



**Product title:** Drilling Rigger Competence Assessment Standard

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**Product code:** 9200

**Product type:** OPITO Standard

**Product category:** Oil and Gas / Technical Roles

**Date of last update:** 19/05/2023 - Date of last update field added to product spec

### Who is the Product for?

This Product is for personnel that wish to become OPITO certified competent Drilling Riggers - having previously completed the OPITO Rigger Initial Training and Drilling Rigger Workplace Experience Log Book, and/or possess sufficient and relevant work experience to be eligible for the OPITO Drilling Rigger Competence Assessment.

### What does this Product cover?

This Product is to establish that the learner has the required underpinning knowledge, understanding and practical skills to fulfill the role of Drilling Rigger safely and effectively.

### How can you successfully achieve this Product?

To achieve the OPITO Drilling Rigger Competence Assessment Standard the learner will need to complete the 2 mandatory units.

### What could this Product lead to?

Drilling Rigger Competence Reassessment

Please refer to Drilling Rigger Training and Assessment Framework also.

### What are the entry requirements?

Learners for the Drilling Rigger competence assessment must possess:

#### Option 1

(a) A valid OPITO-approved Rigger Initial Training Certificate

And

(b) A fully completed and valid OPITO Drilling Rigger Workplace Experience Logbook and supporting evidence each of the nine tasks, such as a copy of the lifting plan, permit or tool box talk, based on the OPITO Rigger Initial Training Standard and Drilling Rigger Workplace Experience Logbook Requirements requirements, which has been signed as true and valid by the employing company head of discipline or the employing company discipline manager and confirmed by the Centre as being present and correct prior to assessment taking place.

\*Supporting evidence is not required for learners who completed the Initial Training Standard (previously Stage 1) between February 29th, 2020, and February 28th, 2022.

Or

(c) If a learner completed the Initial Training Standard (previously Stage 1) between February 29th, 2020, and February 28th, 2022 and does not have a completed Workplace Experience Logbook, a formal letter from a current employer, meeting the below criteria, may be accepted.

The letter must:

1) Be on company letterhead

2) State that the learner has met the equivalent of the OPITO (previously Stage 2) Workplace Experience Logbook criteria

3) Include details of the senior employer representative's position in the company, full contact details, and be signed and dated by the senior employer's representative

4) Be sent directly from the employer to the Centre prior to assessment and not provided by the Learner

## **Option 2**

(d) An OPITO Approved Drilling Rigger Competence Assessment or Re-Assessment Certificate awarded within the previous 30 months.

Note 1: Learners who possess an OPITO Drilling Rigger or Rigger Assessment or Re-Assessment Certificate (or equivalent) which has expired by more than 6 months will be required to attend the OPITO Rigger Initial Training prior to undertaking the Drilling Rigger Competence Assessment. In these instances, there will be no requirement to complete a Work Experience Logbook.

## **Medical entry requirements**

Training and/or assessment activities contained within this Product may include physically demanding and potentially stressful elements. All personnel who participate in such activities must be capable of participating fully.

Therefore, OPITO-approved Centres are required, to ensure that prior to participating in practical exercises the learner undergoes medical screening by completing an appropriate medical screening form provided by the OPITO-approved Centre

The OPITO-approved Centre shall keep a record of the learner's declaration of fitness in accordance with their document control policy(s) or procedures.

This information, along with summary details of the type of physical activities the learner will be asked to perform, will be given to learners by the OPITO-approved Centre and, if applicable, to their sponsoring company as part of the joining instructions. The responsibility for declaring any current or pre-existing medical conditions that could have adverse effects to the individual's state of health while undertaking the training and/or assessment activities lies with the learner and/or company sponsoring the learner.

Where doubt exists regarding the fitness of any learner, the OPITO-approved Centre should direct the individual to consult a medical officer familiar with the nature and extent of the training.

Note: Practical exercises should be designed and delivered solely to meet this Product, and must not place on the learners any demands other than those required to meet the Product.

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### **Country Specific if applicable?**

N/A

### **How is this Product assessed?**

Learners will be assessed against the outcomes specified in accordance with the assessment guidance detailed in each unit.

If unsuccessful learners must retake the OPITO Drilling Rigger Competence Assessment. Learner's employer to decide how to address the competence gap to allow the Drilling Rigger to continue in the role.

### **Are there any ratios that must be adhered to for the delivery of this Product?**

The number of learners undertaking the practical assessment is 2

The assessor-to-learner ratio is 1:1 (this refers to the fact that that even though two learners may be assessed within the group of learners, the assessor can only fully assess one learner at a time)

### **What are the Guided Learning Hours?**

Each learner will be expected to lead two drilling related lifting tasks and assist with two drilling related lifting tasks.

Each drilling related lifting task should be of approximately one and a half hours duration.

Note: Where assessment is conducted in the workplace it must be completed within one trip or hitch; the length of the trip/hitch would depend on individual company work cycles.

### **What staff resources are required to deliver this Product?**

#### **Assessor Requirements**

Assessors must:

- (a) Be occupationally competent
- (b) Assessors must hold an industry-recognised assessor qualification
- (c) Fully understand the OPITO-approved Assessment Centre's internal quality assurance of assessment processes and practices.
- (d) Fully understand the requirements of this Industry Standard
- (e) Fully understand the OPITO requirements for recording assessment decisions and securely maintaining accurate records of these.
- (f) Participate in regular standardisation meetings or events to ensure a consistent approach to assessment.
- (g) Undertake and record continuing professional development (CPD).

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## What facilities and equipment are required to deliver this Product?

### Location of Assessment

It is recognised that certain elements of competence assessment can be more robust when carried out 'on-the-job'. Accordingly, this Standard has been deemed suitable for 'on-location' assessment. However, prior to any such assessments taking place, OPITO-Approved Training & Assessment Centres must comply with the following requirements:

- (a) Prior to initial approval, the Centre will specify a single onshore 'approved site' and advise OPITO of its intention to carry out assessments remotely, i.e. 'on-location'.
- (b) Prior to initial approval, the Centre will advise OPITO where all their remote assessments are expected to take place. After approval is awarded, any additional locations must be communicated to OPITO as and when they arise.
- (c) The Training & Assessment Centre shall ensure the suitability of 'on-location' facilities and arrangements prior to each assessment.
- (d) Documented evidence will be retained to show that assessment at the remote site meets the criteria detailed in this OPITO standard including, but not limited to, facilities, equipment and qualifications of relevant staff.
- (e) Documented evidence shall be retained that record all measures required to assure the quality and safety of 'on-location' assessment activities.
- (f) All records must be retained at the single onshore 'approved site' (see Point (a) above).
- (g) OPITO reserves the right to audit any or all the remote sites operated by the Centre at any time

### Facilities

OPITO-approved Assessment Centres must, as a minimum, comply with the following:

**Practical** assessments must be planned to ensure that all the learners get an equal opportunity to demonstrate their rigging and lifting skills - as specified in this Standard.

All facilities must be maintained and where appropriate, inspected and tested in accordance with current standards/legislation.

### Equipment

As a minimum, the following equipment is required to meet the requirements of this standard:

1. Appropriate PPE e.g. safety helmets, safety boots, eye protection, hearing protection, and gloves. Also high-visibility vests for candidates/assessors.
2. A variety of drilling related loads to be lifted e.g. steelwork assemblies, pipework assemblies (e.g. drilling related jumper hoses), plant and equipment (e.g. motors, pumps, valves), loads with an offset centre of gravity etc.
3. Examples of damaged lifting equipment and lifting accessories
4. Appropriate lifting equipment and lifting accessories; the lifting equipment and accessories should be of types typically found in a workplace rigging loft, and must include:
  - a. Chain blocks

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- b. Snatch blocks
- h. Slings (wire/webbing)
- c. Pull lifts
- d. Beam trolley (to be used with runway beams)
- e. Beam clamps
- f. Master links
- g. Barrow/pallet truck
- h. Slings (wire/webbing) .
- i. Eye bolts/ eye nuts
- j. Turnbuckles
- k. Shackles/bow shackles and 4 part shackles
- l. Tag lines

5. All of the equipment listed above must be available on site and included across the bank of lifting plans held by the Approved Centre.

All equipment must be maintained and inspected and tested in accordance with applicable legislation and standards. Certificates and maintenance schedules should be available at all times.

Note: Damaged lifting equipment and lifting accessories - purposely used for specific assessment criteria by the approved centre - must be securely controlled and clearly identifiable to the assessor and centre support staff.

## What is the validity of this Product?

2 years

Please note: If the expiry date on the learners previous certificate is within 3 months prior of the course enrolment date then the date of the new certificate should correspond with the expiry date of the existing/previous certificate unless stated otherwise by the Duty Holder or Asset Owner or Operator.

## Product Summary

### Product Structure:

To achieve the OPITO Drilling Rigger Competence Assessment Standard the learner will need to complete the 2 mandatory units.

| Unit Code | Unit Title                                |
|-----------|---|
| OIS-271   | Prepare, Lift and Lower Loads - Theory    |
| OIS-272   | Prepare, Lift and Lower Loads - Practical |

## Unit Summary

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|----------------------------------|---|
| Unit Code                        | OIS-271   |
| Title                            | Prepare, Lift and Lower Loads - Theory  |
| Guided Learning Hours            | See GLH at Product level  |
| Assessment Guidance              | <p>Learners will be required to undertake a written or electronic knowledge assessment test which covers the outcomes and corresponding criteria stated. Each of the criteria must be covered. The knowledge assessment must be of a 'closed book' format, questions must be clearly referenced against specific criteria and question selection must be random.</p> <p>The knowledge test must incorporate written and/or scenario-based questions and multiple-choice questions. A maximum of 50% of questions should be multiple choice. Learners must achieve a pass mark of 80% or higher of the criteria to successfully complete the knowledge assessment.</p> |
| Assessment/Evidence Requirements | Records of assessment referencing all outcomes, must be securely maintained.  |

| OUTCOMES   | CRITERIA  |
|--|---|
| <p>1 <b>Outcome: How to prepare for the lifting and lowering of loads</b></p> <p><b>The learner will understand:</b></p> | <p>1.1 The employer's responsibilities under Lifting Operations and Lifting Equipment Regulations</p> <p>1.2 The hazards associated with a lifting operation</p> <p>1.3 The hazards in the prepared risk assessment associated with the lifting operation and the control measures required to address these to include:</p> <p>1.3.1 Exposure to drilling chemicals</p> <p>1.3.2 Noise and vibration</p> <p>1.4 The purpose of a risk assessment and lifting plan</p> <p>1.5 The approved procedures and practices in the context of the operations, the work activity and the workplace</p> <p>1.6 How to determine the weight of loads</p> <p>1.7 The relevant roles of personnel involved in lifting operations, and typical reporting lines</p> <p>1.8 How to identify areas near the load where it is unsafe to stand</p> |

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|   | <p>1.9 Load lifting/lowering route planning methods and techniques</p> <p>1.10 Areas of the installation/site which need special consideration if a load needs to be landed near or passes close to those areas</p> <p>1.11 Rigging principles, SWL, WLL and angles of lift</p> <p>1.12 Why lifting equipment and lifting accessories are marked e.g. SWL and WLL</p> <p>1.13 Pre-use inspections of lifting equipment and lifting accessories</p> <p>1.14 Considerations to ensure load stability, security and weight distribution</p> <p>1.15 The types of faults that are possible with lifting equipment and lifting accessories</p> <p>1.16 The key information to be included in handovers during lifting operations</p> <p>1.17 Types of lifting accessories</p> <p>1.18 The purpose of a rigging loft and the quarantine system</p> <p>1.19 How to take into account dynamic factors</p> |
| <p>2 <b>Outcome: The Lifting, moving, lowering and landing of a load</b></p> <p><b>The learner will understand:</b></p> | <p>2.1 The capabilities and limitations of lifting equipment and lifting accessories</p> <p>2.2 What to do when the lifting/rigging operation requires a deviation from the lifting plan (this must be ascertained by the assessor during the assessment at the lift site)</p> <p>2.3 Post-use inspections on lifting equipment and lifting accessories</p> <p>2.4 How to identify and report defective lifting equipment, lifting accessories and associated materials</p> <p>2.5 How to correctly store various items of lifting equipment and lifting accessories</p>  |

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|  | <p>How to restore the worksite and return lifting equipment and lifting accessories to the required location</p> <p>2.6</p> <p>2.7 How to conduct post-work debriefings</p> |
|--|---|

|                       |  |
|-----------------------|--|
| Unit Code             | OIS-272  |
| Title                 | Prepare, Lift and Lower Loads - Practical  |
| Guided Learning Hours | Each drilling related lifting task should be of approximately one and a half hours duration.   |
| Assessment Guidance   | <p>Centres must ensure that learners are assessed against the theoretical outcomes specified in each unit prior to any practical assessment taking place, where applicable. There will be instances where it is most appropriate to assess the learners knowledge and practical skills simultaneously.</p> <p>Learners will be assessed through observation undertaking practical exercises covering all the criteria specified.</p> <p>The learner must be briefed to ensure they know how the assessment will be conducted and what is expected of them during the assessment</p> <p>The learner must be assessed against all of the following lifting activities at least once through the conduct of two different drilling related lifting tasks</p> <ol style="list-style-type: none"> <li>1. Lifting and positioning of electrical/mechanical equipment for installation</li> <li>2. Changing out fluid end parts, modules, liners and retention systems for mud pumps</li> <li>3. Installation and removal of HP valves including choke manifold and stand pipe manifold</li> <li>4. Lifting and positioning of pipe spools within mud system and diverter system</li> <li>5. Installation of choke and kill lines</li> </ol> <p>Each learner will be expected to lead two drilling related lifting tasks and assist with two drilling related lifting tasks.</p> <p>The learner will be required to demonstrate the drilling related lifting activities to the performance and knowledge criteria specified incorporating the full range of tasks specified below::</p> <p><b>Drilling Rigging Tasks:</b></p> <ol style="list-style-type: none"> <li>1. Lift and lower loads to intended location.</li> <li>2. Obtain and position the lifting equipment and lifting accessories as detailed in the lifting plan</li> </ol> <p><b>Lifting Operations:</b></p> <p>The drilling related lifting tasks must be either:</p> |

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|                                  | <p>(a) Taken from a bank of lifting exercises (complete with risk assessments and lifting plans) - prepared in advance by the Assessment Centre.</p> <p><b>Or</b></p> <p>(b) Planned workplace lifting tasks (complete with risk assessments and lifting plans) that tests the candidate against the Unit criteria specified in this section.</p> <p><b>Note:</b> Risk assessments and lifting plans must be approved by a competent person*.</p> <p>*Competent Person: A person nominated to approve risk assessments and lifting plans by virtue of relevant knowledge and expertise.</p> <p>When leading the drilling related lifting task, the learner will be expected to brief the team (toolbox talk), allocate tasks and give clear instructions.</p> <p>During the assessment, the learner must take account of the relevant worksite operational requirements, procedures and safe working practices</p> <p>Learners will be required to assist other learners with lifting tasks.</p> <p>Learners must successfully complete all practical exercises in order to achieve the Unit.</p> <p>The assessor must provide feedback to the learner following completion of the practical assessments.</p> <p>Centres are required to complete, and learners to sign, the OPITO Drilling Rigger Competence Assessment/ Reassessment Record in the supporting documents.</p> <p><b>Notes for the Assessor</b></p> <ol style="list-style-type: none"> <li>1. Where the assessment is conducted at the worksite, the tasks associated with the practical assessment must be conducted within a realistic timeframe. The Assessor will determine a reasonable timeframe for the learner to complete each task – considering worksite environment and activities.</li> <li>2. An approved assessment checklist and record sheet must be used and will be made available to the Assessor (refer to OPITO Drilling Rigger Competence Assessment/ Reassessment Record) by the OPITO-approved Centre.</li> </ol> <p><b>Notification of Assessment Outcome</b></p> <p>Where a learner <b>does not meet</b> the required assessment outcomes: the assessor must clearly identify and record the outcomes which have not been met and suggest any further training requirements. The Assessment Centre must provide the learner and the learner's employer with a written report identifying why the learner was unsuccessful and suggest any further training requirement – within 7 days of the assessment.</p> <p>Centres are required to complete, and learners to sign, the OPITO Drilling Rigger Competence Assessment/ Reassessment Record in the supporting documents.</p> |
| Assessment/Evidence Requirements | Records of assessment referencing all outcomes, must be securely maintained.  |

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| OUTCOMES   | CRITERIA   |
|--|--|
| <p>1 <b>Outcome: Preparing for lifting and lowering of loads</b></p> <p><b>The learner will perform:</b></p> | <p>1.1 Identify potential hazards in the prepared risk assessment associated with the lifting operation to include:</p> <p>1.1.1 Hand and body positioning</p> <p>1.1.2 Working in a restricted work area</p> <p>1.1.3 Use of hand tools</p> <p>1.1.4 Manual handling</p> <p>1.1.5 Working at height</p> <p>1.2 Implement control measures to address the identified hazards to include</p> <p>1.2.1 Hand and body positioning</p> <p>1.2.2 Working in a restricted work area</p> <p>1.2.3 Use of hand tools</p> <p>1.2.4 Manual handling</p> <p>1.2.5 Working at height</p> <p>1.3 Follow the plan for lifting and lowering the load to minimise any risk to personnel and surroundings</p> <p>1.4 Ensure the load is accurately assessed for approximate weight, incorporating an adequate safety factor</p> <p>1.5 Communicate, discuss and ensure understanding of the prepared lifting plan and risk assessment with the lifting team</p> <p>1.6 Communicate, discuss and agree with appropriate personnel, actions to take related to the lifting operation in the event of an emergency</p> <p>1.7 Inform the relevant personnel of the lifting operation and identify any potential disruption to operations</p> <p>1.8 Obtain the resources identified in the lifting plan required to lift and lower the</p> |

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|  | <p>load, following relevant rigging lift procedures</p> <p>1.9 Ensure the lifting equipment and lifting accessories are free of obvious defects, and certification is current</p> <p>1.10 Carry out pre-use inspection of lifting equipment and lifting accessories</p> <p>1.11 Prepare the load according to specified requirements of the lifting plan</p> <p>1.12 Protect the load from possible damage during the lifting operation</p> <p>1.13 Attach the lifting accessories to the load using industry best practice</p> <p>1.14 Determine the centre of gravity of a load that has an offset centre of gravity</p> <p>1.15 Install and position the lifting equipment for balanced weight distribution</p> <p>1.16 Ensure appropriate barriers are installed at appropriate areas</p> |
| <p>2 <b>Outcome: The Lifting, lowering and landing of a load</b></p> <p><b>The learner will perform:</b></p> | <p>2.1 Give clear instructions to the lifting team before and during the lifting/lowering of the load</p> <p>2.2 Use the identified method of communications derived from the risk assessment, lifting plan and work permit, and comply with signalling protocols agreed within the lifting team, or company-specific protocols</p> <p>2.3 Progressively apply force/tension to the load via the attached lifting equipment, until the weight of the load is fully taken up</p> <p>2.4 Confirm the load security before raising to the minimum height required for lifting</p> <p>2.5 Maintain load security and stability throughout transportation of the load</p> <p>2.6 Take adequate precautions to maintain the safety of personnel and</p>   |

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|  | <p>surroundings during the lifting/lowering of the load</p> <p>2.7 Correctly positioning the load in the intended location and progressively remove the lifting equipment force/tension, safely disconnect the load from the lifting equipment and remove the lifting accessories</p> <p>2.8 Work effectively as part of a team</p> <p>2.9 Comply with relevant health and safety legislation and guidelines at all times</p> |
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## Links

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