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Subject
H - 3160-6 NATIONAL CERTIFICATION HANDBOOK FOR OIL AND GAS INSPECTION AND ENFORCEMENT PERSONNEL (INTERNAL)

1. **Explanation of Material Transmitted**

This release transmits the National Certification Policy (NCP), a new Handbook Section that provides direction for Training and Certification of Oil and Gas Inspection Personnel for the Bureau of Land Management (BLM) Oil and Gas Inspection and Enforcement (I&E) program 3100.

2. **Reports Required**

None

3. **Material Superseded**

None

4. **Filing Instructions**

File as directed below.

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H - 3160-6

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Assistant Director,
Minerals, Realty and Resource Protection

**United States
Department of the Interior
Bureau of Land Management**

**H-3160-6
National Certification Handbook for Oil and Gas
Inspection and Enforcement Personnel (Internal)**



**H-3160-6 NATIONAL CERTIFICATION HANDBOOK FOR OIL AND GAS INSPECTION AND
ENFORCEMENT PERSONNEL (Internal)**

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INTRODUCTION

In accordance with the Federal Oil and Gas Royalty Management Act (FOGRMA) of 1982 the Bureau of Land Management (BLM) has established the National Certification Policy (NCP) to train and to maintain a high level of expertise among oil and gas inspection personnel so that adequate oversight is provided for public health and safety, protection of the surface and subsurface environment, and production accountability while operations are being conducted on Federal and Indian oil and gas leases. The NCP provides procedures and/or requirements to acquire and maintain the skills and knowledge necessary to conduct inspections of oil and gas operations. It also provides flexibility in position management including the movement of inspection personnel between field office organizations. Personnel that conduct or participate in actual field inspections and perform oversight functions, or have day-to-day quality control responsibilities shall be certified. When certification is required, such certification shall be in accordance with the instructions contained in this handbook/manual.

Those skills and knowledge essential to the NCP are contained in the “National Certification Policy Handbook Criteria.” These criteria are a part of the “Certification Training Program” which outlines an extensive on-the-job training program. While the NCP is intended to develop and maintain competent inspection and enforcement personnel, it is not designed to produce "experts" in oil and gas technology. Advanced training and skills should be provided for in accordance with national, state, and local training plans and the Inspection and Enforcement (I&E) Strategy.

Section I provides a general overview and provisions of the National Certification Policy, purpose of the program, who must be certified, partial certification, use of noncertified personnel, responsibilities for program management, and certification of State and Indian cooperators.

Section II describes the certification process, model certification program, technical review process, crediting prior experience and education toward certification, completion of certification when on-the-job training (OJT) is not available, and the issuance of Inspector ID Cards.

Section III describes the training programs at the State level and crediting prior in-house formal training.

Section IV is a miscellaneous category that describes the phase-in period, position descriptions, transfer between States, and the rehiring policy for inspection personnel.

I. GENERAL PROVISIONS

A. The National Certification Program

The NCP for oil and gas inspection personnel is a systematic training and professional development process whereby the BLM:

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- Provides personnel with the skill and knowledge necessary to conduct and document regulatory inspections of oil and gas operations.
- Recognizes the attainment of such skill and knowledge by issuing Form 3100-8, *Federal Oil and Gas Inspector ID Card*, Form 3100-9, *State Oil and Gas Inspector ID Card*; and Form 3100-10, *Indian Oil and Gas Inspector ID Card for Indian Inspectors*.

B. Purpose of the Certification Program

The BLM has established the NCP to train and maintain a high level of expertise among oil and gas inspection personnel nationwide. The establishment of a basic level of expertise is desirable for a number of reasons, including the following:

1. The I&E program regulates a major revenue-producing program of the U.S. Government.
2. I&E personnel have significant responsibilities in the areas of public health and safety, protection of the surface and subsurface environment, and production accountability while operations are being conducted on Federal and Indian oil and gas leases.
3. I&E personnel are a first point of contact for the BLM with the public and industry.
4. I&E personnel are responsible for identifying instances of regulatory noncompliance, and occurrences that may result in monetary penalties and litigation.
5. I&E personnel may be called on to serve as expert witnesses in hearings and legal proceedings.

C. Who Must Be Certified

The purpose of this program is to ensure that I&E program activities are performed by persons properly trained in the operating and regulatory requirements relating to oil and gas drilling and production activities. All personnel who conduct inspections within the I&E program shall be certified. This includes, but is not limited to personnel who:

1. Inspect oil and gas operations for compliance with operating regulations, regardless of the classification or title of their position. Personnel that conduct Environmental Protection Agency (EPA) assessments and/or surface compliance inspections, do not require certification.
2. Execute, issue, or contribute to the completion of citations for noncompliance with governing regulations, that is, Form 3160-9, *Notice of Incidents of Noncompliance*, concerning oil and gas operations.

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3. Review and/or advise management or operators on the aspects of appeals from citations (incidents of noncompliance-INCs), penalties, and assessments, including state director and other technical reviews.
4. Review inspection activities for adequacy.
5. Coordinate inspection and enforcement program activities, (I&E coordinators, I&E specialists, supervisory inspectors and/or first line supervisors).

Personnel exercising administrative oversight (Field Office Managers, District Managers, Administrative Officers) over I&E program responsibilities should attend *Oil and Gas for Managers* or Course 3100-01, *Oil and Gas Compliance Certification School*, Module 1 only. Completion of one of these courses is desirable, but not mandatory.

Full certification requires completion of the *Certification Training Program Tracking Document (Appendix 1)*; successful completion of Course 3100-01, *Oil and Gas Compliance Certification School*, comprising of six modules; successful completion of Course 3000-89, *Automated Fluid Minerals Support Systems (AFMSS) for Inspectors*; demonstration of competency before a technical reviewer and completion of the Certification Criteria and Record of Review (Appendix 2); and final review by the National Lead for Certification Training and Compliance.

D. Partial Certification

Partial certification for oil and gas inspection personnel may be accomplished by demonstrating a basic proficiency of inspection in areas of drilling or production operations including a working knowledge of the laws and regulations governing oil and gas exploration and production operations on Federal and Indian lands. This proficiency must be documented throughout the OJT and the *Certification Training Program and Tracking Document (Appendix 1)*. As this process is documented and the technical reviewer is satisfied with the demonstrated level of competency in drilling or production operations, the inspector is eligible for partial certification. The Technical Reviewer shall inform the State Director and the national lead for certification and training that the inspector has demonstrated ability to conduct inspections in areas identified by the technical reviewer. The inspector that has been partially certified by the reviewer may conduct inspections in the area(s) of partial certification.

E. Utilization of Noncertified Personnel

Personnel performing activities such as National Environmental Policy Act (NEPA) assessments and compliance inspections, and right-of-way (ROW) compliance inspections are not required to be certified under this program.

For persons in the OJT phase of the certification program, participation in field inspections provides a valuable hands-on training opportunity. Trainees who have demonstrated competency in specific elements of the certification program may be utilized to perform work in

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those areas. However, their work must be reviewed by certified inspection personnel before any official action is taken. Additionally, trainees may not independently perform inspections of elements for which they have not demonstrated the required basic skills through the certification criteria and record of review process.

F. Who May Issue Incidents of Noncompliance (INC) Form 3160-9

The use of the INC form is not limited to certified personnel only. All personnel that have successfully completed the National Training Center's (NTC) **Environmental Compliance Training module** (not the certification training program) may issue an INC using form 3160-9. To obtain compliance for non-technical aspects of the I&E program, the Notice of Violation Letter is optional.

G. Responsibilities for Program Management

1. The Director of the Bureau of Land Management is responsible for establishing program policy and standards, coordinating nationwide implementation, and evaluating the effectiveness of the National Certification Program.
2. The State Director is responsible for implementing a State-level certification program, including a formal on-the-job training program, and designating personnel to conduct technical reviews, in accordance with national program standards and goals. In designating these personnel, the State Director considers inspection qualifications such as locally recognized subject matter experts, full performance inspectors, and lead inspectors with quality experience from both BLM and the industry. The State Director approves certification upon demonstration of candidates' competency.
3. The National I&E Program Lead for Certification and Training (WO-310) will recommend to the State Director that an inspector should be certified upon completion of the final third-party technical review. The State Director will then be responsible for issuing Form 3100-8, *Federal Oil and Gas Inspector ID Card* and Form 3100-10, *Indian Oil and Gas Inspector ID Card*, and declaring that an inspector is "certified."
4. The Technical Reviewer must be certified and designated by the State Director. The reviewer will be responsible for determining if candidates can demonstrate basic proficiency in performing certification criteria elements. This review can be conducted on all or any portion of the Certification Criteria and Record of Review (Certification Criteria) (Appendix 2).

In the case of partial certification, documentation and approval resides with the State Director or its designated representative.

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5. The Certified Instructor, in the context of the program, is an employee that has been certified under the NCP and who is selected to provide instructions to a candidate for the purpose of obtaining certification in any or all elements of the certification training program.

H. Certification of State and Indian Cooperators/ FOGRMA 638 Contracts

Qualification requirements for State and Indian tribal personnel participating in inspection and enforcement program activities under cooperative agreements, delegations, or memoranda of understanding will be determined by State Directors. State and tribal inspectors working under these agreements must meet the certification requirements outlined in the NPC.

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II. THE CERTIFICATION PROGRAM

A. The Certification Process

An employee may be formally declared certified after successfully completing a specified regimen of internal training. The purpose of the training is to provide inspection personnel with the knowledge and skills to ensure oil and gas operations on Federal and Indian lands are in compliance. This program covers the knowledge and skills of operational standards and practices in use by industry as well as the governing regulatory requirements. Onsite inspection tasks and procedures, documentation systems and standards, and remedies and penalties for noncompliance are integral parts of the program. The programs are as follows:

1. **Formal Training.** Formal training requires completion of NTC *Course 3100-01, Oil and Gas Compliance Certification School; Course 3000-89, Applied AFMSS for Inspectors;* and any subsequent specified curriculum, including the required refresher course(s).
2. **On-the-Job Training (OJT).** OJT requires completion of a comprehensive training program developed and conducted by the employee's State Office organization in accordance with national standards. The full range of skills and knowledge deemed necessary for certification are consolidated into *Appendix 1, Certification Training Program Tracking Document* and should be used as the basis for State-level OJT programs. While most skill and knowledge requirements are addressed in Course 3100-01, some require further study, practice and/or field application in order to develop full proficiency. In some instances, OJT may be necessary for refresher purposes.
3. **Technical Review.** The technical review is the successful demonstration of applying skills and knowledge in performing a field inspection(s) while observed by the designated technical reviewer. Appendix 2, *Certification Criteria and Record of Review*, represents tasks that are routinely performed by inspection personnel while conducting field inspections. To become certified, inspection personnel must demonstrate proficiency in each task.
4. **Certification.** After the National Lead for Certification and Training has recommended to the State Director that an inspector be certified, the inspector will be certified when issued a Form 3100-8, *Federal Oil and Gas Inspector ID Card*, by the State Director. The inspector ID card will reflect the ID number and date of initial certification. When recertification occurs, the ID card will show the original ID number, date of initial certification, and current renewal issue date.
5. **Certification Maintenance.** Basic competency is required to maintain certification. In order to maintain competency, certified inspection personnel must successfully complete the *NTC Course 3100 -01, I&E Compliance Certification* course every five years. Any deficiencies identified during this training will be forwarded to the immediate supervisor for

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correction. If deficiencies are not corrected with 90 days, the individual's certification will be revoked.

B. Model Certification Program

The certification program should adhere to the following chronology of events in the case of a new hire:

1. Phase I, Orientation

After entry on duty, and prior to attending formal training, the trainee will be introduced to and familiarized with, the duties and responsibilities of the job through an orientation program established by the State Office organization and administered at the duty station. Typically, this orientation will consist of reviewing internal policies and procedures as contained in governing regulations, manual issuances, instruction memoranda, other references, and observing field inspections. As a part of this phase, the trainee is required to complete the Self-Study components 2 & 3 of Module 1 administered by the NTC; courses 3000-ST-1, *Familiarization With Oil and Gas: Overview*; 3000-ST-2, *Familiarization With Oil and Gas: Drilling Equipment and Operations*; and/or 3000-ST-3, *Familiarization With Oil and Gas: Production Operations*.

2. Phase II, Formal Training

All trainees must complete the following formal training courses sponsored by the National Training Center:

- (1) Course 3100-01, *Oil and Gas Compliance Certification School*
- (2) Course 3000-89, *Applied AFMSS for Inspectors*.

3. Phase III, Orientation and Formal On-the-Job Training

The trainee will receive ongoing training in inspection procedures and day-to-day operations through a program of on-the-job training established by the State Office organization and administered at the duty station. Supervisors of candidates for certification are responsible for arranging for a certified instructor to work with the trainee during the OJT training phase. The instructor may be different for various parts of the program and must date and initial the progress tracking chart as each element is completed. Instruction should place particular emphasis on the knowledge and skills specifically identified as production, drilling and abandonment criteria in Appendix 2, Certification Criteria.

4. Phase IV, Technical Review

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Following completion of Phases I, II, and III, or in the course of completing Phase III, the trainee may be eligible for certification if proficiency in the certification criteria (Appendix 2) before a Technical Reviewer can be demonstrated.

Since the emphasis of the National Certification Program is on the timely and systematic acquisition of skills, the model chronology described above, which stresses orientation, formal training, and OJT training, may be modified to accommodate individual situations. Experienced Bureau employees or new hires with substantial field experience would be good candidates for this approach. For example, current employees who have completed formal training requirements and do not require orientation may move immediately to any part of the OJT phase or even directly to the demonstration-of-skills phase. New hires may move from orientation to OJT if attendance at formal training cannot be scheduled timely.

Likewise, the demonstration of individual certification criteria skills may take place over a period of time as instruction takes place and/or other circumstances dictate.

Final certification (Form 3100-8, *Federal Oil and Gas Inspector ID Card*) will be issued to a candidate by the State Director upon successful completion of the review and a recommendation for certification from the WO-310 Oil and Gas Certification and Training Lead. If the candidate fails to pass this review, additional training will be required in those areas of concern.

C. Technical Review Process

Skills and knowledge required for the inspection of oil and gas drilling and production operations cover:

The technical processes used by operators; and,

The specific regulatory requirements and procedures required by the U.S. Department of the Interior.

Demonstrations of skill will include all of the elements of the certification criteria (Appendix 2). Each element must be completed to the satisfaction of the Technical Reviewer. Demonstrations will be conducted on individual elements or groups of elements as agreed to by the trainee and reviewer. Demonstrations are to be conducted that clearly show proficiency in the required skill. For example, the use of gauging equipment should involve actual measurement at a production facility to replicate an oil transaction. The simulation of skills or procedures is not acceptable for purposes of this requirement.

The designated Technical Reviewer shall be responsible for completion of the appropriate portion of the checklist of the certification criteria (Appendix 2) by dating and initialing each criterion when the trainee has demonstrated competency of a particular element to the Technical Reviewer's satisfaction.

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When all of the certification criteria have been met, the Technical Reviewer will forward the checklist to the National I&E Program Lead for Certification and Training (WO-310), who will ensure that the certification criteria has been met and recommend certification of the trainee by issuing Form 3100-8, *Federal Oil and Gas Inspector ID Card*, and/or

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Form 3100-10, *Indian Oil and Gas Inspector ID Card* as appropriate. If it is determined that there is a need for further training, the trainee's immediate supervisor will be notified. The completed certification criteria and record of review checklist, including the certification certificate, will be filed in the employee's official personnel folder.

D. Crediting of Education and Experience Toward Certification

Many of the skills and knowledge required for certification may be attained through experience with industry, prior service with Federal or State organizations regulating oil and gas operations, or technical schools providing training in the petroleum field. However, the BLM has no effective means of crediting the wide range of possible education or work experiences against the individual criteria established for certification. Therefore, in order to be certified, a candidate must demonstrate specified knowledge, skill, and ability before a designated Technical Reviewer.

E. Completion of Certification Requirements Where Required Experience is Not Available at the Duty Station

Certification covers both drilling and production operations. The unavailability of specific on-the-job training experiences at the duty station does not change the requirement for training in, or demonstration of, that particular skill.

As a part of the State OJT program, State Directors should ensure that arrangements can be made to provide employees with needed experience, and technical review covering that experience, at another field office within the State or in another State Office organization.

F. Inspector ID Cards

The BLM will continue to utilize the current Form 3100-8, *Federal Oil and Gas Inspector ID Card*, and Form 3100-10, *Indian Oil and Gas Inspector ID Card* as a unique means of identification for oil and gas Federal and Indian inspection personnel. It is the intent of this policy that all Inspector ID Cards issued in the future will reflect certification under this program. Under no circumstances will Inspector ID cards be issued to personnel who are not certified.

1. New Employees. New employees will not be issued Inspector ID cards until they are certified.
2. Current Employees. Personnel now on the rolls will be issued new cards upon successful completion of the NTC refresher training courses.

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III. TRAINING PROGRAMS

A. State-level OJT Programs

New Employees. New employees will not be issued Inspector ID cards until they are certified. Orientation and on-the-job training will be conducted under programs developed by the State Director.

The supervisor of each trainee is responsible for arranging for appropriate certified personnel to work with and review each element of the program as the trainee progresses. The Technical Reviewer, who may be different for each element, is responsible for dating and initialing the Certification Training Program Tracking Document checklist as each element is completed.

OJT requirements that cannot be met within the home office due to lack of opportunity, such as drilling operations not currently being conducted, will be met by detailing the employee to another field location where that opportunity does exist.

Portions of the OJT training program may be omitted when a trainee demonstrates competency in specific elements of the certification program.

B. Crediting Prior In-house Formal Training

All sessions of Course 3000-89, *Applied AFMSS for Inspectors*, Course No. 3000-17, *Fluids Inspection and Enforcement: Drilling*, and Course No. 3000-18, *Fluids Inspection and Enforcement: Production*, taught in and subsequent to fiscal year 1986 are fully creditable toward the formal training requirement for certification.

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IV. MISCELLANEOUS

A. Phase-in Period

Timely completion of certification is encouraged. Certification would typically be accomplished within a one- to two-year time frame; however, it must be completed within 3 years. Failure to complete the certification process within the 3 year period should be addressed under the merit promotion plan. All future recruitment actions and vacancy announcements should include these requirements. Application of this standard for new inspection personnel already on board must be determined on a case by case basis.

Those employees certified for 5 years or more must satisfactorily complete the refresher training (NTC Course 3000-14) within 2 years of the effective date of this Handbook. When deficiencies are identified, an additional year will be provided for remedial training and demonstration of competency per section II.A.3.

B. Position Descriptions

The certification criteria represent a composite of common base-level knowledge and proficiency which are typical of all types of drilling, production, and other related inspections. The knowledge and proficiencies vary widely in application based on the nature, complexity, and phase of operations for each individual operational site. Therefore, the certification criteria cannot and should not be interpreted to constitute duties representative of any particular grade, nor should it be used as the basis for position descriptions.

C. Transfer Between State Offices Following Certification

Since the NCP is based on nationwide criteria, skills and knowledge are readily transferable from one state office to another. Therefore, certified employees who move to a different state office organization need not be recertified.

D. Annuitants or Government Rehires

Inspectors who resign from government service to work for private industry must give their Inspector ID card to the State I&E Coordinator/State Director. These cards are tracked and must be accounted for. If a former inspector applies for an I&E PET position and is rehired, but at the time of reemployment 5 years or more have elapsed since last certification, the hiree must attend the new 3100-01 Compliance Certification School. When the person attends Course 3100-01, *Oil and Gas Certification Compliance School*, all six modules must be completed with a score of 80% or better. This is consistent with policy for recertification or new hires every 5 years.

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Glossary of Terms and Acronyms

Terms

-A-

Activities: are sub-inspections under the type of inspection being conducted. Activities are completed as they apply to the type of inspections.

Authorized Officer: any employee of the Bureau of Land Management who has been delegated the authority to perform the duties described in this Manual Section.

-C-

Certification Policy: outlines the certification requirements for all Petroleum Engineering Technicians (PETs).

Certification Program: the process used to ensure that all PETs attend the required formal training, receive on-the-job-training (OJT), and complete and demonstrate final certification criteria and record of review.

-N-

Noncertified: personnel who perform activities such as NEPA assessments, compliance inspections and ROW inspections; would issue written orders of the authorized officer for associated compliance issues. Noncertified personnel may not issue INCs (Form 3160-9).

-P-

Partial Certification: accomplished by demonstrating basic proficiency in inspection areas of drilling or production, including a working knowledge of laws and regulations. Proficiency must be documented throughout the On-the-Job Training (OJT) and the Certification Training Tracking System (Appendix 1) and the final Certification Criteria and Record of Review (Appendix) 2 of the National Certification Policy.

Petroleum Engineering Technician (PET): conducts oil and gas inspections on drilling and production operations in accordance with laws and regulations.

-T-

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Technical Reviewer: certified personnel, designated by the State Director, who are responsible for determining if candidates can demonstrate basic proficiency in performing certification criteria.

Acronyms

AFMSS	Automated Fluid Minerals Support System
EPA	Environmental Protection Agency
FOGRMA	Federal Oil and Gas Royalty Management Act
I&E	Inspection and Enforcement Strategy
INC	Incident of Noncompliance
NCP	National Certification Policy
NEPA	National Environmental Policy Act
NTC	National Training Center
OJT	On-the-job training
PET	Petroleum Engineering Technician
ROW	Rights-of-Way

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**Appendix 1
Certification Training Program Tracking Document**

	Reference or Exercise	Target Competency	Completion Date
1.	Review <i>Mineral Leasing Act of 1920</i>	To become familiar with the Act.	
2.	Review <i>Federal Oil and Gas Royalty Management Act of 1982</i>	To become familiar with the Act.	
3.	Review all current I&E strategy, policy, documentation requirements, and guidance	To become familiar with the requirements necessary.	
4.	Review 43 CFR 3160, <i>Onshore Oil and Gas Operations</i> . This includes subparts:	To identify the regulatory reference for oil and gas operations and the reporting forms required.	
	(a) 3160, <i>General</i>	To identify the regulatory reference for purpose, policy, authority, objectives, and definitions.	
	(b) 3161, <i>Jurisdiction and Responsibility</i>	To identify the regulatory reference for jurisdiction and responsibility.	
	(c) 3162, <i>Requirements for Operating Rights Owners and Operators</i>	To identify the regulatory reference for general operator requirements.	
	(d) 3163, <i>Noncompliance, Assessments, and Penalties</i>	To identify the regulatory reference for <i>Incidents of Noncompliance (INC)</i> .	
	(e) 3164, <i>Special Provisions</i>	To identify the regulatory reference for Onshore Oil and Gas orders, NTLs, surface rights, and damages.	
	(f) 3165, <i>Relief, Conflict and Appeals</i>	To identify the regulatory reference for relief, conflict, and appeals.	
5.	Review Onshore Oil and Gas Order No. 1, <i>Approval of Operation</i>	To become familiar with the contents of the order.	
6.	Review Onshore Oil and Gas Order No. 2, <i>Drilling Operations</i>	To become familiar with the contents of the order.	
7.	Review Onshore Oil and Gas Order No. 3, <i>Site Security</i>	To become familiar with the contents of the order.	
8.	Review Onshore Oil and Gas	To become familiar with the contents of the order.	

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	Reference or Exercise	Target Competency	Completion Date
	Order No. 4, <i>Measurement of Oil</i>		
9.	Review Onshore Oil and Gas Order No. 5, <i>Measurement of Gas</i>	To become familiar with the contents of the order.	
10.	Review Onshore Oil and Gas Order No. 6, <i>Hydrogen Sulfide Operations</i>	To become familiar with the contents of the order.	
11.	Review Onshore Oil and Gas Order No. 7, <i>Disposal of Produced Water</i>	To become familiar with the contents of the order.	
12.	Review NTL 3A, <i>Reporting of Undesirable Events</i>	To become familiar with the requirements.	
13.	Review NTL 4A, <i>Royalty or Compensation for Oil and Gas Lost</i>	To become familiar with the requirements.	
14.	Review API Recommended Practices and Standards for Oil and Gas Operations, including:	To become familiar with industry, policies, practices, and procedures.	
	(a) RP-55, <i>Oil and Gas Production Operations</i>	Operations involving:	
	(b) RP-11ER, <i>Guarding of Pumping Units</i>	To identify public safety problems and recommend corrective action.	
	(c) RP-12R1, <i>Operation of Lease Tanks</i>	To identify proper installation of tank facilities.	
	(d) MPMS (Chapter 10.4), <i>Methods of Test for Water and Sediments in Crude Oil</i>	To identify reference for BS&W content.	
	(e) MPMS (Chapter 7.1), <i>Method of Measuring Temperature of Petroleum and Petroleum Production</i>	To identify reference for measuring temperature.	
	(f) Chapter 8.1, <i>Methods of Sampling Petroleum</i>	To identify reference for sampling petroleum.	
	(g) Chapter 9.1, <i>Density Determinations</i>	To identify reference for testing for API gravity.	
	(h) Standard 2540, <i>Petroleum Measurement tables 5A and 6A</i>	To be able to use correct factor to determine volume reduction and gravity correction.	
	(i) Specification 11N, <i>Lease</i>	To identify reference source for LACT equipment.	

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	Reference or Exercise	Target Competency	Completion Date
	<i>Automatic Custody Transfer Equipment</i>		
	(j) <i>Measurement of Petroleum Liquid Hydrocarbons by Positive Displacement Meter</i> , and MPMS Chapter 6.1, <i>Proving and Calibration</i>	To identify reference for LCT proving.	
	(k) Training Series, Book 4, <i>Well Testing</i>	To become familiar with proper procedures were used for testing a gas or oil well for production volume.	
	(l) RP-9, <i>Safe Drilling of Wells Containing Hydrogen Sulfide</i>	To identify safe drilling practices for wells with H ₂ S.	
	(m) RP-3, <i>Blow-out Prevention Equipment Systems for Drilling Wells</i>	To identify the proper use of BOP equipment.	
	(n) RP-54, <i>Oil and Gas Well Drilling and Servicing Operations</i>	To identify the proper equipment, procedures, and testing that must be used during drilling operations.	
15.	Review AGA Committee Report No. 3, <i>Second Edition 1985</i>	To identify industry policies and procedures for natural gas measurement.	
16.	43 CFR 3103.4, Review CDM 647.13, <i>Variable Royalty Rate and Well Count</i>	To become familiar with the variable royalty rate well count procedures and issues.	
17.	Review BLM Manual 3160-9, <i>Communitization</i>	To become familiar with the purpose of and authorities for Communitization agreements.	
18.	Review Release 3-101, Manual 3180, <i>Unitization (Exploratory)</i> , and Release 3-102, H-3180-1 to:	To become familiar with the purpose of and authorities for Unitization.	
	(a) Become familiar with authority excerpt from Mineral Leasing Act of 1920; and,	To identify BLM reference for unit agreements.	
	(b) Become familiar with contents of Exhibit 4, <i>Model Agreement</i>	To identify the extent of Federal jurisdiction.	
19.	Receive instructions for H ₂ S escape pack	To use escape pack in life-threatening circumstances.	
20.	Receive instructions for H ₂ S monitor	To be able to calibrate and use H ₂ S monitor.	

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Reference or Exercise		Target Competency	Completion Date
21.	Review H ₂ S safety requirements	To determine if H ₂ S safety requirements are satisfactory.	
PRODUCTION			
22.	Review <i>Automated Fluid Minerals Support System (AFMSS)</i>	To become familiar with computerized system and generate form 3160-11, <i>Inspection Record – Production</i> .	
23.	Tour producing case operation to:		
	(a) Review H ₂ S requirements	To determine if H ₂ S safety requirements are satisfactory.	
	(b) Determine tank volumes	To determine volumes by determining tank size(s).	
	(c) Observe site security methods used	To determine effective methods of sealing valves required to detect unauthorized access to oil.	
	(d) Determine degree of compliance with minimum standards for site security	To determine compliance with minimum standards.	
	(e) Learn how to trace battery flow systems	To be able to trace flow systems.	
	(f) Review battery facility diagram	To be able to compare accuracy of diagram to actual equipment on site.	
	(g) Observe well sign	To determine if well sign(s) are in compliance.	
	(h) Observe battery sign	To determine if battery sign(s) are in compliance.	
	(i) Observe environmental, housekeeping, and safety conditions	To determine if conditions are satisfactory.	
	(j) Determine methods of oil and gas measurement	To determine if methods of measurement are satisfactory.	
	(k) Determine if production is on or off lease	To determine if production is handled as approved.	
	(l) Observe commingled production facilities	To determine if production is handled as approved.	
	(m) Witness tank gauging to:		
	(1) Observe isolating tank for sales	To identify proper technique for isolating an oil tank.	
	(2) Observe methods of gauging	To identify proper gauging techniques.	

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	Reference or Exercise	Target Competency	Completion Date
	(3) Observe methods of sampling	To identify proper sampling methods.	
	(4) Observe measured API gravity	To identify proper technique for determining gravity.	
	(5) Observe taking of tank temperature	To identify proper technique for determining temperature.	
	(6) Observe completion of a run ticket	To determine compliance with minimum requirements.	
	(7) Complete form 3160-16, <i>Measurement Record – Oil by Tank Gauge</i>	To be able to accurately complete required form.	
	(n) Gauge and sample production in an oil tank	To develop skill and ability in the use of gauging equipment.	
	(o) Calculate the net oil volume from a sale	To be able to determine net volume using values from a run ticket.	
	(p) Witness a LACT meter proving to:		
	(1) Observe components, procedures, and calculations	To be able to determine if components, procedures, and calculations meet minimum requirements.	
	(2) Complete form 3160-17, <i>Measurement Record – Oil by LCT Meter</i>	To be able to accurately complete the required form.	
	(q) Witness gas meter calibration to:		
	(1) Observe procedures	To be able to determine if procedures meet minimum requirements.	
	(2) Complete form 3160-15, <i>Measurement Record – Gas</i>	To be able to accurately complete required form.	
	(r) Conduct a production inspection	To be able to accurately complete the AFMSS form 3160-11.	
DRILLING			
24.	Review <i>Automated Fluid Minerals Support System (AFMSS)</i>	To become familiar with computerized system and generate for 3160-10, Inspection Record – Drilling.	

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	Reference or Exercise	Target Competency	Completion Date
25.	Tour drilling operation to:	To be able to identify equipment, procedures and testing used during drilling operations as per approved APD.	
	(a) Recognize circulation system	To be able to identify pumps, pits, rotary hose, storage, return line, shale shaker(s), and their purpose.	
	(b) Recognize rotating system	To be able to identify swivel, Kelly bushings and rotary table and their purpose.	
	(c) Recognize hoisting system	To be able to identify crown block, monkey board, mast, cathead, traveling block, hook, elevators, draw works, etc. and their purpose.	
	(d) Recognize power system	To be able to identify generating plant, fuel tanks, motors, engines, and their purpose.	
	(e) Recognize pipe-handling equipment	To be able to identify drill pipe, drill collars, drill bit, rat hole, mouse hole, tongs, pipe ramps, etc. and their purpose.	
	(f) Recognize well control equipment	To be able to identify annual preventer, blind ram, pipe ram, choke manifold, accumulator, mud-gas separator, etc. and their purpose.	
	(g) Observe key drilling functions, including:		
	(1) Routine drilling	To be able to identify and understand procedures.	
	(2) Tripping operations	To be able to identify and understand procedures.	
	(3) Running casing	To be able to identify and understand procedures.	
	(4) Cementing	To be able to identify and understand procedures.	
	(h) Observe safety equipment	To be able to identify and understand explosion-proof lighting, hard hats, safety lines, sensors, hand rails, alarms, etc. and their purpose.	
	(i) Witness well control system test to:		
	(1) Identify equipment	(a) To be able to determine if blow-out preventer type, pressure rating and arrangement meets minimum requirements.	
		(b) To be able to determine if choke line, manifold fill line, and kill line are properly installed.	
		(c) To be able to determine if controls (i.e., automatic on floor, remote automatic, and locking device hand wheels) are properly installed.	

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Reference or Exercise	Target Competency	Completion Date
	(d) To be able to determine the adequacy of accumulator system to activate the blow-out preventer equipment (i.e., volumes and back-up system).	
	(e) To be able to identify all safety valves and handles for all safety valves.	
	(f) To be able to identify and understand operation of upper and lower Kelly cocks.	
(2) Observe procedures	To be able to determine if procedures and test pressures meet minimum requirements.	
(j)) Witness a casing and cementing job to:		
(1) Identify equipment	(a) To be able to determine identify casing by size, weight, grade, thread type, and all other required associated equipment.	
	(b) To be able to calculate all capacities and volumes necessary to meet the requirements.	
(2) Observe procedures	To be able to determine if procedures meet minimum requirements.	
(k) Review a drilling mud program to:		
(1) Identify materials and equipment	(a) To be able to determine identify mixing and monitoring equipment and additives used to condition the mud.	
	(b) To be able to calculate the pressure needed to conduct a mud weight equivalent test and casing shoe test.	
	(c) To be able to determine mud viscosity and weight.	
	(d) To be able to calculate hole volume.	
	(e) To be able to calculate hydrostatic head at total depth.	
(l) Review special drilling operations to:		
(1) Identify equipment	(a) To be able to determine identify all the required specialized equipment associated with drilling operations.	
	(b) To be able to determine the proper installation of a blooie line	

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Reference or Exercise		Target Competency	Completion Date
		and explain circulation requirements.	
	(2) Observe procedures	To be able to determine if procedures meet minimum requirements.	
	(m) Review drillers log or equivalent	To be able to verify if log complies with the approved form 3160-3, <i>Application for Permit to Drill (APD)</i> .	
	(n) Review appropriate well logs (bond, caliper, temperature, etc....)	To be able to determine if log information indicates that requirements have been met.	
	(o) Review Surface Use plan	To be able to determine if surface use complies with APD conditions of approval (COA).	
	(p) Conduct a Drilling Inspection	To be able to accurately complete the AFMSS form 3160-10.	
ABANDONMENT			
26.	Review <i>Automated Fluid Minerals Support System (AFMSS)</i>	To become familiar with computerized system and generate for 3160-13, Inspection Record – Abandonment.	
	(a) Witness abandonment of a well to:		
	(1) Identify equipment	(a) To be able to determine identify tubing/casing by size, weight, grade, and thread type.	
		(a) To be able to calculate all capacities and volumes necessary to meet the requirements.	
	(2) Observe procedures	To be able to determine if procedures meet minimum requirements for the various methods of placing plugs.	
	(b) Conduct an Abandonment Inspection	To be able to accurately complete the AFMSS form 3160-13.	

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**Appendix 2
Certification Criteria and Record of Review**

Employee Name

Series/Grade/Title

CERTIFICATION CRITERIA AND RECORD OF REVIEW

I. PRODUCTION CRITERIA

<u>Date</u>	<u>Reviewer</u>	
/ /	_____	1) Determine if a tank battery is in compliance with minimum standards for site security.
/ /	_____	2) Determine if the appropriate valves are effectively sealed as dictated by ongoing lease activities.
/ /	_____	3) Trace battery flow systems and compare the accuracy of battery facility diagrams with actual equipment on site.
/ /	_____	4) Verify accuracy of Minerals Management Service (MMS) Form 4054 (parts A, B, and C), <i>Oil and Gas Operations Report</i> (OGOR).
/ /	_____	5) Determine if well signs are in compliance.
/ /	_____	6) Determine if battery signs are in compliance.
/ /	_____	7) Determine if environmental, housekeeping, and safety conditions at a well are satisfactory.
/ /	_____	8) Determine if the equipment used for measurement of oil and gas is satisfactory.
/ /	_____	9) Inspect case(s) involved in an off-lease measurement and production storage approval. Determine whether production is handled in accordance with approval.
/ /	_____	10) Verify compliance for disposal of produced water.
/ /	_____	11) Verify compliance for venting and flaring of gas.
/ /	_____	12) Inspect case(s) involved in a commingling approval. Determine whether accountability for commingled production is in accordance with the approval.

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- / / _____ 13) Identify variances approved and verify compliance with conditions of approval.
- / / _____ 14) Determine if gas and liquid handling facilities are satisfactory to handle lease production.
- / / _____ 15) Accurately verify volumes of oil and gas produced, sold, reported by the lessee/operator.
- / / _____ 16) Identify the difference between a well in a shut-in mode and one that is temporarily abandoned.
- / / _____ 17) Distinguish between proper and improper techniques for sales from a tank battery, including:
 - / / _____ a. Gauging techniques.
 - / / _____ b. Sampling techniques.
 - / / _____ c. Techniques for determining API gravity.
 - / / _____ d. Techniques for determining temperature.
- / / _____ 18) Identify the correct method for completing a run ticket.
- / / _____ 19) Complete Form 3160-16, Measurement Record - Oil, By Tank Gauge or Alternate Method.
- / / _____ 20) Use gauging equipment i.e., tape, thief, centrifuge, hydrometer, and thermometer.
- / / _____ 21) Witness Lease Automatic Custody Transfer (LACT) meter proving and determine if meter meets Bureau standards and tolerances.
- / / _____ 22) Complete Form 3160-17, Measurement Record - Oil By LACT Meter.
- / / _____ 23) Calculate net oil volumes using values on a run ticket from both hand gauge and LACT.
- / / _____ 24) Witness a gas meter calibration and determine if the procedures are in accordance with approved standards.
- / / _____ 25) Complete Form 3160-15, Measurement Record - Gas.
- / / _____ 26) Calculate gas volumes from a gas meter flow chart using American Gas Association Report No. 3, Second Edition 1985.
- / / _____ 27) Determine if proper procedures were used for testing a well for production volumes as specified in the requirements of the order or approval.
- / / _____ 28) Complete Form 3160-9, Notice of Incidents of Noncompliance (INC).
- / / _____ 29) Use a H₂S Escape Pack.
- / / _____ 30) Calibrate and use an H₂S monitor.

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- / / _____ 31) Review H₂S production operations for compliance.
- / / _____ 32) Complete Form 3160-11, Inspection Record - Production.

II. DRILLING AND ABANDONMENT CRITERIA

<u>Date</u>	<u>Reviewer</u>	
/ /	_____	1) Review Form 3160-3, <u>Application For Permit To Drill or Reenter (APD)</u> including the 8-point plan (engineering), the 13-point plan (surface use), conditions of approval, lease stipulations, and subsequent sundry notices.
/ /	_____	2) Determine if procedures used during the running of casing are in accordance with the approval.
/ /	_____	3) Determine if procedures used during cementing of casing are in accordance with approved plan and proper remedial action taken, if necessary.
/ /	_____	4) Calculate all capacities and volumes necessary to meet the requirements for primary cementing.
		<u>Determine:</u>
/ /	_____	a. BOPE, pressure rating, and arrangement are rated to at least that approved.
/ /	_____	b. Choke line and manifold, fill line, and kill lines are properly installed and operable.
/ /	_____	c. If controls are installed and functional, i.e., automatic on floor, remote, and master controls as specified in APD.
/ /	_____	d. Accumulator system is adequate to activate BOPE
/ /	_____	1. Calculate accumulator volumes needed to open and close BOPE.
/ /	_____	2. Perform accumulator Function Test
/ /	_____	3. Determine availability and sources for accumulator based on approved pressure rating of BOPE.
/ /	_____	e. If safety valves are on hand for all sizes of drill pipe and drill collars.
/ /	_____	f. Upper and lower Kelly cocks are in place as per regulation.
/ /	_____	g. Handles for all safety valves are accessible.

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- / / _____ 5) If procedures used during a blow-out preventer equipment tests are satisfactory.
- / / _____ 6) If that personnel safety practices are acceptable.
- / / _____ 7) If the approved plugging plan and that cement volumes and plug depths are accurate.
- / / _____ 8) Calculate volumes of cement and displacement to spot a balanced plug.
- / / _____ 9) Identify casing by size, weight, grade, and thread type.
- / / _____ 10) Identify if the Drillers Log is in compliance with the APD and Onshore Order # 2.
- / / _____ 11) Calculate equivalent mud weight.
- / / _____ 12) Calculate hole volume.
- / / _____ 13) Calculate hydrostatic head of mud being used.
- / / _____ 14) If lighting is in accordance with OSO #2 III. D.
- / / _____ 15) Identify BOPE and Accumulator required for:
 - 2M (2,000 PSI) system.
 - 3M (3,000 PSI) system.
 - 5M (5,000 PSI) system.
 - 10M (10,000 PSI) system.
 - 15M (15,000 PSI) system.
- / / _____ 16) Determine mud viscosity and weight.
- / / _____ 17) Determine if surface use is in accordance with approved drilling permit.
- / / _____ 18) Verify the H₂S Drilling Operations plan equipment listed is available, installed, and operational as required.
- / / _____ 19) Verify proper installation of mud monitoring equipment as required. (e.g. APD, COAs, Orders, Onshore Orders).
- / / _____ 20) Verify that required safety equipment is available i.e.; Hand Rails belt guards and extinguishers.
- / / _____ 21) Verify that kill line is installed properly.
- / / _____ 22) Verify that flare system is installed in accordance with the APD, OSO #2&6.
- / / _____ 23) Verify that mud/gas separator is applicable, installed and operable.
- / / _____ 24) Complete Form 3160-10, Inspection Record - Drilling.
- / / _____ 25) Complete Form 3160-13, Inspection Record - Abandonment.

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II. BLM TRAINING

Date Completed

- _____ 1) Successful completion of Course 3100-01, *Oil and Gas Compliance Certification School for New Petroleum Engineering Technicians* (formerly 3000-03: *Fluids Inspection and Enforcement: Drilling*, and Course 3000-04, *Fluids Inspection and Enforcement: Production*)
- _____ 2) Successful completion of Course 3000-89, *Applied AFMSS for Inspectors*.

Recommendation

I recommend that _____ be certified as a Bureau of Land Management representative authorized to conduct inspections of Federal and Indian oil and gas lease operations.

Technical Reviewer

Date

Certification

_____ is hereby certified as a Bureau of Land Management representative authorized to conduct inspections of oil and gas lease operations.

National Lead for Oil and Gas Compliance
Certification and Training

Date

cc: 310:LS:Rm.501
300:MIB:Rm.5625
310:LS:Rm.501:Fluids:FOneyear:kg-f:(307)261-7569:4/19/05
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