

Liberty's Customer Experience Update Meeting with MPSC Consumer Experience Department

March 2, 2023



Agenda

- Safety Moment
- Customer First Project Update – All
- Customer Experience Organizational Changes – Hayley
- Contact Center Update - Candice
- Follow Up Items from last meeting
 - Estimated Wait Time
 - Call Back Feature
- Discussion & Wrap-Up - All



Safety Moment – March is Ladder Safety Month

- Ladder accidents account for over 100 deaths and 1000s of injuries each year
- A few tips:
 - Read and follow all labels on the ladder
 - Avoid electrical hazards – look for OH lines and never use a metal ladder near power lines or other exposed energized electrical equipment.
 - Always maintain 3-point contact on the ladder when climbing
 - Use a ladder only on a stable and level surface
 - Do not exceed maximum load rating



What is the Customer First Program?

Customer First is putting our customers at the center of everything that we do. The **Customer First program will provide employees with the tools to deliver the experience our customers demand and deserve** - whether it's providing sustainable energy solutions or effortless interactions.

Customer First is Liberty's multi-project, transformational journey that will create greater consistency, around Finance, Customer Service and Operations, resulting in an industry-leading customer experience.

As well, driven by project teams that are representative of our Liberty regions and communities, Customer First will create the foundation to support our system sustainability objectives.

The outcome will be one source of truth - a fully integrated system with agile processes to support future growth.



Why is Liberty implementing Customer First?

Liberty's performance has been constrained by...

- Aging systems
- Varied processes
- Limited access to data + reporting
- Ambiguous roles + career paths

Customer First creates opportunities for Customer Care through...

- Modernized digital tools
- Standardized processes + ways of working
- Timely, easy access to insightful reporting + data
- Enhanced career paths for local + virtual teams
- Empowerment of continuous improvement

Ultimately providing...

Us, our customers + our community with an enhanced product + experience



What does this mean for Customer Care's org. structures?

Customer Care has had...

- Strong local presence that support our customer + regulatory goals
- Transactional teams that are burdened with highly manual processes, resulting in high costs for customers and risk of errors
- Varied skills and processes by location due to legacy systems and norms

The new structures have been designed to help realize the benefits of Customer First + to align with the Enterprise operating model principles...

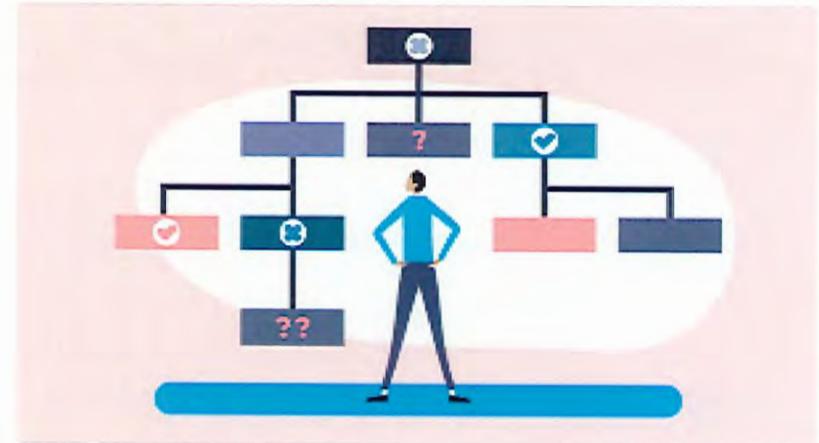
- 1 **Keep close to our customers** – Customer service stays local to support our communities
- 2 **Create virtual centers of excellence** – enable workload sharing to deliver billing, payments collections, and meter data more efficiently
- 3 **Standardize for value** – Continue to standardize processes to enable consistent customer and revenue realization outcomes
- 4 **Enable data driven decision-making** – upskill talent to shift from processing work to overseeing automated and deriving insights



How will our new org. design benefit our teams?

As we prepare to implement Customer First, our org. structure will enable...

- A. A **business-led vision** of the change
 - Avoid risk of being led by the technology change alone
- B. The **alignment** of our teams to our **strategic objectives**
- C. More **efficient ways of working** in-sync with our processes
- D. A **smooth transition** via a thoughtful workforce implementation
- E. A tangible view of **how business benefits will be achieved**



More on Customer First

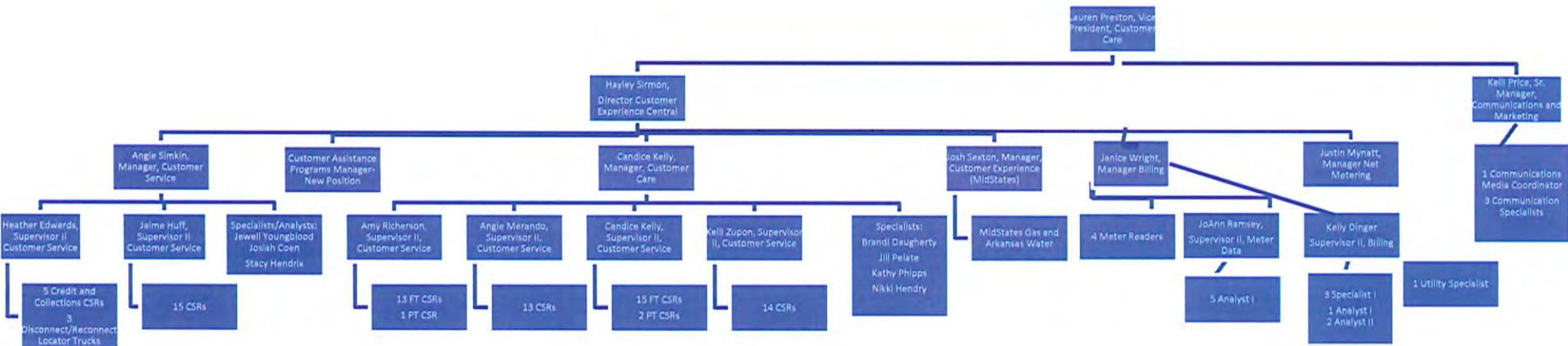
Go Live for Central Region – October 2023

- **Currently participating in work shops for information and requirement gathering**
- **Train the Trainer sessions**
 - Early look during West region training this week
 - Central sessions will be held around July/August time frame
- **End User Training**
 - Early look during West region training in March/April
 - Central sessions will be held August/September time frame
- **Go Live and Hyper Care**
 - October through end of year

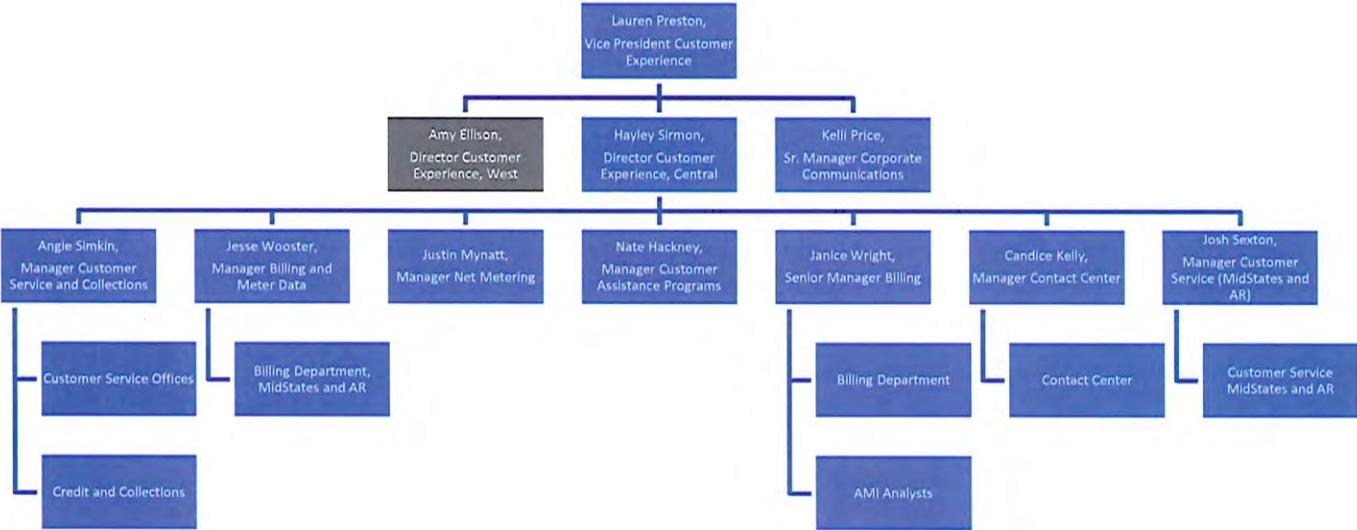


Central Region Customer Care Organizational Chart

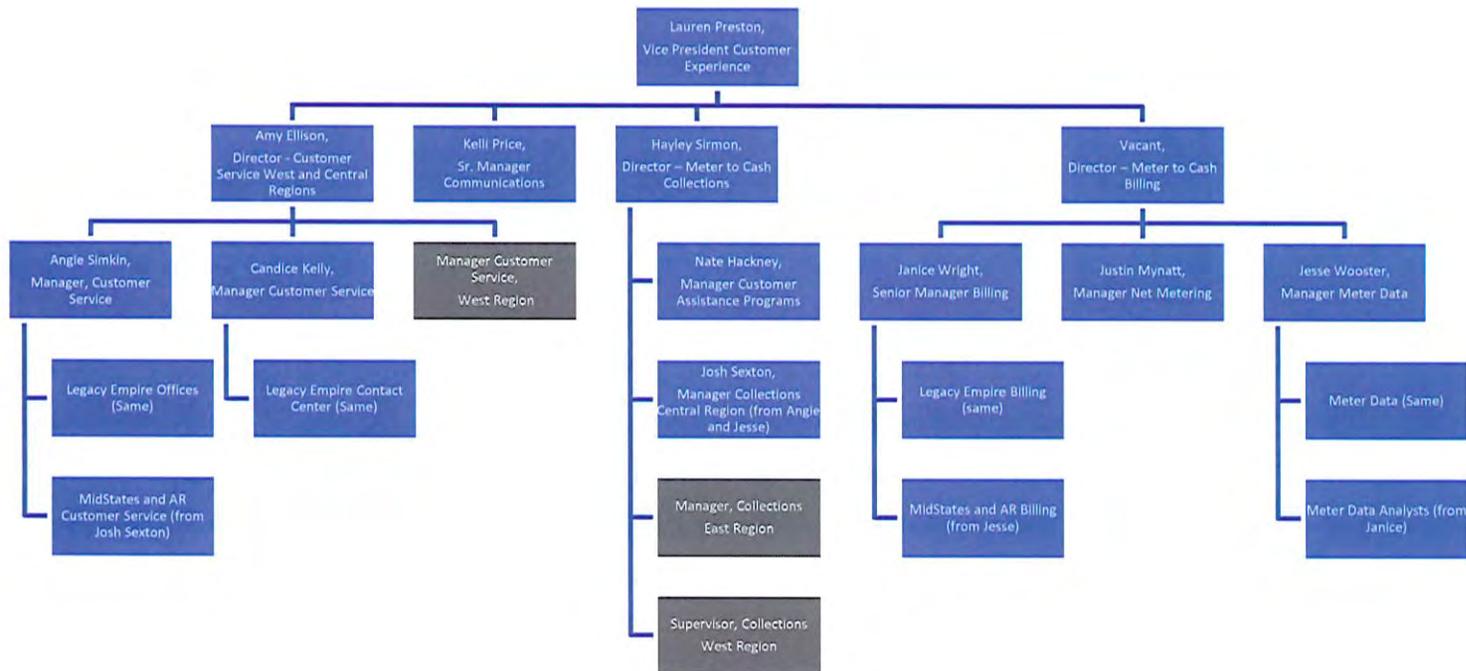
(from June 2022 Meeting, with update from July 2022)



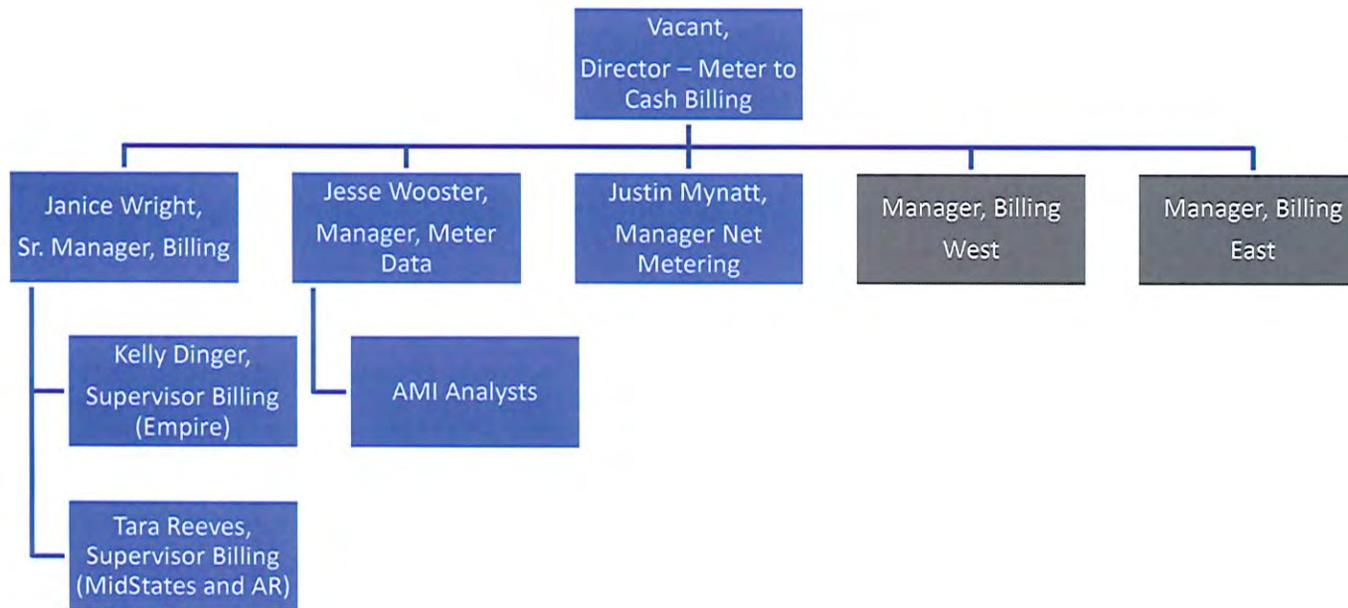
Simplified Previous Organizational Design (focus on Central Managers and Departments)



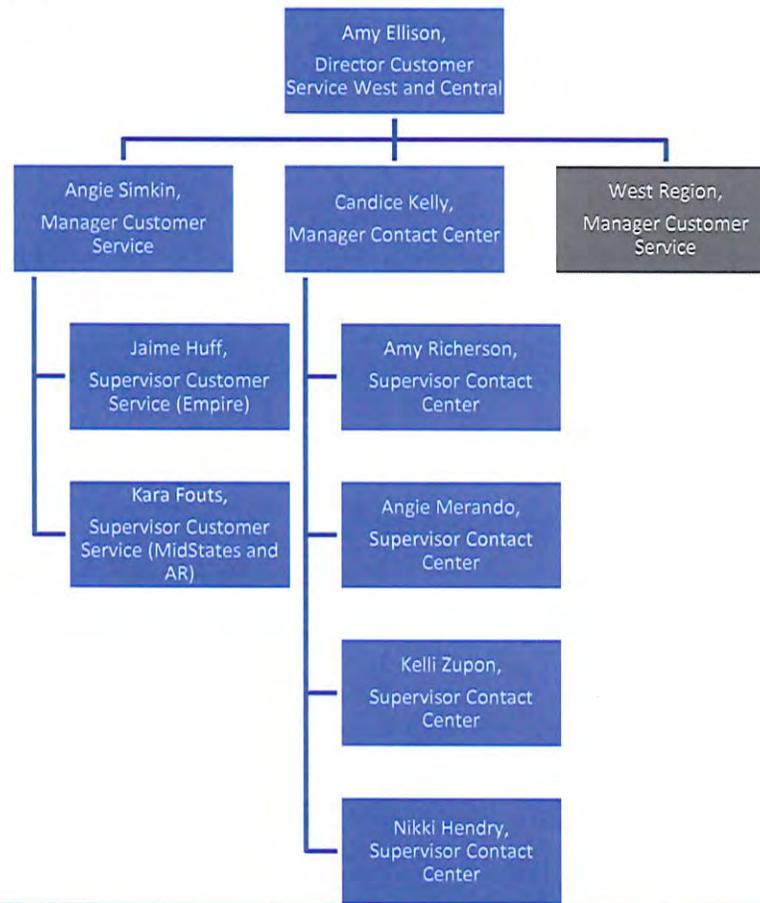
New Organizational Design



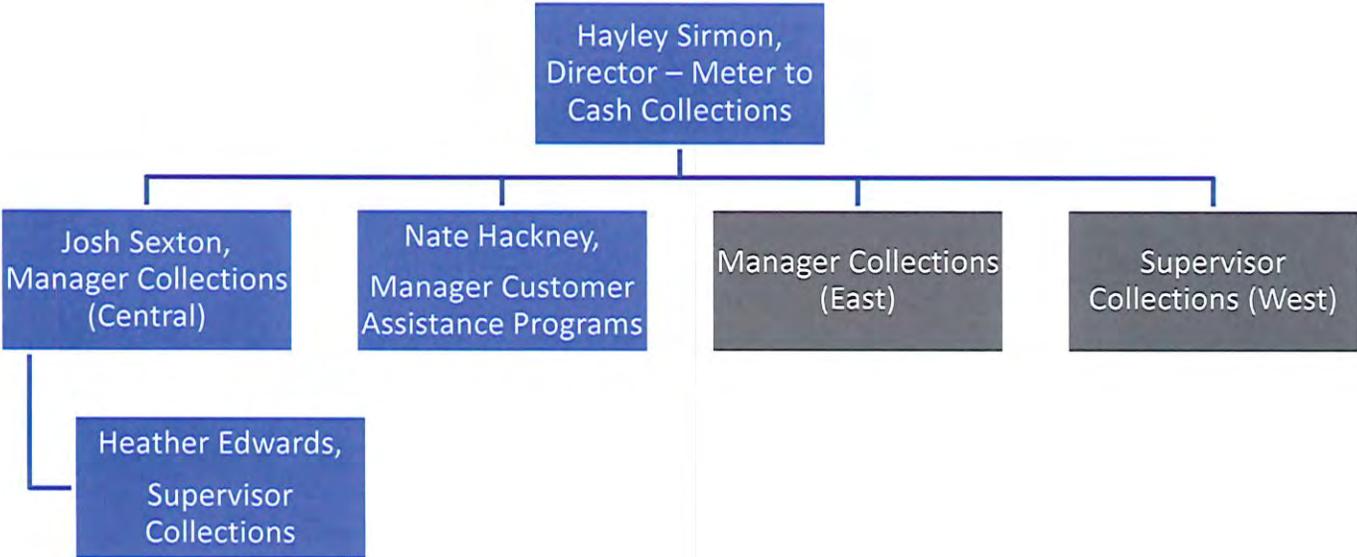
Detail - Billing



Detail – Customer Service



Detail - Collections



Key Changes

- **Hayley transitions from Central Region Customer Experience Director to Enterprise Director of Collections**
- **Josh's MidStates and AR CS team transitions to reporting under Angie**
- **Josh transitions from MidStates and AR CS manager to Central region manager of Collections**
- **Candice's Quality Assurance Specialists (2) moves from Contact Center to a centralized team**
- **Jesse's MidStates and AR Billing team transitions to reporting under Janice.**
- **Janice's AMI analysts transition to reporting under Jesse.**
- **Meter Readers transition from Billing to Operations department.**
- **None of these changes result in any relocation**



Contact Center Update - 2022

CALLS RECEIVED, ANSWERED, & ABANDONED											
Incoming Call Statistics	Incoming Electric & Gas Calls	Calls Answered Joplin & Ozark	Calls Answered at Ozark	Calls Answered at Joplin	Calls Answered Thru IVR	Calls Answered at Contact Ctrs & IVR	Calls Abandoned by Caller	Percentage Abandoned	Calls Answered 30 Sec or Less	Avg Speed of Answered (min.sec)	Power Outage Calls
Jan	78,047	31,698	8,245	23,453	45,845	77,543	504	1%	94%	0:12	2088
Feb	82,212	33,348	8,417	24,931	48,015	81,363	849	1%	87%	0:19	2780
March	96,047	38,999	8,648	30,351	55,766	94,765	1,282	1%	87%	0:20	4748
April	87,148	33,989	6,714	27,275	52,484	86,473	675	1%	92%	0:14	3395
May	92,007	36,939	8,832	27,461	53,796	90,735	1,272	1%	85%	0:23	5252
June	98,372	39,284	8,907	28,784	57,088	96,372	2,000	2%	80%	0:30	6010
July	91,302	35,767	7,314	27,692	54,515	90,282	1,020	1%	85%	0:23	3956
Aug	107,717	45,498	9,826	34,909	59,954	105,452	2,265	2%	79%	0:38	5094
Sept	106,522	43,865	9,159	33,146	61,345	105,210	1,312	1%	82%	0:26	3802
Oct	101,612	44,057	10,348	32,143	55,844	99,901	1,711	2%	85%	0:28	5389
Nov	89,121	36,980	8,137	27,458	51,040	88,020	1,101	1%	86%	0:22	4168
Dec	85,844	32,412	6,192	24,573	52,313	84,725	1,119	1%	88%	0:24	4453
Totals & Averages	1,115,951	452,836	100,739	342,176	648,005	1,100,841	15,110	1%	86%	0:23	51,135



Estimated Wait Time

The What?

- The estimated wait time is calculated based on the following:
 - Rolling average calculation computed by Workgroup for the last 30 minutes
 - It is a dynamic calculation – updating roughly every 2 minutes or so
 - Based only on ANSWERED calls (abandons do not count) – if a call is still in queue, it would not yet be part of the calculation either.
- If no calls were answered in the workgroup in the past 30 minutes, then no estimated wait time is spoken to the caller.

The When?

- Callers will be provided the Estimated Wait Time (EWT) as the last thing they hear before they go into queue:
- Therefore, only when they choose the option to go to an agent
- And they would hear it 'after' they hear the “Your call will be recorded for... “
- The message only plays once
- Only plays when there is a wait time of over 1 minute.



Call Back Feature

- Once a caller has entered a wait queue, estimated wait time (EWT) is provided to the customer, and the option to use the Callback feature is offered.
 - Currently set to an EWT higher than 3 minutes before Call Back is triggered
- If the customer accepts, then the phone number to use for the Callback is confirmed, and a Callback is scheduled to take place at the current time plus EWT.
- At the scheduled time, Dialer will automatically place a call to the customer at the number provided.
- When the customer answers, they are placed back into the wait queue, but they are given ‘front-of-the-line’ priority (although not ahead of emergency calls).
- However, the customer will likely still have to wait to speak to a CSR, because:
 - Assuming all CSRs are already on calls, then the caller will have to wait for the next available CSR.
 - Assuming that more than one customer has used the Callback feature, then the caller may have to wait for other Callbacks to be handled.
- Analogy: even if you have a FastPass at Disney World, there may be others with a FastPass still ahead of you in line.



Thank you



Quarterly Update March 2023

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

In the Matter of the Application of The Empire)
District Electric Company d/b/a Liberty for an)
Order Granting Billing Variances Related to the) Case No. EE-2024-0232
Company’s Implementation of Customer First)

In the Matter of the Application of The Empire)
District Gas Company d/b/a Liberty Utilities or)
Liberty for an Order Granting Billing Variances) Case No. GE-2024-0201
Related to the Company’s Implementation of its)
Customer First Program)

In the Matter of the Application of Liberty)
Utilities (Missouri Water) LLC d/b/a Liberty)
(MO Water) for an Order Granting Billing) Case Nos. WE-2024-0202
Variances Related to the Company’s) and SE-2024-0203
Implementation of Customer First)

INTERIM UPDATE

COME NOW The Empire District Electric Company, The Empire District Gas Company, and Liberty Utilities (Missouri Water) LLC (collectively, “Liberty” or the “Company”), and submit this Interim Update regarding the Company’s implementation of Customer First. In this regard, Liberty respectfully states as follows to the Missouri Public Service Commission (“Commission”):

1. Liberty filed applications for billing practice variances from Commission Rules 20 CSR 4240-13.015(1)(C) and 20 CSR 4240-13.020(6) to accommodate a recalibration of meter reading and billing cycles needed to implement Customer First.

2. The Commission issued an *Order Granting Variances* in Case No. EE-2024-0232 on March 27, 2024. The Commission issued an *Order Granting Variances* in Case No. GE-2024-0201 on February 29, 2024. The Commission also issued an *Order Granting Variances* in Case Nos. WE-2024-0202 and SE-2024-0203 on February 29, 2024.

3. With each order, the Commission included certain conditions, including waiver of late payment fees for 90 days post-implementation and the directive that Liberty file an update on the Company's Customer First transition 90 days after the transition occurs. Liberty was directed to include the following information with this update report:

- a. A detailed description of all technical and customer service issues encountered during the transition, including what the issue was, how the issue occurred, the time period during which the issue persisted, and the resolution if applicable.
- b. The number of customers who received a bill for a usage period of less than 26 or more than 35 days for a monthly billed customer, and the reason(s) why this occurred. This should be broken down by month for each month following the transition.
- c. The number of customers whose bills were delayed following the transition and the reason for the delayed bill. This should be broken down by month for each month following the transition.
- d. Start times, end times, and duration of the following outages/closures/downtimes as part of the Customer First transition: the data processing blackout, Liberty's walk-in and drive-thru office closure, the My Account downtime, the IVR downtime, and Kubra unavailability. Any unplanned or unexpected outages/closures/downtimes should be notated as such. The Company should also list all other outages/closures/downtimes that were not included in this list but related to the Customer First transition.

4. Liberty will prepare and file a full report within 30 days following 90 days after Customer First implementation (allowing time to assess the data and prepare the report after the

90-day mark). At this time, Liberty submits this interim report to keep the Commission and interested stakeholders informed during the transition.

5. Overall, the transition to Customer First is going well for the Company and its customers. Customers appear to be especially pleased with the new billing statement form. Attached as Appendix A is the new statement form for each commodity – electric, gas, and water/wastewater.

6. There has been a “growing pain” regarding collective accounts – those accounts with more than one meter of the same commodity, not at the same address, but on one billing invoice. Liberty has approximately 15,000 collective account customers. With the conversion to SAP, Liberty moved these customers to bill at the beginning of the following month. These accounts used to bill throughout the month. With the transition, some collective bills processed for the month of May also included April billing. This issue is being addressed.

7. These collective accounts also experienced some changes for making payments through the automated phone system (“IVR”). There are two account numbers associated with a collective account – a parent (3000 level number) and a child (2000 level number). Each child will have their own 2000 level account number. The 2000 level account number does not appear on the invoice that is mailed to customers; only the 3000 level account number, or parent account number, appears on the invoice.

8. All Liberty customers continue to be able to pay their bills by phone (in addition to other methods, including online). Non-collective account customers may call Liberty and directly pay by phone (using our third party payment provider, Kubra).

9. Collective account customers, however, due to the multiple account numbers, are unable to pay by phone *within* the Liberty IVR. Instead, to pay by phone, collective account

customers need to be transferred by a Liberty customer service representative to the payment provider. We are evaluating the possibility of streamlining this process for our collective account customers.

WHEREFORE, Liberty respectfully submits this Interim Update. No action on the part of the Commission is requested at this time.

Respectfully submitted,

/s/ Diana C. Carter

Diana C. Carter MBE #50527

428 E. Capitol Ave., Suite 303

Jefferson City, Missouri 65101

Joplin Office Phone: (417) 626-5976

Cell Phone: (573) 289-1961

E-Mail: Diana.Carter@LibertyUtilities.com

CERTIFICATE OF SERVICE

I hereby certify that the above document was filed in EFIS on this 7th day of June, 2024, and sent by electronic transmission to the Staff of the Commission and the Office of the Public Counsel.

/s/ Diana C. Carter



Account Information

Customer Name: JANE DOE
Service Address: 123 ANY STREET, ANYTOWN MO 64801
Account Number: 20001234567

What do I owe?

\$204.00

Payment will be drafted on the due date

How much did I use?

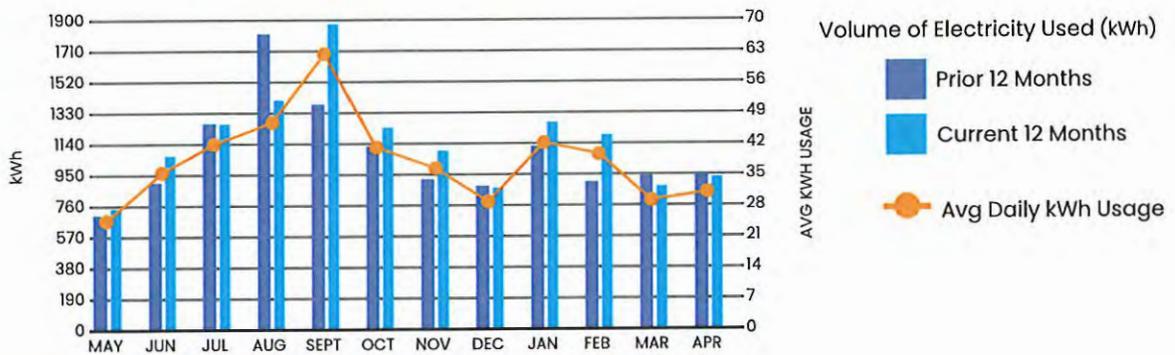
931

kWh

When is it due?

May 1, 2024

Your Monthly Electricity Use At a Glance



Important messages from Liberty

ELECTRIC EMERGENCIES: For electric emergencies, or to report power outages, call 1-800-206-2300

energy and water for life

Pay online at LibertyEnergyandWater.com, or return this portion with your payment. Please include your account number on your check and make payable to Liberty Utilities.



Account Number: 20001234567
Service Address: 123 ANY STREET
Bill Date: 09-APR-2024
Due Date: 01-MAY-2024

\$204.00*
 Amount Due

Amount Enclosed

*Payment will be drafted on the due date

Please check box and see reverse for: Assistance Donation

JANE DOE
 123 ANY STREET
 ANYTOWN MO 64801

REMIT TO:
 LIBERTY
 P.O. BOX XXXXX
 ANYTOWN MO XXXXX-XXXX

Go green and sign up for paperless billing today! Online access gives you the ability to make payments, set up autopay and activate useful email or text notifications about your usage.



Explanation of Regulations and Policies

For additional information please visit www.LibertyEnergyandWater.com.

Understanding Your Bill

Customer Charge:

A fixed monthly charge to cover costs to meter and bill your account and provide customer service.

Due Date/Late Charge:

Please pay your bill by the due date to avoid a late charge.

February 2021 Storm and Asbury Costs:

For most of our rate classes, including our residential class, this charge of approximately 1 cent per kWh of energy usage is to primarily recover approximately \$305 million in costs incurred because of the 2021 extreme weather event called Winter Storm Uri and the Asbury generation plant that was removed from service after 50 years. Learn more at www.libertyenergyandwater.com. BondCo is the owner of the rights to securitized utility tariff charges (SUTC). Liberty is acting as the servicer for BondCo.

Franchise Fee:

This fee is a tax levied by local municipalities that Liberty collects and passes on to those respective cities. Applicable state and local taxes are also charged.

Fuel Adjustment Clause:

This is the charge for the difference between the amount of fuel and purchased power costs established in the current base rate structure and the amount of actual fuel and purchased power costs incurred by Liberty. The rate changes twice a year. If fuel costs incurred by the Company are less than what is established in the current base rate structure, customers will see a credit in the Fuel Charge line. The charge includes no mark-up or profit for Liberty.

Meter Read Date:

This is typically the day before the start of the billing period.

Multiplier:

Converts the metered unit of measure to the standard billing unit of measure, where applicable.

Prorated Bill:

If applicable, we will adjust, or prorate, the charges on bills with more or less than the standard days of service.

Rate Code:

This code represents the rate used to calculate your bill.

Read Type:

If we are unable to read your meter, we will estimate your usage for the month.

Taxes:

This section summarizes state and local taxes, including city franchise tax, if applicable.

Units:

kWh= Kilowatt Hour

Usage Charge

The portion billed for the kilowatt hours of electricity used.



Important Information

Customer Care and Emergency:

800-206-2300

Call before you Dig:

8-1-1

Website:

www.LibertyEnergyandWater.com

Social Media:

Facebook: @LibertyUtilitiesCentral

X: @PlugIntoLiberty

Youtube: @liberty-centralregion718



Other Information

General Correspondence

Please remember to include your name, 12-digit account number, service address, mailing address and phone number including the area code, on any correspondence to us. Contact us if you have had a change in mailing address or name, or you may be billed even after a move.

Mail to:

Liberty
P.O. Box 127
Joplin, MO 64802

Email to:

customerservice@Libertyutilities.com

Glossary of Terms

For a definition of the additional billing terms, please visit: www.libertyenergyandwater.com

Dispute Resolution

Liberty is regulated by the Missouri Public Service Commission (PSC). Customers can contact the PSC at:

Missouri Public Service Commission:

200 Madison Street, PO Box 360
Jefferson City, MO 65102-0360
1-800-392-4211 / www.psc.mo.gov

Employee Identification

All Liberty service employees are uniformed and wear identification badges with the company logo, employee picture, and name. Please verify the badge or call us to confirm employee identification.

Financial Assistance

Liberty offers assistance programs and flexible payment options, including a payment arrangement program for residential and business customers to allow for additional time to spread out past due balances and make payments more manageable. Customers can learn more about our assistance options at www.libertyenergyandwater.com.

Liberty has a list of various agencies that may be able to provide financial assistance for some portion of the utility bill. This list is available on our website or customers can call our Customer Care team at 800-206-2300.

If you're a Missouri homeowner struggling to make your mortgage payment due to the COVID-19 pandemic, you may qualify for assistance from Missouri SAFHR. For more information, visit www.safhrforhomeowners.com.

Payment Options



EFT (Automatic) Payments

Pay your bill automatically from your bank account.



Online

www.LibertyEnergyandWater.com



Phone

800-206-2300



Mail Payments

Liberty - MO
P.O. Box 75660
Chicago, IL 60675-5660



In Person

Visit LibertyEnergyandWater.com for our office locations or authorized payment centers.

Billing Programs

Budget Billing (Formerly Average Payment Plan "APP")

Allows you to spread out payments over the year, avoiding high and low fluctuations in your monthly bill. The statement will also show the difference between Budget Billing and Actual Charges to Date otherwise known as Settlement Amount.

Installment Plan

An extended payment plan where past-due bills may be paid in installments over a specific time period. The Statement will also show the Remaining Installment Plan amount to be billed.

Project Help Energy Assistance Program

Project Help is an assistance program created to meet emergency energy-related expenses of the elderly and/or customers with disabilities. Project Help is funded through voluntary donations. Visit our website for more information and to sign up for the program. All donations are tax deductible.

Thank you for sharing with those in need in your community.

Please choose an amount to be billed monthly on your Liberty Statement.

\$1 ___ \$5 ___ \$10 ___ \$20 ___ Other ___ One-Time Contribution ___



Account Activity for Your Electric Service from 03/01/2024 – 04/01/2024
 Rate: Time Choice Residential Rate Plan (Schedule TC-RG)
 Next Scheduled Meter Read Date: 05/01/2024
 Point of Delivery ID: 00000000000012345678

Meter Number	Type of Service	Read Type	Service Days	Billing Period	Current	Previous	KWH Used	Multiplier	Usage
EEF12345678	Off-Peak	Actual	32	3/1/24 - 4/1/24	42991.848	42060	931.848	1	931.848
		Actual	32	3/1/24 - 4/1/24			252.769	1	252.769

What am I paying for? **Additional messages**

Previous Balance	\$ 204.00
Payment(s) Received as of 04/09/2024	\$ -204.00
Balance Forward	\$ 0.00

April is National Safe Digging month. Remember - whether you're planting a tree, adding a fence, or changing your landscaping, you must always call 811 in advance of digging. Dig Safe: It's free; it's safe; it's the law. For more information, visit www.call811.com.

Current Charges

ELECTRICITY CHARGES	QUANTITY USED	COST PER KWH		
Customer Charge			\$	13.00
Usage Charge	600.0000 KWH	\$ 0.140310	\$	84.19
Usage Charge	331.3690 KWH	\$ 0.116510	\$	38.61
Off Peak Credit	252.7690 KWH	\$ -0.020000	\$	-5.06
Energy Efficiency Prgm Cost	931.3690 KWH	\$ 0.000280	\$	0.26
Energy Efficiency Investment	931.3690 KWH	\$ 0.000510	\$	0.47
February 2021 Storm And Asbury Costs	931.3690 KWH	\$ 0.010474	\$	9.76
Fuel Adjustment Clause	931.3690 KWH	\$ 0.007270	\$	6.77
TOTAL ELECTRICITY CHARGES			\$	148.00
TAX CHARGES				
Franchise Fee \$148.00 @ 4.000%			\$	5.92
County of Newton \$148.00 @ 1.625%			\$	2.41
City of Neosho \$148.00 @ 1%			\$	1.48
TOTAL TAX CHARGES			\$	9.81
TOTAL CURRENT CHARGES			\$	157.81

Budget Billing Program Information (BBP)

Budget Billing Start Date	02-MAY-2023
Your Current Budget Installment is	\$ 204.00
Total Actual Charges to Date	\$ 2,548.65
Total Budget Plan Charges to Date	\$ 2,448.00
Difference between Budget and Actual Charges to Date	\$ 100.65
Total Amount Due on this bill	\$ 204.00
Actual Account Balance if you come off Budget	\$ 304.65

Total Amount Due **\$ 204.00**



Account Information

Customer Name: JANE DOE
Service Address: 123 ANY STREET, ANYTOWN MO 64801
Account Number: 20001234567

What do I owe?

\$96.89

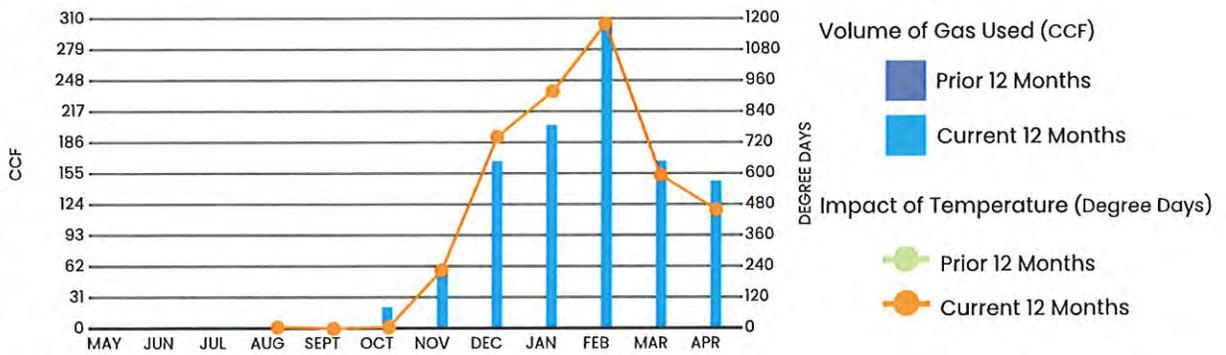
How much did I use?

147
CCF

When is it due?

May 21, 2024

Your Monthly Gas Use At a Glance



Important messages from Liberty

CALL US IMMEDIATELY IF YOU SMELL GAS: If you suspect a natural gas leak, leave the area immediately and then call our emergency number at 1-800-406-9220 or 911.

Pay online at LibertyEnergyandWater.com, or return this portion with your payment. Please include your account number on your check and make payable to Liberty Utilities.



Account Number: 20001234567
Service Address: 123 ANY STREET
Bill Date: 30-APR-2024
Due Date: 21-MAY-2024

\$96.89
Amount Due

Amount Enclosed

Please check box and see reverse for: Assistance Donation

JANE DOE
 123 ANY STREET
 ANYTOWN MO 64801

REMIT TO:
 LIBERTY
 P.O. BOX XXXXX
 ANYTOWN MO XXXXX-XXXX

32032000133858160000012345

energy and water for life

Go green and sign up for paperless billing today! Online access gives you the ability to make payments, set up autopay and activate useful email or text notifications about your usage.



Explanation of Regulations and Policies

For additional information please visit www.LibertyEnergyandWater.com.

Understanding Your Bill

Customer Charge:

A fixed monthly charge to cover costs to meter and bill your account and provide customer service.

Due Date/Late Charge:

Please pay your bill by the due date to avoid a late charge.

Franchise Fee:

This fee is a tax levied by local municipalities that Liberty collects and passes on to those respective cities. Applicable state and local taxes are also charged.

Meter Read Date:

This is typically the day before the start of the billing period.

Multiplier:

Converts the metered unit of measure to the standard billing unit of measure, where applicable.

Prorated Bill:

If applicable, we will adjust, or prorate, the charges on bills with more or less than the standard days of service.

Purchase Gas Adjustment (PGA):

This is the cost the company pays to purchase natural gas on the open market, plus the transportation and storage services fees. It also reflects any under- or over- collection of actual costs in the previous period. The PGA accounts for about two-thirds to three-fourths of a winter bill.

Rate Code:

This code represents the rate used to calculate your bill.

Read Type:

If we are unable to read your meter, we will estimate your usage for the month.

Taxes:

This section summarizes state and local taxes, including city franchise tax, if applicable.

Units:

CCF = Hundred Cubic Feet

Usage Charge:

This charge applies to the consumption of gas. It is billed as the cubic feet of natural gas used.



Other Information

General Correspondence

Please remember to include your name, 12-digit account number, service address, mailing address and phone number including the area code, on any correspondence to us. Contact us if you have had a change in mailing address or name, or you may be billed even after a move.

Mail to:

Liberty
P.O. Box 127
Joplin, MO 64802

Email to:

customerservice@Libertyutilities.com

Glossary of Terms

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Dispute Resolution

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Missouri Public Service Commission:

200 Madison Street, PO Box 360
Jefferson City, MO 65102-0360
1-800-392-4211 / www.psc.mo.gov

Employee Identification

All Liberty service employees are uniformed and wear identification badges with the company logo, employee picture, and name. Please verify the badge or call us to confirm employee identification.

Financial Assistance

Liberty offers assistance programs and flexible payment options, including a payment arrangement program for residential and business customers to allow for additional time to spread out past due balances and make payments more manageable. Customers can learn more about our assistance options at www.libertyenergyandwater.com.

Liberty has a list of various agencies that may be able to provide financial assistance for some portion of the utility bill. This list is available on our website or customers can call our Customer Care team at 800-424-0427.

If you're a Missouri homeowner struggling to make your mortgage payment due to the COVID-19 pandemic, you may qualify for assistance from Missouri SAFHR. For more information, visit www.safhrforhomeowners.com.



Important Information

Customer Care:

800-424-0427

Emergency:

800-406-9220

Call before you Dig:

8-1-1

Website:

www.LibertyEnergyandWater.com

Social Media:

Facebook: LibertyUtilitiesCentral
X: @PlugIntoLiberty
Youtube: @liberty-centralregion718

Payment Options



EFT (Automatic) Payments

Pay your bill automatically from your bank account.



Online

www.LibertyEnergyandWater.com



Phone

800-424-0427



Mail Payments

Liberty - MO
P.O. Box 75660
Chicago, IL 60675-5660



In Person

Visit LibertyEnergyandWater.com for our office locations or authorized payment centers.

Billing Programs

Budget Billing (Formerly Average Payment Plan "APP")

Allows you to spread out payments over the year, avoiding high and low fluctuations in your monthly bill. The statement will also show the difference between Budget Billing and Actual Charges to Date otherwise known as Settlement Amount.

Installment Plan

An extended payment plan where past-due bills may be paid in installments over a specific time period. The Statement will also show the Remaining Installment Plan amount to be billed.

Project Help Energy Assistance Program

Project Help is an assistance program created to meet emergency energy-related expenses of the elderly and/or customers with disabilities. Project Help is funded through voluntary donations. Visit our website for more information and to sign up for the program. All donations are tax deductible.

Thank you for sharing with those in need in your community.

Please choose an amount to be billed monthly on your Liberty Statement.

\$1 ___ \$5 ___ \$10 ___ \$20 ___ Other ___ One-Time Contribution ___



Account Activity for Your Natural Gas Service from 03/13/2024 - 04/16/2024
 Rate: Residential Service (Schedule RS)
 Next Scheduled Meter Read Date: 05/17/2024
 Point of Delivery ID: 00000000000012345678

Meter Number	Read Type	Service Days	Billing Period	Current	Previous	CCF Used	Usage
EGNGMI23456	Actual	35	3/13/24 - 4/16/24	3467	3320	147	147

What am I paying for? **Additional messages**

Previous Balance	\$ -8.27
Payment(s) Received as of 04/30/2024	\$ -350.00
Balance Forward	\$ -358.27

April is National Safe Digging month. Remember - whether you're planting a tree, adding a fence, or changing your landscaping, you must always call 811 three business days in advance of digging. Dig Safe: It's free; it's safe; it's the law. For more information, visit www.call811.com.

Current Charges

DELIVERY CHARGES	QUANTITY USED	COST PER CCF		
Customer Charge			\$	16.50
Delivery Charge	147 CCF	\$ 0.21748	\$	31.97
WNA	147 CCF	\$ 0.01632	\$	2.40
TOTAL DELIVERY CHARGES			\$	50.87

GAS CHARGES	QUANTITY USED	COST PER CCF		
PGA - Cost Of Gas	147 CCF	\$ 0.34303	\$	50.42
TOTAL GAS CHARGES			\$	50.42

MISCELLANEOUS CHARGES AND CREDITS		
Security Deposit Interest	\$	-2.20
Security Deposit	\$	350.00
TOTAL MISC. CHARGES AND CREDITS	\$	347.80

TAX CHARGES		
Franchise Fee \$101.29 @ 5.000%	\$	5.06
City of Maryville \$101.29 @ 1%	\$	1.01
TOTAL TAX CHARGES	\$	6.07

TOTAL CURRENT CHARGES	\$ 455.16
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Total Amount Due **\$ 96.89**

Security Deposit Held	\$ 350.00
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Account Information

Customer Name: **JANE DOE**
 Service Address: 123 ANY STREET, ANYTOWN MO US 63077
 Account Number: 200012345678



What do I owe?

\$61.66

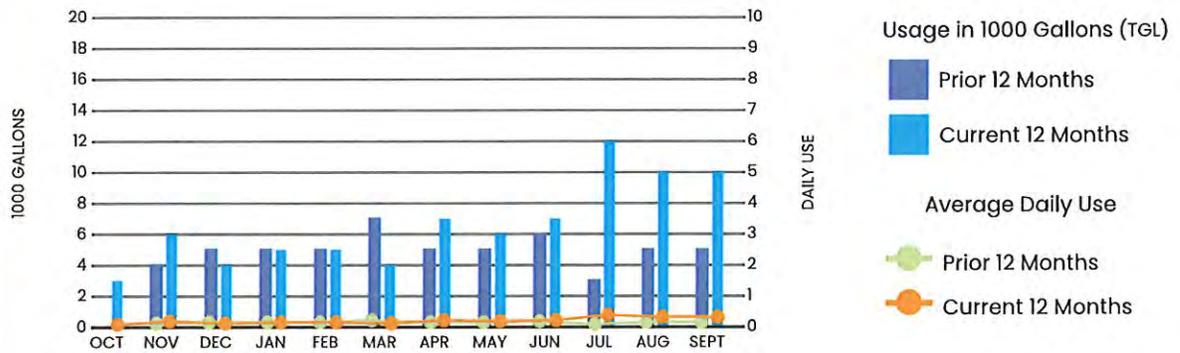
How much did I use?

9,630
Gallons

When is it due?

Dec 12, 2023

Your Monthly Water Use At a Glance



energy and water for life

Pay online at LibertyEnergyandWater.com, or return this portion with your payment. Please include your account number on your check and make payable to Liberty Utilities.



LATE PAYMENT FEE:
 Payments received after the due date are subject to a greater of \$5.00 or 3.00% fee per month late

Account Number: 200012345678
Service Address: 123 ANY STREET
Bill Date: 21-NOV-2023
Due Date: 12-DEC-2023

\$61.66
Amount Due

Amount Enclosed

JANE DOE
 123 ANY STREET
 ANYTOWN MO 63077

REMIT TO:
 LIBERTY
 P.O. BOX XXXXX
 ANYTOWN MO XXXXX-XXXX



Go green and sign up for paperless billing today! Online access gives you the ability to make payments, set up autopay and activate useful email or text notifications about your usage.



Explanation of Regulations and Policies

For additional information please visit www.LibertyEnergyandWater.com.

Understanding Your Bill

- Customer Charge:**
A fixed monthly charge to cover costs to meter and bill your account and provide customer service.
- Due Date/Late Charge:**
Please pay your bill by the due date to avoid a late charge.
- Franchise Fee:**
This fee is a tax levied by local municipalities that Liberty collects and passes on to those respective cities. Applicable state and local taxes are also charged.
- Meter Read Date:**
This is typically the day before the start of the billing period.
- Multiplier:**
Converts the metered unit of measure to the standard billing unit of measure, where applicable.
- Prorated Bill:**
If applicable, we will adjust, or prorate, the charges on bills with more or less than the standard days of service.
- Rate Code:**
This code represents the rate used to calculate your bill.
- Read Type:**
If we are unable to read your meter, we will estimate your usage for the month.
- Taxes:**
This section summarizes state and local taxes, including city franchise tax, if applicable.
- Units:**
GAL = Gallons
- Usage Charge**
The portion billed for the gallons of water used.



Other Information

General Correspondence

Please remember to include your name, 12-digit account number, service address, mailing address and phone number including the area code, on any correspondence to us. Contact us if you have had a change in mailing address or name, or you may be billed even after a move.

Mail to:
Liberty
P.O. Box 127
Joplin, MO 64802

Email to:
customerservice@Libertyutilities.com

Glossary of Terms
For a definition of the additional billing terms, please visit: www.libertyenergyandwater.com

Dispute Resolution

Liberty is regulated by the Missouri Public Service Commission (PSC). Customers can contact the PSC at:

Missouri Public Service Commission:
200 Madison Street, PO Box 360
Jefferson City, MO 65102-0360
1-800-392-4211 / www.psc.mo.gov

Employee Identification

All Liberty service employees are uniformed and wear identification badges with the company logo, employee picture, and name. Please verify the badge or call us to confirm employee identification.

Financial Assistance

Liberty offers assistance programs and flexible payment options, including a payment arrangement program for residential and business customers to allow for additional time to spread out past due balances and make payments more manageable. Customers can learn more about our assistance options at www.libertyenergyandwater.com.

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If you're a Missouri homeowner struggling to make your mortgage payment due to the COVID-19 pandemic, you may qualify for assistance from Missouri SAFHR. For more information, visit www.safhrforhomeowners.com.



Important Information

Customer Care and Emergency:
800-206-2300

Website:
www.LibertyEnergyandWater.com

Call before you Dig:
8-1-1

Social Media:
Facebook: LibertyUtilitiesCentral
X: @PlugIntoLiberty
Youtube: @liberty-centralregion718

Payment Options



EFT (Automatic) Payments
Pay your bill automatically from your bank account.



Online
www.LibertyEnergyandWater.com



Phone
800-206-2300



Mail Payments
Liberty
P.O. BOX XXXXX
Anytown MO XXXXX-XXXX



In Person
Visit LibertyEnergyandWater.com for our office locations or authorized payment centers.

Billing Programs

Installment Plan

An extended payment plan where past-due bills may be paid in installments over a specific time period. The statement will also show the remaining Installment Plan amount to be billed.

Project Help Energy Assistance Program

Project Help is an assistance program created to meet emergency energy-related expenses of the elderly and/or customers with disabilities. Project Help is funded through voluntary donations. Visit our website for more information and to sign up for the program. All donations are tax deductible.

Thank you for sharing with those in need in your community.
Please choose an amount to be billed monthly on your Liberty Statement.

\$1 ___ \$5 ___ \$10 ___ \$20 ___ Other ___ One-Time Contribution ___



Account Activity for Your Water Service from 08/02/2023 - 09/01/2023
 Rate: Franklin County Water all services
 Next Scheduled Meter Read Date: 10/02/2023
 Point of Delivery ID: 00000000000012345678

Meter Number	Read Type	Service Days	Billing Period	Current	Previous	Gallons Used	Multiplier	Usage
MWPKL1234	Actual	31	8/2/23 - 9/1/23	952740	943110	9630	0.001	9.63

What am I paying for? Additional messages

Previous Balance	\$	30.83
Payment(s) Received as of 11/21/2023	\$	0.00
Balance Forward	\$	30.83

Current Charges

WATER CHARGES	QUANTITY USED	COST PER 1000 GALLONS		
Customer Charge			\$	5.70
Water Usage Charge	9.6300 TGL	\$ 2.61000	\$	25.13
TOTAL WATER CHARGES			\$	30.83
TOTAL CURRENT CHARGES			\$	30.83

Total Amount Due \$ **61.66**

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

In the Matter of the Application of The Empire)
District Electric Company d/b/a Liberty for an)
Order Granting Billing Variances Related to the) Case No. EE-2024-0232
Company’s Implementation of Customer First)

In the Matter of the Application of The Empire)
District Gas Company d/b/a Liberty for an)
Order Granting Billing Variances Related to the) Case No. GE-2024-0201
Company’s Implementation of its Customer)
First Program)

In the Matter of the Application of Liberty)
Utilities (Missouri Water) LLC d/b/a Liberty)
(MO Water) for an Order Granting Billing) Case Nos. WE-2024-0202
Variances Related to the Company’s) and SE-2024-0203
Implementation of Customer First)

REPORT REGARDING
CUSTOMER FIRST IMPLEMENTATION

COME NOW The Empire District Electric Company (“Empire Electric”), The Empire District Gas Company (“Empire Gas”), and Liberty Utilities (Missouri Water) LLC (“Missouri Water”) (and collectively, “Liberty” or the “Companies”), and submit this Report regarding the Companies’ implementation of Customer First on April 8, 2024. In this regard, Liberty respectfully states as follows to the Missouri Public Service Commission (“Commission”):

1. Liberty filed applications for billing practice variances from Commission Rules 20 CSR 4240-13.015(1)(C) and 20 CSR 4240-13.020(6) to accommodate a re-routing of meter reading and billing cycles needed to implement Customer First.

2. The Commission issued an *Order Granting Variances* in Case No. EE-2024-0232 on March 27, 2024 (Empire Electric). The Commission issued an *Order Granting Variances* in Case No. GE-2024-0201 on February 29, 2024 (Empire Gas). The Commission also issued an *Order Granting Variances* in Case Nos. WE-2024-0202 and SE-2024-0203 on February 29, 2024

(Missouri Water).

3. With each order, the Commission included certain conditions, including waiver of late payment fees for 90 days post-implementation and the directive that Liberty file an update on the Companies' Customer First transition 90 days after the transition occurs. Liberty was directed to include the below information in the report.

- a. A detailed description of all technical and customer service issues encountered during the transition, including what the issue was, how the issue occurred, the time period during which the issue persisted, and the resolution if applicable.
- b. The number of customers who received a bill for a usage period of less than 26 or more than 35 days for a monthly billed customer, and the reason(s) why this occurred. This should be broken down by month for each month following the transition.
- c. The number of customers whose bills were delayed following the transition and the reason for the delayed bill. This should be broken down by month for each month following the transition.
- d. Start times, end times, and duration of the following outages/closures/downtimes as part of the Customer First transition: the data processing blackout, Liberty's walk-in and drive-thru office closure, the My Account downtime, the IVR [interactive voice response system] downtime, and Kubra unavailability. Any unplanned or unexpected outages/closures/downtimes should be notated as such. The Company should also list all other outages/closures/downtimes that were not included in this list but related to the Customer First transition.

4. Liberty filed an Interim Update on June 7, 2024, to inform the Commission and interested stakeholders on the transition. Liberty stated it would submit a full report within 30 days following 90 days after Customer First implementation to allow time to assess and prepare a report.

5. On April 8, 2024, Customer First was implemented for Empire Electric, Empire Gas, and Missouri Water; this filing contains detailed information on the experience of the Companies and their customers for the first 90-days following implementation.

A. The Customer First Project

6. Customer First is a large project that has been implemented across all utilities owned by Liberty Utilities Co., including all of Liberty's utilities that operate in Missouri. The Customer First project consists of the following systems that may themselves have multiple components: Customer First Foundations, Employee Central, Procure to Pay, Network Design and Operations, eCustomer and Advanced Metering Infrastructure (AMI).



B. Technical and Customer Service Issues

7. Hypercare is Liberty's comprehensive post-implementation support program. The Hypercare effort, which typically lasts 60 to 90 days after implementation of the new systems, provides additional operation and technical support for three main purposes:

- a. to identify and update any transactions which were suspended/suppressed during the data and system transition;
- b. to affirm the system is operating as intended and identify any data or processing corrections and enhancements needed; and
- c. to support the employees, customers and other stakeholders who may need help using the system.

8. During Hypercare, there were more than 300 requests for assistance logged. As Liberty prepares to transfer out of Hypercare into a steady-state operation of the new system, only 13 priority issues remain open.

9. Many of the closed items include issues Liberty expected to be part of the Hypercare effort and were anticipated in the project scope. By broad category, these closed items are listed below.

- a. Employee access and data security adjustments were needed to clarify the types of data and transactions certain employees are authorized to access commensurate with their duties.
- b. Rate updates and proration adjustments were needed for certain seasonal rate changes to update changes to pricing and tariff rules which may change while a system is newly installed.
- c. Liberty anticipated the need to process service orders and payments delayed during the data blackout discussed below (see Section E below). Hypercare included additional staffing resources for processing these transactions.
- d. Similarly, Liberty could not update meter inventory data (new purchases, meter data attributes and related service orders) during the blackout period. This data was updated as part of Hypercare.

- e. Liberty implemented new software that allows the system to validate sales tax and franchise fee rules with the Missouri Department of Revenue. Liberty anticipated some cleanup of local addresses and geographic records to take full advantage of this new software. This work is more fully described in paragraph 23.
- f. Liberty made bill print adjustments to include a line item for the recently enacted securitization charge.
- g. Liberty cleaned up complex mailing addresses to allow for mailing in a manner consistent with U.S. Postal Service bulk mailing rules.
- h. Liberty reports on revenues and billing to certain cities. It developed new reporting capabilities within Customer First to continue this reporting.
- i. Liberty reconciled financial balances needed to transfer the customer account records of accounts previously discharged in bankruptcy.
- j. Liberty developed a new reporting capability in Customer First related to solar net metering customers.
- k. Liberty developed within Customer First a new interface and data files for the Apogee customer usage education platform.

10. Just prior to Customer First implementation, Empire Electric implemented the securitization tariff approved by the Commission in Case Nos. EO-2024-0040 and EO-2024-0193 which required changes to the payment hierarchy allocation. The configuration did not account for treatment of Low-Income Home Energy Assistance Program (LIHEAP) payments and assistance payments were not applied resulting in some customers erroneously receiving shut off notices. Liberty did not disconnect any customers as a result of this error and a correction was deployed on June 26. LIHEAP payments are now being applied appropriately.

11. On May 16, Liberty issued corrected bills to certain low-income customers of Empire Electric. On May 14 and 15, ledgers associated with the low-income rates were in the process of being updated which prevented the billing of low-income rates to approximately 5,000 customers.

12. In its Interim Update, Liberty described an issue affecting collective accounts. Collective invoicing allows customers who have multiple metered accounts to receive a single bill for a parent account that bundles the individual (child) accounts. Some collective accounts processed in May included April billing. Collective account bills are now largely on cycle and being released to customers on time, except for billing or meter reading investigations that may happen as part of normal monthly processes.

13. After Liberty filed its initial Interim Update and during the Hypercare period, Liberty identified additional issues related to Customer First or AMI operations which caused billing delays or corrections. These are listed in the delayed bills category below.

14. Certain customer payments made in response to direct customer correspondence and notifications, such as a final collection notice, were forwarded to incorrect payment processing lockboxes due to a configuration error. Liberty's lockbox vendor identified this issue and overnight shipped the payments to the correct location for processing. This issue had no effect on monthly billing and the overall impact was kept to a minimum. Liberty closed this issue in July.

15. There are currently 10 priority open items Liberty continues to work. The following descriptions of these issues aggregate the related open items.

- a. The interest rate on customer deposits was not updated appropriately. The Customer First system credits interest to customer deposits monthly rather than annually as was done in the previous system. Liberty corrected the rates on June 21 and is reviewing customer deposit accounts for April through June to determine the amount of credits to customer deposits in that period. The deposit interest adjustment will be posted in August for any impacted customer.
- b. Liberty discovered that new customer booklets were not mailed with the new customer letter. Liberty has identified the customers who did not receive the booklet and is on track to deliver it to those customers by mail or e-mail in August 2024.
- c. The remaining open repair tickets are related to items described more fully below. These include edits to collective billing, an interface adjustment for Itron's AMI data, sales tax data validation, some infrequent instances of late fee presentation on the invoice, and an adjustment to the move in/move out transaction.

C. Short or Long Usage Periods

16. Across Empire Electric, Empire Gas and Missouri Water (the three companies subject to this reporting), Liberty issued more than 828,000 bills during the April through June 2024 period. Of the bills rendered, 21,538 were for periods of less than 26 days and 21,582 were for periods longer than 35 days. Attachment 1 shows the number of bills for each company for periods of less than 26 days or more than 35 days.

17. Bills for usage periods outside the normal 26 to 35 days were commonly caused by delays in receiving meter reading data, delays in working or closing field service orders that affect billings (particularly during the transaction blackout period), accounts held while consumption calculations were checked or corrected, and ordinary bill changes related to customers moving in or out of a property. The bill cycle re-routing requiring this variance is complete.

18. In April and May, changes to meter reading routes caused some customers to receive bills for periods other than 26 to 35 days. The meter reading re-routing requiring this variance is substantially complete. Liberty continues to refine meter reading schedules for certain accounts carried under the collective billing program to help bring those groups of accounts closer together for billing purposes. This is an ongoing maintenance activity.

19. The collective accounts issue mentioned previously also resulted in bills outside of the 26 to 35 days period, as did the disruptions to AMI operations that are described in more detail in the discussion of delayed bills below. These are both ongoing efforts being managed through the Hypercare and post-go live support teams.

D. Delayed Bills

20. As part of the transition to a new system, Liberty anticipated there would be some instances of delayed bills. Some were intentional, such as the re-routing of meter reading cycles. Others were anticipated for other reasons such as data conversion corrections, meter service order adjustments, and bills held for investigation and review, etc. To reduce any financial hardship to customers during this transition, Liberty suspended all late fees and collections actions. Liberty has granted liberal payment extensions when requested by customers to allow time for any disruption in the normal bill cycle to be absorbed. Liberty began sending collections notices in June so customers who receive energy assistance benefits would be able to use collection notices in their applications for benefits, but otherwise Liberty has not resumed field shut off activity. Liberty has dedicated staff to assist customers and quickly resolve late bills or service issues.

21. Of the more than 828,000 bills issued in April, May and June, less than 215,000 were delayed for various reasons. **Attachment 2** shows the number of delayed bills for each company.

22. Because of the transaction blackout period and meter reading re-routing effort, bills that were due to be sent the first week of April 2024 were instead sent the week of April 8.

23. Some bills were delayed because of the need for data repair or correction. The majority of these were due to sales tax and franchise fee investigations. The new system uses a third-party software, Onesource, to validate sales tax rates based on customer location with the Missouri Department of Revenue. This validation identified instances where Liberty needed to validate the precise location of a customer's property because the tax rate could change based on a property being within or outside a city boundary. This affected approximately 13,000 customers. Liberty is billing all impacted customers, has fewer than 8,000 left to validate, and expects to have this data corrected by mid-August 2024.

24. In April, Liberty discovered approximately 2,500 service addresses that did not convert correctly from Customer Watch (Liberty's prior customer billing system) to SAP. The service addresses were corrected during Hypercare and customers received their first bill following the implementation of Customer First later than usual but are now on a normal cycle.

25. On May 10, there were approximately 1,200 meter-reading exceptions for Cycles 4 and 5 related to a storm and power outages. The AMI network meters were not able to transmit a midnight register reading used for the monthly bill. In May, the configuration was updated to allow a one-day look back and a one-day look forward. The exceptions were resolved, and the customers have received their bills.

26. On May 14, approximately 1,500 water meters in Bolivar did not have actual readings. After investigation, it was determined that customers with electric, water and sewer accounts did not have the correct configuration set up in the meter read order therefore it was not available for the reader to read. As a result, Liberty estimated usage and billed in the beginning of June. The configuration was corrected, and the meters were available in the handheld to be read the following month.

27. On May 23, approximately 2,300 customers did not receive a bill in April because meter reading orders were not created in SAP. This was due to a data configuration error in converting the accounts which needed to be active to ask the AMI system for the needed meter reading. Most were AMI meters, so Liberty was able to obtain consumption data from the AMI system. In early June, meter reading orders were created for actual April readings and customers received a separate April and May bill. However, it was also discovered that a small number (less than 50) of long bills (greater than a 35-day service period) were inadvertently sent to customers who had to be rebilled in June.

28. On June 4, Liberty discovered billing for Time Choice Plus customers of Empire Electric was not properly prorated due to an error in programming how the fuel charge should prorate. The proration issue affected approximately 80 accounts and was resolved on June 5.

29. On June 5, a billing exception was discovered affecting approximately 600 customers that blocked correct AMI meter readings from posting and allowing bills to calculate. The issue was resolved on June 7.

30. On June 18, approximately 3,000 AMI meters were not communicating with the AMI system due to a technical issue. While not an SAP-specific issue, the delay impaired Liberty's ability to send timely bills. The issue was resolved on June 24.

31. The disruption of AMI communication by storms in June lead to delayed bills for approximately 9,000 customers on time of use rates. Liberty's AMI equipment normally gathers a consumption measure every 15 minutes which is used to apportion the customer's total monthly consumption according to the time of use parameters. When the communication system is disrupted, there can be a delay in receiving the 15-minute interval readings. Following such a disruption, Liberty must create an additional data correction transaction to estimate or gather the missing data. To reduce delayed billing, on June 27, Liberty released bills with up to a 20 kWh difference between the register reads and the sum of the interval consumption measurements, while Itron and the Company made adjustments to the communications network. Itron continues to perform a systematic interrogation of the meters to fill in missing interval data and remove any corresponding estimates that the system had previously calculated. All bills with missing data assumed the usage on the lower time of use rates so that customers would not be overbilled. This rework delayed releasing the affected bills by approximately one week. Liberty is engaged with Itron to assure all data is collected and customers' accounts reflect correct usage.

32. On July 2 and July 9, there was a file transfer error that caused the files sent to the Liberty's third-party bill printer (Kubra) to be delayed later than the day intended. This affected approximately 23,000 bills. The bills were reprinted with revised payment due dates. Liberty has put in place a process for handling such issues to assure bills are mailed as expected.

33. Beginning on July 26, Liberty observed a slow down in the file processing to create printable invoices. This problem affected all of the Liberty companies using SAP. The slow down was traced to an interface with the Onesource sales tax validation application. As a result of the slow down, Liberty was not able to print each day's scheduled invoices in full beginning July 25 until August 2. Until a technical repair was implemented, Liberty was able to adjust bill print volumes to release approximately half of the usual daily volume of bills. A technical solution was implemented on August 2 and all of the pending invoices were prepared for delivery to the bill print provider, except for any invoices that would normally be withheld for exception processing. At peak the number of invoices affected by the delay for the companies covered in this update was 29,858. All of the invoices were printed on August 5 and all invoices reflected an extended payment due date commensurate with the mailed date.

34. As of August 5, 2024, and since the implementation of Customer First, Liberty has 4,674 bills being held from the reporting period: 282 bills for April, 826 for May and 3,566 for June. Most of these require detailed data investigation or field inspections to correct which we anticipate being in August 2024. Liberty will contact affected customers via mail to alert them of the investigation and allowances for extended payment periods after the bills are released.

E. Outages, Closures or Downtimes

35. Certain systems were blacked out for data entry as early as March 27, ending with the launch of Customer First on April 8. Some additional closures or downtimes followed to allow full implementation.

36. Liberty sought to minimize effects on customer payment and service requests during the transition from the legacy system, Customer Watch, to Customer First from March 29 to April 7. Except for a four-hour period on April 3, Customer Watch remained available for customer service representatives to view customer information and track service orders. However, no payments were entered into Customer Watch after March 29. Payments received were processed on April 8. In the interim, Liberty continued to receive payments at walk-in and drive-through and collector locations, providing customers with handwritten receipts.

37. Since the conversion, Liberty has experienced a delay in the ability to serve builders, developers and property owners with new meter sets and electrical connections in the time they prefer. Previously we could issue an order to set a meter in as little as 1 day. The new system requires more upfront data to be collected before a meter can be installed than the legacy systems required which provides additional benefits like more accurate maps for outage management and better customer information. This has resulted in an increase in (10-15) days longer to have a new service line approved and meter installed, resulting in complaints to the Commission. Liberty is adding staff to help reduce the backlog of meter set requests and is reorganizing system processes between multiple departments to streamline the process. This will help reduce the backlog and bring this process in line with reasonable customer expectations.

38. On March 27, customer service representatives stopped entering the completion of turn-off orders in Customer Watch and stopped entering completion of turn-on orders on April 2. However, these orders continued to be completed in the field and order completions were entered

into Customer First beginning April 8. This was a purposeful action to isolate any partially completed computer record work which might have difficulty in the conversion while Liberty caught up on the blackout period transaction processing without depriving customers of their utilities.

39. Liberty's My Account portal had limited accessibility from March 29 until April 8 during which time the new version of the My Account portal was launched (April 8). Generally, payments or changes could not be made from March 29 to April 5. The My Account mobile application was unavailable from April 6 through April 15 as a result of this transition.

40. Liberty's IVR was available throughout the transition, although there were periods of limited function. As noted below, customers could not make payments through the IVR while Kubra, Liberty's third-party payment processor, was unavailable. Outage reporting through IVR was unavailable on two occasions: (1) April 3, from approximately 11:25 a.m. to 3:25 pm; and (2) April 6 beginning at approximately 10:00 a.m. through April 7 at approximately 5:00 p.m. Customers with outage reports were transferred to customer service representatives during these periods.

41. Kubra was unavailable March 29 through April 8, during the transition blackout period. Customers were not able to pay online or by phone and were not able to transfer to the interactive voice response system to make a payment. Customers were able to make payments by other means including walk-in centers or mail.

42. As previously communicated to customers, Liberty's walk-in offices in Bolivar, Branson, Joplin, Neosho and Ozark were closed to walk-in and drive-through traffic from April 8 through April 19 to temporarily reassign staff who normally provide in-person service to answer customer phone calls. During the closure, Liberty continued to collect payments left at the walk-

in office drop boxes. Due to staffing constraints, the Bolivar office remained closed until May 18, 2024, while Liberty hired and trained a Customer Service Representative.

WHEREFORE, Liberty respectfully submits this Report regarding the Company's implementation of Customer First on April 8, 2024. No action on the part of the Commission is requested at this time.

Respectfully submitted,
/s/ Jermaine Grubbs
Jermaine Grubbs MBE #68970
602 S. Joplin Ave.
Joplin, Missouri 64801
Cell Phone: (417) 317-9024
E-Mail: Jermaine.Grubbs@LibertyUtilities.com

CERTIFICATE OF SERVICE

I hereby certify that the above document was filed in EFIS on this 6th day of August, 2024, and sent by electronic transmission to the Staff of the Commission and the Office of the Public Counsel.

/s/ Jermaine Grubbs

ATTACHMENT 1

**The Empire District Electric Company, The Empire District Gas Company and Liberty Utilities
(Missouri Water) LLC d/b/a Liberty or Liberty Utilities**

Case Nos. EE-2021-0232, GE-2024-0201, WE-2024-0202 and SE-2024-0203

April-June 2024

Bill Usage Periods

Line No.	Utility/ Period	Days in Usage Period			Total
		<26	26-35	>35	
1	The Empire District Electric Company				
2	April	5,621	188,264	6,022	199,907
3	May	5,481	201,940	5,573	212,994
4	June	<u>5,471</u>	<u>214,513</u>	<u>758</u>	<u>220,742</u>
5	Total	16,573	604,717	12,353	633,643
6	The Empire District Gas Company				
7	April	774	44,128	35	44,937
8	May	968	43,980	158	45,106
9	June	<u>949</u>	<u>46,320</u>	<u>123</u>	<u>47,392</u>
10	Total	2,691	134,428	316	137,435
11	Liberty Utilities (Missouri Water) LLC				
12	April	267	8,436	436	9,139
13	May	1,255	14,469	2,619	18,343
14	June	<u>752</u>	<u>23,068</u>	<u>5,858</u>	<u>29,678</u>
15	Total	2,274	45,973	8,913	57,160

ATTACHMENT 2

The Empire District Electric Company, The Empire District Gas Company and Liberty Utilities (Missouri Water) LLC d/b/a Liberty or Liberty Utilities
 Case Nos. EE-2021-0232, GE-2024-0201, WE-2024-0202 and SE-2024-0203
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Delayed Bills

Line No.	Utility/ Period	Delayed	Not Delayed	Total
1	The Empire District Electric Company			
2	April	40,235	159,672	199,907
3	May	51,564	161,430	212,994
4	June	<u>61,778</u>	<u>158,964</u>	<u>220,742</u>
5	Total	153,577	480,066	633,643
6	The Empire District Gas Company			
7	April	8,563	36,374	44,937
8	May	5,267	39,839	45,106
9	June	<u>6,917</u>	<u>40,475</u>	<u>47,392</u>
10	Total	20,747	116,688	137,435
11	Liberty Utilities (Missouri Water) LLC			
12	April	7,835	1,304	9,139
13	May	12,913	5,430	18,343
14	June	<u>19,682</u>	<u>9,996</u>	<u>29,678</u>
15	Total	40,430	16,730	57,160