

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

In the Matter of the Application of Evergy )  
Missouri West, Inc. d/b/a Evergy Missouri West ) **File No. EO-2024-0381**  
Containing Its Semi-Annual Fuel Adjustment )  
Clause True-Up )

**STAFF RECOMMENDATION TO APPROVE TRUE-UP FILING**

**COMES NOW** the Staff of the Missouri Public Service Commission (“Staff”), by and through counsel, and for its Staff Recommendation to Approve True-Up Filing respectfully states:

1. On June 28, 2024, Evergy Missouri West, Inc. d/b/a Evergy Missouri West (“Evergy Missouri West”) filed an application containing its 31<sup>st</sup> true-up filing for recovery period 31 (“RP31”) (September 1, 2022, through August 31, 2023), as allowed by Commission Rule 20 CSR 4240-20.090(9), in order to remedy an over-recovery to be returned to customers. On July 26, 2024, Evergy Missouri West filed a substitute tariff with the same issue and effective dates.

2. Rule 20 CSR 4240-20.090(9)(D) requires the Commission’s Staff to examine and analyze the information Evergy Missouri West has submitted. Commission Rule 20 CSR 4240-20.090 provides a 60-day timeline for resolution of these rate adjustment mechanism proceedings. The Commission ordered Staff to file its Report and Recommendation no later than July 31, 2024.

3. As explained in Staff’s Memorandum, attached hereto as Appendix A and incorporated herein by reference, Staff recommends the Commission approve Evergy Missouri West’s thirty-first true-up filing for RP31, following its

Accumulation Period 31 (“AP31”), during which Evergy Missouri West over-collected \$3,556,358 from its customers.

4. Staff reviewed and analyzed the direct testimony, supporting schedules and work papers of Evergy Missouri West witness Lisa A. Starkebaum. Staff has determined that Evergy Missouri West’s calculations for the true-up amount for RP31 are correct.

5. Therefore, Staff recommends the Commission approve Evergy Missouri West’s thirty-first true-up filing for RP31 during which Evergy Missouri West over-collected \$3,556,358 from its customers. The over-collected amount will be included in Evergy Missouri West’s proposed changes to its current period fuel adjustment rates in its semi-annual FAC filing in File No. ER-2024-0382, filed on June 28, 2024, as substituted on July 26, 2024, for Accumulation Period 34 (December 1, 2023 through May 31, 2024).

6. Staff has verified that Evergy Missouri West has filed its 2023 annual report and is not delinquent on any assessment. Evergy Missouri West is current on its submission of its Surveillance Monitoring reports as required in 20 CSR 4240-20.090(6), and its periodic monthly reports as required by 20 CSR 4240-20.090(5). With the exception of Evergy Missouri West’s proposed changes to its current period fuel adjustment rates in its semi-annual FAC filing in File No. ER-2024-0382, Staff is not aware of any other matter before the Commission that affects or is affected by this filing.

**WHEREFORE**, Staff submits its analysis and recommends that the Commission approve Evergy Missouri West’s thirty-first true-up filing for RP31 during which Evergy Missouri West over-collected \$3,556,358 from its customers with the over-collected amount to be included in Evergy Missouri West’s proposed changes to its

current period fuel adjustment rates in its semi-annual FAC filing in File No. ER-2024-0382, filed on June 28, 2024, as substituted on July 26, 2024, for Accumulation Period 34 (December 1, 2023 through May 31, 2024).

Respectively Submitted,

/s/ Paul T. Graham

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Attorneys for the Staff of the  
Missouri Public Service Commission

**CERTIFICATE OF SERVICE**

I hereby certify that copies of the foregoing have been mailed, hand-delivered, or transmitted by facsimile or electronic mail to counsel of record as reflected on the certified service list maintained by the Commission in its Electronic Filing Information System this 31<sup>st</sup> day of July, 2024.

/s/ Paul T. Graham

## M E M O R A N D U M

**TO:** Missouri Public Service Commission Official Case File  
File No. EO-2024-0381

**FROM:** Brooke Mastrogiannis, Utility Regulatory Audit Supervisor

**DATE:** /s/ Brooke Mastrogiannis 07/31/2024  
Energy Resources Department /Date

**SUBJECT:** Staff's Analysis of and Recommendation to Approve Evergy Missouri West, Inc., d/b/a Evergy Missouri West's Thirty-First Fuel Adjustment Clause True-up Filing Under the Provisions in 20 CSR 4240-20.090(9).

**DATE:** July 31, 2024

### **Recommendation**

On June 28, 2024, Evergy Missouri West, Inc., d/b/a Evergy Missouri West ("Evergy Missouri West") filed one (1) tariff sheet, P.S.C. Mo. No. 1 3rd Revised Sheet No. 127.34, Canceling 2nd Revised Sheet No. 127.34, bearing a proposed effective date of September 1, 2024 . This tariff is to revise Evergy Missouri West's current annual Fuel Adjustment Rates ("FARs") (lines 16, 19, 22, and 25 on 3rd Revised Sheet No. 127.34) of its Fuel Adjustment Clause ("FAC"). Evergy Missouri West also filed the direct testimony of Lisa A. Starkebaum on June 28, 2024, and submitted to Staff work papers in support of the direct testimony and filed tariff sheet.

Subsequently, on July 26, 2024, Evergy Missouri West filed a substitute tariff sheet, following discussion with Missouri PSC Staff and the Office of the Public Counsel on July 23, 2024. This substitute tariff reflected the Company removing an adjustment related to Winter Storm Uri of \$117,070 that they originally included for recovery on line 8 of its proposed 3rd Revised Sheet No. 127.34, and also reflected in this true-up filing.

Staff of the Missouri Public Service Commission ("Staff") recommends the Commission approve Evergy Missouri West, Inc., d/b/a Evergy Missouri West's ("Evergy

Missouri West”) thirty-first true-up filing for Recovery Period 31 (“RP31”) during which Evergy Missouri West over-collected \$3,556,358<sup>1</sup> from its customers.

### **Discussion**

On June 28, 2024, Evergy Missouri West filed with the Commission, along with direct testimony and supporting schedules of Evergy Missouri West witness Lisa A. Starkebaum, its fuel adjustment clause (“FAC”) true-up filing under the provisions in 20 CSR 4240-20.090(9). According to Evergy Missouri West’s true-up filing, in the aggregate for RP31 (September 1, 2022 through August 31, 2023), Evergy Missouri West over-collected from its customers \$3,556,358 following its Accumulation Period 31 (“AP31”) (June 1, 2022 through November 30, 2022).

### **Staff Review and Recommendation**

Staff reviewed the direct testimony of Evergy Missouri West witness Lisa A. Starkebaum, the supporting schedules Evergy Missouri West provided with its application in this case, and the monthly information Evergy Missouri West submitted to the Commission in accordance with 20 CSR 4240-20.090(9).

Staff notes one item impacting this true-up filing that should be mentioned. In Case No. EO-2023-0277, the Commission approved the Non-Unanimous Stipulation and Agreement on May 2, 2024. In this Stipulation, the parties agreed to remove \$2,076 (plus interest) for transmission and SPP administrative fees for recovery from the FAC. After applying the jurisdictional factor, the Company removed \$1,969 plus interest of \$237 from this true-up filing.

Based on its review and analysis of the information Evergy Missouri West filed and submitted for RP31, Staff has determined that Evergy Missouri West’s calculations for the true-up amounts for RP31, including the calculation of monthly interest, are correct.

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<sup>1</sup> The true-up amount on line 8 of the proposed 3rd Revised Sheet No. 127.34 is \$3,556,358 over-recovery. This includes \$3,554,389 over-recovery from RP31, a prudence adjustment/correction ordered by the Commission in EO-2023-0277 for \$(1,969), and interest for that adjustment of \$(237), for a total true-up over-recovery of \$3,556,594. The amount on line 8 is \$3,556,358 because it only includes the over-recovery of \$3,554,389, plus the prudence adjustment/corrections of \$(1,969). The interest adjustment is included in the interest amount on line 9 of the proposed 3rd Revised Sheet No. 127.34.

Therefore, Staff recommends the Commission approve Evergy Missouri West's thirty-first true-up filing for RP31 during which Evergy Missouri West over-collected \$3,556,358 from its customers. The over-collected amount will be collected from the customers as it will be included in Evergy Missouri West's proposed changes to its current period fuel adjustment rates in its semi-annual FAC filing in File No. ER-2024-0382, filed on June 28, 2024, for Accumulation Period 34 (December 1, 2023 through May 31, 2024).

Staff has verified that Evergy Missouri West has filed its 2023 Annual Report and is not delinquent on any assessment. Evergy Missouri West is current on its submission of its Surveillance Monitoring reports as required by 20 CSR 4240-20.090(6), and its monthly reports as required by 20 CSR 4240-20.090(5). With the exception of Evergy Missouri West's proposed changes to its current period fuel adjustment rates in its semi-annual FAC filing in File No. ER-2024-0382 (also filed on June 28, 2024), Staff is not aware of any other matter before the Commission that affects or is affected by this filing.

**BEFORE THE PUBLIC SERVICE COMMISSION**

**OF THE STATE OF MISSOURI**

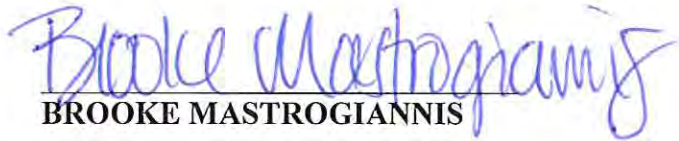
In the Matter of the Application of )  
Evergy Missouri West, Inc. d/b/a Evergy ) File No. EO-2024-0381  
Missouri West Containing Its Semi-Annual )  
Fuel Adjustment Clause True-Up )

**AFFIDAVIT OF BROOKE MASTROGIANNIS**

STATE OF MISSOURI )  
 ) ss.  
COUNTY OF COLE )

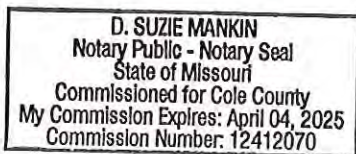
**COMES NOW BROOKE MASTROGIANNIS** and on her oath declares that she is of sound mind and lawful age; that she contributed to the foregoing *Staff Recommendation* in memorandum form; and that the same is true and correct according to her best knowledge and belief.

Further the Affiant sayeth not.

  
**BROOKE MASTROGIANNIS**

**JURAT**

Subscribed and sworn before me, a duly constituted and authorized Notary Public, in and for the County of Cole, State of Missouri, at my office in Jefferson City, on this 31<sup>st</sup> day of July 2024.



  
Notary Public