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### MISSOURI PUBLIC SERVICE COMMISSION

### CASE NO. EE-2025-0084

### DIRECT TESTIMONY

### OF

### JULIE DRAGOO

### **ON BEHALF OF**

### EVERGY MISSOURI METRO AND EVERGY MISSOURI WEST

Kansas City, Missouri January 2025

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### CASE NO. EE-2025-0084

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### I. <u>INTRODUCTION AND EXECUTIVE SUMMARY</u>

- 2 Q. Please state your name and business address.
- 3 A. My name is Julie Dragoo. My business address is 1200 Main, Kansas City, Missouri 64105.

### 4 Q. By whom and in what capacity are you employed?

- A. I am employed by Evergy Metro, Inc. and serve as Vice President, Customer Operations
  for Evergy Metro, Inc. d/b/a as Evergy Missouri Metro ("Evergy Missouri Metro"), Evergy
  Missouri West, Inc. d/b/a Evergy Missouri West ("Evergy Missouri West"), Evergy Metro,
  Inc. d/b/a Evergy Kansas Metro ("Evergy Kansas Metro"), and Evergy Kansas Central,
  Inc. and Evergy South, Inc., collectively d/b/a as Evergy Kansas Central ("Evergy Kansas
  Central") the operating utilities of Evergy, Inc.
- 11 Q. On whose behalf are you testifying?
- 12 A. I am testifying on behalf of Evergy Missouri Metro and Evergy Missouri West (collectively
  13 "Evergy" or "Company").
- 14 Q. What are your responsibilities?

A. As the Vice President of Customer Operations, I am responsible for the meter to cash
 operations of Evergy including Metering, Billing, Payments and Collections, as well as the
 Contact Centers. In addition, I lead the teams who support Evergy billing and metering
 systems and data analytics.

Q.

### Please describe your education, experience and employment history.

A. I hold an Executive Masters of Business Administration from University of Missouri –
Kansas City and a Bachelor of Science in Business in Finance from Emporia State
University. I have been with Evergy and predecessor companies since October 2000 and
have served in many capacities in the customer service organization since 2003. I've led
large customer projects, managed Contact Center Operations, as well as Metering and Field
Service and Revenue Management teams. I established the current system support team
for customer systems as well as the project delivery team for this organization.

## 9 Q. Have you previously testified in a proceeding at the Missouri Public Service 10 Commission ("MPSC" or "Commission") or before any other utility regulatory 11 agency?

A. Yes. I provided testimony in File No. EO-2022-0002, In the Matter of Requests for
 Customer Account Data Production from Evergy Metro, Inc. d/b/a Evergy Missouri Metro
 and Evergy Missouri West, Inc. d/b/a Evergy Missouri West.

15

Q.

### What is the purpose of your testimony?

16 The purpose of my testimony is to (1) describe the status of Evergy's Advanced Metering A. 17 Infrastructure ("AMI") rollout to Missouri customers; (2) provide an overview of the variances being requested by the Company; (3) describe the reasons for the Company's 18 request and the benefits that will result from the Commission granting the request; (4) share 19 20 Evergy's experience from its successful implementation of "knock and collect" variances 21 in Kansas; (5) introduce Evergy's proposed changes in customer communications and 22 outreach solutions if the variances are granted; and (6) summarize the Company's request 23 related to compliance with recent changes to the Federal Communications Commission's

("FCC") Telephone Consumer Protection Act ("TCPA") and its impact on compliance with
 certain Commission Chapter 13 rules.

3

### Q. Please summarize your testimony.

4 My testimony will discuss Evergy's Advanced Metering Infrastructure (AMI) rollout A. 5 which began in 2014, replacing outdated meters in Kansas and Missouri, with about 64% 6 of meters now capable of remote connect/disconnect in our Missouri jurisdictions. In 7 addition, I will cover the variances Evergy is seeking from specific Chapter 13 Rules to maximize the functionality of AMI-SD meters for remote service disconnection by 8 9 eliminating in person notification, while also addressing compliance with the FCC's TCPA 10 amendments that require an opt-out mechanism for automated notifications, which 11 currently complicates our customer notification process. I will speak to the customer and 12 company benefits if the Commission approves this application including enhanced employee safety, reduced risks of fraud and theft, significant cost savings from eliminating 13 14 in-person disconnections, faster response times, improved communication options, and the 15 elimination of collection and reconnection fees, all of which lead to lower overall utility 16 costs for customers. I will discuss the successful implementation of similar changes in 17 Kansas, where a pilot program initiated in 2017 led to the elimination of in-person 18 notifications, while enhancing communications throughout the disconnection process, resulting in a successful program and a permanent variance granted by the Kansas 19 20 Corporation Commission in 2021. I will share details around these enhanced 21 communications including allowing the customer to elect their Preferred Method of 22 Contact (PMOC) to receive notifications as well as two new communications that offer 23 more effective and efficient ways to alert customers of their account information. In

1 addition, I will discuss plans for Evergy to enhance our website and disconnect 2 communications to include detailed information about customer assistance programs, such as the Medical Customer Program and the Special Friend Notification for vulnerable 3 customers. These enhancements include creating a dedicated webpage where customers 4 5 can easily access resources related to these programs, including financial assistance options 6 and energy-saving tips. This initiative aims to ensure that customers are well-informed 7 about the support available to them, particularly during disconnection periods, while maintaining a focus on their safety and well-being. 8

### 9

### II. BACKGROUND: OVERVIEW AMI DEPLOYMENT & CURRENT STATUS

### 10 Q. Can you describe the AMI rollout for Evergy?

11 A. Yes, the rollout of Advanced Metering Infrastructure ("AMI") meters began in 2014, 12 replacing outdated Automatic Meter Reading ("AMR") and Cellnet meters in the Evergy 13 Kansas and Evergy Missouri metro areas. This initial phase included a mix of AMI-SD 14 (meters with service disconnect capability) and non-SD meters (AMI meters that have no 15 service disconnect capability and/or Non-AMI meters), with about 10% of the meters 16 equipped with AMI-SD capabilities.

In late 2015, the expansion continued into the Evergy Missouri West metro areas, maintaining the same mix of residential meters. After a temporary halt in mass meter exchanges due to the implementation of a new billing system, Evergy proceeded with the rural expansion to install AMI meters in the remaining areas. By 2019, Evergy began building out the AMI system in outlying regions and updated the standard residential meter to the AMI-SD model. Approximately 180,000 meters were replaced with the new AMI-SD meters where feasible.

1		As of today, Evergy has three types of basic residential service meter options.	
2		Residential customers will have 1) an AMI meter with no service disconnect capability, 2)	
3		an AMI-SD meter that is an AMI meter with service disconnect capability <sup>1</sup> or 3), a Non-	
4		AMI meter due to electing to opt-out of the standard AMI meter.	
5	Q.	Are all of the Company's customers capable of being remotely disconnected and	
6		reconnected?	
7	А	No. They are not.	
8	Q.	How many meters exist on Evergy's system which will be capable of remote	
9		disconnect and reconnect operations?	
10	A.	As of mid-November 2024, approximately 67.5%, or 216,000 meters of Evergy Missouri	
11		Metro meters <sup>2</sup> are capable of remote connection/disconnection. For the Evergy Missouri	
12		West territory, the amount of said meters is approximately 61.5% or also 216,000 meters.	
13	Q.	Does Evergy have current efforts or future plans to convert all residential AMI meters	
14		to remote disconnection?	
15	A.	As a result of the Commission Order in cases ER-2022-0129 and ER-2022-0130 which is	
16		described in more detail by Company witness Gunn, Evergy does not currently have plans	
17		to proactively replace existing, properly functioning non-SD meters with AMI-SD prior to	
18		the fully depreciated life of those assets. However, if a meter has cause (is damaged,	
19		malfunctioning, etc.) for replacement, it will also be replaced with a Focus AXR-SD. The	
20		Landis + Gyr Focus AXR-SD (which includes service disconnect capability) is the standard	
21		residential meter that is used for all new residential and small commercial meter sets. There	

 <sup>&</sup>lt;sup>1</sup> Meter is officially known as a Landis + Gyr Focus AXR-SD.
 <sup>2</sup> Currently, Evergy uses the Landis + Gyr Focus AX-SD ("AMI-SD") meter as the standard residential meter. This is an advanced single-phase meter designed for residential and light commercial applications supports various connect/disconnect features.

1		are non-standard residential meters including some that require current transformer ("CT")
2		meters that will not be replaced or set with service disconnect meters. As the Commission
3		is aware, there is a small set of customers who have elected to have a NON-AMI meter that
4		do not have remote connect/disconnect capabilities.
5		III. OVERVIEW OF VARIANCES REQUESTED
6	Q.	Which provisions of the Commission's Chapter 13 Rules is the Company seeking
7		variances from?
8	A.	With Evergy's initial deployment of AMI-SD meters complete, the Company is seeking
9		variances to maximize benefits related to the capabilities of AMI-SD meters to remote
10		disconnect and reconnect services. Specifically, the Company is requesting a variance from
11		Commission Rules 20 CSR 4240-13.050(9), 13.055(3)(C) and (D). Additionally, as a result
12		of amendments to the FCC TCPA the Company is seeking variances from the Commission
13		Rules 20 CSR 4240-13.050(8), 13.055(3)(A) and (B). The TCPA amendments require
14		Evergy to provide an opt-out mechanism for all automated phone calls and text
15		notifications made to residential customers. This has impacted Evergy's customer
16		notification process for impending discontinuances of service.
17		IV. <u>REASONS FOR VARIANCE/GOOD CAUSE SHOWN:</u>
18	Q.	How will the variance maximize AMI technology available to the Company and
19		Customer?
20	A.	By eliminating the "knock" as the final notification requirement, the Company will be able
21		to remotely disconnect customers for non-payment and notify them through the customers'
22		preferred method of contact ("PMOC"). This will help alleviate safety concerns and create

operational efficiencies by removing the need for the Company to send an employee to the
 customer's premises and physically disconnect service.

### 3 Q. Please explain what benefits will accrue to the customers and the Company if the 4 Commission approves Evergy's application in this case.

A. There are many benefits to both Evergy and our customers as it relates to granting the relief
requested by the Company:

7 Employee Safety – Removing the need for in-person communication will remove a significant safety hazard for field personnel. When an employee is required to enter a 8 9 customer's premise, that employee is walking into an unknown environment which could 10 lead to potential threats to employees, especially in a situation where the employee is there to disconnect power. In the Kansas City metro area, there have been instances where 11 12 government and utility employees faced hostile reactions from customers during in-person 13 visits. Over the past few years, Evergy has experienced an increase in such hostile 14 situations. By eliminating these in-person interactions, we can enhance the safety of our 15 employees.

In just the past few months, Evergy has seen employees be attacked by aggressive dogs and by aggressive customers who have approached our employees with knives and other customers that cornered these field employees by using their own safety devices against them. In July 2024, a customer who was threatening our employee with a knife, also threw a board with a nail in it at the employee once they were in their truck. While these severe incidents don't happen every day, unfortunately our employees regularly face these challenges when dealing with the public.

1	Due to these events, and the employee risk in managing this work, Evergy tracks
2	customers who have created hostile situations for our customers with either threats of harm
3	or other actions that would suggest our employees are not safe. The customer information
4	system reflects over 300 customers with Hostile Customer Alerts on their accounts, with
5	170 of those being Missouri customers. For reference to actual incidents in the last four
6	years see Schedule JD-1.
7	Customer Fraud & Scam Prevention – In the past when the industry used
8	metering technology that required on-site meter reads and disconnects across its system,
9	the Company would also accept and collect customer payment at the door. This is not a
10	requirement of the Commission's Chapter 13 rules but was a common practice.
11	However, scams are on the rise for utilities and Evergy is no exception. Over the
12	past 2 years, the Company has released eight traditional media advisories to communicate
13	broadly with Evergy customers and people in our region to educate them on specific scams
14	and general scam awareness. For reference to these advisories please see Schedule JD-2.
15	Because of these concerns and because Evergy has deployed metering technology across
16	parts of its system that does not require on-site visits, Evergy plans to no longer accept and
17	collect payments in the field. Upon Commission approval of the variance requests Evergy
18	will implement these changes along with the other proposed process changes in this
19	application.
20	Clear communication that Evergy will never ask about money at a customer's door
21	builds customer trust and reduces the risks of customers being impacted by scams.
22	Reduced Theft Risk – Due to Evergy's decision to stop collecting payments in the
23	field, field employees will no longer need to handle cash or checks, reducing the risk of

theft and the risk of lost payments. Again, while this decision is not directly dependent on
 the Commission granting the requested variances, the change in disconnect processes and
 communications will offer a strategic opportunity to educate our customers on this
 decision.

5 <u>Cost Savings</u> – By allowing remote disconnection and eliminating the need for an 6 in-person field visit, Evergy can significantly reduce the need for these visits and in turn, 7 significantly reduce costs associated with rolling trucks to a premise. Reduced operational 8 costs can be passed on to customers, leading to lower utility bills. In addition, reductions 9 in cost can reduce fees that need to be collected for this service. As I describe further 10 below, if the Commission grants the requested variances, Evergy is proposing to reduce 11 these fees for all customers regardless of their meter type.

In addition, with the Company's proposed enhanced customer disconnection notification process in place, Evergy is confident that it can effectively communicate to customers and provide access to disconnect information without the added costs of truck rolls. In the past 12 months, nearly 40,000 residential disconnect orders were completed in MO West & MO Metro, each requiring a truck roll. Evergy estimates savings at over \$2M annually associated with eliminating the need for these truck rolls across both MO Metro and MO West where the metering technology in the field does not require it.

19 <u>Faster Response Times</u> – Currently, customers with AMI-SD meters enjoy 20 immediate reconnection after resolving a non-payment disconnection, as well as same-day 21 turn-ons when needed for new accounts. With resources reallocated from truck rolls for 22 non-payment disconnections, Evergy can respond more quickly to other customer needs 23 and service requests.

1 Improved Communication – All customers will benefit from the additional 2 communications, the efficiency of those communications and the ability to elect their own 3 PMOC. Digital notifications can replace door hangers, providing customers with more timely and convenient updates. In addition to the enhanced communications for disconnect 4 5 communications, customers who access Evergy's MyAccount portal can get even more 6 timely updates and alerts regarding billing and payment with their account. Currently, 7 nearly 80% of our active accounts have online profiles and the ability to access these 8 updates and alerts via MyAccount.

9 <u>Operational Efficiency</u> – Evergy expects operational efficiencies in multiple areas 10 including our payment processing teams (no need to manage field payments) and, as 11 described in more detail below, our credit and collections teams who are currently 12 managing manual phone calls daily to meet both the requirements of Chapter 13 and TCPA 13 rules.

### 14 Q. If the Commission approves the variances, will there be any savings for Evergy15 customers?

16 Yes, if the variances necessary for fully remote disconnections are granted, Evergy A. 17 proposes to eliminate the Company's collection and reconnection fees for all Evergy customers. These changes will reduce the overall fees by \$20 - \$30 based on the 18 jurisdiction. In lieu of the collection and reconnection fees, Evergy will assess a 19 20 disconnection fee of \$5 for all customers who are disconnected for non-pay. While Evergy 21 recognizes not all customers have AMI-SD meters and thus, still carry a higher cost to 22 disconnect/reconnect, the overall benefit to the Company allows us to offer this reduced 23 fee benefit to all customers. A reduction in fees will also provide immediate relief for

eligible customers who are struggling with financial hardship. Table A offers a comparative view of the current and new fee, if the Company's variance proposal is approved.

3

2

### **Table A: Collection, Reconnection and Disconnection Fees**

	Current Collection Fee	Current Reconnection Fee	Proposed Non-Pay Disconnection Fee
Missouri Metro	\$20	\$25	\$5
Missouri West	\$25	\$30	\$5

### 4 Q. How did Evergy determine a \$5 disconnection fee?

A. Evergy expects to incur administrative costs and costs for truck rolls, in the event
automated reconnect/disconnect fail. However, if the variances are granted, current fees
can be lowered as the Company anticipates that related costs will be reduced. The \$5
proposed fee is based on the Evergy's fee that was implemented for Kansas customers with
AMI meters with remote disconnect/reconnect services.

### 10 As Company Witness Gunn explains in his testimony, Ameren Missouri was

### 11 granted similar variances and reduced their fees to a \$5 charge as a result.

### 12 If the Commission approves the variance proposal, Evergy intends to monitor the

### 13 fees and re-evaluate the appropriate level in the future, if needed.

### 14 V. EVERGY EXPERIENCE AND SUCCESS WITH VARIANCES TO SIMILAR 15 <u>RULES IN KANSAS</u>

### Q. Does Evergy have any experience implementing changes and proposals similar to the ones you are proposing now?

### 18 A. Yes. Evergy Kansas Central, an affiliated company of Evergy Missouri Metro and Evergy 19 Missouri West, which is a public utility providing electric services in Kansas, was granted

1		a variance from similar Kansas rules in 2021. <sup>3</sup> This variance was granted after a pilot
2		program was initiated in 2017. The program saw great success and was fully implemented
3		across our Kansas utilities in third quarter 2021.
4	Q.	What were the results of the Evergy Kansas Central Knock and Collect Variance
5		Pilot program?
6	A.	In August 2017, the Kansas Corporation Commission ("KCC") approved a pilot program
7		for Evergy Kansas Central, formerly known as Westar Energy. This approval followed a
8		General Investigation initiated on February 26, 2015, which allowed all interested utilities
9		to participate. The pilot program introduced two additional notifications for customers
10		before service disconnection due to non-payment, replacing the traditional collection
11		attempt at the door. This change leveraged the investment in Advanced Metering
12		Infrastructure ("AMI-SD") technology.
13		The elimination of "Knock" orders took effect on October 4, 2017. Prior to this change, we
14		informed customers through bill inserts which detailed the new process, how to update
15		their PMOC, and illustrated the reduction in disconnection fees. Additionally, we provided
16		information on utility bill assistance, specifically highlighting the 2-1-1 service from the
17		United Way.
18		The contact center implemented a quality initiative requiring Customer Service

20 remained throughout the pilot program.

19

Representatives to update or validate customers' PMOC during every call. This initiative

<sup>&</sup>lt;sup>3</sup> On February 4, 2021, in Docket No. 15-GIMX-344-GIV, the Kansas Corporation Commission ("KCC") granted Evergy Kansas Central a permanent waiver from the KCC's Knock and Collect requirements. The KCC Order modernized billing standards, permitted Evergy to fully utilize the capabilities of the AMI meters already deployed by the Company in Kansas and reduced costs for Evergy's Kansas customers through lower operating costs and lower service fees.

1		Data analysis during the most recent non-Cold Weather Rule ("CWR") period in
2		Kansas (through October 17, 2024) revealed notable customer behaviors:
3		<ul> <li>24% fewer 2-day notifications compared to 5-day notifications</li> </ul>
4		<ul> <li>18% fewer 1-day notifications compared to 2-day notifications</li> </ul>
5		<ul> <li>49% fewer disconnections compared to 1-day notifications</li> </ul>
6		While direct correlation between notifications and customer actions is challenging
7		to establish, the consistent monthly pattern suggests that additional notifications provide
8		customers with more time to address past due balances. Customers utilized various
9		methods such as agency assistance, personal payments, enrolling in payment arrangements,
10		or stopping service after moving.
11		Throughout the pilot program, Westar received only one customer inquiry and no
12		complaints regarding the updated notification policy. The inquiry concerned the
13		sufficiency of notification attempts, which was resolved by providing proof, leading to a
14		payment arrangement. There were no complaints about the inability to pay at the door
15		before disconnection.
16		The variance of the knock requirement in Kansas has proven successful by nearly
17		every measure. On February 4, 2021, the KCC approved a permanent variance of the
18		knock/collect requirement for Evergy and Southern Pioneer.
19 20		VI. EVERGY'S PROPOSED CHANGES & OUTREACH SOLUTIONS IF <u>VARIANCE IS GRANTED</u>
21	Meter	and Reconnect/Disconnect Process
22	Q.	Please explain the Company's process of disconnecting a customer under the current
23		requirements.
24	A.	The process of disconnecting customers for non-pay begins with a mailed notification of

1 disconnection. From there if the customer does not remedy the outstanding balance, the 2 customer receives an automated phone call at least two days in advance, alerting them 3 disconnection can happen if the balance is not resolved by a certain date. If this date arrives and the outstanding balance still exists, a field order is issued and sent to the appropriate 4 5 resource in the field to complete. The field personnel will attempt to contact the customer 6 (knock) and offer to collect payment (as noted above, collection at the door is a Company 7 decision and not part of the Chapter 13 rules, and the Company plans to change its process to no longer collect payments in the field). If the customer is not present or payment cannot 8 9 be made, Evergy will proceed with the disconnect. If the customer has an AMI-SD meter, 10 the employee will return to their truck and issue the disconnection command by completing the order on their mobile device. In this case, the turn off or disconnection of service will 11 12 occur within a few minutes. If the customer does not have an AMI-SD meter, the employee proceeds to the meter and shuts it off manually. 13

### 14 Q. Does the Company provide other notifications regarding the customer's account

### 15 status outside of Commission requirements?

A. Yes. There are number of communications or notices that are or may be provided, if the
 customer elects to receive them. Table: B below shows the communications<sup>4</sup> that occur

- 18 before disconnection, with communications we are asking a variance on required by 20
- 19 CSR 4240 Chapter 13 highlighted in light blue<sup>5</sup>:

<sup>&</sup>lt;sup>4</sup> All communication is made using the available contact information.

<sup>&</sup>lt;sup>5</sup> While the CWR (20 CSR 4240 13.055) is cited in Table B, its requirements are only applicable during certain time periods.

	Action	Communication/Notice Provided
Paperless Billing Bill is Ready	Notification sent when bill is available to view/pay online	Email/Text Visible via MyAccount portal
(1) to (14) Days Before Bill is Due	Notification sent indicating how many days before the customer's bill is due if bill has not been paid	Email /text to customer Visible via MyAccount portal
(1) Day after bill is due Bill Overdue	Notification sent one day after bill is due, only sent if bill has not been paid in full	Email/Text Visible via MyAccount portal
	Payment Scheduled – If using real-time payment options, notifications sent when a payment is scheduled	Email/Text Visible via MyAccount portal
Payment Information	Payment Received - Notification sent when customer payment has posted in Evergy billing system	Email/Text Visible via MyAccount portal
	Payment Failed – notification sent when a real-time payment option fails to post	Email/Text Visible via MyAccount portal
	Notice provided at least 10 days prior to disconnection	Disconnection notice provided by mail (20 CSR 4240-13.050(5), (7) and 20 CSR 4240-13.055(3)(A))
Before Disconnection	2 days prior to disconnection	Two automated phone call attempts (20 CSR 4240-13.055(3)(B))
(current process)	1 day prior to disconnection (currently CWR only)	Two automated phone call attempts (20 CSR 4240-13.055(3)(B))
	Account Status update – Alert in in Red	Visible via MyAccount portal
Disconnection	Disconnection occurs	Door hanger left at premises (20 CSR 4240-13.050(9) and 20 CSR 4240-13.055(3)(C), which incorporated 13.050(9) by reference)
	Account Status update – Alert in in Red	Visible via MyAccount portal

### Table B: Current Customer Notifications Prior to Service Disconnection

### 2 Q. How will the communication process change for customers if the variances are

### 3 granted?

A. Table C below provides the proposed timeline and channels for the enhanced residential
 customer disconnection notifications if the requested variances are granted. These
 enhanced communications will supplement the communications noted above in Table B

2

and are applicable to all Evergy residential customers in Missouri, whether or not they have an AMI-SD meter.

3 The Company is proposing two new communication attempts in addition to the required 10-day mail notification and the 2-day communication to ensure customers can 4 5 address disconnections quickly and efficiently. Customers will be mailed the 10-day notice, followed by a 5-day communication, a 2-day communication and a 1-day 6 7 communication. Outside of the 10-day mailed notice, Evergy will make the attempts utilizing the customer's PMOC or by the default method (phone) if there is no PMOC 8 9 associated with the customer account. The customer will be asked to elect a PMOC, which 10 can be <u>call, text</u>, or <u>email</u>. On the business day following the 1-day notice, the customers 11 with AMI-SD meters will be disconnected between the hours of 8:00 am and 4:00 pm. No 12 field personnel will physically be at the address before disconnection.

13

### **Table C: Disconnection Notice Timing and Communications**

Days Before Disconnection	Communication/Notice Provided
at least 10 days before	Written notice provided via US Mail
at least 5 days before	Contact via Customers PMOC (phone call, text message, email)
at least 2 days before	Contact via Customers PMOC (phone call, text message, email)
1 business day before	Contact via Customers PMOC (phone call, text message, email)

### 14 Q. If the variances are granted, will there be any difference in the process for customers

15 who do not have AMI-SD meters?

A. For customers who do not have AMI-SD meters, as noted above the communication and
 customer notification process will be the same used for customers with AMI-SD meters.
 However, due to the need to physically shut off the meter, the field personnel will be routed
 to the customer location and may knock on the door to alert the customer of our plans to

enter their property to shut off the meter. This is for the safety of our personnel and may
 not be necessary in the cases of apartment buildings or other situations with easy access to
 the meter.

4

### Q. How is each customer's PMOC obtained?

5 A. At the time the customer requests service, the representative will request the customer's 6 PMOC. The customer is also able to set/edit their PMOC via the Evergy website. In 7 addition, a Customer Service Representative can update the PMOC during any interaction 8 with the customer and the information is stored within our Customer Information System.

9 The customer is able choose a phone call, SMS text message, or email as their 10 PMOC. If a customer has not chosen their PMOC, then the default option will be a phone 11 call to the primary number for the main customer. While Missouri customers can currently 12 elect a PMOC, the current process only supports phone calls as the notification method for disconnection notifications due to the existing Chapter 13 rule requirements. As of October 13 14 2024, 20% of our Missouri have selected a PMOC other than phone. Approximately 15% 15 of customer have elected SMS text, and just over 5% have selected email. Over the past 16 five years, customers have chosen to call Evergy less and do more business with Evergy 17 through digital toolsets. It is important to offer the opportunity for customers to receive these important account communications through their preferred digital channel as well as 18 by phone call. 19

Evergy's internal Customer Information System ("CIS") system will document the generation and execution of each outbound notification attempt. In addition, Evergy monitors, daily, the successful outbound delivery of each SMS text and email message. In the rare event of a delivery failure, the attempt can be re-sent. If delivery failures continue

- then the severance process is manually canceled. In addition, our outbound call vendor
 provides the call result from the outbound call attempts and the call result is noted with a
 customer contact note in Evergy's CIS system.

4

5

Q. In addition to the customer notifications as part of the disconnection process, are

there other communications available for customers to receive about their account?

- A. Yes, Customers have the option to set up a variety of billing, payment, account activity,
  and outage notifications sent to them via email, text, or both. This helps customers better
  manage their account and avoid late payments. Customers can only subscribe to text
  notifications when there is a mobile phone tied to their account; however, text notifications
  include the same options available by email, plus includes a Pay by Text option which
  allows a customer to quickly and conveniently pay their monthly bill via text message.
- 12 Q. Does Evergy currently accept field payments and does the Company plan to continue
  13 this practice?

14 As I described earlier in my testimony, Evergy's current practice is to accept payments in A. 15 the field. Currently, the field service professional (FSP) will knock on the door and attempt 16 to collect the past due amount to avoid a service disconnection. Payments made to the FSP 17 will either be taken to a walk-in payment location, or the payment will be couriered to the remittance department to post the payment to the specific account. This process can take 18 several days, with a risk of lost payments and/or theft. In conjunction with the outcome of 19 20 this application and the customer education associated with the implementation of our other 21 proposed changes in customer communications, Evergy will no longer be accepting 22 payments in the field. This allows us to eliminate the current collection fee as noted above, 23 and it offers consistency to all customers regardless of meter type. In addition, Evergy will

be able to tell customers with certainty that no one will ask them for money to prevent disconnection in the field or live phone call as has been a widespread fraud scheme for many years. All customers will benefit from the enhanced notification process whether or not they have an AMI meter with remote disconnect capabilities and will have even more notifications/opportunities to make payment or payment arrangements to avoid disconnection.

7

### VII. ADDITIONAL PROPOSED CHANGES & OUTREACH SOLUTIONS

8 Q. Does Evergy have any enhanced disconnection notice language that it would propose
9 to use if the Application is granted?

A. The Company proposes to include information regarding the payment options available to
 customers along with a link to a dedicated website that has information on Evergy's
 Medical Customer Programs, Medical Hardship Extension, and financial assistance
 options. The Company will provide this information in a separate bill insert to increase the
 visibility of the information for customers.

### Q. Please discuss the timing of disconnection and reconnection if the Application is granted.

# A. Evergy proposes to issue disconnections between 8:00 AM and 4:00 PM on business days consistent with our practices today. Based upon the customer's PMOC, Evergy proposes to attempt phone calls and text messages between 8:00 AM and 8:00 PM, however, email notifications will be delivered at any time.

21 Per the Company's current practice, Evergy will not make notification attempts or
22 issue disconnections on any observed Evergy holiday. These current holidays include New
23 Year's Day, Martin Luther King Day, Memorial Day, Independence Day, Labor Day,

Veteran's Day, Thanksgiving Day, Day after Thanksgiving, Christmas Eve, and Christmas
 Day.

3		For reconnection, Evergy will continue to use the process that is in place today.
4		Evergy will reconnect customers with AMI-SD meters 7-days a week. For customers with
5		Non-SD meters, the standard one business day reconnect timeline will still apply. Once a
6		customer pays the amount necessary to restore service, an order is automatically generated
7		(or entered by Customer Service Representative) and will immediately flow through the
8		systems and reconnect the meter. This is a huge benefit to the customer and is in place
9		today for those meters with remote service capability.
10	Q.	Please discuss Evergy's proposed outreach to Elderly and Disabled Customers.
11	A.	Evergy intends to leverage and enhance current practices as well as introduce new
12		methods for reaching elderly and disabled customers. This includes:
13		• Expanding the <i>Special Friend Notification</i> <sup>6</sup> for elderly and disabled from only the
14		CWR period, November 1 – March 31, to a year-round program.
15		• Evergy's Customer Affairs team will continue to work with customers who can
16		illustrate that a disconnection of service would be dangerous to the customer or a
17		member of the household to find additional sources of assistance, or alternative
18		arrangements for the customer.
19		• Evergy will continue work with the Family Support Division of the Low-Income
20		Home Energy Assistance Program ("LIHEAP") and the Missouri Department of

<sup>&</sup>lt;sup>6</sup> Evergy currently provides all customers with the ability to add another individual to the account to receive bills and disconnect notifications at the time service started. These individuals receive the bills and paper disconnect notifications only.

1	Health and Senior Services to coordinate outreach to "elderly" and "disabled"
2	customers to promote programs and options such as:
3	<ul> <li>Medical Customer Program</li> </ul>
4	<ul> <li>Medical Hardship</li> </ul>
5	• Low Income Home Energy Assistance Program ("LIHEAP")
6	• Economic Relief Pilot Program (ERPP)
7	<ul> <li>Critical Needs Pilot Program</li> </ul>
8	• Evergy will maintain the list of customers designated as "elderly" and "disabled"
9	customers from one year to the next on the utility's Special Friend Notification list
10	of vulnerable customers, even if such customers do not apply or receive LIHEAP
11	grants each year.
12	• Evergy will reach out annually to customers with Special Friend contact
13	information on file to confirm accuracy of contact information.
14	It is worth highlighting that Evergy currently partners with state agencies for
15	outreach events onsite at KC Connect. The Company partners with agencies at KC Connect
16	weekly and is committed to providing local public health authorities, area agencies on
17	aging, and other relevant entities information regarding available programs and options to
18	support vulnerable customers.
19	In addition to including the specific information shared above related to the
20	enhanced disconnection notice, Evergy will continue to include an annual notice of options
21	to all customers via bill inserts that includes details on the CWR and Evergy's Medical
22	Customer Program, and Special Friend offerings.

**Q**.

### Does Evergy have any proposals related to its *Medical Customer Program*?

A. Evergy currently has practices in place to support customers enrolled in the *Medical Customer Program* or for those who are potential candidates for the program.

Evergy currently contacts approved *Medical Customer Program* customers who are
in danger of disconnect for non-payment and have not utilized the 21-day Medical
Extension. This is a manual process that includes at least (1) phone call attempt between
(10) and (2) days prior to disconnection.

8 For customers who may be eligible to enroll in the *Medical Customer Program*, a 9 form is available online for doctors, physician's assistants, hospice nurses, and nurse 10 practitioners to print for completion.

Evergy's *Medical Customer Program* form conveniently includes the medical equipment listed as presumptively qualifying a customer for the program. The *Medical Customer Program* form also includes space for a doctor, physician's assistant, hospice nurse, or nurse practitioner to list other additional medical equipment along with a justification for why, in the opinion of such professional, this equipment qualifies as critically necessary to sustain the life of the patient (whether the patient is a customer or someone residing in the customer's household).

18 The Company offers the *Medical Customer Program* voluntarily, and with 19 approval of the waiver agrees to maintain practices at a minimum, and not to adopt lesser 20 measures without Commission approval. The Company offers that it may adopt policies 21 with stronger consumer protections without approval from the Commission.

**Q**.

#### **Does Evergy have any proposals related to a Dedicated Web Page?**

A. Evergy proposes to create and launch, as soon as practical, a web page containing
information specifically aimed at vulnerable customers. The web page will have its own
URL and will be a resource where these customers can find information including, but not
limited to, the *Medical Customer Program* form, *Special Friend* registration form, energy
assistance program information, and energy saving tips.

### 7 **Q.**

### Do you have comments about disconnections during the Cold Weather Rule period?

8 November 1 through March 31 is the Commission's CWR period and disconnection during A. 9 this time requires customer contact and contact attempts which necessitate a truck roll. As 10 I discussed already, if these rules are not also waived then the benefits of the remote The Company's proposed enhanced residential customer 11 disconnect are void. 12 disconnection notification process is inclusive of the number of contact attempts currently 13 provided by the Company during the CWR period. With the number of attempted customer 14 contacts and with allowing the customers to select their preferred method for contact, 15 Evergy will sufficiently reach and effectively provide customers access to service 16 reconnect and disconnect information. Therefore, the Company proposes to adhere to 17 timeline and channels for the enhanced residential customer disconnection notifications 18 offered in Table B during the CWR period and non-CWR time period.

### 19 Q. Does Evergy now provide reports to the Commission related to the disconnection 20 process?

A. Yes. Evergy is currently providing monthly residential customer count and disconnect
information via the monthly data disconnection report in compliance to 20 CSR 424013.075.

1	Q.	What is the timeline that Evergy expects to implement the new processes and
2		communications once the variance is granted?
3	А.	As with all technology projects, Evergy will need time to configure systems, work with
4		vendors and establish and communicate the new processes before the customers will see
5		the changes. We expect this to be dependent on timing of orders and other efforts going
6		with the company, but generally six months should be enough time to complete the work
7		once we have solidified the requirements.
8 9	VIII.	REQUESTS FOR RELIEF RELATED TO RECENT CHANGES WITH THE FCC $\underline{\text{TCPA}}$
10	Q.	What are the recent changes to the Federal Communication Commission's Telephone
11		Consumer Protection Act?
12	А.	The recent TCPA amendments require Evergy to provide an opt-out mechanism for all
13		automated phone calls and text notifications made to residential customers.
14	Q.	How will the variance support compliance with the FCC's TCPA?
15	A.	Amendments to the TCPA impact the Company's ability to adhere to its standard severance
16		notification process which includes using an automated phone system to comply with 20
17		CSR 4240-13.050 (8) and 20 CSR 4240-13.055 (3)(A) and (3)(B). These rules require the
18		utility to make at least two telephone attempts to notify customers prior to disconnecting
19		their service. As mentioned above, the TCPA amendments require the Company to provide
20		an opt-out mechanism for these automated phone calls and automated text messages. If a
21		customer elects to no longer receive automated calls from Evergy for any reason, the
22		Company cannot use its standard severance notification. Based on this new rule, Evergy
23		has created a manual process to ensure compliance. This process consists of manually
24		calling customers rather than using the automated process to call. While the volume of

customers who have opted out may currently be limited, if enrollments continue to grow,
this process will not be manageable with current resources. Company Witness Gunn
provides more details on this in his testimony, but if the Company's variance request is
approved then Evergy will not be required to continue this manual process for those
customers that have elected not to receive automated telephone calls from Evergy.

### 6

7

### Q. What is the specific relief requested from the Commission as it relates to the recent amendments to the FCC TCPA?

8 Evergy requests variances related to 20 CSR 4240-13.050 (8) and 20 CSR 4240-13.055 A. 9 (3)(A) and (3)(B). As noted above, an automated phone call is delivered to customers at 10 least two days in advance of disconnection. Evergy is asking in this variance application 11 to waive the requirement that the notification must be a phone call. Every recognizes 12 alternative notifications could be a separate field trip or another mailed notification. However, the significant inefficiencies of trips to the premise for an additional door hanger 13 14 and the unreliability of a second mailed notification in the short window drives Evergy to 15 elect to make automated phone calls for this required notification. The company seeks the 16 ability to provide the customer with the option of choosing how they receive that 17 notification: phone call, SMS text, or email. This will provide Evergy an avenue to remain 18 compliant with the intent of the disconnect notification requirements in Chapter 13 as well 19 as comply with the amendments to the TCPA that require giving customers the option of 20 NOT receiving automated phone calls. In addition, it gives Evergy an alternative other 21 than an expensive, inefficient field trip and could eliminate the daily manual process 22 Evergy is managing to ensure compliance with both sets of regulations. 23 It is for these reasons that Evergy also requests that the Commission consider the

1 Company's obligations related to the notice requirement satisfied if a customer opts out of 2 their PMOC or the default method (phone) when no PMOC has been selected by the 3 customer. For example, if a customer opts out of their PMOC or the default method of 4 phone, it is possible that a customer could be disconnected having only received the paper 5 disconnect notice. If Evergy is not allowed to consider their obligation met under these 6 circumstances, this situation could be abused by customers with purpose of avoiding 7 communications and therefore disconnections for non-pay.

8 Q. How will the Company notify a customer who has opted out of phone and text 9 communications, and not selected email as their PMOC, that they are only receiving 10 the initial written disconnection notice?

A. For all customers who have opted out of all phone and text communications from Evergy via the TCPA, Evergy will evaluate a process to notify all customers opting out of such communications that, unless they have identified a working email address as their PMOC or opt back in to receive communications from Evergy either through phone or text, the customer may only receive the one official disconnection notice in the mail as part of the notification process.

17

#### IX. <u>CONCLUSION</u>

### 18 Q. What are the key takeaways related to the Company's variance proposal?

A. As summarized in testimony above, Evergy is seeking variances to specific Chapter 13
 rules to maximize the functionality of AMI-SD meters for remote service disconnection by
 eliminating in person notification, while also addressing compliance with the FCC's TCPA
 amendments that require an opt-out mechanism for automated notifications, which
 currently complicates our customer notification process. There are many customer and

1 Company benefits tied to these variances including enhanced employee safety, reduced 2 risks of fraud and theft, significant cost savings from eliminating in-person disconnections, 3 faster response times, improved communication options, and the elimination of collection and reconnection fees, all of which lead to lower overall utility costs for customers. Everyy 4 5 has proven success with similar changes in Kansas, where a permanent variance was granted by the Kansas Corporation Commission in 2021. Ameren has also previously 6 7 received similar variances in Missouri from the Commission. The enhanced communications proposed here include allowing customers to elect their PMOC as well as 8 9 additional communications within the disconnection for non-payment process. These 10 notifications benefit customers by offering more effective and efficient ways to 11 communicate. In addition, it is important to note that Evergy intends to enhance our 12 website and disconnect communications to include detailed information about customer 13 assistance programs, such as the Medical Customer Program and the Special Friend 14 Notification for vulnerable customers. These enhancements include creating a dedicated 15 webpage where customers can easily access resources related to these programs, including 16 financial assistance options and energy-saving tips. This initiative aims to ensure that 17 customers are well-informed about the support available to them, particularly during 18 disconnection periods, while maintaining a focus on their safety and well-being.

19

Q. Does that conclude your testimony?

20 A. Yes, it does.

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

In the Matter of Application of Evergy Metro, Inc. ) d/b/a Evergy Missouri Metro and Evergy Missouri ) West, Inc. d/b/a Evergy Missouri West Request For a Waiver for Various Tariffs and Regulations Related to Automated Metering Infrastructure

File No. EE-2024-0084

### **AFFIDAVIT OF JULIE DRAGOO**

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### **STATE OF MISSOURI** ) ss **COUNTY OF JACKSON**

Julie Dragoo, being first duly sworn on his oath, states:

1. My name is Julie Dragoo. I work in Kansas City, Missouri, and I am employed by Evergy Metro, Inc. as Vice President, Customer Operations.

Attached hereto and made a part hereof for all purposes is my Direct Testimony 2. on behalf of Evergy Missouri Metro and Evergy Missouri West consisting of twenty-seven (27) pages, having been prepared in written form for introduction into evidence in the abovecaptioned docket.

3. I have knowledge of the matters set forth therein. I hereby swear and affirm that my answers contained in the attached testimony to the questions therein propounded, including any attachments thereto, are true and accurate to the best of my knowledge, information and belief.

Julie Dragoo

Subscribed and sworn before me this 17<sup>th</sup> day of January 2025.

My commission expires:  $\frac{H/2u/2w25}{V}$ 

Event Type	Event Date	Hazard Source	Event Description
First Aid - No	8/31/2024	Animal	Employee bit by small dog
Medical Attention			
Safety Incident	7/30/2024	Hostile Customer /	Employee working a CMSO order, male
		Person	subject came out of the house with a
			knife in his hand and told employee to
			leave the property
First Aid - No	7/11/2024	Animal	Employee Bitten by dog
Medical Attention			
First Aid - No	6/12/2024	Hostile Customer /	Employee threatened by customer
Medical Attention		Person	
First Aid - No	6/10/2024	Hostile Customer /	Potentially Dangerous Interaction with
Medical Attention		Person	Homeless in Vacant Building
First Aid - No	5/29/2024	Animal	Dog Bite
Medical Attention			
First Aid - No	5/26/2024	Animal	Employee Bitten by dog
Medical Attention			
Safety Incident	4/22/2024	Hostile Customer /	Customer with firearm
		Person	
Safety Incident	3/27/2024	Hostile Customer /	Hostile customer actions toward
•		Person	employe and customer took FSP tools
			unitl police arrive
Near Miss	3/4/2024	Animal	Dog charged at employee, baton used to
			prevent dog from biting employee.
Safety Incident	2/23/2024	Other	Hostile customer contacted employee
			with vehicle.
First Aid - No	11/3/2023	Animal	Employee biten by dog on the palm of
Medical Attention			the left hand
Injury/Illness -	8/14/2023	Animal	Employee experienced multiple injuries
Recordable			from animal attack.
Near Miss	7/31/2023	Animal	Employee knocked to ground and bitten
			by dog.
First Aid - No	5/17/2023	Animal	Employee bit by dog.
Medical Attention			
Injury/Illness -	5/4/2023	Animal	Employee bit on leg by dog
Recordable			
Near Miss	4/4/2023	Trip	Employee stumbled after stepping
			through rotting board on customer's
			deck.
First Aid - No	3/15/2023	Animal	Employee bit by dog while turning to
Medical Attention			exit yard.
Safety Incident	12/16/2022	Hostile Customer /	Altercation with hostile customer.
		Person	
Near Miss	11/28/2022	Stepped On	While walking in customers yard,
			stepped on rake hidden by leaves.

Good Catch	11/23/2022	Other	During meter exchange, internal fuse on tester blew showing fault on customer side.
Safety Incident	11/3/2022	Hostile Customer / Person	Employee confronted by individual with firearm.
First Aid - Medical Attention	9/21/2022	Bite, Animal	Dog bite on left index finger.
First Aid - No	9/8/2022	Twisting Motion	Employee experienced pain/discomfort
Medical Attention			in leg while fending off dog.
Near Miss	8/29/2022	Hostile Customer /	Employee was able to fend off
		Person	customer's dog with baton.
First Aid - No	6/2/2022	Animal Strike	Employee felt pull in left foot escaping
Medical Attention			possible dog attack.
Near Miss	5/12/2022	Hostile Customer /	Hostile customer charged at employee.
		Person	Employee was able to evade and escape.
Safety Incident	5/5/2022	Trip	Loose board on customer's wooden
			walkway caused employee to trip and fall.
Near Miss	3/31/2022	Other	Hostile Customer
First Aid - No	3/11/2022	Bite, Animal	Employee nipped by dog
Medical Attention			
Injury/Illness -	9/22/2021	Bite, Animal	Employee bitten by dog resulting in
Recordable			injury.
First Aid - No	8/5/2021	Bite, Animal	Dog Bite
Medical Attention			
Near Miss	5/18/2021	Stepped In	Employee fell into a collapsed septic
			tank while walking on customer's
			property. No injuries.
First Aid - No	5/13/2021	Bite, Animal	Bitten by dog while attempting to make
Medical Attention			contact with customer at front door of
			home.
Near Miss	5/12/2021	Other	Broken Meter Can Clip
First Aid - No	4/29/2021	Trip	Employee fell and injured their arm
Medical Attention			while attempting to evade a dog.
Injury/Illness -	4/9/2021	Bite, Animal	Dog Bite
Recordable			
Injury/Illness -	2/27/2021	Bite, Animal	Troubleshooter bit by a dog while
Recordable			responding to a lights out ticket
Near Miss	2/23/2021	Bite, Animal	Employee was bitten on boot by
			aggressive dog

### Scam Awareness Recap: Traditional and Social Media

#### **Traditional Media:**

Two-year summary (November 2022 – December 2024).

These were sent to all broadcast and print media outlets in Evergy territory.

Eight (8) Traditional media advisories were sent:

- November 2022: Scam Awareness Day
- January 19, 2023: Evergy Warns Customers Regarding Recent Scam Attempts
- April 12, 2023: Evergy Warns Customers Regarding Recent Utility Scam Attempts
- August 14, 2023: Evergy Warns of Latest Scam Targeting Customers
- August 30, 2023: Evergy Warns of New Scams Targeting Customers
- November 15, 2023: Evergy Recognizes Utility Scam Awareness Day
- September 4, 2023: Evergy Warns Customers of Recent Utility Scam Attempts
- Nov 20, 2024: Evergy Recognizes Utility Scam Awareness Day

#### Social Media:

Includes content posted to owned Evergy Facebook and X (formerly Twitter) channels from all of 2023 and YTD 2024. The most recent post from 12/11 (listed separately below) is not included in the table because summary information is compiled at the conclusion of each month.

16 posts total with an estimated reach of ~350k people.

Facebook and X post from December 11, 2024:

https://www.facebook.com/photo.php?fbid=991915179631432&set=a.640238154799138&type=3 https://twitter.com/evergypower/status/1866944421419168159

Message Scorecard				
Published Date	Outbound Post			
Mar 07, 2024, 10:09 AM	We've received reports of scammers pretending to be a Evergy emplo			
Nov 15, 2023, 02:54 PM	evergypower It is Utility Scam Awareness Day. With an increase in new scam tactic Wednesday, November 15, 2023 2:54 PM			
Nov 15, 2023, 02:54 PM	Evergy Facebook It is Utility Scam Awareness Day. With an increase in new scam tactic Wednesday, November 15, 2023 2:54 PM			
Sep 22, 2023, 11:31 AM	Evergy Facebook Just today we got notice of another in-person scam attempt at a cust Friday. September 22, 2023 11:31 AM			
Sep 22, 2023, 11:31 AM	Severgypower Just today we got notice of another in-person scam attempt at a cust Friday. September 22, 2023 11:31 AM			
Jul 03, 2023, 09:33 AM	Scam alert! A Evergy employees will never ask customers for credit Monday, July 3, 2023 9:33 AM			
Apr 12, 2023, 02:15 PM	evergypower Evergy warns customers regarding recent utility scam attempts http Wednesday, April 12, 2023 2:15 PM			
Apr 12, 2023, 02:15 PM	Evergy Facebook Evergy warns customers regarding recent utility scam attempts http Wednesday, April 12, 2023 2:15 PM			
Mar 14, 2023, 02:35 PM	Your Evergy bill is paid, but someone has called you claiming that your <u>Tuesday, March 14, 2023 2:35 PM</u>			
Mar 14, 2023, 02:35 PM	Your Evergy Facebook Your Evergy bill is paid, but someone has called you claiming that your <u>Tuesday, March 14, 2023 2:35 PM</u>			
Jan 20, 2023, 09:05 AM	Evergy Facebook NEWS RELEASE   Evergy Warns Customers Regarding Recent Utility S Friday, January 20, 2023 9:05 AM			
Jan 20, 2023, 09:05 AM	NEWS RELEASE   Evergy Warns Customers Regarding Recent Utility S Friday, January 20, 2023 9:05 AM			
Jan 19, 2023, 01:21 PM	** evergypower 1/3 Beware of scammers! Thursday, January 19, 2023 1:21 PM			
Jan 10, 2023, 09:52 AM	Stop scams 🜋 Evergy recently launched an enhanced online collecti <u>Tuesday, January 10, 2023 9:52 AM</u>			
Jan 10, 2023, 09:52 AM	Stop scams 👗 Evergy recently launched an enhanced online collecti <u>Tuesday, January 10, 2023 9:52 AM</u>			