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# Standard Guide for Use of Casing Advancement Drilling Methods for Geoenvironmental Exploration and Installation of Subsurface Water Quality Monitoring Devices<sup>1</sup>

This standard is issued under the fixed designation D5872/D5872M; the number immediately following the designation indicates the year of original adoption or, in the case of revision, the year of last revision. A number in parentheses indicates the year of last approval. A superscript epsilon ( $\epsilon$ ) indicates an editorial change since the last revision or reapproval.

## 1. Scope\*

1.1 This guide covers how casing advancement drilling and sampling procedures may be used for geoenvironmental exploration and installation of subsurface water quality monitoring devices.

1.2 Different methods exist to advance casing for geoenvironmental exploration. Selection of a particular method should be made on the basis of geologic conditions at the site. This guide does not include procedures for wireline rotary casing advancer systems which are addressed in Guide [D5786](#).

1.3 Casing advancement drilling methods for geoenvironmental exploration and monitoring-device installations will often involve safety planning, administration, and documentation. This guide does not purport to specifically address exploration and site safety.

1.4 The values stated in either SI units or inch-pound units are to be regarded separately as standard. The values stated in each system may not be exact equivalents; therefore, each system shall be used independently of the other. Combining values from the two systems may result in non-conformance with the standard.

1.5 *This standard does not purport to address all of the safety concerns, if any, associated with its use. It is the responsibility of the user of this standard to establish appropriate safety, health, and environmental practices and determine the applicability of regulatory limitations prior to use.*

1.6 *This guide offers an organized collection of information or a series of options and does not recommend a specific course of action. This document cannot replace education or experience and should be used in conjunction with professional judgment. Not all aspects of this guide may be applicable in all circumstances. This ASTM standard is not intended to represent or replace the standard of care by which the adequacy of*

*a given professional service must be judged, nor should this document be applied without consideration of a project's many unique aspects. The word "Standard" in the title of this document means only that the document has been approved through the ASTM consensus process.*

*1.7 This international standard was developed in accordance with internationally recognized principles on standardization established in the Decision on Principles for the Development of International Standards, Guides and Recommendations issued by the World Trade Organization Technical Barriers to Trade (TBT) Committee.*

## 2. Referenced Documents

### 2.1 ASTM Standards:<sup>2</sup>

- [D653 Terminology Relating to Soil, Rock, and Contained Fluids](#)
- [D2113 Practice for Rock Core Drilling and Sampling of Rock for Site Exploration](#)
- [D3740 Practice for Minimum Requirements for Agencies Engaged in Testing and/or Inspection of Soil and Rock as Used in Engineering Design and Construction](#)
- [D4428/D4428M Test Methods for Crosshole Seismic Testing](#)
- [D5088 Practice for Decontamination of Field Equipment Used at Waste Sites](#)
- [D5092 Practice for Design and Installation of Groundwater Monitoring Wells](#)
- [D5434 Guide for Field Logging of Subsurface Explorations of Soil and Rock](#)
- [D5521 Guide for Development of Groundwater Monitoring Wells in Granular Aquifers](#)
- [D5782 Guide for Use of Direct Air-Rotary Drilling for Geoenvironmental Exploration and the Installation of Subsurface Water-Quality Monitoring Devices](#)
- [D5786 Practice for \(Field Procedure\) for Constant Drawdown Tests in Flowing Wells for Determining Hydraulic](#)

<sup>1</sup> This guide is under the jurisdiction of ASTM Committee [D18](#) on Soil and Rock and is the direct responsibility of Subcommittee [D18.21](#) on Groundwater and Vadose Zone Investigations.

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<sup>2</sup> For referenced ASTM standards, visit the ASTM website, [www.astm.org](http://www.astm.org), or contact ASTM Customer Service at [service@astm.org](mailto:service@astm.org). For *Annual Book of ASTM Standards* volume information, refer to the standard's Document Summary page on the ASTM website.

\*A Summary of Changes section appears at the end of this standard

## Properties of Aquifer Systems

### 3. Terminology

#### 3.1 Definitions:

3.1.1 For definitions of general terms used within this standard, refer to Terminology **D653**.

3.1.2 *cleanout depth*—the depth to which the end of the drill string (bit or core barrel cutting end) has reached after an interval of cutting. The cleanout depth (or drilled depth as it is referred to after cleaning out of any sloughed material in the bottom of the borehole) is usually recorded to the nearest 30 mm [0.1 ft].

### 4. Significance and Use

4.1 Casing advancement may be used in support of geoenvironmental exploration and for installation of subsurface water-quality monitoring devices in both unconsolidated and consolidated sediment. Casing advancement systems and procedures used for geoenvironmental exploration and instrumentation installations consist of direct air-rotary drilling utilizing conventional rotary bits or a down-the-hole hammer drill with under reaming capability, in combination with a drill through casing driver.

**NOTE 1**—Direct air-rotary drilling uses pressured air for circulation of drill cuttings. In some instances, water or foam additives, or both, may be injected into the air stream to improve cuttings-lifting capacity and cuttings return. The use of air under high pressures may cause fracturing of the formation materials or extreme erosion of the borehole, if drilling pressures and techniques are not carefully maintained and monitored. If borehole damage becomes apparent, consideration to other drilling method(s) should be given.

4.1.1 Casing advancement methods allow for installation of subsurface water quality monitoring devices and collection of water quality samples at depth(s) during drilling.

4.1.2 Other advantages of casing advancement drilling methods include: the capability of drilling without the introduction of drilling fluid(s) to the subsurface; maintenance of hole stability for sampling purposes and monitor-well installation/construction in poorly-indurated to unconsolidated materials.

4.1.3 The user of casing advancement drilling for geoenvironmental exploration and monitoring device installations should be cognizant of both the physical (temperature and airborne particles) and chemical (compressor lubricants and fluid additives) qualities of compressed air that may be used as the circulating medium.

4.2 The application of casing advancement drilling to geoenvironmental exploration may involve soil or rock sampling, or in situ soil, rock, or pore-fluid testing. The user may install a monitoring device within the same borehole wherein sampling, in situ or pore-fluid testing, or coring was performed.

4.3 The subsurface water quality monitoring devices that are addressed in this guide consist generally of a screened or porous intake device and riser pipe(s) that are usually installed with a filter pack to enhance the longevity of the intake unit, and with isolation seals and low-permeability backfill to deter the movement of fluids or infiltration of surface water between

hydrogeologic units penetrated by the borehole (see Practice **D5092**). A piezometer is primarily a device used for measuring subsurface hydraulic heads, the conversion of a piezometer to a water quality monitoring device should be made only after consideration of the overall quality and integrity of the installation to include the quality of materials that will contact sampled water or gas. Both water quality monitoring devices and piezometers should have adequate casing seals, annular isolation seals, and backfills to deter communication of contaminants between hydrogeologic units.

**NOTE 2**—The quality of the result produced by this standard is dependent on the competence of the personnel performing it, and the suitability of the equipment and facilities used. Agencies that meet the criteria of Practice **D3740** are generally considered capable of competent and objective testing/sampling/evaluation/and the like. Users of this standard are cautioned that compliance with Practice **D3740** does not in itself assure reliable results. Reliable results depend on many factors; Practice **D3740** provides a means of evaluating some of those factors.

### 5. Apparatus

5.1 Casing advancement systems and procedures used for geoenvironmental exploration and instrumentation installations include: direct air-rotary in combination with a drill through casing driver, and conventional rotary bits or down-the-hole hammer drill with or without under reaming capability. Each of these methods requires a specific type of drill rig and tools.

**NOTE 3**—In North America, the sizes of casings bits, drill rods and core barrels are standardized by American Petroleum Institute (API) **(1)**<sup>3</sup> and the Diamond Core Drill Manufacturers Association (DCDMA). Refer to the DCDMA Technical Manual **(2)** and to published materials of API for available sizes and capacities of drilling tools equipment.

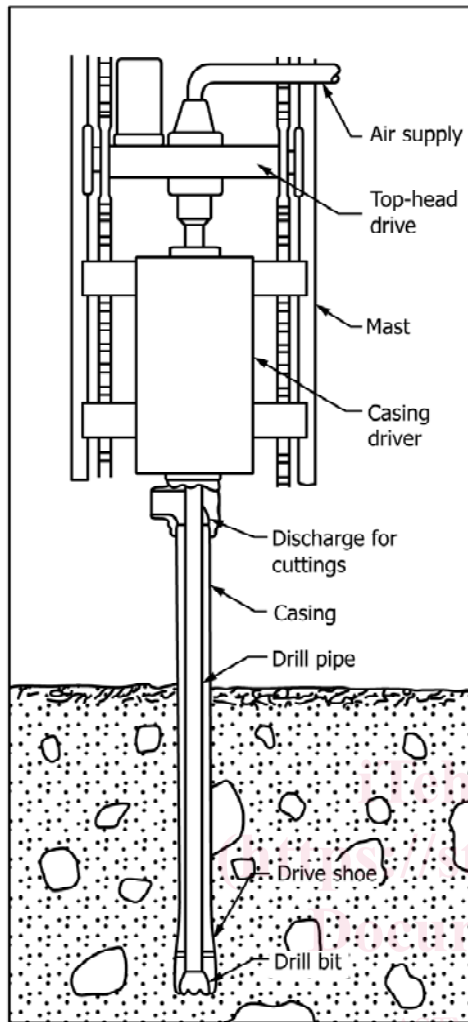
5.1.1 Direct air-rotary drill rigs equipped with drill through casing drivers have a mast-mounted, percussion driver that is used to set casing while simultaneously utilizing a top-head rotary drive unit. The drill string is generally advanced with bit being slightly ahead of the casing. **Fig. 1** shows the various components of the drill through casing driver system. Other mechanical components include casings, drill rods, drill bits, air compressors, pressure lines, swivels, dust collectors, and air-cleaning device (cyclone separator).

5.1.1.1 *Mast-Mounted Casing Driver*, using a piston activated by air pressure to create driving force. Casing drivers are devised to principally drive casing down while drilling but they can also be used to drive the casing upward for casing removal.

5.1.1.2 *Standard Casings*, driven with the casing driver. The bottom of the casing is equipped with a forged or cast alloy drive shoe. The top of the casing fits into the casing driver by means of an anvil. In hard geologic formations, casings may be welded at connections for added stability. The casing size is usually selected to provide a drill hole of sufficient diameter for the needed sampling or testing or for insertion of instrumentation device components such as the screened intake and filter pack and installation devices such as a tremie pipe.

5.1.1.3 Other considerations for selection of casing size are borehole depth and formation type. The casing size should

<sup>3</sup> The boldface numbers in parentheses refer to a list of references at the end of this standard.



**FIG. 1 Casing Drivers can be Fitted to Top-Head Drive Rotary Rigs to Simultaneously Drill and Drive Casing**

of pipe-thread lubricants on chemical analyses of samples should be considered and documented when using casing advancement drilling. The same consideration and documentation should be given to lubricants used with water swivels, hoisting swivels, or other devices used near the drilling axis.

5.1.1.5 *Rotary Bit*, attached to the bottom of the drill rod and provides material-cutting capability. Core barrels may be used to obtain sample cores and during this operation the casing can be advanced up to the length of the core barrel. Numerous bit types can be selected depending on the formation properties. Some types successfully used include roller-cone rock bits and drag bits. In hard geologic formations, down-the-hole hammers can be substituted for rotary drill bits. Bit selection can be aided by review of referenced literature or consultation with manufacturers, or both.

5.1.1.6 Perform coring of rock in accordance with Practice **D2113**. Soil sampling or coring methods, some of which are listed in 2.2, can also be used to obtain samples and advance the hole. Simultaneously coring and advancing the casing with the casing driver would normally be considered incompatible.

5.1.1.7 Direct-rotary bits have discharge ports that are in close proximity with the bottom of the hole. When these are used in loose cohesionless sediment, jetting or excessive erosion of the test intervals could occur.

5.1.2 Casing advancement drill rigs may be equipped with either standard or under reaming down-the-hole hammers. Standard down-the-hole hammers can be used in unconsolidated deposits to break up highly abrasive sediment, such as cobbles and boulders. Under reaming down-the-hole hammers operate by drilling and under reaming the drill hole using an air-activated down-the-hole percussion hammer so that the casing falls or can be pushed downward directly behind the hammer bit. Cuttings are removed from the drill hole by air exiting the down-the-hole hammer. In stable geologic formations, such as within rock, casings may not be needed. Down-the-hole hammers may also be used with direct air-rotary drilling procedures discussed in Guide **D5782**.

5.1.3 *Down-the-Hole Hammer*, is a pneumatic drill operated on the end of the drill rods. The bit at the end of the hammer is constructed of alloy steel and tungsten-carbide inserts to provide cutting or chipping surfaces. The pneumatic hammer impacts the rock surface while the drill pipe is slowly rotated. Rotation of the bit helps ensure even penetration and straight holes in rock. Proper rotational speed is 10 to 30 rpm with lower speeds used in harder rock. Down-the-hole hammers require air pressures ranging from 700 to 1400 kPa [100 to 200 lb/in.<sup>2</sup>] and volumes of 2.8 to 8.5 m<sup>3</sup>/min [100 to 300 cfm].

5.2 *Air Compressors*, needed to operate the casing driver and the down-the-hole hammer and to provide air to circulate the drill cuttings out of the borehole.

5.2.1 *Air Compressor and Filter(s)*, providing adequate air without significant contamination, for removal of cuttings generated at the bit. Air requirements for casing drivers can be evaluated from manufacturers' literature. Air requirements for rotary drilling bits or down-the-hole hammers will depend upon the drill rod and bit configuration, the characteristics of

allow for adequate annulus between the casing and the drill rod for upward discharge of cuttings. Also, consideration should be made when difficult formations are expected to require telescoping from larger to smaller casing diameters.

5.1.1.4 *Drill Rods*, used inside the casing for rotary air drilling. The rods extend through the casing driver and are connected to a top-head drive motor for rotation and transfer of rotational force from the drill rig to the bit or core barrel. Drill rod and casing are usually assembled as a unit and raised into position on the mast. Individual drill rods should be straight so they do not contribute to excessive vibrations or "whipping" of the drill-rod column. All threaded connections should be in good repair and not leak significantly at the internal air pressure needed for drilling. Drill rods should be made up securely by wrench tightening at the threaded joint(s) at all times to prevent rod damage. Drill pipes usually require lubricants on the threads to allow easy unthreading (breaking) of the connecting joints. Some lubricants have organic or metallic constituents, or both, that could be interpreted as contaminants if detected in a sample. Various lubricants are available that have components of known chemistry. The effect

the geology penetrated, the depth of drilling below groundwater level, and the total depth of drilling. The flow-rate requirements are usually based on an annulus upflow velocity of about 900 to 1200 m/min [about 3000 to 4000 ft/min] even though upflow rates of less than 900 to 1200 m/min [about 3000 to 4000 ft/min] are often adequate for cuttings transport. Guidance for design of air-pressure circulation systems can be found in referenced literature.

5.2.1.1 The quality of compressed air entering the borehole and the quality of air discharged from the borehole and air-cleaning devices must be considered. If not adequately filtered, the air produced by most oil-lubricated air compressors can introduce some oil into the circulation system. High-efficiency, inline, air filters are usually needed to minimize contamination of the borehole. Air-quality monitoring may be needed and, if performed, results should be documented.

5.2.2 *Pressure Hose*, conducting the air from the air compressor to the swivel.

5.2.3 *Swivel*, directing the air to the drill-rod column.

5.2.4 *Discharge Hose*, conducting air and cuttings from the drill-hole annulus to an air-cleaning device.

5.2.5 *Air-Cleaning Device*, generally called a cyclone separator—separates cuttings from the air returning from the drill hole via the discharge hose. A correctly sized cyclone separator can remove practically all of the cuttings from the return air. A small quantity of fine particles, however, are usually discharged to the atmosphere with the “cleaned” air. Some air-cleaning devices consist of a cyclone separator alone. In certain cases, the cyclone separator can be combined with a HEPA (high-efficiency particulate air) filter for removing dust particles that might be radioactive. In other special situations, the cyclone separator may be used in conjunction with a charcoal-filtering arrangement for removal of organic volatiles. Samples of drill cuttings can be collected for analyses of materials penetrated. If samples are obtained, the depth(s) and interval(s) of sample collection should be documented.

5.2.6 Compressed air alone can often transport cuttings from the drill hole and cool the bit. For some geologic conditions, injection of water into the air stream will help control dust or break down “mud rings” that tend to form on the drill rods. Under other circumstances, for example if the drill hole starts to produce water, the injection of a foaming agent may be needed. If changes to the circulating medium are made, such as addition of water, the depth(s) or interval(s) of these changes should be documented. It is important to observe the quantity and quality of return air and cuttings. Zones of low air return as well as zones of no air return should be documented. If circulation is lost and input air pressure is allowed to increase, the possibility of fracturing the encountered geologic formation exists. In order to not raise pressures excessively, the compressor can be equipped with pressure relief valves.

## 6. Drilling Procedures

6.1 As a prelude to and throughout the drilling process stabilize the drill rig and raise the drill-rig mast and position the cyclone separator. If air-monitoring operations are performed,

consider the prevalent wind direction relative to the exhaust from the drill rig. Also, consider the location of the cyclone separator relative to the rig exhaust since air-quality monitoring will be performed at the cyclone-separator discharge point. Establish and document a datum for measuring hole depth. This datum is normally the top of the surface casing or the drilling deck. If the hole is to be later surveyed for elevation, record and report the height of the datum to the ground surface.

6.1.1 Clean and decontaminate the drill rig, drill rods and bits, and hoisting and sampling tools according to Practice **D5088** prior to commencing drilling and sampling operations and at periods during the drilling operation when deemed appropriate such as when the drill string is removed from the hole to permit intermittent sampling.

**NOTE 4**—It is very important to check above the drilling rig for overhead obstructions or hazards, such as power lines, prior to lifting the mast. In most cases, it is needed to perform a survey of underground and all other utilities prior to drilling to evaluate hazards.

6.2 Drilling is usually done as follows:

6.2.1 Attach an initial assembly of a bit, often with a single section of drill rod and casing, to the top-head drive unit.

6.2.2 Activate the air compressor, causing compressed air to circulate through the system.

6.2.3 Drill through casing driver.

6.2.3.1 Several drilling methods can be used with direct air-rotary drill rigs equipped with drill through casing drivers: the drill bit and casing are advanced as a unit, in unconsolidated materials the casing is driven first and then the plug in the casing is drilled out, and the drill bit advances beyond the casing, and then is withdrawn into the casing and then the casing is driven. Air exiting the bit removes the cuttings uphole. Separate cuttings from the return air with an air-cleaning device such as a cyclone separator. Air pressures at the bit should be as low as necessary to maintain circulation in order to minimize hydraulic fracturing or excessive erosion of the surrounding materials. Monitor air pressures during drilling. Changes in cuttings return and circulation pressures may indicate occurrence of excessive erosion. Should excessive erosion occur, note and document the depth(s) of the occurrence(s). Duly note and document abrupt changes or anomalies in the air pressures including the depth(s) of occurrence(s).

6.2.3.2 In most operations the casing and bit are advanced as a unit. The drill bit or down-the-hole hammer generally protrudes out through the bottom of the casing usually not more than 30 cm [12 in.]. Bit-lead distance is adjusted according to drilling conditions. In loose unstable formations it may be necessary to keep the bit near the end of the casing to prevent excessive erosion of the formation. Occasionally, casing advance is stopped, the bit is retracted inside the casing and circulation is maintained to clear cuttings.

6.2.3.3 Compressed air from the drilling system, when allowed to enter geologic zones to be monitored or sampled, may not be easily developed out and may, in turn, affect the chemistry of water samples obtained. Take care in the drilling process to minimize introduction of air into the formation by not allowing the drill bit to advance beyond the casing shoe in unconsolidated formations where it may be practical to do so.