid for 3 years.

Maintenance of accreditation is contingent on continued adherence to accreditation requirements, timely reporting of program and training activity, and payment of annual and other fees as described in the Schedule of Fees.

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.
- Complete WSP Application document(s)

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4 Maintaining Program Integrity

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

4.1 Privileges of Accreditation

Upon receipt of the formal *WellSharp* Certificate of Accreditation, an applicant may publicly stipulate the Program's compliance with the *WellSharp* 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 though the following methods:

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

Information about *WellSharp*-accredited training providers may also be distributed at conferences and communicated through advertisements or other means. Regardless of means of promotion, each listing of *WellSharp*-accredited training providers will include all providers accredited at the time of the event, publication, IADC website update, or other type of promotion.

IADC shall periodically publish additions to or deletions from the directory of *WellSharp*-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 *WellSharp* logo on course materials and in promotion of the accredited course. Please refer to logo usage guidelines for additional information regarding the Logo Policy.
https://www.iadc.org/logo-usage-guidelines/

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 decision regarding accreditation.
- The term "IADC-Accredited" may be used by Program that has been notified that it has received accreditation.
- A *WellSharp* logo and trademark may be used. The nonexclusive use by Program is hereby licensed to Program upon official notification that it has received accreditation. Guidelines for logo usage are published by IADC and should be strictly followed.

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,

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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 program applications and accreditation records will be held in strict confidentiality All official forms/documents submitted are held for the duration of the active accreditation.

4.2.1 Information Sharing

IADC may share general information about company affiliation(s), program accreditation status, and instructor certification status. This information may be shared with other accrediting bodies and interested parties.

All records relating to accreditation shall be kept confidential except the following:

- Listings of all categories/courses of accredited programs that are published on IADC's website.
- Information IADC (or a representative of IADC) is legally required to disclose.
- Accreditation status (and other pertinent information) of an accredited training provider.

4.3 *WellSharp* Program Changes

From time to time, the *WellSharp* accreditation criteria 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 *WellSharp* program changes IADC initiates. Therefore, providers (i.e., the Primary Contact) are required to periodically monitor the *WellSharp* program website for program updates. Program updates and changes are communicated to the Primary Contact, and it is the Primary Contact's (Responsible Party's) responsibility to ensure that the accredited program continues to meet program requirements.

4.4 Voluntary Withdrawal from the Program

An accredited training provider may request its removal from the *WellSharp* accreditation program at any time. Such request must have been submitted in writing 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

Program audits are important steps in awarding and in maintaining *WellSharp* accreditation. They provide 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 accreditation and periodic follow-up audits performed by an auditor, as well as records and other administrative audits periodically performed by ACD staff.

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Repeat audits shall be conducted every 3 years. However, IADC reserves the right to conduct an audit of an accredited training provider at any time. 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 3.4.6. For more information about audits, contact QA/QC.

4.6 Corrective Actions (CAs)

A Corrective Action (CA) will be required 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.

Once a non-conformity has been identified and issued to a training provider and a CA is required, 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.

Once IADC has closed a training provider's program, the training provider may be required to wait up to one (1) year, with no guarantee of obtaining accreditation, before reapplying for Accreditation. A new application fee and audit will be required.

Failure to resolve a CA in the allotted time will lead to disciplinary actions, including those discussed in Sections 4.7 and 4.8 below.

4.7 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 IADC staff, technical reviewer, Review Panel, or auditor.
- Provider fails to resolve a complaint issued against the Provider.
- Provider interferes with a Proctor or Proctor service during a knowledge assessment or abetting a Proctor's noncompliance with Proctor policies and procedures.

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- 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.

4.7.1 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 *WellSharp* 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.

4.7.2 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 *WellSharp* test codes, must cease delivery of *WellSharp* training immediately, and must refrain from issuing *WellSharp* certificates. Access to the *WellSharp* database for Providers will be suspended for the duration of the Suspension.

In addition, IADC will remove the Provider's listing on IADC's *WellSharp* 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).

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4.7.3 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 *WellSharp* Accredited Training Provider webpage and will remove their access to the *WellSharp* database.

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

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

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

Once IADC has closed a training provider's program, the training provider may be required to wait up to one (1) year, with no guarantee of obtaining accreditation, before reapplying for Accreditation. A new application fee and audit will be required.

4.7.4 Miscellaneous

Resolution of Disputes and Forum Selection Clause

Any dispute arising from or relating to the IADC *WellSharp* 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.

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4.8 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
- Interference with a Proctor or Proctor service during a knowledge assessment or abetting a Proctor's noncompliance with Proctor policies and procedures
- Failure to follow quality control procedures
- Cheating, conducting components of the program fraudulently, and/or compromising the quality of the program

4.8.1 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.

4.8.2 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.

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4.8.3 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 *WellSharp* database.

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

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

4.8.4 Miscellaneous

Resolution of Disputes and Forum Selection Clause

Any dispute arising out of or relating to the IADC *WellSharp* Program, its policies and procedures, or its administration shall be resolved in the following manner:

1. First, by notifying the 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, a 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 Sending Feedback 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 *WellSharp* accredited training. One of the ways IADC can continue to improve the accreditation system is by listening and responding to the views of training providers, their instructors and students, the student's employer (if different from the training provider), and the public. IADC wishes to ensure the following:

- Providing feedback is as easy as possible.
- Feedback regarding accredited training providers is treated with confidentiality and professionalism.

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- Depending on the severity of the feedback, or urgency of a complaint, IADC will investigate, collect information, and ensure all sides have an opportunity to provide evidence before taking appropriate action.
- Accredited training providers may also receive feedback and use it to improve the quality of the instruction they provide.

All well control training stakeholders are encouraged to provide feedback about the *WellSharp* Program or its administration. Feedback may be made in person, in writing, by fax, by e-mail, by telephone, or through a form on the IADC website. https://www.iadc.org/accreditation/feedback/

IADC contact information is provided in Table 17.

Direct all feedback 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 (e.g., course date, location, training provider, instructor, etc.). Providing contact information is optional but will assist IADC if follow-up communications are required.

Table 17: Alternate Ways to Contact IADC's Accreditation and Credentialing Division

In Person:	IADC Headquarters
	3657 Briarpark Drive, Suite 200
	Houston, TX 77042 USA
In Writing:	IADC – ACD Quality Department
	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:	https://www.iadc.org/accreditation/feedback

4.10 Conformance with Other Standards

The *WellSharp* program may satisfy the requirements of other industry or governmental standards. In the event *WellSharp* training is conducted in a way to satisfy both *WellSharp* 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.

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Appendix A: Recommended Course for Each Position

IADC recommends that persons in the positions identified in Table 18 and Table 19 take the *WellSharp* course level as identified. Commonly accepted position titles are used here. Other titles may apply for the same position.

Table 18: Recommended Courses per Position or Job Role for the Drilling Operations Track of Well Control Training

Company Type	Positions
*IADC recommends that persons in these positions or roles complete the **Awareness level course.***	
Contractor	Roustabout, deck crew, and Crane Operators
	Rig Move Captain or Rig Move Offshore Installation Manager
Operator	Office-based Operations Geologist
	Office-based logistics coordination personnel and logistics supervisors
Service Company	Casing running personnel, casing-crew (non-supervisory)
	Downhole Equipment Specialists/Operators
	MWD/LWD, Surveying Engineer or Operator
	Other non-supervisory and non-critical drilling or intervention personnel
	ROV personnel (non-supervisory)
	Well Control Trainers—in-house or commercial (for Awareness course)
	Supply and support vessel Watch Officers and Captains
	Oilfield equipment repair personnel
	Tubular and rig inspection personnel
	Wireline/Slickline crews (non-Supervisory)
*IADC recommends that persons in these positions or roles complete the **Introductory Level Course**.*	
Contractor/Operator/ Service Company	MPD/UBD wellsite service personnel (non-supervisory)
Contractor	Barge Engineer
	Captain/Master
	Pit Hand, Pump Hand, Shaker Hand
	Subsea Engineer
	Derrickman
	Floorman
Operator	BOP/Subsea Engineer, LMRP Engineer and Dynamic Positioning Officer
	Operator Offshore Installation Manager (OIM)
	Onshore monitoring crew
	Wellsite Geologist and office-based Operations Geologist
	OIM (for installations not primarily involved with drilling)

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Company Type	Positions
Service Company	Casing Crew Supervisor
	Cementer
	ROV personnel (supervisory)
	Mud Engineer
	Mud Logger/Wellsite Drilling Data Engineer
	Directional Driller
	Fishing Tool Operators (non-pressure operations)
*IADC recommends that persons in these positions or roles complete the **Driller Level Course.***	
Contractor	Assistant Driller
	Driller (including intervention and workover drillers)
Service Company	Coiled Tubing Driller
*IADC recommends that persons in these positions or roles complete the **Supervisor Level Course**.*	
Contractor	Office-based Rig, Drilling, or Intervention Manager
	OIM for mobile offshore drilling and intervention units
	Rig Superintendent Offshore (most senior offshore leader for rig owner, may be OIM)
	Toolpusher (including Intervention and Workover Toolpusher)
	Drilling contractor Wellsite Engineer
Contractor/Operator/ Service Company	MPD/UBD Wellsite Supervisor

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Company Type	Positions
Operator	Assistant Wellsite Supervisor / Wellsite Drilling Engineer
	Drilling/Intervention Wellsite Supervisor, superintendent, or company representative (day & night)
	Office-based Drilling Supervisor / Superintendent (not involved with well design approval)
	Office-based Intervention or Workover Supervisor (not involved with well design)
	Office-based Wellsite Completions Engineer/Senior Completions Engineer
	Office-based Drilling Engineer/Senior Drilling Engineer
	Office-based Drilling Manager (first line management)
Contractor	Office-based Drilling Supervisor / Superintendent (involved with well design approval)
	Office-based Intervention or Workover Manager
	Office-based Intervention/Workover Engineer/Senior Engineer
	Well Control Engineers
Service Company	Well Control Engineers
	Well Control Specialists

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Table 19: Recommended Courses per Position or Job Role for the Well Servicing Track of Well Control Training

Company Type	Positions
IADC recommends that persons in these positions or roles complete the ***Well Servicing Introductory Well Control Course.***	
Service Company and Oil and Gas Company Representatives	Coiled Tubing Field Personnel Snubbing Field Personnel Wireline Field Personnel Workover Field Personnel Oil and Gas Company Representatives Field Personnel
IADC recommends that persons in these positions or roles complete the ***Service Company Equipment Operator—Coiled Tubing course.***	
Coiled Tubing Company Personnel	Supervisor Engineer Coiled Tubing Operator
IADC recommends that persons in these positions or roles complete the ***Service Company Equipment Operator—Snubbing course.***	
Snubbing Company Personnel	Supervisor Engineer Snubbing Operator
IADC recommends that persons in these positions or roles complete the ***Service Company Equipment Operator—Wireline course.***	
Wireline Company Personnel	Field Engineers (Cased Hole/Open Hole/Pipe Recovery/Production Logging/TCP) Senior Field Engineer (CH/OH/PR/PL/TCP)
IADC recommends that persons in these positions or roles complete the ***Service Company Equipment Operator—Workover course.***	
Operator	Contractor Superintendent (Consultant)
Rig Workover Contractor (Workover-Only Company)	Supervisor (Rig Foreman) Crew Chiefs (Driller)
Hydraulic Intervention Contractor	Frac Supervisor Pumping Supervisor Hydraulic Workover Equipment Supervisor

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*IADC recommends that persons in these positions or roles complete the **Oil and Gas Operator Representative Workover & Intervention (Wellsite Leader) course**.*	
Operator (Oil & Gas Company)	Wellsite Leaders/Company Man Company Representative All Superintendents Production/Company Engineer Consultant General Desk Engineer/Specialist/SME
Non-Operator (Oil & Gas) Company Personnel	Position determined by Service Company and Oil and Gas Company that is **not a direct operator of equipment or supervisor of that equipment** and determined to need a broader scope of knowledge greater than his/her product line. **NOT intended to replace or be equivalent to Equipment Operator Course.**
*IADC recommends that persons in these positions or roles complete the **Subsea Supplement for either of the following courses:*** ***Oil and Gas Operator Representative Workover & Intervention course*** ***Service Company Equipment Operator—Workover course***	
Operator	Wellsite Leaders/Company Man Company Representative All Superintendents Production/Company/Intervention Engineer General Desk Engineer/Specialist/SME
Rig Workover Contractor (Workover Only Company)	Supervisor (Rig Foreman) Vessel Captain/Offshore Installation Manager (OIM) Driller/Assistant Driller/Toolpusher Rig contractor Wellsite/Office Engineer Office-based rig, drilling, or intervention manager

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Appendix B: Course Prerequisite Policy Statement

Prerequisites for IADC's *WellSharp*® Drilling Operations and Well Servicing courses are as follows:

Drilling Operations Prerequisites

IADC's *WellSharp* Driller- and Supervisor-level Drilling Operations courses build upon important foundational knowledge and skills acquired in the preceding *WellSharp* course(s). These courses are, therefore, a prerequisite for enrolling in a higher-level course. All trainees enrolling in a Driller or Supervisor course are expected to successfully complete the prerequisite course(s) before advancing to the next higher-level course. Evidence of doing so should be provided to the training provider at time of enrolling in the course.

Important: See the ***Drilling Operations Prerequisite Acknowledgement Form*** for trainees on the following page. Trainees who do not meet the prerequisite must sign this form, and the training provider must retain the signed form.

Well Servicing Subsea Supplement Prerequisite

To enroll in IADC's *WellSharp* Well Servicing Subsea Supplement, trainees must provide a valid WellSharp Service Equipment Operator Workover Certificate of Completion **or** an Oil and Gas Operator Representative Certificate of Completion. The training provider must retain a copy of the Well Servicing Workover or Oil and Gas Operator course certificate as evidence. If the trainee is taking the Service Equipment Operator Workover or Oil and Gas Operator Representative Course in conjunction with the Subsea Supplement, a Certificate of Completion is not required for enrolling in the course, but the trainee must have successfully completed the main content of the course before beginning the Subsea content. If the trainee does not meet the course prerequisite requirement, the training provider cannot allow enrollment in the course. The Subsea Supplement is not a stand-alone certificate. The supplement can only be an added to the Service Equipment Operator Workover Course/ Certificate or the Oil and Gas Operator Representative Course/Certificate.

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Trainee's Acknowledgement of *WellSharp*®
Drilling Operations Course Prerequisite Requirement

By enrolling in the *WellSharp* Drilling Operations _____ (course name), I, _____ (print trainee's name), acknowledge that my training provider informed me of IADC's course prerequisite requirement(s) for this course and gave me a printed copy of the IADC *WellSharp* Drilling Operations Course Prerequisite Policy Statement for Trainees. I am aware of the potential consequences of taking this Drilling Operations course without having first satisfied the course prerequisite. I am choosing to do so at my own risk.

_____
Trainee's Signature

_____
Date

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Well Servicing Course Prerequisite Policy Statement for Trainees

The IADC *WellSharp*® Well Servicing Subsea Supplement is only available to those trainees successfully completing the Well Servicing Workover or Oil and Gas Operator course.

If the trainee does not enroll in the Subsea Supplement at the same time as the Well Servicing Workover or Oil and Gas Operator course and returns to take the supplement at a later date, evidence of completion must be submitted to the training provider at time of enrolling in the course. The training provider must retain a copy of the Well Servicing Workover or Oil and Gas Operator course certificate as evidence.

If the trainee does not have a valid Well Servicing Workover or Well Servicing Oil and Gas Operator Certificate, the training provider shall **not** enroll the trainee in the Subsea Supplement course.

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Appendix C: Simulator Design Requirements

The simulator must have a minimum of two (2) discrete and physically separate workstations. Within that minimum design, the trainee must have access to specific operator controls and key data screen/panel displays. The simulator should be programmable, giving an instructor the ability to pre-program well control problems based on actions, time, or strokes pumped within the well control scenario.

The simulator should have operator controls that allow the trainee to carry out specific operations efficiently. The trainee should be able to carry out the following:

1. Drilling operations
2. BOP operation (e.g., surface or subsea)
3. Choke operation
4. Manifold line-up

The simulator must provide the instructor with the following capabilities:

- Alter the programmed bit size (openhole diameter), casing inside diameter (ID), drillpipe, heavy weight drillpipe, and drill collar outside diameter (OD) and ID.
- Add a non-ported float to the drillstring.
- Assign the use of water-based mud.
- Choose and set parameters for FIT and LOT.
- Program formation pressure and fracture pressure.
- Select kick type (e.g., simulate both gas and liquid kicks).

Simulator Operator Controls and Displays

Table 20 lists the minimum requirements for simulator controls and displays. Some controls or displays may reside on more than one of the panels and/or screens.

Simulator Reporting Capabilities

Simulators store key data to assist with grading and audit. Data that should be recorded include drillpipe and casing/choke pressures, strokes per minute, pit level changes, casing shoe pressure, formation fluid pressure and bottomhole pressure, all of which must be scalable against time and/or strokes pumped.

A record of key data from simulator assessments and the Skills Assessment Checklist shall be retained as a record of the assessment and shall be available to the auditor during the *WellSharp* audit. Record would commonly be in graphical format, with data parameters plotted against time or strokes pumped. Hard copy or electronic format is acceptable as a record.

Simulator Operational Capabilities for Driller and Supervisor Courses

For *WellSharp* Driller and Supervisor Drilling Operations courses, the simulator to be used in the delivery of practical skills exercises and assessments shall have the following operational capabilities:

- Simulators used in the Driller course must allow trainees to:
  - Line up the BOP panel, remote choke, standpipe, choke manifolds, mud pits, trip tank, flow line, mud pumps, etc.
  - Record slow circulating rates.

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- Record choke line friction (subsea mode only), either circulating down through the bit or circulating down the kill/choke line and up the riser. (Circulating down choke or kill line and up opposing kill and choke line is recommended but optional.)
- Drill ahead with required pump speed (strokes per minute, SPM), weight on bit (WOB), and rotary/top drive speed.
- Monitor pit levels and return flow rate and set up high/low level alarms for both.
- Monitor the key drilling and well control parameters of rate of penetration (ROP), weight on bit (WOB), strokes per minute (SPM), total strokes, drillstring revolutions per minute (RPM), pit level, flow rate, rotary/top drive torque, pump pressure, and choke pressure.
- Be able to monitor trip tank level when tripping in or out of the hole.
- Adjust mud weight in the surface pits.
- Trip in or out of the hole and monitor the trip tank.
- Add a full opening safety valve into the drillstring at surface in the event of a kick while tripping.
- Recognize a drilling break (positive or negative).
- Recognize a kick through changes to flow rate and pit level.
- Shut the well in using either the hard or the soft shut-in procedure.
- Recognize a problem with the shut-in process and take corrective action(s).
- Record key kick data, inclusive of shut-in pressures, kick volume, and pit level change.

- Simulators used in the Supervisor course must allow trainees to:
  - Review line up of main panels (as stated in the Driller level above) in preparation to kill the well.
  - Check key kick data.
  - Monitor for gas migration and take necessary action (with either a float in the string or not).
  - Determine shut-in drillpipe pressure (SIDPP) if a non-ported float is in the string.
  - Change mud weight.
  - Start well control procedures inclusive of managing choke line friction effects for subsea wells (if applicable).
  - Carry out the Driller or Wait and Weight method using the relationship between SPM, strokes pumped, mud weight in the well, and surface pressure to successfully kill the well.
  - Recognize common problems that can occur during a kill operation and take steps to maintain correct bottomhole pressure and continue kill operation.
  - Carry out volumetric well control and bullheading.
  - Shut down at the end of the kill operation to determine if the well is dead.
  - Strip drillstring into the well and maintain correct bottomhole pressure during this operation.
- Additional capabilities include:
  - Be able to monitor trip tank level when tripping in/out of the hole.
  - Adjust mud weight in the active system pits.

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- Be able to transfer fluid to/from trip-tank(s) and active system pits.
- Add a full opening safety valve into the drillstring at the rig floor.
- Ability to obtain SIDPP for both solid and ported drill string floats.
- Carry out volumetric and bullheading operations with or without tubulars through BOP.
- Allow for stripping tubulars into or out of hole, through BOP, while maintain constant BHP.
- Monitor for gas migration.
- Ability to bleed fluid from choke manifold to both MGS & trip-tank and/or stripping tank (not simultaneously).
- Have a minimum of 2 well control chokes.

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Table 20: Requirements for Simulator Controls and Displays

Drilling Controls	
Controls	**Displays**
Drawworks (raise & lower) functions and brake control	Hook Load and Weight on Bit
Mud Pump (minimum 2 pumps)	SPM and Total Strokes
Rotary Speed/Top Drive Speed	RPM
Pit and flow alarm adjustments for high and low	ROP
Pit Volume Totalizer re-zero	Pit volumes and Totalizer
Adjust pit and trip tank volumes	Trip Tank volume
Auto Driller function (optional)	Pit Deviation indicator
Total stroke reset	Return Flow Rate indicator
	Pump Pressure
	Flowback when pumps are switched off (recommended)
BOP Controls	
Surface Stack Controls	**Surface Stack Displays**
One Annular Preventer	Air Panel gauge
Two Pipe Rams	Accumulator pressure gauge
One Blind and/or Shear Ram	Manifold pressure gauge
One Choke Line outlet with minimum of one valve	Annular pressure gauge
One Kill Line outlet with minimum of one valve	Accumulator fluid flowmeter (optional)
Annular Pressure regulator	Open and Close indicator lights for all Annular, Ram, and Valve functions
Master Control (push to operate control)	
Subsea Stack Controls	**Subsea Stack Displays**
One Annular Preventer (with Block function)	Air Panel gauge
Two Pipe Rams (with Block function)	Accumulator pressure gauge
One Blind and/or Shear Ram (with Block function)	Manifold Readback pressure gauge
One Choke Line outlet with minimum of one valve (with Block function)	Annular Readback pressure gauge

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One Kill Line outlet with minimum of one valve (with Block function). Kill Line must be piped into a different cavity to Choke Line. Annular Pilot pressure regulator Master Control (push to operate control) Ram Locks (optional)	Accumulator fluid flowmeter Open, Block and Close indicator lights for all Annular, Ram and Valve functions
Choke Control	
Controls	**Displays**
Total Strokes Reset Simulated Choke Open/Close Control (second remote choke is optional) Choke Speed Control Air Pressure on/off (optional)	Total Stroke counter SPM Choke Position indicator Drillpipe Pressure Casing/Choke Pressure Kill Line Pressure (for Subsea Stacks) Stack gauge below Bottom Rams for Subsea Stack (optional)
Standpipe and Choke Manifolds	
Controls	**Displays**
Open and close capability for all valves Manual choke and control Remote controlled choke Ability to route fluids from Choke Manifold to gas buster, flare line, and shale shaker	Labeling of pipework to rig equipment (e.g., Kelly/Top Drive, Pumps, BOP, etc.) Pressure gauges or pressure sensor location(s)

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Appendix D: Testing Protocol

Training providers shall ensure that the following protocol is in place whenever a written knowledge test or skills assessment (i.e., simulator assessment) is conducted.

Knowledge-Based Test

A proctor is required for all courses except Drilling Operations Awareness, Drilling Operations Introductory, and Well Servicing Introductory levels.

- In order to help ensure the presence of a proctor, the class must be *Scheduled* in the *WellSharp* Database at least 5 U.S. working days in advance of the exam date (at least 2 weeks in advance for traveling schools).
- Training provider shall assist trainees with logging into testing database.
- Training provider and proctor shall review testing instructions with the class.
- Independent proctor will verify identity of test candidates before beginning the test. Proctors will use documents such as a national identification card, passports, driver's license (with photograph), or other valid means.
- Proctor will signal start time start all test candidates at the same time.
- All tests are to be "closed book." The candidate may have only the following items available during the test:
  - Formula Sheet supplied by training provider (This may not be part of a course manual or other handout reference document.)
  - Blank kill sheets and blank paper (for calculation work)
  - Reference tables specific to the course level (e.g., weights, pipe or annular displacements/capacities) that may not be part of a course manual or other handout reference document
  - Copy of the Managed Pressure Drilling Operations Matrix
  - Handheld calculator—Calculator must be non-programmable type and preferably supplied by training provider.
- Seating arrangements should ensure privacy of each candidates test questions.
- In normal circumstances, only one candidate at a time should be permitted to leave the examination room while the test is in progress.
- Candidates who have submitted their test and have been told their score are allowed to stay in the room and review the questions they got wrong.
- All kill sheets and papers used for calculations, etc. are to be collected and shredded following the test.

Drilling Operations Simulator Skills Assessment

- For the Drilling Operations Driller course, trainees must be assessed individually. Each candidate must complete all elements of the skills assessment without technical assistance from others in the room.
- For the Drilling Operations Supervisor course, trainees must be assessed individually. Each candidate must complete all elements of the skills assessment without technical assistance from others in the room. Whether the skills assessor or another trainee, a pump operator is permitted to assist during the simulator assessment.

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- All Drilling Operations Skills Assessment documentation must be based on the IADC Skills Assessment Template (WSP-07 Simulator Assessment Template).
- Pre-Operational Set Up (Module 1 of the *WellSharp* Drilling Operations Skills Assessment Template) can be assessed and documented before other components of the Drilling Operations skills assessment (Items 2 and 3 on the Assessment Template) are assessed. This is at the discretion of the training provider.
- Items 2 and 3 of the *WellSharp* Drilling Operations Skills Assessment Template are to be carried out as a continuous assessment. In the Drilling Operations Supervisor course, the trainee will need to use information found on a kill sheet. This kill sheet may be pre-calculated and information provided to the trainee for the assessment, or the training provider may ask the trainee to complete a kill sheet.
- For training providers that employ more than one simulator, it is acceptable for one instructor to conduct up to three trainee assessments simultaneously, each on a separate simulator in the same room.
- If more than three (3) simulators are used, another instructor will be required to manage the additional assessments.

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Appendix E: Proctor Approval Requirements

IADC require that written assessments be proctored by an individual who is suitably qualified for the role. Persons who serve as proctors must be pre-approved by IADC, or designee, before serving in the role.

Proctor Qualifications

Candidates for *WellSharp* Proctor must meet three basic requirements: experience, skills, and other requirements, such as professionalism and integrity.

Experience (any one of the following)

Evidence can be met by one of the following ways:

- Professional qualification (active or retired)—Someone who requires a professional qualification to perform their job (e.g., teacher, college lecturer, accountant, legal person, doctor, banker, chartered engineer, etc.).
- Employee of professional organization—Person who works for a "professional" company (e.g., education, accountancy, legal, medicine, banking, engineering).
- Legal Notary or equivalent—Person who is allowed to notarize official legal documents.
- Other, as defined by the IADC and the vendor organization or agency.

- Military, law enforcement, or responsible civil service position
- Licensed or certified position
- College degree
- Employee of professional organization
- Independent testing center staff member

Skills (all the following)

- Basic computer skills (MS Office minimum)
- Proficient/Fluent in the language in which test to be administered
- Good verbal and written communication skills

Other (all of the following)

- Independent of the well control training provider (i.e., not an employee nor a relative of any employee of the training provider)
- Willing to undergo a background check
- Professionalism
- Integrity
- Ability to be reached by phone or email

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Gaining Approved Proctor Status

The person seeking to be an approved Proctor must submit the following:

- An application requesting approval
- Evidence of meeting the basic requirements to serve as a proctor

Proctor Training Requirements

The person who would serve as a *WellSharp* Proctor must complete, at a minimum, the following required training after approval and prior to first performing proctor duties:

- *WellSharp* proctoring procedures
- An orientation on the role of well control training in the oil and gas industry

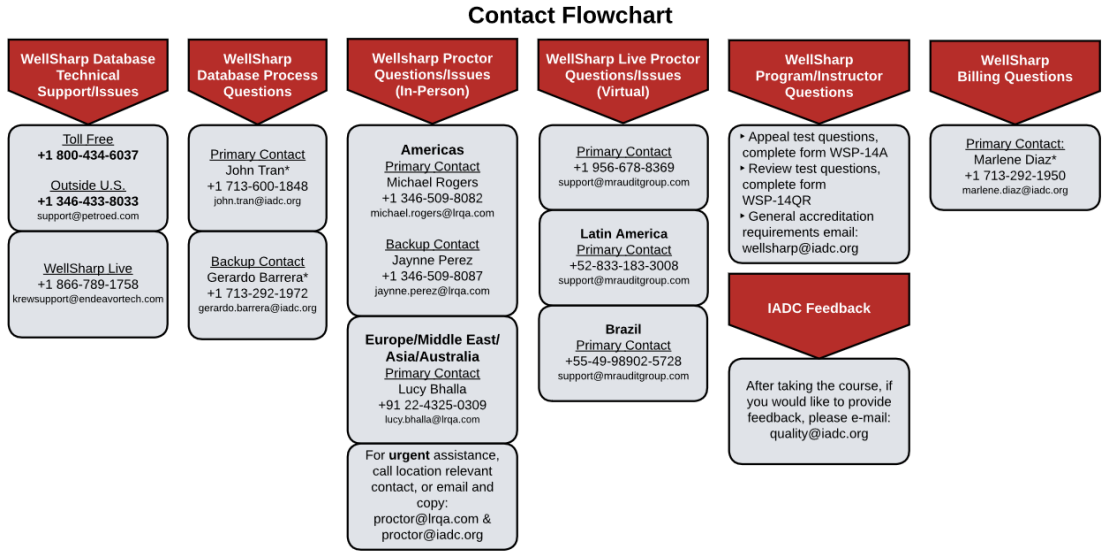
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Appendix F: *WellSharp* Forms and Documents Available for Training Provider Use

WSP-01	*WellSharp Handbook for Accreditation*
WSP-01S	*WellSharp Handbook for Accreditation* in Spanish
WSP-01E	e-Learning Requirements
WSP-01V	Virtual Instructor-led Training and Platform Requirements and Agreement
WSP-02	Course Curriculums and Supplements
WSP-02X	Curriculum Cross-Reference Tool
WSP-03	Application for Accreditation (Drilling Operations Driller and Supervisor courses)
WSP-03-WS	Application for Accreditation (Well Servicing Equipment Operator and Oil & Gas Operator Representative courses)
WSP-03I	Application for Accreditation (Drilling Operations Awareness and Introductory courses)
WSP-03I-WS	Application for Accreditation (Well Servicing Introductory course)
WSP-03A	Additional Course Application (Drilling Operations)
WSP-03A-I	Additional Course Application (Drilling Operations Introductory course)
WSP-03A-WS	Additional Course Application (Well Servicing)
WSP-03F	Facility Floor Plan
WSP-03M	Course Modification Form
WSP-04	Accreditation/Audit Policy Agreement
WSP-05	Instructor Application
WSP-05S-A	Skill Assessor Application
WSP-06	Schedule of Fees
WSP-06P	Schedule of Fees for Proctoring Service
WSP-07	Skills Assessment Template
WSP-10	Accreditation Flowchart
WSP-14	Request for Exception
WSP-14A	Test Question Appeal
WSP-14TQR	Test Question Review
WSP-26	Course Interruption Form
WSP-30	Instructor Update Form
WSP-61	Audit Report

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Appendix G: *Contact Flowchart*



*IADC proctor support is in the U.S. and staff operates in central standard time (CST) hours. Voice messages and e-mails will be returned with urgency; replies however, could be the next day.

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