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INTRODUCTION

ABOUT THIS HANDBOOK
The purpose of this handbook is to provide you with important information about the Credential Maintenance requirements necessary to maintain your Certified Petroleum Data Analyst (CPDA™) credential.

All Certified Petroleum Data Analysts, (CPDAs) are expected to read this handbook.

KEY CONTACT INFORMATION

INTRODUCTION

CREDENTIAL MAINTENANCE OVERVIEW
To maintain an active certification status, you are required to complete professional development and learning activities, these allow you to earn Professional Development Units (PDUs). These PDUs fulfill your credential maintenance requirements and ultimately grow and develop your knowledge as a practitioner. The purpose of the Credential Maintenance program is to:
- encourage continuous learning and development among certification holders,
- provide direction in development areas to ensure relevancy of certified practitioners,
- recognize individual learning opportunities, and,
- sustain the global recognition and value of the CPDA credential.
CREDENTIAL MAINTENANCE REQUIREMENTS

PROFESSIONAL DEVELOPMENT UNITS (PDUs)
All CPDAs are required to complete a minimum of ninety (90) hours of professional development units (PDUs) per three-year term to renew their certification.

Ways to Earn PDUs
PDUs can be earned through various professional development activities associated with two groups:

Group A: Education
Group A is focused on learning opportunities that allow you to expand and enhance your technical, leadership, strategic and business management skills.

Submissions under Group A must be related to one (or more) of the eight CPDA Competency Areas to be accepted.

• Data Governance  
• Data Analysis  
• Data Quality Management  
• Data Security  
• Spatial Data  
• Exploration and Production (E&P) Lifecycle  
• Master Data Management  
• Communication

A minimum of sixty (60) PDUs are required per 3-year term for Group A.

Group B: Giving back to the Professional Discipline
Group B includes activities that enable you to share and utilize your knowledge and skills to contribute to and help build the profession.

Submissions under Group B must be directly related to your profession as a Certified Petroleum Data Analyst to be accepted.

A minimum of thirty (30) PDUs are required per certification term for Group B.
Professional Development Activities
The table overleaf (below) details activities that you may complete to earn your Professional Development Units, examples of Supporting Documentation, and the maximum PDUs that can be claimed in each activity area.

Please use your best judgment to determine relevant PDUs when selecting activities that are not listed within these guidelines. Activities surrounding hobbies or a second profession not related to the credential are not eligible for PDUs. For example, activities that do not qualify for earning either Group A or Group B PDUs include attending Alumni Association Meetings, Parent Teacher Association meetings, Photography Club gatherings, or volunteering at an animal rescue centre as these activities are not related to the CPDA credential.

If a CPDA is unsure if a professional development activity meets the Credential Maintenance requirements, they should contact the Registrar (certification@ppdm.org) providing details of their intended activity. If necessary, the Registrar will work with the Energy Data Management Certification Committee (EDMCC) to determine the suitability of an intended activity for the purpose of Credential Maintenance.

In most instances, one (1) hour of activity is equal to one (1) Professional Development Unit (PDU).
<table>
<thead>
<tr>
<th>Professional Development Activity</th>
<th>PDU Maximums</th>
<th>Supporting Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registered Courses</td>
<td>A maximum of 60 PDUs will be awarded per 3-year term.</td>
<td>Registration form, certificate or letter of attendance and course abstract.</td>
</tr>
<tr>
<td>Conferences &amp; Industry Events</td>
<td>A maximum of five PDUs will be given per day to a maximum of 20 PDUs per 3-year term.</td>
<td>Registration form, certificate or letter of attendance and event agenda.</td>
</tr>
<tr>
<td>In-House Training</td>
<td>A maximum of 20 PDUs per 3-year term.</td>
<td>A certificate/letter from employer outlining the learning outcomes.</td>
</tr>
<tr>
<td>Self-Directed Learning</td>
<td>A maximum of 20 PDUs will be awarded per 3-year term.</td>
<td>Provide details of the learning materials and outcomes.</td>
</tr>
<tr>
<td>University or Academic Institution Courses</td>
<td>One semester will equate a total of 20 PDUs to a maximum of 60 PDUs per 3-year term.</td>
<td>Transcript or grade report indicating a passing mark.</td>
</tr>
<tr>
<td>Create Content</td>
<td>A maximum of 15 PDUs will be awarded per 3-year term.</td>
<td>Provide details of the materials and outcomes.</td>
</tr>
<tr>
<td>Give a Presentation</td>
<td>A maximum of 15 PDUs will be awarded per 3-year term.</td>
<td>Provide details of the presentation and your preparation.</td>
</tr>
<tr>
<td>Share Knowledge</td>
<td>A maximum of 15 PDUs will be awarded per 3-year term.</td>
<td>Provide details.</td>
</tr>
<tr>
<td>Volunteer</td>
<td>A maximum of 15 PDUs will be awarded per 3-year term.</td>
<td>Provide summary of activities and organization.</td>
</tr>
<tr>
<td>Work as a Practitioner</td>
<td>A maximum of 15 PDUs will be awarded per 3-year term.</td>
<td>Provide updated CV/Résumé.</td>
</tr>
</tbody>
</table>

In most instances, one (1) hour of activity is equal to one (1) Professional Development Unit (PDU).
Additional Guidance – Group B, Create Content

Preparing Materials for a Presentation
You can use this activity area to claim time spent preparing materials for use by industry, this includes the preparation of materials for presentations that you, or a colleague, may give either in the workplace, or at an industry event.

Publishing a Book or an Article
In most instances, one (1) hour of activity is equal to one (1) Professional Development Unit (PDU) there are some exceptions under this activity area:

- **Publishing a Book**
  30 PDUs may be earned for the first publication of a book.
  Reprints and republications are not applicable for PDUs.

- **Publishing an Article or White Paper**
  PDUs can be earned for the first publication of an article. The table below identifies the number of PDUs that will be earned based on the length of the published material. A page is estimated at 700 words.

<table>
<thead>
<tr>
<th>Material Length</th>
<th>PDUs</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-5 Pages</td>
<td>5</td>
</tr>
<tr>
<td>6+ Pages</td>
<td>10</td>
</tr>
</tbody>
</table>
Reporting PDUs
PDUs are due for submission to the PPDM Association at the end of each three-year renewal term. You are responsible for recording your PDU activities on the Credential Maintenance Reporting Form. The form is available to download from the Credential Maintenance web page.

The Credential Maintenance Reporting Form will assist you in:
- understanding where you are in your Credential Maintenance Term,
- tracking your progress against the Credential Maintenance requirements, and
- recording your PDUs as they are earned.

Supporting Documentation
You must obtain documentation supporting any PDU activities that you complete. This documentation must be retained for twelve (12) months following the end of each certification term. Documentation could be in the form of:
- a letter,
- certificate of completion,
- attendance roster,
- a verification of attendance form, and
- other independent attestation of completion.

At a minimum, each record should include your name, the name of the sponsoring organization, activity title, activity description, activity date, activity duration (hours) and the number of PDUs awarded or claimed. Note: Calendar screenshots, invitations, etc. by themselves are not compliant documentation.

PDU Audit
The Registrar will randomly select PDU submissions to be audited. If selected, you will be required to submit your supporting documentation for your three (3) year Credential Maintenance Term within sixty (60) days.

Failure to provide documentation may result in the suspension, or expiration of your credential.

If found acceptable, the supporting documentation will be placed in the CPDA’s file. If the documentation does not fulfill the requirements additional documentation will be requested.
ANNUAL RENEWAL FEES

There are annual renewal fees associated with the maintenance of a CPDA credential. These fees are due each year on the anniversary your CPDA certification.

For example, for a credential achieved on May 1, 2023, the first annual renewal fee payment would be expected on or before May 1, 2024, and annually thereafter.

There are two rates for CPDA Annual Renewal Fees, Member and Non-Member. CPDAs will receive the member rate if their PPDM Association membership is in good standing at the time of renewal.

<table>
<thead>
<tr>
<th>Annual Renewal Fee Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>PPDM Member</td>
</tr>
<tr>
<td>$75.00</td>
</tr>
<tr>
<td>Plus, applicable taxes</td>
</tr>
</tbody>
</table>

CPDAs will receive three (3) email notifications regarding their CPDA Annual Renewal Fee:

- the first, one (1) week prior to their CPDA anniversary date
- the second, on their CPDA anniversary date
- the final notification one (1) week following their anniversary date

For example:

**CPDA™ Anniversary Date: June 8th**

Initial Renewal Notification — June 1st

Renewal Due — June 8th

Renewal Past Due — June 15th
CERTIFICATION STATUS

Your participation in the CPDA Credential Maintenance program and fulfilling its requirements determines your certification status. Current Certification status will be reflected on a CPDAs digital credential. Your CPDA credential can have one of the following certification statuses:

ACTIVE STATUS
When you first earn your CPDA, it is in an Active status. To continue to remain Active you must remit your Annual Renewal Fees and earn and report the required Professional Development Units.

EXPIRED STATUS
If you do not remain current with your Annual Renewal Fees, or fail to submit your Professional Development Units, your certification will go into an Expired Status.

Once a credential has expired, you may no longer refer to yourself as a CPDA certification holder or use the CPDA designation. To reobtain an expired certification, you will be required to reapply by submitting a new application and associated fees, and retake and pass the examination.

SUSPENDED STATUS
If you are unable to satisfy your Professional Development requirements, and have remained current with your annual renewal payments, you may be able to arrange an accommodation with the Registrar to be placed in a Suspended status whilst you earn and submit any remaining PDUs. The length of the suspension period granted will be determined by the registrar, based on a case-by-case basis. If the professional development requirements are not met by an agreed upon date your certification will go into an Expired Status.

The dates of the next Credential Maintenance Term will not be impacted if a suspension period is issued. The suspension period will overlap the timeframe of the next term.

RETIRED STATUS
If your credential is in good standing and you wish to voluntarily relinquish your active status due to retirement, you are eligible to apply for a Retired status. To qualify, you must no longer earn primary remuneration as a professional, and will need to complete a declaration for the PPDM Association’s records. Once granted a Retired status Credential Holders will not be required to complete any credential maintenance activities or remit Annual Renewal Fees.

To apply for Retired Status, submit a written request to certification@ppdm.org.
APPENDIX: ETHICAL INTEGRITY POLICY

Ethical misconduct includes actions that have a negative effect on the integrity of the certification program. You are expected to familiarize yourself with the actions that are defined as ethical dishonesty and misconduct. CPDAs who are unclear should consult the PPDM Association.

You are required to agree to and comply with the Ethical Integrity and PPDM Association Privacy policies when you complete your CPDA Application form, and once certified you are required to reaffirm your ethical integrity upon the completion of each three-year term with the submission of your Professional Development Units (PDUs).

Ethical Integrity Policy.