

**BEFORE THE PUBLIC SERVICE COMMISSION
OF THE STATE OF MISSOURI**

In the Matter of Union Electric Company)
d/b/a Ameren Missouri’s 4th Filing to)
Implement Regulatory Changes in Furtherance) File No. EO-2023-0136
of Energy Efficiency as Allowed by MEEIA.)

**JOINT STATUS REPORT AND
JOINT MOTION TO ADOPT PROCEDURAL SCHEDULE**

COME NOW Union Electric Company d/b/a Ameren Missouri (“Ameren Missouri”), Staff of the Missouri Public Service Commission (“Staff” and “Commission,” respectively), the Office of Public Counsel (“OPC”), Natural Resources Defense Council (“NRDC”), Midwest Energy Consumers Group (“MECG”), and Consumers Council of Missouri (“Consumers Council”),¹ collectively, the “Parties,” and jointly propose the following procedural schedule and requirements for approval by the Commission.

1. On May 2, 2023, Ameren Missouri, on behalf of itself and the Parties to this proceeding, filed a request for extra time to propose a schedule in this docket and requested leave to file a status report if more time was needed to develop a schedule. The Parties have filed subsequent status reports on May 22, 2023, June 20, 2023, July 10, 2023, and August 16, 2023.

2. The Parties also filed a Stipulation and Settlement to extend Ameren Missouri’s current MEEIA 3 Plan for 2024 in EO-2018-0211 on August 3, 2023. The Commission approved the Stipulation and Settlement on August 23, 2023. Additionally, the Parties are close to finalizing schedules on the agreed to workshops under the Stipulation and Settlement. The Parties anticipate conducting several workshops and conducting a workshop on the 2023 Integrated Resource Plan over the next few months.

¹ The Joint Status Report and Motion was sent to all parties to allow for the opportunity to sign the pleading. At the time of this filing, Ameren Missouri did not hear back from Renew Missouri Advocates d/b/a Renew Missouri.

3. The Parties to this case have reached an agreement on a procedural schedule that would enable the Commission and interested parties time to fully consider the MEEIA 4 Plan and still complete that review so Ameren Missouri can implement an approved plan by January 1, 2025. The proposed procedural schedule resulting from those discussions is as follows:

EVENT	DATE
Filing Date	March 27, 2023
Additional Workshops ²	Beginning October 18, 2024
Amended MEEIA 4 Application	January 16, 2024
Direct Testimony	February 21, 2024
Rebuttal	April 17, 2024
Surrebuttal/Cross-Surrebuttal Testimony	May 8, 2024
Last Day to Request Discovery ³	May 15, 2024
List of Issues, List of Witnesses, and Order of Cross-Examination	May 15, 2024
Position Statements	May 20, 2024
Evidentiary Hearing	June 4-7, 2024
Initial Post-Hearing Briefs	June 28, 2024
Reply Briefs	July 12, 2024
Requested Order	August 1, 2024

² Workshop topics will cover: (1) Questions regarding MEEIA 4 Plan documents and analysis; (2) Ameren Missouri's upcoming IRP filing; (3) new IRA guidance and impact to MEEIA; and (4) other topics including but not limited to MISO Planning Reserve Auction, Time of Use Rates. Additional dates to be added as needed.

³ This date represents the last day to issue Data Requests or other written discovery requests, subpoenas, or the last date by which a deposition may be taken.

Proposed Procedural Requirements

- (a) For all pre-filed testimony, all parties must comply with the requirements of Commission Rule 20 CSR 4240-2.130 for prepared testimony, including the requirement that testimony be filed with line-numbered pages.
- (b) Although not all parties may agree upon how each issue should be described or on whether a listed issue is in fact a proper issue in this case, the parties shall agree upon and file a list of the issues to be heard, the witnesses to appear on each day of the hearing, the order in which they will be called, and the order of cross-examination for each witness. The list of issues should be detailed enough to inform the Commission of each issue that must be resolved. The Commission will view any issue not contained in this list of issues as uncontested and not requiring resolution by the Commission.
- (c) Each party shall file a simple and concise statement summarizing its position on each disputed issue.
- (d) All pleadings, briefs, and amendments shall be filed in accordance with Commission Rule 20 CSR 4240-2.080. Briefs shall follow the same list of issues as filed in the case and must set forth and cite the proper portions of the record concerning the remaining unresolved issues that are to be decided by the Commission.
- (e) If part of testimony or documents are pre-filed and served upon the parties before a hearing, a party need only provide a copy of the testimony or document to the court reporter for marking as an exhibit. If not pre-filed and served upon the parties, then a party who has a document marked for use at the hearing shall have sufficient copies of the document to provide a copy not only to the court reporter, but also to each of the Commissioners, the presiding officer, and counsel for each other party.
- (f) All parties shall provide copies of testimony (including schedules), exhibits, and pleadings to other counsel by electronic means and in electronic form, essentially concurrently with the filing of such testimony, exhibits, or pleadings where the information is available in electronic format (.PDF, .DOC, .WPD, .XLS, etc.). Parties are not required to put information that does not already exist in electronic format into electronic format for purposes of exchanging.
- (g) Public documents filed in the Commission's Electronic Filing and Information System ("EFIS") shall be considered properly served by serving the same on counsel of record for all other parties via e-mail. The parties agree confidential documents may be obtained from EFIS and so agree not to serve those documents via e-mail. Any data requests issued to or by Staff shall be submitted and responded to in the Commission's Electronic Filing and Information System (EFIS) pursuant to 20 CSR 4240-2.090(2)(H). All data requests other than those issued to or by Staff, as well as all objections to data requests, or notifications of the need for additional time to respond, shall be sent by e-mail to counsel for the other parties. If a party desires the response to a data request that has been served on another party, the party desiring a copy of the response must request in writing a copy of the response from the party answering the data request, thereby providing the responding party the opportunity to object. Counsel may designate other

personnel to be added to the service list for data requests but shall assume responsibility for compliance with any restrictions on confidentiality. If any party responds to a data request in EFIS, the response is available in EFIS to all counsel on the certified service list. Data request responses, other than responses to data requests in EFIS, shall be served on counsel for the requesting party, unless waived by counsel, and on the requesting party's employee or representative who submitted the data request, and shall be served electronically, if feasible and not voluminous as defined by Commission rule. In the case of Ameren Missouri data request responses, Ameren Missouri shall post its data request responses on its Caseworks Extranet site; however, in the case of responses to data requests Staff issues, Ameren Missouri shall also submit the responses to Staff data requests in EFIS, if feasible, or in electronic format on compact disc or by other means agreed to by Staff counsel, if infeasible.

- (h) The parties shall make an effort to not include confidential information in data requests. If confidential information must be included in a data request, the confidential information shall be appropriately designated as such pursuant to Commission Rule 20 CSR 4240-2.135.
- (i) With respect to data requests, the Parties agree:
- The response time for all data requests shall be twenty (20) days, with five (5) business days to object or notify the requesting party that more than twenty (20) days will be needed to provide the requested information.
 - Beginning February 21, 2024, the response time for all data requests shall be ten (10) calendar days, with five (5) business days to object or notify the requesting party that more than ten (10) calendar days will be needed to provide the requested information.
 - Beginning April 17, 2024, the response time for all data requests shall be five (5) business days, with three (3) business days to object or notify the requesting party that more than five (5) business days will be needed to provide the requested information.
 - Data requests sent after 5:00 p.m. on Monday-Friday or on a weekend or state/federal holiday will be considered served on the next business day.
 - If a data request has been responded to, a party's request for a copy of the response shall be timely responded to without waiting the full response time allowed (except that, with the exception of responses to Staff, responses will not be needed for Ameren Missouri data request responses posted on Ameren Missouri's Caseworks Extranet site).
- (j) Workpapers prepared in the course of developing a testimony shall not be filed with the Commission but shall be submitted to each party within two (2) business days following the filing of the testimony document, unless a party has indicated that it does not want to receive some or all of the workpapers. Workpapers containing confidential information shall be appropriately marked. If there are no workpapers associated with testimony, the party's attorney shall so notify the other parties within the time allowed for providing those workpapers.

- (l) Where workpapers or data request responses include models or spreadsheets or similar information originally in a commonly available format where inputs or parameters may be changed to observe changes in inputs, if available in that original format, the party providing the workpaper or response shall provide this type of information in that original format with formulas intact. With the exception of workpapers provided to Staff and OPC, Ameren Missouri may provide workpapers by posting the same on its Caseworks Extranet site, with e-mail notification to counsel for the parties to be provided essentially concurrently with the posting of workpapers on the Extranet site. Ameren Missouri shall provide its workpapers to Staff and OPC in electronic format by e-mailing or by delivery of a compact disc or other electronic storage.
- (m) Commission Rule 20 CSR 4240-2.090's requirement that a party must seek a telephone conference with the presiding officer before filing a discovery motion shall be waived.

WHEREFORE, the Signatories to this pleading request the Commission adopt the procedural schedule and requirements contained herein.

Respectfully submitted,

/s/ Jennifer S. Moore

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**ATTORNEYS FOR NATURAL
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CERTIFICATE OF SERVICE

The undersigned hereby certifies that a true and correct copy of the foregoing was served on the Staff of the Commission and the Office of the Public Counsel on this via electronic mail (e-mail) on this 25th day of September, 2023.

/s/ Jennifer S. Moore
Jennifer S. Moore