About Valero Energy Corporation

Valero Energy Corporation operates 16 refineries and more than 5,000 retail venues, making it North America’s largest independent refiner and marketer. Located in southeastern Texas, the Port Arthur refinery employs over 800 employees and achieves a total production of 95,000 barrels per day. The refinery is strategically located on the Texas Gulf Coast, approximately 90 miles east of Houston.

Valero wanted something that was going to be easy to use and that people were going to be using. PolicyTech was easy to use and the price was right. I recommend it.

Reggie Ramirez
Process Safety Management Coordinator

To create a safe workplace that meets OSHA’s Voluntary Protection Program (VPP) standards, as well as positively execute Valero’s best practice standards, Port Arthur needed a way to keep their policies and procedures accessible, orderly and accurate.

Given the tough economic times, the refinery was also looking to implement a solution in the most cost-effective way possible. Using NAVEX Global's PolicyTech policy management software, Port Arthur met these goals in an affordable yet high-tech manner.

The Challenge: Four Complexes, 800 Employees

The Port Arthur refinery is only one of Valero’s 16 refineries. The campus consists of four complexes and more than 800 employees. In 2007, Valero corporate headquarters sent policy writers to Port Arthur to spend months rewriting and updating the refinery’s operating manuals.
These procedures were maintained in a series of spreadsheets and paper copies stored at each complex and varied based on managerial preference. When the writers finished, Reggie Ramirez, Port Arthur’s Process Safety Management Coordinator, wanted to see that the procedure documents never again fell into disarray. Unfortunately, Port Arthur had no system to consistently manage the newest manuals.

“We saw that as a problem,” said Ramirez. “We were going to end up in the same situation a couple of years down the road if we didn’t implement a system to manage all of the documents.”

To remedy the problem Port Arthur chose NAVEX Global’s PolicyTech — a web-based policy management system—to track, store and distribute their policies. The software created a system for organizing procedures with automated review and approval processes, a unique network ID for each employee to record when a document is read, and quick reports to demonstrate that employees have read the documents.

“Hopefully we won’t have to implement a major procedure rewrite every few years,” Ramirez said. “We can actually keep them up to date.”

The Results: Multiple Advantages Via PolicyTech

With hundreds of employees accessing policies and procedures, Valero found a variety of features in PolicyTech that benefit the company in efficiency and cost savings. The system enables access based upon an employee’s unique network ID. This allows the system to dynamically filter out thousands of documents based upon the user’s role, team, department, supervisor, etc. When the user searches by keyword, regulation, date, author, etc., they search only the documents appropriate to them rather than the entire database. “The operators say, ‘Wow! How come we couldn’t have this 20 years ago?’” Ramirez said.

In a highly regulated industry, reporting is another huge consideration. With specific user IDs associated with every document viewing, employees simply click a ‘mark as read’ dialog box to certify that they’ve read and understand the document. When it comes time to check compliance, Ramirez knows exactly who has read which policies by running a report on that document.

Valero opted to purchase PolicyTech on NAVEX Global’s concurrent licensing system. Rather than having specific ‘seats’ based upon the total number of employees, it’s based upon the number of people who can be simultaneously accessing the system. This method is particularly economical for employers such as Valero that use shift-work as a major portion of the organization’s employment practice.

Another particularly helpful feature is the quiz that can be associated with any document. Complacency is common; employees may simply be checking the box indicating they’ve read this new policy or important change in procedure. With PolicyTech, Ramirez can easily create a quiz reinforcing some key points that need to be conveyed. Quizzes and surveys aren’t a unique technology, but “NAVEX Global does it a lot easier and a lot quicker than the other methods we tried,” said Ramirez.

How are you training against your policies?

Having your policies and procedures organised and easily managed is critical to your compliance program, and the overall health of your business. But how do you know your staff and vendors have read and understand them? Ask one of our compliance experts about NAVEX Global’s complete online training systems.

To learn more about PolicyTech or to schedule a demo, visit www.navexglobal.com/PolicyTech or call us at +1 866 297 0224.
The Results: Success Through Access

Since 2007, eight of Valero’s refineries have purchased PolicyTech. In addition to Port Arthur, refineries in Benicia, California; Houston, Texas; McKee, Texas; Memphis, Tennessee; Paulsboro, New Jersey; San Nicolas, Aruba and Texas City, Texas have implemented the solution. A year after installing PolicyTech, Valero’s Port Arthur refinery feels the benefits of having their procedures organized in both improved safety awareness and maintained production. “We stress to employees that we want them to follow procedures,” said Ramirez. “If we implemented something that required too much effort to get to the documentation, people weren’t going to use it. That puts lives in danger. It’s not like they are working with a can of applesauce. It’s chemicals, flammables and combustibles.”

“There’s no computers all day,” Ramirez adds. “They are out climbing around, checking levels and turning valves. When they need to look for a procedure, they need to get their hands on it fairly quickly. That is one of the keys here. Time equals money.”

Interested in converting more time into money where your policy management is concerned?

Contact the compliance experts at NAVEX Global.

Advanced Policy Management

Training is a critical element of your compliance program, but it’s only as effective as the policies and procedures you’re training against. If you’re like most Healthcare organisations, policy creation, management, and distribution is an ongoing challenge. Ask one of our compliance experts about integrating policy management with your training systems.

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