EVERSOURCE **All Hazards Emergency Response Program**	**EP-ERSG-JA-1000E 5 Rev 0** **ERSG Roster Scrubbing**
Approval Date: April 30, 2025 **Effective Date:** April 30, 2025 **Applicability:** ERSG	**Approver:** Robert J. Giguere **Subject Matter Expert:** John Skiff, Courtney Lent

OVERVIEW

The Eversource Resource Support Group (ERSG) plays a pivotal role in ensuring the seamless coordination and acquisition of resources during emergency situations. At its core, the ERSG serves as a lifeline beyond the Eversource local service territory, mobilizing a diverse array of crews, including, but not limited to overhead line (OH) crews, service (SV) crews, tree (TR) crews, wire guards (WG), damage assessors (DA), External Resource Field Coordinators (ERFC), and others.

The ERSG objective revolves around effective communication, hiring, and meticulous tracking of external resources until they are received by each state's Resource Acquisition (RA) Team. Notably, the ERSG extends its reach by collaborating with mutual aid groups such as the North Atlantic Mutual Assistance Group (NAMAG), which serves as a linchpin for an enhanced line of communication among member companies. In times of crisis, the ERSG's dedication to resource management ensures a swift and coordinated response, bolstering the resilience of our communities.

Once rosters are submitted to Eversource, the ERSG is typically the primary roster scrubber. Rosters are required by our state regulatory agencies to be in a certain format and validated, so that they can be uploaded into our resource tracking system (such as ARCOS). There have been communications and training with each of the contractor companies as to how to successfully validate and submit a roster.

This job aid provides guidance on the ERSG's *Roster Scrubbing* process, including:

- Roster requirements
- A specific ERSG Roster Scrubbing Checklist to ensure accuracy
- Step-by-step instructions to work with contractors if their rosters are not correct

To work with ERSG rosters, you will need access to:

- ERSG SharePoint Site
- ERSG Rosters Email (ersgrosters@eversource.com)

ROSTER STANDARDS

- A line crew is defined as two people, which should include at least one lineworker and one helper (apprentice, journeyman, groundperson, or similar) in one bucket truck.
- Crews can contain at a minimum two persons in one bucket truck or three persons with one bucket truck and one digger derrick. Any more than four persons to a crew is NOT ACCEPTED without prior approval.
- Eversource allows one digger derrick per five bucket trucks.
    - Some crews can be three people with the digger included (see above).

Ensure you are using the current revision by verifying it against the controlled electronic copy
located in the Emergency Preparedness Documentation Database.

- Rosters should have between 10 and 15 crews per roster, maximum.
  - Crews are grouped together for larger trouble spots unless communicated previously by a state RA Branch member to separate the rosters.

NOTE

Crews and *Full Time Employees* (FTE) are not the same thing. There can and will be rosters with more than 15 people (FTEs) and this is acceptable. There cannot be more than 15 *crews* on a roster (each consisting of two people).

ERSG ROSTER SCRUBBING CHECKLIST

All actions in the ERSG Roster Checklist are performed by the ERSG Roster Scrubber.

ERSG Roster Checklist				Notes
1	*ERSG Roster Scrubber*	**Roster Received through email**	Open the ERSG Storm Crew Tracking Spreadsheet	Link to Tracking Spreadsheet
2	*ERSG Roster Scrubber*	**File - Naming Convention**	Ensure the file has the correct naming convention, which is completed after validating	**Naming convention (on the list) -** 4_1_2024_Roster_I B ABEL INC_OH_York_PA_MORENOC **Naming convention (not on the list) -** 4_2_2024_Roster_NOT ON THE LIST_OH_Meadville_PA_RENFREWR **Naming convention for revisions -** Rev_4_2_2024_NOT ON THE_OH_Meadville_PA_RENFREWR
2a	*ERSG Roster Scrubber*	**File - Wrong Naming Convention**	Reply to contractor asking them to resubmit with the correct naming convention.	This can be accomplished by saving the file from the message box that pops up after validating
3	*ERSG Roster Scrubber*	**Roster Verification**	Ensure roster is Rev. 8.1. (7.94 only if roster is for ERFC/CG)	
3a	*ERSG Roster Scrubber*	**Incorrect Roster Version**	Reply to the contractor with the correct version roster attached, explaining that the roster is attached in the hiring email as well	Link to Rosters
4	*ERSG Roster Scrubber*	**Validation**	Ensure roster is validated	If you see the Validate and Submit button, it is not validated
4a	*ERSG Roster Scrubber*	**Validation Needed**	Reply to contractor asking them to validate and submit roster	This step is when validating is the only thing needed to complete the validation.
4b	*ERSG Roster Scrubber*	**Errors in Validation**	If there are errors on the roster, explain how to correctly make changes to validate	Refer to [insert doc number of Using the ERSG Roster Spreadsheet job aid]
5	*ERSG Roster Scrubber*	**Crew Contact/Event Contact**	Ensure Crew Contact is a person physically on the roster, in the Crew Complement Details section	This person needs to be traveling with the crews, as they will receive tickets and food/lodging information
5a	*ERSG Roster Scrubber*	**Crew Contact/Event Contact not with crews**	Reply to the contractor and ask to make the crew contact/event contact someone physically with the crew	It is suggested to be the Line General Foreman or a Field Support Person
6	*ERSG Roster Scrubber*	**Update Tracker**	Update the tracker with the received roster	Refer to [insert doc number of Using the ERSG Roster Spreadsheet job aid]
6a	*ERSG Roster Scrubber*	**Ticket Number**	Refer to ticket number column when receiving email from company hired more than once	Refer to [insert doc number of Using the ERSG Roster Spreadsheet job aid]
6b	*ERSG Roster Scrubber*	**Unknown Ticket Number**	Reply to contractor asking for ticket number, if roster was received and you are unsure which crew it is for.	Each hiring email comes with a ticket number, companies should have the correct ticket number available
7	*ERSG Roster Scrubber*	**Save Roster File**	Save Roster file to incident folder	Link to Incidents - NOTE: save to current storm based on date

8	*ERSG Roster Scrubber*	**State RA**	Ensure Roster will be emailed to the correct state RA Team	
8a	*ERSG Roster Scrubber*	**Email Roster to Correct State**	If email from contractor was sent only to ERSG	Forward Email to the correct State RA Team
9	*ERSG Roster Scrubber*	**Move Email**	Save Emails to the correct Storm Folder in Outlook and the ERSG SharePoint	When all steps above are completed, check the email off, then move it to the correct storm folder based on date

UNDERSTANDING THE ROSTER, AND HOW TO MAKE CORRECTIONS

If you are unable to complete the steps of the roster scrubbing checklist provided in the table above or are stopped at numbers 4a and 4b due to the roster not being validated, the next steps in this Job Aid describe successfully understanding the issues and how to guide the contractors into making the corrections, so that they are able to validate the roster.

The roster macros are built to guide the user, to make sure it is fully validated. Every time the validate button is clicked, the macros verify the roster from left to right, top to bottom, and check for any issues in the same order. If there is an issue at a specific spot, the roster is equipped with error messages that explain what the specific issue is. This will help not only the contractors, but the ERSG to successfully fix the issues at hand and validate the roster.

Below are the step-by-step instructions from when you first receive a roster, to how it is validated, to forwarding the roster to the correct state RA team. This step-by-step instruction covers all the issues that may come up and how to mitigate them, so that you can work with the contractor step by step to get the roster completed and validated faster.

NOTE

The ERSG needs to ensure the rosters are validated and submitted *by the contractor*. The steps below detail troubleshooting the roster to validate it so that you can provide those steps to the contractor for them to validate and submit back to the ERSG.

Roster Naming Convention

When a roster comes into the ERSG Roster email box, the first check is to make sure it uses the right naming convention. There are typically four types of naming conventions. The naming conventions are created from the roster being validated. The naming convention consists of:

- **A.** Date_Company Name_Leaving From Location_Last Name and First Initial of Crew Contact Person
- **B.** Date_NOT ON THE LIST (if you are a company not in the drop down) _Leaving From Location_Last Name and First Initial of Crew Contact Person
- **C.** Revision_Date_Company/Not on list_Location_Last Name/First Initial
  - **i. Examples:**
    Naming convention (on the list) - 4_1_2024_Roster_I B ABEL INC_OH_York_PA_MORENOC
    Naming convention (not on the list) - 4_2_2024_Roster_NOT ON THE LIST_OH_Meadville_PA_RENFREWR
    Naming convention for revisions (on the list / not on the list) - Rev_4_2_2024_NOT ON THE_OH_Meadville_PA_RENFREWR

Incorrect Roster Version

Rosters are updated based on errors that have been fixed, updated, or if more additions were requested to help with integrating into ARCOS. Because of this, it is imperative to ensure the contractors are using the most up-to-date roster. Currently, there are two rosters:

- Version 8.1 – This is the current storm roster
- Version 7.95 – This roster is *only* used when hiring Contractor ERFCs and Crew Guides (CG)

If the contractor submits an incorrect roster version, you need to inform them that they must resubmit the roster using the correct roster version. Both current roster templates are sent to every contractor within their hiring email, but to speed up the process, you can attach a current blank version when replying back to them.

The most current rosters can be found on the Weather & Outages page, under the Contractor Storm Roster button on the left.



Validating the Roster

Contractors should only be sending validated rosters back to Eversource, validating a roster shows us that each of their crews are legally capable to work independently. If a roster is not validated, the steps below are included to ensure there are no issues validating and how to guide contractors to correct them. If the **Validate & Submit** button is visible, it indicates that the roster has *not* yet been properly validated.

NOTE

The hiring email contains detailed instructions to the contractor for validating their rosters. If they have not validated properly, there are times when the ERSG member needs to guide them through the process.

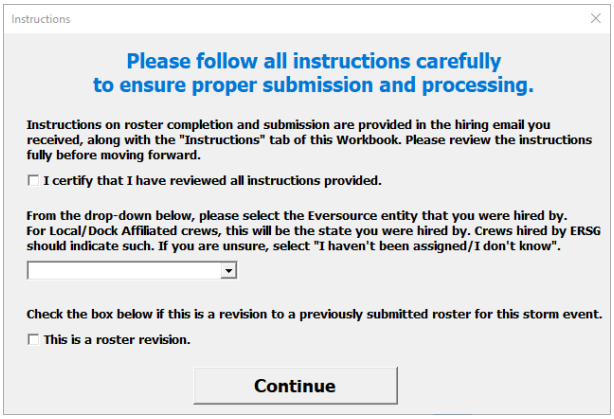
When you receive a Roster that has not been validated, contact the contractor and guide them through the following steps:

1. Open the roster and if it has not been validated, click **Enable Editing**, then **Enable Content**.

   An Instructions pop-up box opens. Click the **I certify that I have reviewed all instructions provided** checkbox.

2. From the drop-down menu, select the state where you were assigned to work.

3. If this is a revised roster, check the **This is a roster revision** checkbox and click **Continue**.



4. Click **Validate** and then **Submit**.
5. When the **Crew Independence** window opens, select the crews that can work independently. To select a crew, click **Select All** then **Save**. A roster validation completion window opens.

NOTE

The Crew Independence window is important to complete so that Eversource can determine if groups of crews can be split into smaller groups and not all sent together to one work location.

6. Close the notification window, and the roster is now validated and extended with more information on the right. Crew Counts are available in the top right corner.
7. Notify the contractor when a roster needs to be validated and go through the steps above on how to have them validate the roster.

Roster Validation Issues

If a roster cannot be validated, a message pops up indicating what is preventing the validation. These are some of the most common issues identified with non-validated rosters that the contractor needs to fix so the roster will validate.

- **Contractor Company Name**
  - The **Contractor Company Name** drop-down list contains names of contractors Eversource uses during Emergency Response Plan (ERP) activations, with a three-character code for each contractor on the list.
  - If a company's name is not on the list, click ***NOT ON THE LIST***. A second text box opens that allows the contractor to enter their company name.
  - The ****NOT ON THE LIST**** text box is also used when a company hires a subcontractor. In this case, the naming convention should be *Company-Subcontractor*.

- After the full company name or Company - Subcontractor name is entered, the new company also needs to enter a three-letter code for their company. If you enter a code that is already in use, the validation prompts you to change the code because another company is using it. This continues until a unique code is entered.
- If you are a company that is on the list, and you are hiring a subcontractor, you will need to enter "*NOT ON THE LIST*" and follow the steps above. You will not be able to use your regular three-letter code.

- **Contact Information**
  - The most common error in the **Contact Name** field is the use of a symbol and/or period in the name (such as "O'Connor"), which causes an error due to the apostrophe ('), so in this example, the name needs to be spelled "OConnor" to avoid the error.
  - Phone numbers need to be in the ###-###-#### format, including dashes. If any other format is entered, it will trigger an error.
  - Each email address must have an @ symbol, the email server name, and a dot followed by the domain name (for example, name@company.com, or .edu or .net). If the email address is not entered in this format, it will trigger an error.
- **Crew Contact**
  - The crew contact is someone who travels with the crews and should respond to RA regarding the crews' location and logistical needs. That means they need to be listed in the crew information, as described below.
  - If the crew contact person is not listed in the Member Type below, notify the contractor company to make the change. Typically, the crew contact should always be the General Foreman, but if there is no general foreman on the roster, the next progression should be Line Foreman, then Safety Person.
- **Travel Information**
  - **Leaving From**
    - There are two drop-down sections: **Country** and **State**. If the contractor pastes into one of the two (rather than selecting from the drop-down menu), there may be an error.
    - Review the **Main Storm Tracker** and hiring email to determine where the company is supposed to be sending crews from, then compare that with where they are physically leaving from, according to the roster.
      - If the two locations differ you need to reflect that in the tracker as well as notify the ERSG Director.
  - **Estimated Time of Arrival (ETA) Date & Time**
    - Each of the sections are drop down menus, if the contractor pastes data into one (rather than selecting from the drop-down menu), it may cause an error
    - The automation of the roster generates an error if the entered ETA is prior to the current time.
    - To fix this, inform the contractor that they can select a future date and time, then after validating, they can change the time to the original time, after they click **Validate**.

- **Crew Information**
  - **Crew Type**
    - This is a drop-down section with seven choices, note that the **Crew Type** you select affects **Member Type** possible choices.
    - All **Support** staff, such as General Foremen, Safety Personnel, Vehicle Mechanics, and others, should always be entered in **Contractor Support**. All others should fall under the other six crew types. Pay close attention to the types of crews hired.
    - **Damage Appraiser** – If selected, an additional section, **Damage Appraiser Information (As Applicable)**, opens on the roster. This section must be completed by the contractor and viewed and confirmed by Eversource. Damage Appraisers receive a Training ID that is sent to IT so that they can be given login credentials on our equipment.
    - The most current Damage Appraiser Training ID can be found in the ERSG SharePoint Site under Dashboards, labeled United Utility DA Certification Status.
- **Crew ID**
  - There are two types of Crew IDs: **S Series** and **Numbered Series**.
    - **S Series** – these are only for Support staff with a **Crew Type** of **Contractor Support**. Each Contractor Support member has their own number because they are not part of a crew. (S1, S2, S3, and so on)
    - **Numbered Series** – this is for anyone other than Contractor Support. These must be broken out into a minimum of two people per crew, with two people in one bucket, but no more than 3 people in a crew if they are with a digger derrick. (1 1 1, 2 2, 3 3, and so on)
  - **First Name, Middle Initial, Last Name**
    - Similarly to the **Contact Information** section, symbols and periods in names are not allowed.
  - **Phone Number**
    - Phone numbers need to be in the format **###-###-####**, including dashes. Any other format triggers an error.
    - It is recommended to have individual phone numbers per person, for both invoice requirements and lodging needs. Typically, contractors will use the Crew Contact or Event Notification person as the sole phone number.
  - **Member Type**
    - This field coincides with the **Crew Type**. When the Crew Type changes, it affects the available member types. Also note, contractors may paste member type information that does not match our roster; if you receive an error about Member Type, open the drop-down and view the types.

- Crew Type and associated Member Types
  - Contractor Line
    - Lineman
    - Line Foreman
    - Line Apprentice
    - Line Equipment Operator
    - Line Groundman
    - Line Cable Splicer
    - Working Foreman
  - **Contractor Service**
    - Line Foreman
    - Lineman
    - Service Crew Electrician
  - **Contractor Support**
    - Field Safety
    - Field Support
    - Flagger
    - Line Foreman
    - Line General Foreman
    - Tree General Foreman
    - Vehicle Mechanic
  - **Damage Appraiser**
    - Damage Assessor
    - Driver
  - **Transmission**
    - Lineman
    - Line Foreman
    - Line Apprentice
    - Line Equipment Operator
    - Line Groundman
    - Line Cable Splicer
    - Working Foreman
  - **Wire Guard**
    - Wire Guard
  - **Contractor Tree**
    - Tree Climber
    - Tree Foreman

        - Tree Groundman
    - **Lodging**
        - Always complete this section, even if contractors are local and do not need lodging.
    - **Lodging Needed**
        - This is a yes or no choice. Enter **No** if a contractor does not need lodging.
    - **Lodging Room**
        - Single – Single rooms are typically assigned to Contractor Support staff.
        - Double – Double rooms are typically assigned to everyone else.
    - **Gender**
        - Male and Female crew members cannot be assigned a room together, if there is one female who is not part of the Contractor Support, that is, a Lineworker, they are assigned a single room.
- **Vehicle Information**
    - **Vehicle Type**
        - Each crew is associated one bucket truck. Only one of the crew members is assigned to the bucket, leaving the other crew member's vehicle type blank. Do not list both members with bucket trucks because adding two buckets to the crew causes irregular counts when validating the roster.
        - Per Eversource's guidelines, there will be one digger derrick per five bucket trucks. If you see diggers in vehicle types or three people per crew with a digger, it is acceptable.
        - Any additional **Equipment** not requested by the ERSG from the contactor, needs to be approved by the ERSG in writing or by email. Any abnormal equipment seen on the roster needs to be directed to the Director of the ERSG.
    - **Vehicle Plates**
        - Each vehicle needs to have a license plate listed, different from any other plates on the roster or it cannot validate.
    - **Supervisor Information**
        - Each member of the roster, including the Supervisor, needs a supervisor name and phone number. This can all be the same person for one company.
            - Conventions are as listed above for symbols and periods, as well as the phone number format of **###-###-####**.

The rest of the checklist refers to updating the roster information and forwarding the rosters to the correct state. For this information, refer to EP-ERSG-JA-1000E7, Using the ERSG Tracking Spreadsheet job aid.