DOC11R

Case Management System - KY Public Service Commission

Regular Cases Before the Commission as of November 11, 2026

2013-00307 RECEIVED: 08/05/13 FILED: 08/22/13 FINAL: 04/11/14 REOPENED:
SUSPENSION DATE: 02/21/14

CASE CODE
Alternative Rate Filing Adjustment

UTILITIES:
JoAnn Estates Utilities, Inc.

HEARINGS:

03/04/14	Informal Conference
01/23/14	Formal Hearing
12/20/13	Informal Conference

INDEX OF EVENTS:

06/11/15	POST CASE: JoAnn Estates Utilities, Inc. Sludge Hauling Expenses for 2014
05/15/14	POST CASE: Joann Estates Utilities Notice Regarding Refund
04/11/14	Order Entered: 1 The rate proposed in Joann Estates' Application is denied. 2. The rate shown in Appendix B is approved for sewer service rendered on and after February 22, 2014. 3. Within 20 days of the date of this Order, Joann Estates shall file revised tariff sheets with the Commission, using the Commission's electronic Tariff Filing System, containing the rates set forth in Appendix B to this Order. 4. As agreed in response to Staffs report, Joann Estates shall expend $9,600 annually for sludge removal in all future reporting periods; however, this amount is prorated to $7,200 for the year ending December 31, 2014, since Joann Estates will not begin recovery of the sludge hauling expense until April, 2014, when the rates approved by this Order become effective. Joann Estates shall report all sludge hauling expenses using account 701-C (Labor and Expense, Treatment System, Sludge Hauling) when filing its Annual Financial and Statistical Reports with the Commission and it shall attach copies of all invoices that support the amount reported. The invoices shall clearly indicate the plant or lagoon from which sludge was removed. 5. In all future reporting periods, Joann Estates shall depreciate its assets using the straight-line method. No retroactive adjustment to accumulated depreciation or retained earnings shall be made to account for this change in accounting method.
03/12/14	Memorandum dated 3/11/14 for Informal Conference of 3/4/14; Comments, if any, due 3/18/14.
03/07/14	Joann Estates Utilities, Inc. Informal Conference Response
03/06/14	Order Entered; Joann Estates shall participate in the March 4, 2014 informal conference via telephone. 2. Commission Staff shall contact Joann Estates by electronic mail to provide details for attending the conference by telephone.
03/05/14	PSC Letter Filing Document
03/03/14	Joann Estates Utilities, Inc. Request for Telephone Conference
02/26/14	Letter Filing Document into the Record
02/24/14	Order Entered: 1. The record in this case is reopened to take further evidence regarding the specific location of the sludge to be removed and the expenses to be incurred in removing the sludge. 2. An informal conference shall be held on Tuesday, March 4, 2014, at 10:00 am. Eastern Standard Time, in Conference Room 1 of the Commission's offices at 211 Sower Boulevard, Frankfort, Kentucky.
02/20/14	Order Entered: that Joann Estates shall maintain its records in such manner as will allow it, the Commission, or any customer to determine the amounts to be refunded and to whom in the event a refund is ordered upon final resolution of this matter.
02/12/14	Joann Estates Utilities Inc. Notice of Implementation of Proposed Rate Increase
01/21/14	JoAnn Estates Utilities, Inc. Nelson Insurance Agency Payment
01/08/14	Joann Estates Utilities, Inc. Supplemental Filing Regarding Rate Case
12/19/13	Order Entered: 1. The conference scheduled in this matter for December 20, 2013 is cancelled.

DOC11R **Case Management System - KY Public Service Commission**

Regular Cases Before the Commission as of November 11, 2026

	2. No formal hearing in this matter shall be held. 3. The record in this case shall remain open for a period of 21 days from the date of this Order. At the end of this period, the record shall be closed and this matter shall be considered submitted for decision.
12/16/13	Joann Estates Utilities, Inc. Response to PSC Staff Report
12/04/13	Joann Estates Utilities Inc. List of Customers Served
12/03/13	Order Entered: 1. The motion of Ms. Hammond to intervene is granted. 2. Ms. Hammond shall be entitled to the full rights of a party and shall be served with the Commission's Orders and with filed testimony, exhibits, pleadings, correspondence, and all other documents submitted by parties after the date of this Order. 3. Should Ms. Hammond file documents of any kind with the Commission in the course of these proceedings, Ms. Hammond shall also serve a copy of said documents on all other parties of record.
11/27/13	Notice of Filing of Commission Staff Report
11/08/13	Attorney General_Response to Teresa Campbell regarding Joann Estates Utilities
10/23/13	Response Letters to Teresa Campbell and R. Tommy Tucker
10/07/13	Order Entered: 1. No later than November 27, 2013, Commission Staff shall file with the Commission and serve upon all parties of record a written report containing its findings and recommendations regarding Joann Estates' requested rate adjustment. 2. No later than December 13, 2013, or 14 days after the date of the filing of the Commission Staff Report, whichever occurs earlier, each party of record shall file with the Commission: a. Its written comments on and any objections to the findings and recommendations contained in the Commission Staff Report; b. Any additional evidence for the Commission's consideration; and, c. Written notice as to whether this matter may be submitted for decision based upon the existing record without hearing. 3. If Commission Staff finds that Joann Estates' financial condition supports a higher rate than Joann Estates proposes, or the assessment of an additional rate or charge not proposed in Joann Estates' application, Joann Estates in its response to the Commission Staff Report shall also state its position in writing on whether the Commission should authorize the assessment of the higher rate or the recommended additional rate or charge.
09/09/13	Public comment of Teresa Campbell
08/26/13	Destiny Hammond's Request to Intervene
08/23/13	Meets Requirements Letter
08/23/13	R. Tommy Tucker Public Comments
08/22/13	JoAnn Estates Utilities, Inc. Statement of Disclosure of Related Party Transactions
08/06/13	Acknowledge Receipt of Filing
08/05/13	JoAnn Estates Utilities, Inc. Application for Rate Adjustment for Small Utilities Pursuant to 807 KAR 5:076

Total Number of Cases: 1