

Denny Hoskins
Secretary of State / Administrative Rules
RULE TRANSMITTAL

001014

Received

SEP 18 2026

SECRETARY OF STATE
ADMINISTRATIVE RULES

Administrative Rules Stamp

JCAR Stamp

RECEIVED
By JCAR at 4:42 pm, Sep 18, 2026

Rule number 20 CSR 4240-21.020

Use a SEPARATE rule transmittal sheet for EACH individual rulemaking.

Name of person(s) Administrative Rules can contact with questions about this rule:

Content Nancy Dippell Phone 573-751-8518 Fax 573-526-6010

Email address Nancy.Dippell@psc.mo.gov

Data Entry Kayla Kliethermes Phone 573-751-4256 Fax 573-526-6010

Email address Kayla.Kliethermes@psc.mo.gov

Interagency mailing address Public Service Commission, 9th Floor Gov. Office Bldg, JC, MO

TYPE OF RULEMAKING ACTION TO BE TAKEN

☐ Emergency rulemaking > ☐ Rule ☐ Amendment ☐ Rescission ☐ Termination

Effective date for the emergency _____

☒ Proposed rulemaking > ☒ Rule ☐ Amendment ☐ Rescission

☐ Rule Action Notice

☐ In Addition

☐ Rule Under Consideration

☐ Request for Non-Substantive Change

☐ Statement of Actual Cost

☐ Order of Rulemaking > ☐ Withdrawal ☐ Adoption ☐ Amendment ☐ Rescission

Effective date for the order _____

☐ Statutory 30 days OR ☐ Specific date _____

Does the Order of Rulemaking contain changes to the rule text? ☐ NO

☐ YES—LIST THE SECTIONS/SUBSECTIONS WITH CHANGES:



Missouri Public Service Commission

MAIDA J. COLEMAN
Commissioner

GLEN KOLKMEYER
Commissioner

KAYLA HAHN
Chair

POST OFFICE BOX 360
JEFFERSON CITY, MISSOURI 65102
573-751-3234
573-751-1847 (Fax Number)
<http://psc.mo.gov>

JOHN P. MITCHELL
Commissioner

VACANT
Commissioner

September 18, 2026

Sarah Schappe
Director
Joint Committee on Administration Rules
State Capitol, Room B8A
Jefferson City, Missouri 65101

Re: 20 CSR 4240-21.020 Filing Schedule, Filing Requirements, and the Integrated Resource Plan Proceeding

Dear Director Schappe,

CERTIFICATION OF ADMINISTRATIVE RULE

I do hereby certify that the attached is an accurate and complete copy of the proposed rule lawfully submitted by the Missouri Public Service Commission.

The Public Service Commission further certifies it has conducted an analysis of whether or not there has been a taking of real property pursuant to section 536.017, RSMo, that the proposed rule does not constitute a taking of real property under relevant state and federal law.

The Public Service Commission has determined and hereby also certifies that if the proposed rule does affect small business pursuant to sections 536.300 to 536.310, RSMo, a small business impact statement has been filed as required by those sections. If no small business impact statement has been filed the proposed rule either does not affect small business or the small business requirements do not apply pursuant to section 536.300.4, RSMo.

Statutory Authority: *sections 386.040, 386.250, 386.610, 393.140, RSMo 2016, and section 393.1900, RSMo Supp. 2025.*

If there are any questions regarding the content of this proposed rule, please contact:



Nancy Dippell
Secretary/Chief Regulatory Law Judge
Missouri Public Service Commission
200 Madison Street
P.O. Box 360
Jefferson City, MO 65102
(573) 751-8518
Nancy.Dippell@psc.mo.gov

Nancy Dippell

Nancy Dippell
Secretary

Enclosures



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Commissioner

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September 18, 2026

Denny Hoskins
Secretary of State
Administrative Rules Division
600 West Main Street
Jefferson City, Missouri 65101

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Secretary

Enclosures

STATE CAPITOL
201 W. CAPITOL AVENUE, ROOM 216
JEFFERSON CITY, MISSOURI 65101



(573) 751-3222
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Mike Kehoe

GOVERNOR
STATE OF MISSOURI

September 16, 2026

Kayla Hahn, Chair
Missouri Public Service Commission
P O Box 360
Jefferson City MO 65102

Dear Ms. Hahn:

Our office has received the Proposed New rulemakings for the following regulations:

- **20 CSR 4240-21.010** General Provisions
- **20 CSR 4240-21.015** Electric Utility Resource Planning Definitions
- **20 CSR 4240-21.020** Filing Schedule, Filing Requirements, and the Integrated Resource Plan Proceeding
- **20 CSR 4240-21.025** Standards and Dataset Management Requirements

Executive Order 25-13 requires this office's approval before state agencies release proposed regulations for notice and comment, amend existing regulations, or adopt new regulations. After our review, we approve submission of the rule and the regulatory impact report (if required) to JCAR and the Secretary of State.

Sincerely,

A handwritten signature in blue ink that reads "Lowell Pearson".

Lowell Pearson
General Counsel

**AFFIDAVIT
PUBLIC COST**

STATE OF MISSOURI)
)
COUNTY OF COLE)

I, Rodney Massman, General Counsel of the Public Service Commission, do declare that it is my opinion that the cost of proposed rule 20 CSR 4240-21.020 is less than five hundred dollars in the aggregate to this agency, any other agency of state government or any political subdivision thereof.



Rodney Massman
General Counsel
Public Service Commission

Subscribed and sworn to before me this 9th day of September, 2026 I am commissioned as a notary public within the County of Cole, State of Missouri, and my commission expires on June 29, 2029.




Notary Public

Title 20 - DEPARTMENT OF COMMERCE AND INSURANCE
Division 4240 - Public Service Commission
Chapter 21 - Resource Planning for Electric Utilities

SEP 18 2026

SECRETARY OF STATE
ADMINISTRATIVE RULES

PROPOSED RULE

20 CSR 4240-21.020 Filing Schedule, Filing Requirements, and the Integrated Resource Plan Proceeding

PURPOSE: This rule establishes the filing schedule, filing requirements, and the schedule of the integrated resource plan proceeding for the electric utility's integrated resource plan and details and supplements the requirements found in section 393.1900, RSMo.

(1) Each electric utility shall file an integrated resource plan (IRP), as required in section 393.1900, RSMo, every four (4) years, or as needed thereafter if ordered by the commission, by the first business day in October of the specified year. Each electric utility shall file its initial IRP on the following schedule:

- (A) Union Electric Company d/b/a Ameren Missouri, or its successor, October 2029;
- (B) Evergy Metro d/b/a Evergy Missouri Metro, or its successor, October 2030;
- (C) Evergy Missouri West d/b/a Evergy Missouri West or its successor, October 2030; and
- (D) The Empire District Electric Company d/b/a Liberty, or its successor, October 2031.

(2) Pre-IRP proceeding.

(A) A pre-IRP proceeding shall be conducted to achieve the requirements outlined in section 393.1900.1., RSMo. The output of a pre-IRP proceeding shall:

- 1. Establish, pursuant to section 393.1900.1(4), any commission prescribed alternative resource plans, scenarios, and sensitivities that the electric utility shall analyze as part of its IRP;
- 2. Specify relevant emerging factors that the electric utility shall examine in its IRP; and
- 3. Identify any variances or waivers that may be requested pursuant to 20 CSR 4240-2.205.

(B) Pre-IRP proceeding process.

1. The pre-IRP proceeding shall commence forty-five (45) days prior to filing the pre-IRP minimum filing requirements. To commence the pre-IRP proceeding, the electric utility shall:

A. File notice in the case and the proposed schedule of upcoming activities, as outlined in paragraphs (2)(B)3. and (2)(B)5.; and

B. Notify all intervenors in the electric utility's most recent general rate case and most recent IRP case of the upcoming activities, as outlined in paragraphs (2)(B)3. and (2)(B)5.

2. Following the notification by the electric utility, the commission will issue notice of the case and establish a time period for intervention.

3. One (1) month prior to filing the pre-IRP minimum filing requirements, the electric utility shall meet with stakeholders to present the preliminary pre-IRP minimum filing requirements and public engagement plan for stakeholder feedback.

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4. The electric utility shall file the pre-IRP minimum filing requirements, as outlined in subsection (2)(C), seventeen (17) months prior to the IRP filing date as outlined in section (1), with the exception of the first IRP under subsection (1)(A), for which the electric utility shall file the pre-IRP minimum filing requirements no less than twenty-six (26) months prior to the IRP filing date.

5. Within one (1) month of the electric utility filing the pre-IRP minimum filing requirements, the electric utility shall:

A. Hold public engagement meetings to provide the opportunity for public input into the electric utility's resource planning process.

B. File a notice summarizing the feedback received from the public engagement efforts, including a description of how the electric utility may incorporate or consider the feedback in the electric utility's IRP submitted pursuant to section (1).

C. Hold presentations and a series of technical sessions with stakeholders to present the pre-IRP proceeding minimum filing requirements, obtain stakeholder feedback, and develop or refine the proposed inputs and assumptions.

6. Within three (3) months of the electric utility filing the pre-IRP minimum filing requirements, the stakeholders and the electric utility must determine if they are able to reach consensus on the topics outlined in subsection (2)(A).

7. The stakeholders and the electric utility shall achieve one of the following outcomes—

A. If consensus is achieved, the stakeholders and the electric utility shall file with the commission the proposed agreed upon alternative resource plans for analysis, the scenarios and sensitivities as inputs for the electric utility's development of alternative resource plans, relevant emerging factors, and any modifications to the previously filed pre-IRP proceeding minimum filing requirements; or

B. If consensus is not achieved, any party may request a hearing for commission determination on unresolved issues.

8. No later than eight (8) months after the electric utility files the pre-IRP minimum filing requirements, the commission shall issue an order to establish and specify the items and information the electric utility shall address in its IRP. The items and information specified in such order shall be in addition to the electric utility's IRP filing obligations pursuant to 20 CSR 4240-21.025 through 20 CSR 4240-21.065.

9. If the electric utility, staff, or public counsel becomes aware of any information that impacts or could impact any direction provided in the commission's order, issued pursuant to paragraph (2)(B)8., the electric utility, staff, or public counsel shall:

A. Notify the stakeholders and electric utility within fourteen (14) days of becoming aware of the impact; and

B. Convene an additional technical session with the stakeholders and the electric utility, if necessary, with the goal of jointly recommending a resolution to the commission, notifying the commission that no recommendation is necessary, or notifying the commission that a resolution could not be reached.

(C) The pre-IRP minimum filing requirements shall include the following:

1. Identification of required and proposed planning reserve margins anticipated over the relevant future timeframe;

2. Identification of current or proposed local clearing requirements anticipated over the relevant future timeframe;

3. Identification of existing federal and state environmental regulations, laws, or rules by resource type, and an explanation of how those regulations, laws, or rules apply to the electric utility;

4. Identification of significant proposed federal and state environmental regulations, laws, or rules, and an explanation of how those regulations, laws, or rules apply to or impact the applicable resource type, and a description of the expected timeframe when each proposed regulation, law, or rule will take effect;

5. Load forecasts for monthly system energy and monthly non-coincident peak over the planning horizon;

6. Identification of anticipated critical uncertain factors based on annual updates prepared by the electric utility in accordance with 20 CSR 4240-21.065(2)(B)2. or 20 CSR 4240-22.080, including descriptive statistics and probability distribution;

7. Identification of reasonable supply-side and demand-side resources that could address the need for additional energy and capacity including, but not limited to:

A. Type and description of technology for proposed supply-side or demand-side resources;

B. Projected load impact due to load-building programs; and

C. Projected load management and demand response savings;

8. Identification of projected range of total costs of different types of technologies and fuels used for existing and future electric generation, including information on the electric utility's availability of different types of fuels, and the projected total costs shall:

A. Include capital, fixed and variable operation and maintenance costs, fuel, and any other costs that are relevant for the particular technology; and

B. Reflect costs developed or incurred no more than twelve (12) months prior to the pre-IRP minimum requirements filing date;

9. Identification of information that may be useful in developing alternative resource plans, scenarios, sensitivities, and relevant emerging factors, for stakeholder discussion;

10. The comprehensive database required pursuant to 20 CSR 4240-21.030(1)(B);

11. A capacity balance forecast, included herein, provided in the following specified form:

A. The base-case capacity balance forecast shall be provided for each season as determined by the appropriate RTO/ISO and shall include the following:

(I) Only existing supply-side and demand-side resources through the currently expected life of each asset or contract; and

(II) Expected load growth over the planning horizon without additions of large load customers;

B. The large load addition capacity balance forecast shall include:

(I) Only existing supply-side resources through the currently expected life of each asset or contract; and

(II) Expected load growth over the planning horizon with additions of large load projects that have the required probability of interconnection pursuant to 20 CSR 4240-21.030(6)(C)3.; and

12. Any other factors the commission may order to be considered in developing alternative resource plans.

(D) The pre-IRP minimum filing requirements are not intended to be the finalized inputs or assumptions to be incorporated within the IRP analyses and shall be updated and documented as specified in subparagraph (3)(D)4.A.

(E) To the extent that any information required as part of the pre-IRP minimum filing requirements relies upon prior studies or prior IRPs and would materially impact the outcome of the next IRP, the electric utility shall update the information prior to the pre-IRP process to account for current and expected market conditions, regulatory changes, or other conditions or events that necessitate changes to the assumptions.

(3) IRP content.

(A) The electric utility's IRP shall demonstrate compliance with the provisions of Chapter 21 and section 393.1900, RSMo, and shall include at a minimum—

1. A letter of transmittal;
2. An executive summary;
3. Technical volumes; and
4. Such other information or formatting as the commission may order.

(B) The electric utility's letter of transmittal shall:

1. Express commitment to the preferred resource plan and its implementation plan; and
2. Be signed by an officer of the electric utility having the authority to bind and commit the electric utility to the implementation plan for the preferred resource plan, if the commission determines the preferred resource plan to be reasonable and prudent in whole or in part.

(C) The electric utility's executive summary shall—

1. Be suitable for distribution to the public in an electronic format, with redactions if needed;
2. Describe –
 - A. The electric utility;
 - B. Its existing supply-side resources, transmission, and distribution facilities;
 - C. Existing purchase power arrangements; and
 - D. Existing demand-side programs;
3. Justify the electric utility's selection of the preferred resource plan, and the strategy for the implementation plan, which shall:
 - A. Provide a summary of the preferred resource plan to meet expected energy service needs for the planning horizon, clearly showing the distributed energy resources, demand-side and supply-side resources, including additions and retirements for each resource type;
 - B. Identify the critical uncertain factors affecting the preferred resource plan;
 - C. Describe the existing legal mandates and approved cost recovery mechanisms, and include the following performance measures for each year of the planning horizon:
 - (I) Estimated annual revenue requirement;
 - (II) Estimated annual customer rate impact; and

(III) Estimated company financial ratios as specified in 20 CSR 4240-21.060(1)(C)3; and

D. Describe the major research projects and programs the electric utility will continue or commence during the implementation period; and

4. Be organized by and summarize the contents of the technical volumes; and

5. Include information for each rate class and for the total of all rate classes:

A. The base-case load forecasts for peak demand and for energy for the planning horizon, with and without demand-side resources; and

B. A listing of the economic and demographic assumptions associated with the base-case load forecast as specified in 20 CSR 4240-21.030(4).

(D) The electric utility's technical volumes shall—

1. Justify decisions in developing the alternative resource plans, selecting the preferred resource plan, and developing the implementation plan;

2. Be organized by chapters corresponding to 20 CSR 4240-21.025 through 20 CSR 4240-21.060 and 20 CSR 4240-21.065(1) and include all documentation and information specified in 20 CSR 4240-21.025 through 20 CSR 4240-21.065(1), respectively;

3. Include the capacity balance forecast, in the specified form included herein, for the preferred resource plan and each alternative resource plan the electric utility considered; and

4. Include a stand-alone chapter that:

A. Outlines any differences between the information ordered by the commission in paragraph (2)(B)8. and the information used by the electric utility in its IRP, along with the reasoning for those differences;

B. Identifies the naming convention of the alternative resource plans selected and identifies the alternative resource plan that the electric utility selected as the preferred resource plan; and

C. Addresses relevant emerging factors ordered by the commission under paragraph (2)(B)8.

(4) Cost updates to the electric utility's IRP.

(A) If the electric utility's cost estimates submitted in the IRP have materially changed, the electric utility may file an update to the IRP on or before one hundred fifty (150) calendar days from the IRP's filing date.

(B) If the electric utility files a cost update to the IRP, then the electric utility shall:

1. Include the cost updates in a format with sufficient detail to distinguish any changes in cost and an explanation of any other impacts over the planning horizon for costs specified in 20 CSR 4240-21.060 and 20 CSR 4240-21.065(1);

2. Notify the stakeholders no more than ten (10) days after the electric utility becomes aware that a cost update is needed; and

3. Convene discussions with the stakeholders on the potential for requesting a modified procedural schedule to accommodate the additional review.

(5) Potential modifications to the electric utility's approved preferred resource plan.

(A) Proposed changes or unforeseen events may require changes to the electric utility's approved preferred resource plan or the implementation plan. If, between IRP filings, the electric utility's implementation plan becomes materially inconsistent with the approved preferred resource plan, or if the electric utility determines that the approved preferred resource plan or implementation plan is no longer appropriate, either due to the range pursuant to 20 CSR 4240-21.060(4)(E)2.A. being exceeded or for other reasons, the electric utility shall:

1. File a notification in the IRP case within thirty (30) days of the electric utility's determination of such change; and

2. Serve notice to stakeholders in the most recent IRP case.

(B) The electric utility, within thirty (30) days of its notification filing pursuant to paragraph (5)(A)1., shall file:

1. A description of all changes to the approved preferred resource plan and the associated implementation plan;

2. The impact of each change on the annual revenue requirement;

3. The impact of the change on the financial performance measures specified in 20 CSR 4240-21.060(1)(C)3.; and

4. Any impact to the performance measures specified in the last IRP pursuant to 20 CSR 4240-21.060(1).

(C) If the electric utility contends that, despite the proposed changes to its approved preferred resource plan identified in subsection (5)(A), certain supply-side resources previously determined by the commission as eligible for a limited inquiry certificate of convenience and necessity (CCN) remain materially consistent with the approved preferred resource plan, the electric utility shall include in its notification:

1. Identification of such supply-side resources or quantities by supply-side resource type;

2. A supporting explanation; and

3. Explanation of any impact on the electric utility's ability to timely meet customer energy needs if such supply-side resources are delayed.

(D) Within twenty (20) days after the electric utility files information in accordance with subsection (5)(B), any stakeholder may respond to the electric utility's notice.

(E) Unless otherwise ordered by the commission, within sixty (60) days of the electric utility's filing of the notice required in paragraph (5)(A)1., the limited inquiry CCN shall be unaffected by the filing of the notice for the specified supply-side resources or specified quantities of supply-side resource types that the electric utility identified as remaining materially consistent with the approved preferred resource plan.

Forecast of Capacity Balance (MW)

Name of Utility: _____

Year of Electric Utility Resource Planning Filing: _____

	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>	<u>Year 4</u>	<u>Year 5</u>		<u>Year 20</u>
A. System Generation Capacity							
Unit 1							
Unit 2							
Unit 3							
Unit 4							
.....							
Unit i							
Total Base Capacity							
Unit i+1							
Unit i+2							
Unit i+3							
Unit i+4							
.....							
Unit j							
Total Intermediate/Peaking Capacity							
Wind							
Solar							
Total Intermittent Capacity							
Percent Accredited Intermittent Capacity							
Total Accredited Intermittent Capacity							
Total Generation Capacity = TGC							
B. Capacity Transactions							
Purchases							
Source 1							
Source 2							
Source 3							
.....							
Source k							
Total Purchases							
less Sales							
Net Transactions = NT							
Total System Capacity = TSC = TGC + NT							
C. System Peaks & Reserves							
Peak Demands							
Forecasted Peak							
less DSM							
Peak Forecast less DSM = PF							
Capacity Reserves = CR = TSC - PF							
D. Capacity Needs							
% Reserve Margin = RM							
% Capacity Margin = CM = RM/(1 + RM)							
Required Capacity = RC = PF/(1-CM)							
Capacity Balance = TSC - RC							

AUTHORITY: sections 386.040, 386.250, 386.610, 393.140, RSMo 2016, and section 393.1900, RSMo Supp. 2025. Original rule filed _____, 2026.

PUBLIC COST: This proposed rule will not cost state agencies or political subdivisions more than five hundred dollars (\$500.00) in the aggregate.

PRIVATE COST: This proposed rule will not cost private entities more than five hundred dollars (\$500.00) in the aggregate.

NOTICE OF PUBLIC HEARING AND NOTICE TO SUBMIT COMMENTS: Anyone may file comments in support of or in opposition to this proposed rule with the Missouri Public Service Commission, Nancy Dippell, Secretary of the Commission, P.O. Box 360, Jefferson City, MO 65102. To be considered, comments must be received at the commission's offices on or before December 2, 2026, and should include a reference to Commission Case No. EX-2027-0085. Comments may also be submitted via a filing using the commission's electronic filing and information system at https://psc.mo.gov/General/Submit_Comments. A public hearing regarding this proposed rule is scheduled for December 15, 2026, at 10:00 a.m., in Room 310 of the Governor Office Building, 200 Madison St., Jefferson City, MO. Interested persons may appear at this hearing to submit additional comments and/or testimony in support of or in opposition to this proposed rule and may be asked to respond to commission questions. Any persons with special needs as addressed by the Americans with Disabilities Act should contact the Missouri Public Service Commission at least ten (10) days prior to the hearing at one (1) of the following numbers: Consumer Services Hotline 1-800-392-4211 or TDD Hotline 1-800-829-7541.