Instruction Document:
Taking a Client Call – First Notice

Document Number: Instruction Document – Taking a Client Call – First Notice	Revision No: 000	Approval Date: May 10, 2017
Name and Position of Document Approver: Colin Fraser, Lead - Logistics		

PURPOSE & SCOPE

- This instruction document outlines the minimum requirements that must be met when taking a preliminary call from a client or prospective client.

ROLES & RESPONSIBILITIES

The instruction document activities described below must be completed by competent personnel. Every effort has been made to ensure the accuracy and reliability of this information.

1) Implementation

- The Lead - Logistics provides direction to Coordinators and provides resources to allow consistent rollout, training, implementation, and evaluation of all procedures; as well as ensuring implementation of this instruction document.

2) Supervision

- The Coordinator team performs the activities of this service under the supervision of the Lead - Logistics.

3) Risk Management

- The Lead - Logistics oversees requirements for the communication, implementation and monitoring of this instruction document. It is the responsibility of the Lead - Logistics to assess operations against documented processes.

4) Other (if applicable)

TASK	STEPS	NOTES/HAZARDS/ COMMENTS
PRE-JOB PREPARATION		
Preparation	1. Ensure the phone headset is sufficiently charged if you prefer to use it when speaking on the dispatch phone.	
Tools/Equipment Required	Ensure that you have the following items before you begin: 1. Access to the internet and email 2. Access to the PDF Pumping Proposals folder on the Sanjel P Drive 3. Primary and Remedial Call Taking Sheets (available in the Dispatch folder on P drive) 4. Access to eService 5. Access to the Sanjel Portal 6. Paper and pen 7. Rig Board open on the dispatch computer	All coordinators should have the ability to send and receive e-mails from their respective office's shared e-mail account.
INSTRUCTION DOCUMENT		
	1. Answer the phone in a clear and courteous manner. Answer using the company name, and your personal name. An example would be "Sanjel, Juan here" or "Good morning, this is Ash with Sanjel".	
	2. Write down the name and phone number of the caller. In case the connection is lost, you can call him or her back without delay. a. Confirm if the OSR has a cross shift, and get his/her name and contact information if so. Get proper spelling of their name. b. Confirm if the phone number provided is a rig/command center number or the OSR's direct line (cell)	Log the OSR's name and contact info into the consultant directory
	3. Ensure that the call is from a current client of Sanjel, using the Sanjel Client List in the Sanjel Portal. If there is no program on the P drive for this particular well or client, take down as much information as possible and speak with Client Solutions On Call.	A credit check may have to be done if the call is from a non-current Sanjel client. Let the caller know that Client Solutions will be calling them for more information.
	4. Confirm that the program that the OSR has, matches the one you have on the P drive. Once this is confirmed, it's important to know if this is the first job on this location/pad, or if there has been others.	Confirm the programs match, using the customer, location, program type, revision number, and finally the date and PRG# on the front page.

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	5. Confirm well name. This is essential on any pad work, as the Surface LSD may remain the same from well to well.	
	6. Confirm whether the location is in LSD or NTS format, and get directions from the closest city or town. Be sure to note any road bans, radio controlled roads and the associated channels. Other concerns would be areas to chain up, low level bridges, etc.	NTS locations are used throughout most of northern BC, whereas the rest of Sanjel's operating areas are covered by LSD format.
	7. Confirm that the program is correct, in regards to cement blends and tonnage, well profile, pressure ratings, temperatures. If anything is different from what the program has written down, contact Client Solutions. a. Some programs have different blend options based on variables like temperature. Ensure to confirm and record which option we will be using. b. Well temperature is critical in blend design in deep holes/SAGD/Thermal wells etc. BHCT or BSHT must be confirmed, as well as the method used to record this data.	Confirm volumes required for all cement blends. Ensure to account for any scavenger required. Many clients will include this in their cement order but it must be confirmed.
	8. Confirm the drilling mud type and weight. If client has the rheology information record that as well. a. Ensure programmed preflush and spacer systems are compatible with mud in the well. b. Mud weight cannot exceed cement density. c. Preflushes and spacers may need to be densified to ±50 kg/m^3 above mud weight, ensure to send batch-o-matic if required to add densifying material.	Invert mud systems require different preflush and spacers than water based mud systems.
	9. Determine what the crew will be pumping through. a. If a drill pipe nubbin is being used, determine size and thread type. b. If a swedge is being used, confirm size and casing thread type. c. If a PLH is being used, confirm size and casing thread type. d. If tying into 3rd party equipment (volant tool, side entry sub, liner PLH etc) confirm connection type (ie 2" 1502)	Always confirm pressure limitations of any third party equipment.

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	10. If the customer has bins spotted on location, confirm when we can begin to load cement. If no bins are on location and the programmed tonnages dictate that a bin(s) is required, arrange for bins to be sent to location. a. If the OSR does not wish to have cement sent yet, ask for as much notice as possible to ensure we are always ahead of the game if possible. b. If we are able to start blending and loading cement immediately, refer to WI: Blend Confirmation for further instructions	The customer can use his or her preferred company to pick up bins from the Sanjel yard, or we can drop them off.
	11. Confirm a rough estimate for the crew to be on location if possible. Based on that information, find out if we need to spot equipment on location early, due to road bans or other situations. If so, Client Solutions will arrange pricing for the spotted units.	Determine if any special training/access permissions for the crew well in advance of job.
	12. Inform the customer that a final call out will be needed. Provide the client with a recommended minimum advance notice. This will change from area to area but a rule of thumb is: a. 3 hours for dedicated crews (in camp/projects) b. 6-8 hours for W4/South work. c. 12 hours for W5 work.	Remind the customer that they can call back and change their time if the rig is running behind or ahead of schedule.
	13. Record all possible information into the Rig Board, and create a call sheet. Refer to the WI: Creating A Call Sheet for further information.	Retain all information taken from the Primary or Remedial job sheet until after the job has been completed.

If there any requests or discrepancies are found in this instruction document, please complete an MOC (if required) and email Instructions@sanjel.com to review.