

**STATE OF MISSOURI, PUBLIC SERVICE COMMISSION**

P.S.C. MO. No. 1 3<sup>rd</sup> Revised Sheet No. R-3.01  
Canceling P.S.C. MO. No. 1 2<sup>nd</sup> Revised Sheet No. R-3.01  
For Missouri Retail Service Area

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| <b>RULES AND REGULATIONS<br/>ELECTRIC</b> |
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**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 1<sup>st</sup> Revised Sheet No. R-73  
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For Missouri Retail Service Area

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**15.01 BUSINESS DEMAND-SIDE MANAGEMENT**

**PURPOSE:**

The Business Demand-Side Management (DSM) Programs (Programs), consist of three programs that support our business customers and are designed to encourage business customers to proactively use energy in such a way as to reduce consumption of electricity or to shift consumption from times of peak demand to times of non-peak demand.

These Programs are offered in accordance with Section 393.1075, RSMo. Supp. 2009 (the Missouri Energy Efficiency Investment Act or MEEIA) and the Commission’s rules to administer MEEIA.

**AVAILABILITY:**

Except as otherwise provided in the terms governing a particular program, these Programs are available to any of Evergy Missouri West Company’s customers served under GS, SGS, LGS or LPS rate schedules. The Programs are not available to customers electing to opt-out of DSM program funding under 20 CSR 4240-20.094(7).

A customer may elect not to participate (opt-out) in an electric utility’s DSM programs under 20 CSR 4240-20.094(7) if they:

- Have at least one account with a demand of 5,000 kW in the previous 12 months with that electric utility, or;
- Operate an interstate pipeline pumping station, or;
- Have multiple accounts with aggregate coincident demand of 2,500 kW in the previous 12 months with that utility and have a comprehensive demand-side or energy efficiency program with achieved savings at least equal to those expected from the utility-provided programs.

A customer electing to opt-out must provide written notice to the electric utility no earlier than September 1 and not later than October 30 to be effective for the following calendar year but shall still be allowed to participate in interruptible or curtailable rate schedules or tariffs offered by the electric utility.

Unless otherwise provided for in the tariff sheets or schedules governing a particular program, customers may participate in multiple programs, but may receive only one Incentive per Measure.

The Company reserves the right to discontinue the entire MEEIA cycle 4 portfolio, if the Company determines that implementation of such programs is no longer reasonable due to changed factors or circumstances that have materially negatively impacted the economic viability of such programs as determined by the Company, upon no less than thirty days’ notice to the Commission.

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**15.01 BUSINESS DEMAND-SIDE MANAGEMENT (continued)**

**DEFINITIONS:**

Unless otherwise defined, terms used in tariff sheets or schedules in Section 15 have the following meanings:

Applicant – A customer who has submitted a program application or has had a program application submitted on their behalf by an agent or trade ally.

Demand Side Investment Mechanism (DSIM) – A mechanism approved by the Commission in Evergy Missouri West Company’s filing for demand-side programs approval in Case No. EO-2023-0370.

Energy Efficiency - Measures that reduce the amount of electricity required to achieve a given end use.

Incentive – Program costs for direct or indirect incentive payments to encourage customer and/or retail partner participation in programs and the cost of measures, which are provided at no cost as part of the program.

Long-Lead Project- A project committed to by a Customer, accepted by the Company, and a signed commitment offer received by the program administrator by the end of the Program Period, according to the terms and implementation of the MEEIA 2025-2026 Energy Efficiency Plan that will require until a date 12 months from the end of the Program Period to certify completion.

Measure – An end-use measure, energy efficiency measure, and energy management measure as defined in 20CSR 4240-22.020(18), (20), and (21).

Participant – End-use customer and/or manufacturer, installer, or retailer providing qualifying products or services to end-use customers.

Program Administrator – The entity selected by Company to provide program design, promotion, administration, implementation, and delivery of services.

Program Partner – A retailer, distributor or other service provider that Company or the Program Administrator has approved to provide specific program services through execution of a Company approved service agreement.

Program Period – The period of which the programs are available. Unless earlier terminated under the TERM provision of this tariff. Programs may have slightly earlier termination dates for certain activities, as noted on the Company website – [www.evergy.com](http://www.evergy.com).

Project – One or more Measures proposed by an Applicant in a single application.

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**15.01 BUSINESS DEMAND-SIDE MANAGEMENT (continued)**

Total Resource Cost (TRC) Test – A test of the cost-effectiveness of demand-side programs that compares the avoided utility costs to the sum of all incremental costs of end-use measures that are implemented due to the program (including both Company and Participant contributions), plus utility costs to administer, deliver and evaluate each demand-side program.

**TERM:**

These tariff sheets and the tariff sheets reflecting each specific Business DSM program shall be effective from the effective date of the tariff sheets to December 31, 2027, unless an earlier termination date is ordered or approved by the Commission.

If the Programs are terminated prior to the end of the Program Period, only Incentives for qualifying Measures that have been installed prior to the Programs' termination will be provided to the customer.

**DESCRIPTION:**

The reduction in energy consumption or shift in peak demand will be accomplished through the following Programs:

- Whole Business Efficiency
- Business Demand Response
- Urban Heat Island (available for both business and residential customers)

Program details regarding the interaction between Company or Program Administrators and Participants, such as Incentives paid directly to Participants, available Measures, availability of the Program, eligibility, and application and completion requirements may be adjusted through the change process as presented below. Those details, additional details on each Program, and other details such as process flows, application instructions, and application forms will be provided by the Company website, [www.evergy.com](http://www.evergy.com).

**CHANGE PROCESS:**

The change process is applicable to changes in program detail regarding the interaction between Company or Program Administrators and Participants, and excludes changes to the ranges of Incentive amounts for each Measure.

- 1) Identify need for program detail change regarding the interaction between Company or Program Administrators and Participants;
- 2) Discuss proposed change with Program Administrator;
- 3) Discuss proposed change with Evaluator;
- 4) Analyze impact on program and portfolio (cost-effectiveness, goal achievement, etc.)
- 5) Inform the Staff, Office of the Public Counsel and the Department of Economic Development, Division of Energy, of the proposed change, the time within which it needs to be implemented, provide them the analysis that was done and consider recommendations from them that are received within the implementation timeline (the implementation timeline shall be no less than five business days from the time that the Staff, Office of the Public Counsel and the Department of Economics development, Division of Energy, are informed and provided the above referenced analysis;

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**15.01 BUSINESS DEMAND-SIDE MANAGEMENT (continued)**

- 6) Take timely received recommendations into account and incorporate them where Company believes it is appropriate to do so;
- 7) Notify and train customer contact personnel (Customer Service Representatives, Energy Consultants, Business Center) of the changes;
- 8) Make changes to forms and promotional materials;
- 9) Update program website;
- 10) File updated web pages and, if appropriate, updated list of Measures and Incentives amounts in Case No. EO-2023-0370; and
- 11) Inform Customer, trade allies, etc.

Evergy Missouri West Company will also continue to discuss and provide information on ongoing Program and Portfolio progress at regulatory advisory group update meetings.

**PROGRAMS' ANNUAL ENERGY AND DEMAND SAVINGS:**

These values are estimates based on savings at customer meters (excluding transmission and distribution line losses).

|   | <i>Incremental Annual kWh Savings at Customer Side of Meter</i> |                            |                            |                            | <i>Total Cycle 4</i> |
|---|---|----------------------------|----------------------------|----------------------------|----------------------|
|   | <b>Program Plan Year 1</b>                                      | <b>Program Plan Year 2</b> | <b>Program Plan Year 3</b> | <b>Program Plan Year 4</b> |                      |
| <i>Chart values represent Evergy Missouri West and Evergy Missouri Metro combined totals.</i> |   |                            |                            |                            |                      |
| <b>Whole Business Efficiency Program</b>  | <b>10,405,000</b>   | <b>10,408,000</b>          |                            |                            | <b>20,812,000</b>    |
| <b>Business Demand Response Program</b>   |   |                            |                            |                            |                      |
| <b>Urban Heat Island</b>  | <b>0</b>  | <b>0</b>                   | <b>0</b>                   |                            | <b>0</b>             |
| <b>TOTAL</b>  | <b>10,405,000</b>   | <b>10,408,000</b>          |                            |                            | <b>20,812,000</b>    |

Earnings Opportunity targets are set forth in Evergy Missouri West Company's Schedule DSIM, Sheet No. 138.29, as approved in Case No. EO-2023-0370.

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**15.01 BUSINESS DEMAND-SIDE MANAGEMENT (continued)**

| <i>Chart values represent<br/>Evergy Missouri West<br/>and Evergy Missouri<br/>Metro combined totals.</i> | <i>Incremental Annual kW Demand Savings<br/>at Customer Side of Meter</i> |                                    |                                    |                                    | <i>Total<br/>Cycle 4</i> |
|---|---|------------------------------------|------------------------------------|------------------------------------|--------------------------|
|   | <b>Program<br/>Plan<br/>Year 1</b>  | <b>Program<br/>Plan<br/>Year 2</b> | <b>Program<br/>Plan<br/>Year 3</b> | <b>Program<br/>Plan<br/>Year 4</b> |                          |
| <b>Whole Business<br/>Efficiency Program</b>  | <b>3,080</b>  | <b>3,080</b>                       |                                    |                                    | <b>6,160</b>             |
| <b>Business Demand<br/>Response Program</b>   | <b>120,460</b>  | <b>140,130</b>                     | <b>140,740</b>                     |                                    | <b>401,320</b>           |
| <b>Urban Heat Island</b>  | <b>10</b>   | <b>0</b>                           | <b>0</b>                           |                                    | <b>10</b>                |
| <b>TOTAL</b>  | <b>123,550</b>  | <b>143,210</b>                     | <b>140,740</b>                     |                                    | <b>407,490</b>           |

Earnings Opportunity targets are set forth in Evergy Missouri West Company’s Schedule DSIM, Sheet No. 138.29, as approved in Case No. EO-2023-0370.

**PROGRAM COSTS AND INCENTIVES:**

Costs of and Incentives for the Business DSM Programs reflected herein shall be identified in a charge titled "DSIM Charge" appearing as a separate line item on customers’ bills and applied to customers’ bills as a per kilowatt-hour charge as specified in the GS, SGS, LGS or LPS rate schedules. All customers taking service under said rate schedules shall pay the charge regardless of whether a particular customer utilizes a demand-side program available hereunder, unless they have opted-out as provided for previously.

**PROGRAM DESCRIPTIONS:**

The following pages contain other descriptions and terms for the Programs being offered under this tariff.

**\*\*CHANGES IN MEASURES OR INCENTIVES:**

Measures contained in Company’s filing approved in Case No. EO-2023-0370. The offering of Measures not contained within the aforesaid filing must be approved by the Commission. Measures being offered and Incentives available to customers will be listed on Company’s website, [www.evergy.com](http://www.evergy.com). The Measures and Incentives being offered are subject to change. Customers must consult [www.evergy.com](http://www.evergy.com) for the list of currently available Measures. Should a Measure or Incentive offering shown on Company’s website differ from the corresponding Measure or Incentive offering shown in the currently effective notice filed in Case No. EO-2023-0370, the stated Measure or Incentive offering as shown in the currently effective notice shall govern.

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**RULES AND REGULATIONS  
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**15.02 WHOLE BUSINESS EFFICIENCY PROGRAM**

**PURPOSE:**

The Whole Business Efficiency Program is designed to promote strong business and economic development by improving operational efficiency and new construction practices with equipment rebates on diverse measures.

**AVAILABILITY:**

The program is available throughout the Program Period to all Missouri commercial and industrial customers who receive electric service and meet the program descriptions below.

**BUDGET:**

Combined Jurisdictions (Component Budgets)

| Program                           | Components           | 2025         | 2026         | Total        |
|-----------------------------------|----------------------|--------------|--------------|--------------|
| Whole Business Efficiency Program | Business Comfort     | \$ 2,733,204 | \$ 2,733,204 | \$ 5,466,407 |
| Whole Business Efficiency Program | Business Products    | \$ 224,544   | \$ 224,544   | \$ 449,088   |
| Whole Business Efficiency Program | Business Operational | \$ 692,252   | \$ 692,252   | \$ 1,384,504 |

**PROGRAM DESCRIPTION:**

The Whole Business Efficiency program assists commercial and industrial customers save energy through a wide range of energy efficiency options that address all major end uses and processes. Evergy will hire a Program Administrator to implement the program, provide the necessary services to effectively manage it, and strive to achieve the energy and demand savings targets.

The program consists of three (3) components:

1. **Business Comfort** includes rebates for heating, ventilation, and air conditioning measures, HVAC maintenance, insulation, and air sealing improvements. Insulation and air sealing upgrades require a blower door test.
2. **Business Products** include rebates for smart thermostats, control equipment, and other products.
3. **Business Operational** offers rebates for upgrades, such as refrigeration, food service equipment, ventilation, laundry, or other mechanical upgrades to save on energy costs. This includes retro commissioning, which incentivizes operations and maintenance measures identified through a study.
  - o **Free Energy Assessments** are offered to Small Businesses and Non-Profit Organizations.
    - **Small Businesses** will be measured by annual usage and is defined as:
      - Businesses that have consumed less than 1.5 million kWh in the preceding 12 months and/or
      - Businesses that have had a monthly peak demand of 100 kW or less in the preceding 12 months
    - **Non-Profit Organizations** that do not meet the eligibility requirements above must be:
      - Organizations in 501(c)3 status and in good standing
      - Serve low-income individuals and families
      - Own the facility and be responsible for paying the energy bills

**Rebate Types:**

Rebates will be either Standard (prescriptive) or Custom.

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**15.02 WHOLE BUSINESS EFFICIENCY PROGRAM (continued)**

**PROGRAM DESCRIPTION:**

**Rebate Types:**

Rebates will be either Standard (prescriptive) or Custom.

- **Standard Rebates** are fixed incentives for technologies with known performance characteristics, which may include HVAC, refrigeration, water heating, operational efficiency, and food preparation technologies. The Business Comfort, Products, and Operational components will offer standard rebates.
  - To participate in this rebate type, customers select energy-efficient equipment from a pre-qualified list, purchase and install the equipment, and submit a rebate application. Rebates will be issued to participants upon receipt and review of the rebate application.
- **Custom Rebates** are variable incentives for qualifying projects, including New Construction.
  - Custom rebates are determined on a \$/kW or \$/kWh bases for incremental savings above the baseline.
  - Projects must be pre-approved before equipment is purchased and installed. To be pre-approved, the project must have a Total Resource Cost (TRC) Test benefit-cost ratio of at least 1.0. Once pre-approved, the customer purchases and installs the approved equipment and submits a rebate application. Rebates will be issued to participants upon receipt and review of the rebate application.

Total rebates per program year are limited to \$1,000,000 per customer. Multiple rebate applications for different measures from the same customer may be submitted.

**ELIGIBLE MEASURES AND INCENTIVES:**

Measures filed in Case No. EO-2023-0370 are eligible for program benefits and incentives and may be offered during the Program Period. The program encompasses Business Custom and New Construction, with measures varying based on calculated savings, Business Comfort, Business Products, and Business Operational measures. These measures include and are not limited to the following equipment:

- Controls
- Pumps and Variable Speed Drivers
- Air Compressors
- HVAC (Heating, Ventilation, and Air Conditioning)
- Food Services and Refrigeration

Eligible **Incentives** directly paid to customers and **Measures**, along with program **Terms and conditions**, can be found at [www.evergy.com](http://www.evergy.com).

**EVALUATION:**

MPSC will hire a third-party evaluator to perform the Evaluation, Measurement and Verification (EM&V) on the program.



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**15.03 BUSINESS DEMAND RESPONSE PROGRAM**

**PURPOSE:**

Business Demand Response (“Program” or “BDR”) is designed to reduce Participant load during peak periods to improve system reliability, offset forecasted system peaks that could result in future generation capacity additions, and/or provide a more economical option to generation or purchasing energy in the wholesale market. Participant curtailment may be requested for any of these operational or economic reasons as determined by the Company.

**AVAILABILITY:**

The Program is available during the Program Period and is available to all customers in the classes identified in the Business Demand-Side Management section that also meet Program provisions. Participants must show economic and technical feasibility for measurable and verifiable load curtailment during the Summer Curtailment Season of June 1 to September 30 and Winter Curtailment Season of October 1 to May 31 within designated Curtailment Hours of 8:00 a.m. to 8:00 p.m., on any weekday (Monday through Friday). In addition, the company may call a curtailment event on Saturday or Sunday during an Energy Emergency Alert (EEA) event officially designated as such. The Company will determine the most beneficial timing and length of curtailment events during the curtailment season, is not required to curtail all Participants simultaneously, and may elect to only call individual participants and/or stagger Participants as deemed appropriate. The Company also reserves the right to apply minimum and/or maximum event performance requirements for incentive payment, to apply financial bonuses or penalties and to terminate Participation Agreements for non-compliance. The Company reserves the right to curtail some or all Participants year-round if needed. This off-season curtailment would be utilized during emergency situations locally or regionally. Off-season participation is voluntary with participant payment at the discretion of the Company outlined in the Participation Agreements.

The Company will engage a third-party Administrator to implement all recruitment, enrollment and daily operations for the Program and manage Company approved Aggregators. A Customer may participate directly through the Program Administrator (“Administrator”) or a Company-approved Aggregator (“Aggregator”). An aggregator is a curtailment service provider, appointed by a customer to act on behalf of said Customer with respect to all aspects of the Program, including but not limited to: a) the receipt of notices from the Company under this Program; and b) the receipt of incentive payments from the Company. The Aggregator will be responsible for establishing independent business to business (B:B) contracts and administering the participation of said customer. The Aggregator is fully responsible for fulfillment of these B:B customer contracts. Contracts between Aggregator and their enrolled customers are not limited to Program provisions.

For this program only, a Participant with multiple accounts may request that some or all of its accounts be aggregated for event performance evaluation. If the Company deems an aggregation would not benefit the customers’ ability to improve event performance, the Company will present the option to the customer to determine whether they would prefer a single account or aggregated view of participation. The aggregated Participant account will be treated as a single account for purposes of calculating potential Program incentive payments. The Aggregator is responsible for all of their independent B:B customer contracts; no minimum customer account requirements apply. Aggregator must maintain a minimum aggregated load as stated in their Aggregator Participation Agreement to maintain Program eligibility.

This schedule is not applicable where the Customer’s load reduction capability is registered for demand response participation in the wholesale market directly by the Customer or via a Demand Response (DR) Aggregator.

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**15.03 BUSINESS DEMAND RESPONSE (continued)**

**PROGRAM PROVISIONS:**

This Program may be executed by manual and/or automated demand response methods: Regardless of the method by which the participating Customer chooses to participate, the Participant enrolls directly with the Administrator or Aggregator. The Administrator or Aggregator evaluates a Customer’s metered usage data from the most recent Curtailment Season and gathers site-specific information from the Participant to establish their curtailment plan and estimated associated curtailable load (kW). The Participant or Aggregator enrolls this curtailable load in the Program by executing their Participation Agreement.

The Company then issues notices to the Participant or Aggregator in advance of scheduled curtailment events, prompting Participants to respond in accordance with their chosen method of participation:

**1. Manual Demand Response (DR)**

The Participant manually executes their facility curtailment plan to curtail at least their enrolled curtailable load for the duration of the curtailment event.

**2. Automated Demand Response (ADR)**

The Participant’s building/energy management system (BMS/EMS) or facility automation system is used to execute their curtailment plan. The Participant or Aggregator receives the integrated signal with the utility’s event calling system and is used to execute their curtailment plan by enacting pre-programmed usage adjustments to respond to demand response events.

**PARTICIPATION AGREEMENTS:**

There will be two versions of Program Participation Agreements (“Agreement”). Customers enrolling with the Administrator will have a customer Agreement between the customer and the Program. Aggregators will have an aggregator Agreement between the Program and the Aggregator. Multi-year participation Agreements will be re-evaluated annually or at any time the Company has data indicating the terms of the participation Agreement cannot be fulfilled by the Participant.

**EVENT PERFORMANCE AND INCENTIVES:**

The Company will employ a calculated baseline load (CBL) methodology to determine participant demand savings associated with a demand response curtailment event. A CBL approach applies a model or algorithm to develop a customer-specific baseline for each day from historic metered usage data that is then used to forecast load impacts for each hour of the event absent a curtailment event. This baseline is calibrated to best match recent operational and/or weather patterns. This baseline is then compared to the actual metered average hourly demand during the curtailment event. The difference between the forecasted hourly baseline and the actual metered hourly usage during the event equals the hourly kW impact of the event. All kW will be calculated as a whole number. The Seasonal hourly average kW achieved divided by the kW enrolled is the Participant’s % kW achieved. The Company will pay the Participant or Aggregator for their achieved Seasonal average percent of their enrolled Curtailable kW load within the established floor and cap as detailed in their Agreement with the Company or Aggregator.

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**15.03 BUSINESS DEMAND RESPONSE (continued)**

**CURTAILMENT SEASON:**

The Summer Curtailment Season will extend from June 1 to September 30 and winter curtailment season from October 1 to May 30 with the ability to call emergency demand response events as needed.

**CURTAILMENT LIMITS:**

The Company may call a curtailment event any weekday, Monday through Friday, or any weekend day (Saturday and Sunday) during an Energy Emergency Alert (EEA) event officially designated as such. A curtailment event occurs whenever the customer load is being called/dispatched by the Company or its assignees. The Company may call a maximum of one curtailment event per day per Participant. The Company is not required to call / dispatch all Participants simultaneously and may stagger curtailment events across Participants.

**PROGRAM TRACKS:**

Standard Demand Response: Participants agree to be on call year-round for a preset number of peak reduction and emergency events. Participants receive a standardized incentive based on their achieved performance.

Custom Demand Response: Participants with a peak reduction capability of 500 kW or greater, specific to their operation(s) and agree to be on call year-round for a preset number of peak reduction and emergency events. Participants receive a customized incentive amount based on their achieved performance.

Emergency Call: Participants with a peak reduction capability of 500 KW or greater, specific to their operation(s) under the program period agree to a be on call year-round. Participants receive an incentive based on their hourly achieved performance.

**EVALUATION:**

A third-party evaluator will be hired to perform Evaluation, Measurement and Verification (EM&V) on this Program.

**PROGRAM BUDGETS:**

| <b>Program Name</b>      | <b>2025</b> | <b>2026</b> | <b>2027</b> |
|--------------------------|-------------|-------------|-------------|
| Business Demand Response | \$5,544,001 | \$6,342,283 | \$6,379,027 |

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**RESERVED FOR FUTURE USE**

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

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**15.15 RESIDENTIAL DEMAND-SIDE MANAGEMENT**

**PURPOSE:**

The Residential Demand-Side Management (DSM) Programs (Programs), which consist of four programs, are designed to encourage residential customers to proactively use energy in such a way as to reduce consumption of electricity or to shift consumption from times of peak demand to times of non-peak demand.

These Programs are offered in accordance with Section 393.1075, RSMo. Supp. 2009 (the Missouri Energy Efficiency Investment Act or MEEIA) and the Commission’s rules to administer MEEIA.

**AVAILABILITY:**

Except as otherwise provided in the terms governing a particular program, these Programs are available to residential customers in Evergy Missouri West Company’s service area being served under any residential rate schedule.

Unless otherwise provided for in the tariff sheets or schedules governing a particular program, customers may participate in multiple programs, but may receive only one Incentive per Measure.

The Company reserves the right to discontinue the entire MEEIA cycle 4 portfolio, if Company determines that implementation of such programs is no longer reasonable due to changed factors or circumstances that have materially negatively impacted the economic viability of such programs as determined by the Company, upon no less than thirty days’ notice to the Commission.

**DEFINITIONS:**

Unless otherwise defined, terms used in tariff sheets or schedules in Section 23 have the following meanings:

Applicant – A customer who has submitted a program application or has had a program application submitted on their behalf.

Demand-Side Program Investment Mechanism (DSIM) – A mechanism approved by the Commission in Company’s filing for demand-side program approval in Case No. EO-2023-0370.

Energy Efficiency - Measures that reduce the amount of electricity required to achieve a given end use.

Incentive – Program costs for direct or indirect incentive payments to encourage customer and/or retail partner participation in programs and the cost of measures, which are provided at no cost as part of the program.

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 2<sup>nd</sup> Revised Sheet No. R-97  
Canceling P.S.C. MO. No. 1 1<sup>st</sup> Revised Sheet No. R-97  
For Missouri Retail Service Area

**RULES AND REGULATIONS  
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**15.15 RESIDENTIAL DEMAND-SIDE MANAGEMENT (continued)**

Measure – An end-use measure, energy efficiency measure, and energy management measure as defined in 20 CSR 4240-22.020(18), (20), and (21).

Participant – End-use customer and/or manufacturer, installer, or retailer providing qualifying products or services to end-use customers.

Program Administrator – The entity selected by Company to provide program design, promotion, administration, implementation, and delivery of services.

Program Period – The period of which the programs are available. Unless earlier terminated under the TERM provision of this tariff. Programs may have slightly earlier deadlines for certain activities, as noted on the Company website – [www.evergy.com](http://www.evergy.com).

Total Resource Cost (TRC) Test – A test of the cost-effectiveness of demand-side programs that compares the avoided utility costs to the sum of all incremental costs of end-use measures that are implemented due to the program (including both Company and Participant contributions), plus utility costs to administer, deliver and evaluate each demand-side program.

Program Partner – A retailer, distributor or other service provider that Company or the Program Administrator has approved to provide specific program services through execution of a Company approved service agreement.

**TERM:**

If the Programs are terminated prior to the end of the Program Period, only Incentives for qualifying Measures that have been preapproved or installed prior to the Programs’ termination will be provided to the customer.

**DESCRIPTION:**

The reduction in energy consumption or shift in peak demand will be accomplished through the following Programs:

- Modified PAYS™
- Hard-to-Reach Homes
- Home Demand Response
- Urban Heat Island (available for both business and residential customers)

These tariff sheets and the tariff sheets reflecting each specific residential DSM program shall be effective from the effective date of the tariff sheets to December 31, 2027, unless an earlier termination date is ordered or approved by the Commission.

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 1<sup>st</sup> Revised Sheet No. R-98  
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**15.15 RESIDENTIAL DEMAND-SIDE MANAGEMENT (continued)**

Program details regarding the interaction between Company or Program Administrators and Participants, such as Incentives paid directly to Participants, available Measures, availability of the program, eligibility, and application and completion requirements may be adjusted through the change process as presented below. Those details, additional details on each program, and other details such as process flows, application instructions, and application forms will be provided on the Company website, [www.evergy.com](http://www.evergy.com).

**CHANGE PROCESS:**

The change process is applicable to changes in program detail regarding the interaction between Company or Program Administrators and Participants in the Programs, and excludes changes to the ranges of Incentive amounts for each Measure.

- 1) Identify need for program detail change regarding the interaction between Company or Program Administrators and Participants in the Programs;
- 2) Discuss proposed change with Program Administrator;
- 3) Discuss proposed change with Evaluator;
- 4) Analyze impact on program and portfolio (cost-effectiveness, goal achievement, etc.);
- 5) Inform the Staff, Office of the Public Counsel and the Department of Economic Development, Division of Energy, of the proposed change, the time within which it needs to be implemented, provide them the analysis that was done and consider recommendations from them that are received within the implementation timeline (the implementation timeline shall be no less than five business days from the time that the Staff, Office of the Public Counsel and the Department of Economic Development, Division of Energy, are informed and provided the above-referenced analysis);
- 6) Take timely received recommendations into account and incorporate them where Company believes it is appropriate to do so;
- 7) Notify and train customer contact personnel (Customer Service Representatives, Energy Consultants, Business Center) of the changes;
- 8) Make changes to forms and promotional materials;
- 9) Update program website;
- 10) File updated web pages and, if appropriate updated list of Measures and Incentive amounts in Case No. EO-2023-0370; and
- 11) Inform Customers, trade allies, Program Partners, etc.

Company will also continue to discuss and provide information on ongoing program and portfolio progress at quarterly regulatory advisory group update meetings.

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 2<sup>nd</sup> Revised Sheet No. R-99  
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**15.15 RESIDENTIAL DEMAND-SIDE MANAGEMENT (continued)**

**PROGRAMS' ANNUAL ENERGY AND DEMAND SAVINGS:**

These values are estimates based on savings at customer meters (excluding transmission and distribution line losses).

|   | <i>Incremental Annual kWh Savings at Customer Side of Meter</i>       |                     |                     |                     | <i>Total Cycle 4</i> |
|---|---|---------------------|---------------------|---------------------|----------------------|
|   | Program Plan Year 1   | Program Plan Year 2 | Program Plan Year 3 | Program Plan Year 4 |                      |
| <i>Chart values represent Evergy Missouri West and Evergy Missouri Metro combined totals.</i>             |   |                     |                     |                     |                      |
| Hard-to-Reach Homes (Income Eligible Multi-Family / Income Eligible Single Family – Weatherization Ready) | 4,717,000   | 4,718,000           |                     |                     | 9,435,000            |
| Modified PAYS (Moderate Income PAYS / Evergy Fast Track)  | 5,897,000   | 5,899,000           |                     |                     | 11,796,000           |
| Home Demand Response Program  | 0   | 0                   | 0                   |                     | 0                    |
| Urban Heat Island   | 0   | 0                   | 0                   |                     | 0                    |
| <b>TOTAL</b>  | <b>10,614,000</b>   | <b>10,617,000</b>   | <b>0</b>            | <b>0</b>            | <b>21,231,000</b>    |
|   | <i>Incremental Annual kW Demand Savings at Customer Side of Meter</i> |                     |                     |                     | <i>Total Cycle 4</i> |
|   | Program Plan Year 1   | Program Plan Year 2 | Program Plan Year 3 | Program Plan Year 4 |                      |
| Hard-to-Reach Homes (Income Eligible Multi-Family / Income Eligible Single Family – Weatherization Ready) | 590   | 590                 |                     |                     | 1,180                |
| Modified PAYS (Moderate Income PAYS / Evergy Fast Track)  | 1,430   | 1,430               |                     |                     | 2,860                |
| Home Demand Response Program  | 23,290  | 20,760              | 24,810              |                     | 71,720               |
| Urban Heat Island   | 0   | 0                   | 0                   |                     | 0                    |
| <b>TOTAL</b>  | <b>25,310</b>   | <b>22,780</b>       | <b>24,810</b>       |                     | <b>72,900</b>        |

Earnings Opportunity targets are set forth in Evergy Missouri West Company's Schedule DSIM, Sheet No.138.29 as approved in Case No. EO-2023-0370.



**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 2<sup>nd</sup> Revised Sheet No. R-100  
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**15.15 RESIDENTIAL DEMAND-SIDE MANAGEMENT (continued)**

**PROGRAM COSTS AND INCENTIVES:**

Costs of and incentives for the Residential DSM Programs reflected herein shall be reflected in a charge titled “DSIM Charge” appearing as a separate line item on customers’ bills and applied to customers’ bills as a per kilowatt-hour charge as specified in the residential rate schedules. All customers taking service under said rate schedule shall pay the charge regardless of whether a particular customer utilizes a demand-side program available hereunder.

**PROGRAM DESCRIPTIONS:**

The following pages contain other descriptions and terms for the Programs being offered under this tariff.

**\*\*CHANGES IN MEASURES OR INCENTIVES:**

Company may offer the Measures contained in Evergy Missouri West Company’s filing approved in Case No. EO-2023-0370. The offering of Measures not contained within the aforesaid filing must be approved by the Commission. Measures being offered and Incentives available to customers will be listed on Company’s website, [www.evergy.com](http://www.evergy.com). The Measures and Incentives being offered are subject to change. Customers must consult [www.evergy.com](http://www.evergy.com) for the list of currently available Measures. Should a Measure or Incentive offering shown on Company’s website differ from the corresponding Measure or Incentive offering shown in the currently effective notice filed in Case No. EO-2023-0370, the stated Measure or Incentive offering as shown in the currently effective notice shall govern.

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 1<sup>st</sup> Revised Sheet No. R-103

Canceling P.S.C. MO. No. 1  Original Sheet No. R-103

For Missouri Retail Service Area

**RULES AND REGULATIONS  
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**15.18 HARD-TO-REACH HOMES**

**PURPOSE:**

Deliver long-term energy savings and bill reductions to income-eligible customers through home retrofits and encourage energy efficiency in multi-family new construction.

**AVAILABILITY:**

**Income Eligible Single Family / Weatherization Ready:**

Income-eligible residential homeowners and renters that reside in single-family housing with two (2) or fewer units. Low-income customers are 200% or below the Federal poverty level.

Eligibility may be based on the following:

- Reside in federal, state, or local subsidized housing and meet those program income guidelines.
- Reside in non-subsidized housing and provide proof of income level.
- Reside within a census tract at or below the required income level or within Justice40 Census Tracts.
- Have participated in other programs that require the same or lesser income levels, such as LIHEAP.

**Income Eligible Multi-Family:**

The Income Eligible Multi-Family program is available for the Program Period to any customer receiving service under any residential or business rate, meeting one of the following building eligibility requirements:

- Participation in an affordable housing program. Documented participation in a federal, state or local affordable housing program, including LIHTC, HUD, USDA, State HFA and local tax abatement for low-income properties.
- Location in a low-income census tract. Location in a census tract we identify as low-income, using HUD's annually published "Qualified Census Tracts" or Justice40 Census Tracts.
- Rent roll documentation. Where at least 50 percent of units have rents affordable to households at or below 80 percent of area median income, as published annually by HUD.
- Tenant income information. Documented tenant income information demonstrating at least 50 percent of units are rented to households meeting one of these criteria: at or below 200 percent of the Federal poverty level or at or below 80% of area median income.
- Participation in the Weatherization Assistance Program. Documented information demonstrating the property is on the waiting list for, currently participating in, or has in the last five years participated in the Weatherization Assistance Program.

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 1<sup>st</sup> Revised Sheet No. R-104  
Canceling P.S.C. MO. No. 1  Original Sheet No. R-104  
For Missouri Retail Service Area

**RULES AND REGULATIONS  
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**15.18 HARD-TO-REACH HOMES (continued)**

**BUDGETS:  
Combined Jurisdictions**

| <b>Program</b>                 | <b>Components</b>   | <b>2025</b> | <b>2026</b> | <b>Total</b> |
|--------------------------------|---|-------------|-------------|--------------|
| <b>Income Eligible Program</b> | Income Eligible Multi-Family & Income Eligible Single Family/Weatherization Ready | \$2,750,000 | \$2,750,000 | \$5,500,000  |

**PROGRAM PROVISIONS:**

The Income-Eligible Program will consist of two components:

- **Income Eligible Single Family / Weatherization Ready** promotes efficiency improvements to housing for low-income single-family customers. Evergy will work with local resources from the Kansas City Low Income Leadership Assistance Collaborative (KC-LILAC) to provide home repairs and/or Missouri community action agencies' deferred customers to remove barriers to proceed through the standard Weatherization Assistance Program for home efficiency improvements. The barriers vary by home but may include foundation issues, roof repairs, mold mitigation, etc.
- **Income Eligible Multi-Family** provides whole building analysis, recommendations for improvements with technical and process assistance, and incentives for upgrades. Projects include both in-unit and common area improvements.
- **In-Unit Upgrades.** Residents in qualifying multi-family housing will receive direct installation of low-cost measures at no cost. The measures may include: low-flow faucet aerators, low-flow showerheads, LEDs, advanced power strips, and hot water pipe insulation. Rebates for in-unit upgrades will also be available.
- **Multi-Family Common Areas.** Prescriptive and custom rebates will be available for qualifying upgrades.
- **Income Eligible Multi-Family New Construction.** Encourages income eligible multi-family builders to build buildings more energy efficiently by offering rebates to offset the cost difference between an inefficient and an efficient building.

Some of these components will be co-delivered with Spire to eligible customers for both utilities. Evergy offerings are not contingent upon co-delivery.

MPSC will hire a third-party evaluator to perform the Evaluation, Measurement, and Verification (EM&V) of the program.

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 Original Sheet No. R-104.1  
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**15.18 HARD-TO-REACH HOMES** (continued)

**ELIGIBLE MEASURES AND INCENTIVES:**

Measures filed in Case No. EO-2023-0369 are eligible for program benefits and incentives and may be offered during the Program Period. Eligible Incentives directly paid to customers and Measures can be found at [www.evergy.com](http://www.evergy.com).

Some of these components will be co-delivered with Spire to eligible customers for both utilities. Evergy offerings are not contingent upon co-delivery.

**ELIGIBLE MEASURES AND INCENTIVES:**

Measures filed in Case No. EO-2023-0370 are eligible for program benefits and Incentives and may be offered during the Program Period. Eligible Incentives directly paid to customers and Measures can be found at [www.evergy.com](http://www.evergy.com).

**EVALUATION:**

MPSC will hire a third-party evaluator to perform the Evaluation, Measurement, and Verification (EM&V) of the program.

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 2<sup>nd</sup> Revised Sheet No. R-105  
Canceling P.S.C. MO. No. 1 1<sup>st</sup> Revised Sheet No. R-105  
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**RULES AND REGULATIONS  
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**15.19 HOME DEMAND RESPONSE**

**PURPOSE:**

The voluntary Home Demand Response Program is designed to reduce Participant load during peak periods to improve system reliability, offset forecasted system peaks that could result in future generation capacity additions and/or provide a more economical option to generation or purchasing energy in the wholesale market.

Participant curtailment may be requested for any of these operational or economic reasons as determined by the Company. The Program accomplishes this by deploying various demand response reductions to Participants WiFi enabled connected device(s) to modify the run-time and utilization of the device for a specified period of time in a Company coordinated effort to limit overall system peak load.

**AVAILABILITY:**

The program is available during the Program Period and available to all Evergy Missouri West residential customers receiving electric service that also meet the program provisions below.

**PROGRAM PROVISIONS:**

This program will consist of qualifying direct load control (DLC) thermostat devices. Customers must maintain a secure home WiFi enabled internet service and have a working central air conditioning system or heat pump. If a WiFi enabled device is provided to customers at a discounted price, customers must agree to install the device at their premise receiving electric service within fourteen (14) days of receiving the device, and keep it installed, operational and connected to a secure home WiFi network for the duration of the program Cycle.

Customers must agree to not sell the device for the duration of the program. If it is found that they do, a debit will be issued on their utility bill for the Manufacturer Suggested Retail Price (MSRP) of the WiFi-enabled device, or the value of incentive provided to the customer. Payment of that debit will be the customer’s responsibility. Incented devices through the Program are only eligible for utility retail or wholesale programs.

The Company reserves the right to apply minimum and/or maximum event performance requirements for incentive payment, to apply financial penalties and to terminate participation for non-compliance.

This schedule is not applicable where the Customer’s electric generating and/or electric storage system(s) are registered in the wholesale market as a part of a Demand Response (DR) or Distributed Energy Resource (DER) aggregation.

The Company will hire a Program administrator to implement this Program. The Program Administrator will provide the necessary services to effectively implement the Program and strive to attain the energy and demand savings targets. The Company and the Program Administrator will follow a multi-faceted approach to marketing the Program.

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 1<sup>st</sup> Revised Sheet No. R-105.1  
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**15.19 HOME DEMAND RESPONSE** (continued)

**CONTROLS & INCENTIVES:**

Participants will receive enrollment and participation incentives at a level determined by the Company. If customers have an existing WiFi enabled eligible device the customer may elect to enroll and participate in the demand response program. During a curtailment event, the Company or its assignee will deploy various demand response reductions to Participants' Wifi enable thermostat device to modify the run-time of central air-conditioning unit(s), heat pump(s) or other behind the meter technologies for a specified period in a Company coordinated effort to limit overall system peak load.

The customer has the option to opt out of any individual curtailment event by modifying the settings on their device or contacting the Company or its assignee. Participants have the option of opting out of the entire program by having the Company remove the device or by returning the device to the Company. The Company reserves the right to set and modify incentive levels at any point during the program.

**CURTAILMENT METHODS:**

The Company may elect to deploy various types of demand response reductions including, but not limited to: (1) cycling the compressor unit(s); (2) deploying stand-alone pre-cooling and pre-heating strategies; (3) deploying a combination of pre-cooling and pre-heating cycling strategies; (4) deploying pre-cooling and pre-heating temperature modification strategies.

The Company reserves the right to test new DR enabled devices during the program period.

**NOTIFICATION:**

The Company will notify Program Participants of a curtailment event via various communication channels, which could include, but is not limited to:

1. SMS.
2. Email.
3. Push notifications.
4. In-App notifications.
5. Device notifications.

The notification can occur prior to or at the start of a curtailment event.

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 2<sup>nd</sup> Revised Sheet No. R-106  
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**15.19 HOME DEMAND RESPONSE CONTROL (continued)**

**CURTAILMENT SEASON:**

The Summer Curtailment Season will extend from June 1 to September 30 and Winter Curtailment Season from October 1 to May 31 with the ability to call emergency demand response events as needed.

**CURTAILMENT LIMITS:**

The Company may call a curtailment event any weekday, Monday through Friday. In addition, the company may call a curtailment event on Saturday or Sunday during an Energy Emergency Alert (EEA) event officially designated as such. A curtailment event occurs whenever the direct load control device is being controlled by the Company or its assignees. The Company may call a maximum of one curtailment event per eligible device per day per Participant. The Company is not required to curtail all Participants simultaneously and may stagger curtailment events across Participants.

**EVALUATION:**

A third-party evaluator will be hired to perform Evaluation, Measurement and Verification (EM&V) on this Program.

**PROGRAM BUDGETS:**

| <b>Program Name</b>  | <b>2025</b> | <b>2026</b> | <b>2027</b> |
|----------------------|-------------|-------------|-------------|
| Home Demand Response | \$2,550,419 | \$2,795,063 | \$3,114,020 |

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

**P.S.C. MO. No.** 1 1<sup>st</sup> Revised Sheet No. R-108  
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**15.20 EVERGY FAST TRACK PROGRAM**

**PURPOSE:**

The Evergy Fast Track HVAC Replace on Fail program is designed to offer immediate solutions for HVAC systems requiring quick replacement while also educating customers on comprehensive energy efficiency upgrades for the future, ultimately reducing utility costs and enhancing energy efficiency.

**AVAILABILITY:**

This offer is available for participation for customers who are receiving services under any generally available Missouri residential rates and reside in a single-family building. Single Family dwellings are defined as two (2) or fewer units.

**BUDGET:**

Combined Jurisdictions

| <b>Program</b>                     | <b>Components</b>                 | <b>2025</b> | <b>2026</b> | <b>Total</b> |
|------------------------------------|-----------------------------------|-------------|-------------|--------------|
| Modified PAYS & Fast Track Program | Moderate Income PAYS & Fast Track | \$3,550,000 | \$3,550,000 | \$7,100,000  |

**PROGRAM DESCRIPTION:**

The Company will hire a Program Administrator to implement the program. The Program Administrator will provide the necessary services to effectively implement the program and will conduct the program via the following steps:

**Step 1: Inform and Enroll:** HVAC contractor informs the customer about the Company's program via the FastTrack HVAC pathway. Customer enrolls using the FastTrack HVAC app/tablet provided by the contractor.

**Step 2: Document the HVAC System:** While the customer enrolls, the HVAC contractor uses the FastTrack HVAC app to take geo-coded, time-stamped images of the failed HVAC system, documenting its tonnage, age, and efficiency rating. Captures additional relevant information (location, size of return vs. unit, duct system observations, etc.)



**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 Original Sheet No. R-108.1  
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**15.20 EVERGY FAST TRACK PROGRAM (continued)**

**Step 3: Confirm Enrollment:** Contractor informs the customer that initial documentation is complete and retrieves the device. Contractor enters the customer tracking number shown on the device to confirm successful enrollment and informs the customer that they will receive their offer in about 10-15 minutes.

**Step 4: Review the Offer:** Once the FastTrack HVAC offer is ready, the contractor uses the tablet to review the offer with the customer, showing the true cost of ownership, applicable rebates, upfront utility payments, and the required customer co-pay. The offer also includes the tariff term and fixed monthly tariff charge.

**Participation Requirements:**

- Location Ownership: If the participant is not the owner of the location, the owner must sign an Owner Agreement. The owner must agree to have a Property Notice attached to their property records.
- Notice: If the signature of the successor customer renting the location is not obtained on the Property Notice form, or if the purchaser in jurisdictions where the company cannot attach the Property Notice to property records does not receive notice, it will be considered as the owner's acceptance of consequential damages. This also grants permission for the tenant or purchaser to terminate their lease or sales agreement without penalty. Also, the customer can pay off the remaining balance including cost of upgrades and the Company's cost of capital remaining due.
- Energy History: The customer authorizes the use of energy usage history by the Program Administrator to true up its energy analysis and determine qualifying recommendations.

**Energy Efficiency Plans:**

The company will have its Program Administrator conduct a cost analysis and develop an Energy Efficiency Plan, outlining recommended upgrades to enhance energy efficiency and reduce utility costs. This report will be provided to the customer at no cost, aiming to incentivize and educate them on the suggested energy efficiency improvements.

- Incentive Payment: The Company will offer incentives currently available for an eligible residential Measure as defined in the Company's MEEIA 4 Demand-Side Plan.
- 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 contractor. The Company will assume no responsibility for such upfront payments to the contractor. Co-payments will be applied after applying relevant incentive payments.

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 Original Sheet No. R-108.2  
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**15.20 EVERGY FAST TRACK PROGRAM** (continued)

**Service Charge**

The company will recover the costs for its investment 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 customer occupying that location until all Company costs have been recovered. The Service Charge will also be set for a duration not to exceed 15 years. The Service Charge and duration of payments will be included in the Efficiency Upgrade Agreement.

- 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.
- 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.
- 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 location's owner.
- 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 during 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 for the expenses incurred.
- Termination of Service Charge: Once the utility's cost for the upgrades at a location have been recovered, including its cost of capital, the cost paid to the contractor to perform the work, costs for any repairs made to the upgrades, the monthly service charge shall no longer be billed.
- 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.
- Extension of Program Charge: If the monthly service charge is reduced or suspended for any reason, once repairs have been successfully effected or service reconnected, the number of total monthly payments shall be extended until the total collected through the Service Charge is equal to the Company's cost for installation, including costs associated with repairs, deferred payments, and missed payments as long as the current occupant is still benefiting from the upgrades.

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1

Original Sheet No. R-108.3

Canceling P.S.C. MO. No. \_\_\_\_\_

Revised Sheet No. \_\_\_\_\_

For Missouri Retail Service Area

**RULES AND REGULATIONS  
ELECTRIC**

**15.20 EVERGY FAST TRACK PROGRAM (continued)**

- Tied to the Location: Until cost recovery for upgrades at a location is complete for the upgrades fail, the terms of this tariff shall be binding on metered structure or facility and any future customer who shall receive service at that location.
- Disconnection for Nonpayment: As a charge paid in furtherance of an approved energy efficiency program, the Company may disconnect the metered structure for non-payment of the Service Charge under the same provisions as for any other electric service.
- Non-Payment: Costs associated with participants who have fallen into non-pay status before complete recovery of equipment costs have been received will be recovered as a MEEIA program cost.
- Repairs: Should at any future time during the billing of the Service Charge the Company determines that the installed upgrades are no longer functioning as intended, and that the occupant or building owner as applicable did not damage or fail to maintain the installed upgrades, the Company shall reduce or suspend the Service Charge until such time as the Company and/or its Program Partner can repair the upgrades. If the upgrades cannot be repaired or replaced cost effectively, the Company will waive the remaining Service Charges. If the Company determines the occupant or owner of the location as applicable, damaged or failed to maintain the upgrades in place, it will seek to recover all costs associated with the installation, including any fees, incentives paid to lower Project costs, and legal fees. The Service Charge will continue until the Company's cost recovery is complete, as long as the upgrades continue to function. The Company will not guarantee perfect operation of installed upgrades in every circumstance, and any suspension or waiver of unbilled Service Charges shall not entitle the Participant or owner to any refund or cancellation of previously billed Service Charges.

Eligible **Incentives** directly paid to customers and **Measures**, along with program **Terms and Conditions** can be found at [www.evergy.com](http://www.evergy.com).

**EVALUATION:**

The Missouri Public Service Commission will hire a third-party evaluator to perform the Evaluation, Measurement, and Verification (EM&V) of the program.

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 1<sup>st</sup> Revised Sheet No. R-109  
Canceling P.S.C. MO. No. \_\_\_\_\_ Original Sheet No. R-109  
For Missouri Retail Service Area

**RULES AND REGULATIONS  
ELECTRIC**

**15.21 MODIFIED PAY AS YOU SAVE ®**

**PURPOSE:**

The purpose of the Residential Modified PAYS® Program is to promote affordability and accessibility for energy efficient upgrades to moderate income customers to create long-term energy savings and bill reduction opportunities through an on-bill tariff tied to the premise.

**AVAILABILITY:**

This offer is available for participation by customers who are receiving services under any generally available Missouri residential rates and reside in a single-family building. Single Family dwellings are defined as two (2) or fewer units. Evergy will market this program in zip codes that generally fall below 300% Federal Poverty Income Levels based on current years guidance. Any customer that wishes to participate in the program that falls outside of these targeted zip codes must sign a self-attestation form verifying they meet the 201-300% FPL level requirement.

**BUDGET:**

Combined Jurisdictions

| Program                            | Components                        | 2025        | 2026        | Total       |
|------------------------------------|-----------------------------------|-------------|-------------|-------------|
| Modified PAYS & Fast Track Program | Moderate Income PAYS & Fast Track | \$3,550,000 | \$3,550,000 | \$7,100,000 |

**PROGRAM OFFER DECIPTION:**

**PARTICIPATION:**

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

- **Step 1:** Visual home inspection/assessment with direct installation of free energy saving measures. Homes that are deemed eligible for participation will move forward with more in-depth data collection to record the actual home features and conditions, including energy usage.
- **Step 2:** The program will analyze usage history, assessment data, and the participating contractor's 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 the lifetime of the measure makes up the monthly tariff charge, while 20% of the estimated post upgrade savings flow to the participant, capped at up to 15 years.
  - Co-Pay Option: If a project is not cost-effective, customers may agree to pay the portion of the project's cost that prevents it from qualifying for the program as an upfront payment to the participating contractor.

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1

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Original Sheet No. \_\_\_\_\_

For Missouri Retail Service Area

**RULES AND REGULATIONS  
ELECTRIC**

**15.21 MODIFIED PAS AS YOU SAVE ® (continued)**

- **Step 3:** If a participant agrees to the scope of work, the Program will facilitate installation through the Company’s network of trade allies/contractors.
- Post Install Quality Control inspections – 100% of installations will be remotely inspected for quality assurance using geo-coded and time-stamped photo documentation.
- Program Administrator to notarize and file Property Notice with the location’s property records.

Company to initiate on-bill charge 45 days following verification of installation.

**Participation Requirements:**

- Location Ownership: If the participant is not the owner of the location, the owner must sign an Owner Agreement. The owner must agree to have a Property Notice attached to their property records.
- Notice: If the signature of the successor customer renting the location is not obtained on the Property Notice form, or if the purchaser in jurisdictions where the company cannot attach the Property Notice to property records does not receive notice, it will be considered as the owner’s acceptance of consequential damages. This also grants permission for the tenant or purchaser to terminate their lease or sales agreement without penalty. Also, the customer can pay off the remaining balance including cost of upgrades and the Company’s cost of capital remaining due.
- Energy History: The customer authorizes the use of energy usage history by the Program Administrator to true up its energy analysis and determine qualifying recommendations.

**Energy Efficiency Plans:**

The company will have its Program Administrator conduct a cost analysis and develop an Energy Efficiency Plan, outlining recommended upgrades to enhance energy efficiency and reduce utility costs. This report will be provided to the customer at no cost, aiming to incentivize and educate them on the suggested energy efficiency improvements.

- Incentive Payment: The Company will offer incentives currently available for an eligible residential Measure as defined in the Company’s MEEIA 4 Demand-Side Plan.
- Net Savings: Recommended upgrades shall be limited to those where the annual Service Charges and the utility’s cost for capital, are no greater than 80% of the estimated annual benefit from reduction to customer annual utility charges based on electricity and/or gas rates.
- 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 contractor. The Company will assume no responsibility for such upfront payments to the contractor. Co-payments will be applied after applying relevant incentive payments.

Issued: October 15, 2024  
Issued by: Darrin R. Ives, Vice President

Effective: January 1, 2025  
1200 Main Kansas City, MO. 64105

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1

Original Sheet No. R-111

Canceling P.S.C. MO. No. \_\_\_\_\_

Original Sheet No. \_\_\_\_\_

For Missouri Retail Service Area

**RULES AND REGULATIONS  
ELECTRIC**

**15.21 MODIFIED PAY AS YOU SAVE ® (continued)**

**SERVICE CHARGE:**

The company will recover the costs for its investment 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 customer occupying that location until all Company costs have been recovered. The Service Charge will also be set for a duration not to exceed 15 years. The Service Charge and duration of payments will be included in the Efficiency Upgrade Agreement.

- 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.
- 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.
- 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 location's owner.
- 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 during 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 for the expenses incurred.
- Termination of Service Charge: Once the utility's cost for the upgrades at a location have been recovered, including its cost of capital, the cost paid to the contractor to perform the work, costs for any repairs made to the upgrades, the monthly service charge shall no longer be billed.
- 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.
- Extension of Program Charge: If the monthly service charge is reduced or suspended for any reason, once repairs have been successfully effected or service reconnected, the number of total monthly payments shall be extended until the total collected through the Service Charge is equal to the Company's cost for installation, including costs associated with repairs, deferred payments, and missed payments as long as the current occupant is still benefiting from the upgrades.
- Tied to the Location: Until cost recovery for upgrades at a location is complete for the upgrades fail, the terms of this tariff shall be binding on metered structure or facility and any future customer who shall receive service at that location.
- Disconnection for Nonpayment: As a charge paid in furtherance of an approved energy efficiency program, the Company may disconnect the metered structure for non-payment of the Service Charge under the same provisions as for any other electric service.

Issued: October 15, 2024  
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**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1

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Original Sheet No. \_\_\_\_\_

For Missouri Retail Service Area

**RULES AND REGULATIONS  
ELECTRIC**

**15.21 MODIFIED PAY AS YOU SAVE ® (continued)**

**SERVICE CHARGE:** (continued)

- Non-Payment: Costs associated with participants who have fallen into non-pay status before complete recovery of equipment costs have been received will be recovered as a MEEIA program cost.
- Confirm Savings Actually Exceeded Tariff-Charge: Program Administrator will perform a bi-annual analysis to evaluate weather-normalized 12-month post upgrade project cost savings and confirm that the Service Charge remains lower than the estimated Project cost savings. In the event the analysis indicates the Service Charge exceeds the estimated project cost savings due to inaccurate savings estimates, the Service Charge may be reduced or eliminated to the extent needed in order for the Participant to realize savings.
- Repairs: Should at any future time during the billing of the Service Charge the Company determines that the installed upgrades are no longer functioning as intended, and that the occupant or building owner as applicable did not damage or fail to maintain the installed upgrades, the Company shall reduce or suspend the Service Charge until such time as the Company and/or its Program Partner can repair the upgrades. If the upgrades cannot be repaired or replaced cost effectively, the Company will waive the remaining Service Charges. If the Company determines the occupant or owner of the location as applicable, damaged or failed to maintain the upgrades in place, it will seek to recover all costs associated with the installation, including any fees, incentives paid to lower Project costs, and legal fees. The Service Charge will continue until the Company’s cost recovery is complete, as long as the upgrades continue to function. The Company will not guarantee perfect operation of installed upgrades in every circumstance, and any suspension or waiver of unbilled Service Charges shall not entitle the Participant or owner to any refund or cancellation of previously billed Service Charges.

Eligible **Incentives** directly paid to customers and **Measures**, along with program **Terms and Conditions** can be found at [www.evergy.com](http://www.evergy.com) .

**EVALUATION:**

MPSC will hire a third-party evaluator to perform the Evaluation, Measurement, and Verification (EM&V) of the program.

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 Original Sheet No. 138.20  
Canceling P.S.C. MO. No. \_\_\_\_\_ Original Sheet No. \_\_\_\_\_

**DEMAND SIDE INVESTMENT MECHANISM RIDER (Cycle 4)  
Schedule DSIM**

**APPLICABILITY**

This rider is applicable to all non-lighting kilowatt-hours (kWh) of energy supplied to customers under the Company's retail rate schedules, excluding kWh of energy supplied to "opt-out" customers. The Demand Side Investment Mechanism Rider will be calculated and applied separately to the following rate classes: (1) Residential and Non-Residential customers; (2) Small General Service (SGS), (3) Large General Service (LGS) and (4) Large Power Service (LPS).

Charges passed through this DSIM Rider reflect the charges approved to be collected from the implementation of the Missouri Energy Efficiency Investment Act (MEEIA) Cycle 4 Plan and any remaining unrecovered charges from the MEEIA Cycle 3 Plan and the MEEIA Cycle 2 Plan DSIM. Those charges include:

- 1) Program Costs, Throughput Disincentive (TD), and Earnings Opportunity Award (EO) (if any) for the MEEIA Cycle 4 Plan, as well as Program Costs, TD and EO for commission approved business program projects completed by June 30, 2025 that will be counted under the MEEIA Cycle 3 Plan and any earned Earnings Opportunity earned (and ordered) attributable to MEEIA Cycle 3 Plan.
- 2) Reconciliations, with interest, to true-up for differences between the revenues billed under this DSIM Rider and total actual monthly amounts for:
  - i. Program Costs incurred in Cycle 4 and/or remaining unrecovered amounts for MEEIA Cycle 3 and Cycle 2.
  - ii. TD incurred in Cycle 4, and/or remaining unrecovered amounts for MEEIA Cycle 3 and Cycle 2.
  - iii. Amortization of any Earnings Opportunity ordered by the Missouri Public Service Commission (Commission), and/or remaining true-ups or unrecovered amounts for MEEIA Cycle 3 and Cycle 2.
- 3) Any Ordered Adjustments. Charges under this DSIM Rider shall continue after the anticipated plan period of MEEIA Cycle 4 approved programs until such time as the charges described in items 1) and 2) above have been billed.

Charges arising from the MEEIA Cycle 4 Plan that are the subject of this DSIM Rider shall be reflected in one "DSIM Charge" on customers' bills in combination with any charges arising from a rider that is applicable to post-MEEIA Cycle 4 Plan demand-side management programs approved under the MEEIA. This will include any unrecovered amounts for Program Costs, TD from MEEIA and any Earnings Opportunity, etc. earned/remaining from MEEIA Cycle 3 and Cycle 2.

**DEFINITIONS**

As used in this DSIM Rider, the following definitions shall apply:

Company's "Throughput Disincentive" (TD) is meant to represent the utility's lost margins associated with the successful implementation of the MEEIA programs. The detailed methodology for calculating the TD is described beginning in Tariff Sheet No. 138.24.

"Effective Period" (EP) means the six (6) months beginning with January 2025, and each six month period thereafter.



**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 Original Sheet No. 138.21  
Canceling P.S.C. MO. No. \_\_\_\_\_ Original Sheet No. \_\_\_\_\_

DEMAND SIDE INVESTMENT MECHANISM RIDER (Cycle 4)  
Schedule DSIM (Continued)

"Evaluation Measurement & Verification" (EM&V) means the performance of studies and activities intended to evaluate the process of the utility's program delivery and oversight and to estimate and/or verify the estimated actual energy and demand savings, utility lost revenue, cost effectiveness, and other effects from demand-side programs.

"Incentive" means program costs for direct and indirect incentive payments to encourage customer and/or retail partner participation in programs and cost of measures, which are provided at no cost as part of the program.

"MEEIA Cycle 4 Plan" consists of the demand-side programs and the DSIM described in the Non-Unanimous Stipulation and Agreement, which became effective following Commission order and approval of the MEEIA Cycle 4 Plan under EO-2023-0370.

"Program Costs" means any prudently incurred program expenditures, including such items as program planning, program design; administration; delivery; end-use measures and incentive payments; advertising expense; evaluation, measurement, and verification; market potential studies; and work on a statewide technical resource manual.

"Cycle 4 Earnings Opportunity" (EO) means the annual incentive ordered by the Commission based on actual performance verified through EM&V against planned targets. The Combined Companies' EO based on budget metrics for all programs excluding Residential Demand Response and Business Demand Response programs for 2025-2027 will be \$2,256,437 if 100% achievement of the planned targets are met. The Earnings Opportunity Matrix outlining the payout rates and weightings can be found at Sheet No. 138.29. The Combined Companies' EO based on budget metrics will be allocated to each jurisdiction by each company's respective contribution to each EO Metric listed in the matrix in tariff Sheet No. 138.29. Evergy Missouri West's EO for the Residential Demand Response and Business Demand Response programs will be a combined \$4,351,173 if 100% achievement of the annual planned targets are met.

"Short-Term Borrowing Rate" means the daily one Federal Reserve Secured Overnight Financing Rate (SOFR) using the last actual rate for weekends and holidays or dates without an available SOFR rate plus applicable term adjustment plus the Applicable Margin for SOFR as defined in the Pricing Schedule of the current Evergy Missouri West Revolving Credit Agreement will be utilized. A simple mathematical average of all the daily rates for the month is then computed.

"AFUDC Rate" means the Allowance for Funds Used During Construction rate computed in accordance with the formula prescribed in the Code of Federal Regulations Title 18, Part 101.

Recovery Period (RP) includes the day the DSIM Rider Tariff becomes effective through July 31, 2025 and each six month period thereafter.

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 Original Sheet No. 138.22  
Canceling P.S.C. MO. No. \_\_\_\_\_ Revised Sheet No. \_\_\_\_\_

**DEMAND SIDE INVESTMENT MECHANISM RIDER (Cycle 4)  
Schedule DSIM (Continued)**

**DETERMINATION OF DSIM RATES:**

The DSIM during each applicable EP is a dollar per kWh rate for each rate schedule calculated as follows:

$$\text{DSIM} = [\text{NPC} + \text{NTD} + \text{NEO} + \text{NOA}] / \text{PE}$$

Where:

NPC = Net Program Costs for the applicable EP plus the succeeding EP, as defined below:

$$\text{NPC} = \text{PPC} + \text{PCR}$$

PPC = Projected Program Costs is an amount equal to Program Costs projected by the Company to be incurred during the applicable EP, plus the succeeding EP, including any unrecovered Cycle 3 and Cycle 2 Program Costs associated with long-lead projects, final EM&V costs and other true-ups.

PCR = Program Costs Reconciliation is equal to the cumulative difference, if any, between the NPC revenues billed resulting from the application of the DSIM through the end of the previous EP and the actual Program Costs incurred through the end of the previous EP (which will reflect projections through the end of the previous EP due to timing of adjustments). Such amounts shall include monthly interest on cumulative over- or under-balances at the Company's monthly Short-Term Borrowing Rate.

NTD = Net Throughput Disincentive for the applicable EP plus the succeeding EP, as defined below:

$$\text{NTD} = \text{PTD} + \text{TDR}$$

PTD = Projected Throughput Disincentive is the Company's TD projected by the Company to be incurred during the applicable EP, plus the succeeding EP, including any unrecovered Cycle 3 and Cycle 2 TD. For the detailed methodology for calculating the TD, see Sheet No.s 138.24 to 138.26.

TDR = Throughput Disincentive Reconciliation is equal to the cumulative difference, if any, between the NTD revenues billed during the previous EP resulting from the application of the DSIM and the Company's TD through the end of the previous EP calculated pursuant to the MEEIA Cycle 4 application, as applicable (which will reflect projections through the end of the previous EP due to timing of adjustments). Such amounts shall include monthly interest on cumulative over- or under- balances at the Company's monthly Short-Term Borrowing Rate.

NEO = Net Earnings Opportunity for the applicable EP plus the succeeding EP, as defined below:

$$\text{NEO} = \text{EO} + \text{EOR}$$

EO = Earnings Opportunity is equal to the Earnings Opportunity Award monthly amortization multiplied by the number of billing months in the applicable EP plus the succeeding EP.

MEEIA Cycle 4 monthly amortization shall be determined by dividing the annual Earnings Opportunity Award by the number of billing months from the billing month of the first DSIM after the determination of the annual Earnings Opportunity Award and 12 calendar months following that first billing month.

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 Original Sheet No. 138.23  
 Canceling P.S.C. MO. No. \_\_\_\_\_ Original Sheet No. \_\_\_\_\_

**DEMAND SIDE INVESTMENT MECHANISM RIDER (Cycle 4)  
 Schedule DSIM (Continued)**

- EOR = Earnings Opportunity Reconciliation is equal to the cumulative difference, if any, between the NEO revenues billed during the previous EP resulting from the application of the DSIM and the monthly amortization of the EO Award through the end of the previous EP (which will reflect projections through the end of the previous EP due to timing of adjustments). Such amounts shall include monthly interest on cumulative over- or under- balances at the Company's monthly Short-Term Borrowing Rate.
- NOA = Net Ordered Adjustment for the applicable EP as defined below:  

$$NOA = OA + OAR$$
- OA = Ordered Adjustment is the amount of any adjustment to the DSIM ordered by the Commission as a result of prudence reviews and/or corrections under this DSIM Rider. Such amounts shall include monthly interest at the Company's monthly Short-Term Borrowing Rate.
- OAR = Ordered Adjustment Reconciliation is equal to the cumulative difference, if any, between the NOA revenues billed during the previous EP resulting from the application of the DSIM and the actual OA ordered by the Commission through the end of the previous EP (which will reflect projections through the end of the previous EP due to timing of adjustments). Such amounts shall include monthly interest on cumulative over- or under-balances at the Company's monthly Short-Term Borrowing Rate.
- PE = Projected Energy, in kWh, forecasted to be delivered to the customers to which the DSIM Rider applies during the applicable RP, plus the succeeding RP.

The DSIM components and total DSIM applicable to the individual rate schedules shall be rounded to the nearest \$0.00001.

Allocation of MEEIA Cycle 4 Program Costs, TD and EO for each rate schedule for the MEEIA Cycle 4 Plan will be allocated as outlined below.

**Cost Allocation(s) by Program**

| <b>Program Name</b>          | <b>Cost Allocation Description</b>                                   |
|------------------------------|--|
| Modified PAYS™               | Residential **   |
| Income-Eligible Multi-Family | Residential ** and Business, by Class kWh Participation*             |
| Whole Business Efficiency    | Business by Class kWh Participation*                                 |
| Residential Demand Response  | Residential **   |
| Business Demand Response     | Business by Class kW Participation (excluding opt-out customers) *** |

\* Monthly amounts are allocated based on kWh/kW participation program year-to-date; if kWh/kW participation is not available for the program year-to-date, prior year's FERC Form 1 page 304 reported billed kWh by class, net of opt-out will be used.

\*\* Residential class allocations will not further allocate by the more granular time-of-use rate schedules.

\*\*\* Estimate based on MEEIA 3 cumulative average kW participation by class until actual kW participation by class is known, then actual kW participation by class will be used.

This DSIM Rider shall not be applicable to customers that have satisfied the opt-out provisions contained in Section 393. Section 393.1075.7, RSMo.1075.7, RSMo.

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 Original Sheet No. 138.24  
Canceling P.S.C. MO. No. \_\_\_\_\_ Original Sheet No. \_\_\_\_\_

DEMAND SIDE INVESTMENT MECHANISM RIDER (Cycle 4)  
Schedule DSIM (Continued)

**CALCULATION OF TD**

Monthly Throughput Disincentive = the sum of the Throughput Disincentive Calculation for all programs applicable to (1) Residential and Non-Residential customers: (2) Small General Service (SGS), (3) Large General Service (LGS) and (4) Large Power Service (LPS).

**Throughput Disincentive Calculation**

The Throughput Disincentive Calculation for each program shall be determined by the formula:

$$TD\$ = MS \times NMR \times NTGF$$

Where:

TD\$ = Throughput Disincentive Dollars to be collected for a given calendar month, for a given class.

NMR = Net Margin Revenue. Net Margin revenue values for each class are provided on Tariff Sheet No.138.29.

NTGF = Net to Gross Factors by MEEIA Cycle 4 programs are as follows:

Factors by MEEIA Cycle 4 program are as follows:

| <b>Program</b>               | <b>NTGF</b> |
|------------------------------|-------------|
| Whole Business Efficiency    | 0.70        |
| Business Demand Response     | N/A         |
| Modified PAYS™               | 1.00        |
| Income-Eligible Multi-Family | 1.00        |
| Residential Demand Response  | N/A         |

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 Original Sheet No. 138.25  
Canceling P.S.C. MO. No. \_\_\_\_\_ Original Sheet No. \_\_\_\_\_

|   |
|---|
| DEMAND SIDE INVESTMENT MECHANISM RIDER (Cycle 4)<br>Schedule DSIM (Continued) |
|---|

**CALCULATION OF TD (continued):**

MS = The sum of all Programs' Monthly Savings in kWh, for a given month, for a given class. The Monthly Savings in kWh for each Program shall be determined by the formula:

$$MS = (MAS_{CM} + CAS_{PM} - RB) \times LS$$

RB = Rebasing Adjustment. The Rebasing Adjustment shall equal the CAS applicable as of the date used for the MEEIA normalization in any general rate case resulting in new rates becoming effective during the accrual and collection of TD\$ pursuant to MEEIA Cycle 4. In the event more than one general rate case resulting in new rates becoming effective during the accrual and collection of TD\$ pursuant to MEEIA Cycle 4, the Rebasing Adjustment shall include each and every prior Rebasing Adjustment calculation.

LS = Load Shape. The Load Shape is the monthly loadshape percent for each program, subdivided by peak, off-peak and super off-peak and end use category for residential programs, as follows:

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 Original Sheet No. 138.26  
Canceling P.S.C. MO. No. \_\_\_\_\_ Original Sheet No. \_\_\_\_\_

DEMAND SIDE INVESTMENT MECHANISM RIDER (Cycle 4)  
Schedule DSIM (Continued)

**CALCULATION OF TD (Continued):**

Where:

MC = Measure Count. Measure Count, for a given month, for a given class, for each measure is the number of each measure installed in the current calendar month.

ME = Measure Energy. Measure Energy will be determined as follows, for each Measure:

- i. Prior to finalization of EM&V for Cycle 4, Year 1 programs, for Measures not listed under those programs listed in (c) below, the ME is the annual total of normalized savings for each measure at customer meter per measure defined in the Technical Resource Manual (TRM).
- ii. After finalization of EM&V for Cycle 4, Year 1 programs, for Measures not listed under those programs listed in (c) below, the ME is the annual total of normalized savings for each measure at customer meter per measure defined in the updated TRM (which will be updated based on EM&V ex-post gross adjustments determined for Year 1 no later than 24 months after the commencement of Cycle 4).
- iii. For Measures in MEEIA Cycle 4 programs: Whole Business Efficiency, Modified PAYS™, and Income Eligible Multi-Family (programs with custom measures), the ME will be the annual value attributable to the installations reported monthly by the program implementer.

MAS = The sum of MC multiplied by ME for all measures in a program in the current calendar month.

CAS = Cumulative sum of MAS for each program for MEEIA Cycle 4

CM = Current calendar month

PM = Prior calendar month

Measure – Energy efficiency measures described for each program in the Technical Resource Manual.

Programs – MEEIA Cycle 4 programs listed in Tariff Sheet No. R-3 and added in accordance with the Commission’s rule 20 CSR 4240-20.094(4).

TRM – Commission-Approved Technical Resource Manual updated based on EM&V ex-post gross adjustments determined for Year 1 no later than 24 months after the commencement of Cycle 4.

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 Original Sheet No. 138.27  
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**DEMAND SIDE INVESTMENT MECHANISM RIDER (Cycle 4)**  
**Schedule DSIM (Continued)**

**Earnings Opportunity Adjustments**

The Combined Companies' (Evergy Missouri Metro and Evergy Missouri West) annual MEEIA Cycle 4 EO Award for 2025-2027 shall be calculated using the matrices in tariff Sheet No. 138.29. The EO target at 100% is \$9,856,437. If Commission-approved new programs are added in the years 2026 and any program plan extensions, the Company may seek Commission approval to have the targets for the EO scale adjusted proportionately to the increase in savings or budget targets.

**Other DSIM Provisions**

The Company shall file an update to NMR rates by month by class contemporaneous with filing any compliance tariff sheets in any general rate case reflecting the rates set in that case, and the billing determinants used in setting rates in that case.

Annual kWh savings per measure will be updated prospectively in the TRM no later than 24 months after the commencement of the Plan based on EM&V ex-post gross adjustments determined for Year 1 and annually thereafter upon finalization of each subsequent program year EM&V report.

**Filing**

After the initial DSIM Rider rate adjustment filing, the Company shall make a DSIM Rider rate adjustment filing to take effect each August and February under the Term of this MEEIA Rider. DSIM Rider rate adjustment filings shall be made at least sixty (60) days prior to their effective dates.

**Prudence Reviews**

A prudence review shall be conducted no less frequently than at twenty-four (24) month intervals in accordance with 20 CSR 4240-20.093(11). Any costs, which are determined by the Commission to have been imprudently incurred or incurred in violation of the terms of this DSIM Rider, shall be returned to customers through an adjustment in the next DSIM Rider rate adjustment filing and reflected in factor OA above.

**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1 Original Sheet No. 138.28  
 Canceling P.S.C. MO. No. \_\_\_\_\_ Original Sheet No. \_\_\_\_\_

|   |
|---|
| DEMAND SIDE INVESTMENT MECHANISM RIDER (Cycle 4)<br>Schedule DSIM (Continued) |
|---|

**Discontinuing the DSIM:**

The Company reserves the right to discontinue the entire MEEIA Cycle 4 portfolio, if the Company determines that implementation of such programs is no longer reasonable due to changed factors or circumstances that have materially and negatively impacted the economic viability of such programs as determined by the Company, upon no less than thirty days' notice to the Commission. As a result of these changes, the Company may file to discontinue this DSIM. Similar to Program discontinuance, the Company would file a notice indicating that it is discontinuing the DSIM Rider. This notice would include a methodology for recovery of any unrecovered Program Costs and TD.

**DEMAND SIDE INVESTMENT MECHANISM CHARGE:**

Effective upon Commission approval in Case No. EO-2023-0370 (consolidated in EO-2023-0369)  
 MEEIA Cycle 4 Filing.

DSIM Components and Total DSIM

| Rate Schedule                         | Cycle        | NPC/PE<br>(\$/kWh) | NTD/PE<br>(\$/kWh) | NEO/PE<br>(\$/kWh) | NOA/PE<br>(\$/kWh) | Total DSIM<br>(\$/kWh) |
|---------------------------------------|--------------|--------------------|--------------------|--------------------|--------------------|------------------------|
| <b>Residential Service</b>            | Cycle 2      |                    |                    |                    |                    |                        |
|                                       | Cycle 3      |                    |                    |                    |                    |                        |
|                                       | Cycle 4      |                    |                    |                    |                    |                        |
|                                       | <b>Total</b> |                    |                    |                    |                    |                        |
| <b>Non- Residential Service - SGS</b> | Cycle 2      |                    |                    |                    |                    |                        |
|                                       | Cycle 3      |                    |                    |                    |                    |                        |
|                                       | Cycle 4      |                    |                    |                    |                    |                        |
|                                       | <b>Total</b> |                    |                    |                    |                    |                        |
| <b>Non- Residential Service - LGS</b> | Cycle 2      |                    |                    |                    |                    |                        |
|                                       | Cycle 3      |                    |                    |                    |                    |                        |
|                                       | Cycle 4      |                    |                    |                    |                    |                        |
|                                       | <b>Total</b> |                    |                    |                    |                    |                        |
| <b>Non- Residential Service - LPS</b> | Cycle 2      |                    |                    |                    |                    |                        |
|                                       | Cycle 3      |                    |                    |                    |                    |                        |
|                                       | Cycle 4      |                    |                    |                    |                    |                        |
|                                       | <b>Total</b> |                    |                    |                    |                    |                        |



**EVERGY MISSOURI WEST, INC. d/b/a EVERGY MISSOURI WEST**

P.S.C. MO. No. 1

Original Sheet No. 138.29

Canceling P.S.C. MO. No. \_\_\_\_\_

Original Sheet No. \_\_\_\_\_

**DEMAND SIDE INVESTMENT MECHANISM RIDER (Cycle 4)  
Schedule DSIM (Continued)**

**Net Margin Revenue Rates by Rate Class by Month & Earnings Opportunity Matrix:**

|                                     | January   | February  | March     | April     | May       | June      | July      | August    | September | October   | November  | December  |
|-------------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| RES-Peak Margin less fuel           | \$0.07192 | \$0.07192 | \$0.07192 | \$0.07192 | \$0.07192 | \$0.12862 | \$0.12862 | \$0.12862 | \$0.12862 | \$0.07192 | \$0.07192 | \$0.07192 |
| RES-Off-Peak Margin less fuel       | \$0.05956 | \$0.05956 | \$0.05956 | \$0.05956 | \$0.05956 | \$0.08509 | \$0.08509 | \$0.08509 | \$0.08509 | \$0.05956 | \$0.05956 | \$0.05956 |
| RES-Super Off-Peak Margin less fuel | \$0.04209 | \$0.04209 | \$0.04209 | \$0.04209 | \$0.04209 | \$0.07093 | \$0.07093 | \$0.07093 | \$0.07093 | \$0.04209 | \$0.04209 | \$0.04209 |
| SGS Margin less fuel                | \$0.03974 | \$0.03883 | \$0.04020 | \$0.04295 | \$0.04393 | \$0.06769 | \$0.06586 | \$0.06545 | \$0.06548 | \$0.04362 | \$0.04324 | \$0.04211 |
| LGS Margin less fuel                | \$0.02134 | \$0.02169 | \$0.02316 | \$0.02459 | \$0.02624 | \$0.03046 | \$0.02820 | \$0.02784 | \$0.02773 | \$0.02309 | \$0.02451 | \$0.02275 |
| LPS Margin less fuel                | \$0.00393 | \$0.00396 | \$0.00377 | \$0.00380 | \$0.00422 | \$0.00786 | \$0.00760 | \$0.00765 | \$0.00783 | \$0.00373 | \$0.00400 | \$0.00417 |

| Combined Companies EO Matrix - Budget Targets  |                                    |             | PY1 Cumulative Budget/MW | PY1 Cumulative EO \$ | PY2 Cumulative Budget/MW | PY2 Cumulative EO \$ | Cycle 4 Cumulative Budget/MW | Cycle 4 Cumulative EO \$ |                    |                    |
|--|------------------------------------|-------------|--------------------------|----------------------|--------------------------|----------------------|------------------------------|--------------------------|--------------------|--------------------|
| Proposed EO Metric   | Unit                               | \$/unit     | Target                   | Target               | Target                   | Target               | Target                       | Target                   |                    |                    |
| <b>IEMF Incentive Budget Spend:</b><br>Includes Income Eligible Multi-Family program   | \$/IEMF Incentive Budget Spend     | \$0.15      | \$ 1,657,826             | \$ 248,674           | \$ 3,315,651             | \$ 497,348           | \$ 3,315,651                 | \$ 497,348               |                    |                    |
| <b>Modified PAYS Incentive Budget Spend:</b><br>Includes Modified PAYS program   | \$/Mod PAYS Incentive Budget Spend | \$0.15      | \$ 2,666,458             | \$ 399,969           | \$ 5,332,917             | \$ 799,937           | \$ 5,332,917                 | \$ 799,937               |                    |                    |
| <b>UHI Budget Spend:</b><br>Includes Urban Heat Island budget spend.   | \$/UHI Budget Spend                | \$0.10      | \$ 990,330               | \$ 99,033            | \$ 1,847,910             | \$ 184,791           | \$ 2,564,990                 | \$ 256,499               |                    |                    |
| <b>WBE Budget Spend:</b><br>Includes Whole Business Efficiency incentive budget spend.   | \$/WBE Incentive Budget Spend      | \$0.15      | \$ 2,342,178             | \$ 351,327           | \$ 4,684,355             | \$ 702,653           | \$ 4,684,355                 | \$ 702,653               |                    |                    |
|  |                                    |             | <b>\$1,099,002</b>       |                      | <b>\$ 2,184,729</b>      |                      | <b>\$ 2,256,437</b>          |                          |                    |                    |
| Evergy Missouri West   |                                    |             | PY1 Annual MW Metrics    | PY1 Annual EO \$     | PY2 Annual MW Metrics    | PY2 Annual EO \$     | PY3 Annual MW Metrics        | PY3 Annual EO \$         | Cycle 4 Cumulative | Cycle 4 Cumulative |
| Proposed Metric  | Unit                               | \$/unit     | Target                   | Target               | Target                   | Target               | Target                       | Target                   | Target             | Target             |
| <b>Demand Response:</b><br>criteria will be annual evaluated MW participation. Includes Residential and Business Demand Response programs. | \$/MW                              | \$10,757.04 | 118.23                   | \$1,271,773          | 137.64                   | \$1,480,632          | 148.63                       | \$1,598,768              | 404.50             | \$4,351,173        |