

STATE OF MISSOURI, PUBLIC SERVICE COMMISSION

P.S.C. MO. No. 1

6th

Revised Sheet No. R-64.02

Canceling P.S.C. MO. No. 1

5th

Revised Sheet No. R-64.02

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**Evergy Missouri West, Inc. d/b/a Evergy Missouri West**  
**KANSAS CITY, MO 64106**

For Missouri Retail Service Area

RULES AND REGULATIONS  
ELECTRIC

**10.16 RESIDENTIAL PAY AS YOU SAVE® PILOT PROGRAM**

**(continued)**

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Service Charge – Monthly charge assigned to the location recovering Program costs for upgrades, fees, any required taxes, applicable cost of capital, or costs for customer-caused repairs as described in section 4.

**AVAILABILITY:**

The Pilot Program is available for participation to qualifying residential customers receiving services under Missouri Residential rates for the Pilot period of September 13, 2021-September 30, 2022. The Service Charge for Participants will not exceed 12 years from the first Service Charge.

In order to qualify as a Participant, customers must either own the home or the owner must sign an Owner Agreement agreeing to maintain the upgrades, and to not damage or remove the upgrades from the location. The owner must also agree to provide Property Notice of the benefits and obligations associated with the upgrades at the location to the next owner or customer before the sale or rental of the property.

Projects that address upgrades to existing homes deemed unlikely to be habitable or to serve their intended purpose for the duration of the Company's cost recovery term will not be approved unless repairs are made that will extend the life through the Company's cost recovery period. If a building is a manufactured home, it must be built on a permanent foundation and fabricated after 1996 to be eligible.

For homes with concerns identified in the initial Analysis, a referral process will be put in place to provide customers with other programs or organizations that can help resolve those concerns.

**PROGRAM DESCRIPTION:**

The Company will hire a Program Administrator to implement the Pilot Program. The Program Administrator will provide the necessary services to effectively implement the program.

The Program will include the following:

- Tier 1 - Visual home inspection with direct install of energy saving measures
- Tier 2 - Homes that do not have concerns which make the location unlikely to produce benefits for the lifetime of the energy efficiency upgrades will move forward with more in-depth data collection using blowing door and cut blaster/pressure pans to record actual home features and conditions.
- Tier 3 - Custom project – the program analyzes usage history, assessment data, and Program Partner installation costs to determine each participant's unique qualifying scope of work. The qualifying scope of work ensures that 80% of the estimated post upgrade savings over 80% of the lifetime of the measures makes up the monthly tariff charge; while 20% of the estimated post upgrade savings immediately flow to the participant, capped at 12 years.
  - Co-Pay option: If a project is not cost-effective, customers may agree to pay the portion of a project's cost that prevents it from qualifying for the Program as an upfront payment to the Program Partner.
  - The first three Tiers of the process described above are completed in the initial home visit.

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STATE OF MISSOURI, PUBLIC SERVICE COMMISSION

P.S.C. MO. No. 1

7th

Revised Sheet No. R-64.04

Canceling P.S.C. MO. No. 1

6th

Revised Sheet No. R-64.04

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**3. Analysis and Assessment fees:** The Company will not recover Analysis or Assessment fee costs from participants through a Service Charge. These fees will be treated as Program Administrative costs.

3.1 Participant Close-out fee: Participants will be charged a close out fee of \$490. The close out fee is included in the project cost-effectiveness calculation and the Program Service Charge.

**4. Service Charge:** The Company will recover the costs for its investments including any fees as allowed in this tariff through a monthly Service Charge assigned to the location where upgrades are installed and paid by the Participant or successor occupying that location until all Company costs have been recovered. The Service Charge will also be set for a duration not to exceed the greater of 1) the length of the full parts and labor warranty or 2) 80 percent (80%) of the estimated life of the upgrades, and in no case longer than twelve years. The Service Charge and duration of payments will be included in the Efficiency Upgrade Agreement.

4.1 Cost Recovery: No sooner than 45 days after approval by the Company or its Program Administrator, the Participant shall be billed the monthly Service Charge as determined by the Company. The Company will bill and collect Service Charges until cost recovery is complete, except in cases discussed in section 4. Prepayment of unbilled charges will not be permitted to facilitate installed upgrades remaining and continuing to function at the location for at least the duration of cost recovery.

4.2 Eligible Upgrades: All upgrades must have Energy Star certification, if applicable, the Program Administrator may seek to negotiate with contractors or upgrade suppliers extended warranties to minimize the risk of upgrade failure on behalf of customers.

4.3 Ownership of Upgrades: During the duration that Service Charges are billed to customers at locations where upgrades have been installed, the Company will retain ownership of the installed upgrades. Upon completion of the cost recovery, ownership will be transferred to the owner of the location.

4.4 Maintenance of Upgrades: Participating customers and owner of the location (if the participant is not the owner) shall keep the installed upgrades in place, in working order, and maintained per manufacturer's instructions for the duration of the cost recovery. Participating customers shall report the failure of the installed upgrades to the Program Administrator or Company as soon as possible. If an upgrade fails, the Company is responsible for determining its cause and for repairing the equipment in a timely manner. If the owner, customer, or occupants caused the damage to the installed upgrades, they will reimburse the Company as described in section 4.

4.5 Termination of Service Charge: Once the utility's costs for the upgrades at a location have been recovered, including its cost of capital, the cost paid to the Program Partner to perform the work, costs for any repairs made to the upgrades as described in 4.11, the monthly Service Charge shall no longer be billed, except as described in 4.7 or 4.11.

4.6 Vacancy: If a location at which upgrades have been installed becomes vacant for any reason and electric service is disconnected, the Service Charge will be suspended until a successor customer takes occupancy. If the owner maintains electric service at the location, the owner will be billed the Service Charge as part of any charges it incurs while electric service is turned on.

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