

**State of Michigan  
Civil Service Commission**  
Capitol Commons Center, P.O. Box 30002  
Lansing, MI 48909

<b>Position Code</b> 1. DEPTALTEK77Y
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## POSITION DESCRIPTION

This position description serves as the official classification document of record for this position. Please complete the information as accurately as you can as the position description is used to determine the proper classification of the position.

<b>2. Employee's Name (Last, First, M.I.)</b>	<b>8. Department/Agency</b> DEPT OF INS AND FIN SERVICE
<b>3. Employee Identification Number</b>	<b>9. Bureau (Institution, Board, or Commission)</b> Office of Insurance Licensing, Investigations, and Audits
<b>4. Civil Service Position Code Description</b> Departmental Analyst-E	<b>10. Division</b> Insurance Licensing
<b>5. Working Title (What the agency calls the position)</b> Education Program Analyst	<b>11. Section</b>
<b>6. Name and Position Code Description of Direct Supervisor</b> BOYNTON, ADRYNE; DEPARTMENTAL MANAGER-3	<b>12. Unit</b>
<b>7. Name and Position Code Description of Second Level Supervisor</b> HUISKEN, JILL STATE ADMINISTRATIVE MANAGER-1	<b>13. Work Location (City and Address)/Hours of Work</b> 530 W. Allegan, Lansing / 8:00 a.m.-5:00 p.m.

**14. General Summary of Function/Purpose of Position**

This position functions as an analyst regarding compliance with the Michigan Pre-Licensing (PE) and Continuing Education (CE) Program in the Insurance Licensing Section. This includes oversight of the activities of Education Providers (PE and CE), and the education aspects of the third-party vendor contracted to develop and administer licensure examinations. Review and approve education provider, instructor and course applications, audit education programs.

Responsible for training the third-party vendor and assure compliance with provider and course approval requirements; assures education audits are conducted annually. This position administers the annual renewal of CE providers and the bi-annual renewal of CE courses.

Monitor the DIFS Education Roster Entry System (DERES) utilized for education providers to submit course completion data to DIFS. Assures the Licensing web pages specific to the education program remain current. Reviews and approves education waiver requests (PE and CE). Processes Education Instructor applications.

15. Please describe the assigned duties, percent of time spent performing each duty, and what is done to complete each duty.

List the duties from most important to least important. The total percentage of all duties performed must equal 100 percent.

**Duty 1**

**General Summary:**

**Percentage: 55**

Oversee the activities of Education Providers (PE and CE), the education aspects of the third-party vendor contract including review and approval of education provider, instructor and course applications, and auditing of education programs.

Train third party vendor to assure compliance with provider and course approval requirements; assure education audits are conducted annually. Administer the annual renewal of CE providers and the bi-annual renewal of CE courses.

Make recommendations to management for improvements in statewide program parameters and guidelines for the education program.

**Individual tasks related to the duty:**

- Oversee the activities of Education Providers (PE and CE) to ensure compliance with the Insurance Code.
- Oversee vendor-conducted processing of pre-licensure and continuing education application submissions (provider and course).
- Ensure education programs are audited annually, and education providers are informed of any infractions and/or areas of concern.
- Provide training to vendor staff and co-workers to assure completeness, accuracy and fair evaluation of courses and credits offered to comply with statutory education requirements of providers and licensees.
- Administer annual renewal of CE providers, and bi-annual renewal of CE courses.
- Follow up with various entities to ensure compliance.
- Respond to inquiries verbally and in writing regarding statutory requirements.
- Give feedback to improve the general guidelines for the review of education providers, instructors and courses assuring conformance with Michigan insurance statutes, rules, regulations, bulletins, filing requirements, policies and procedures.

**Duty 2**

**General Summary:**

**Percentage: 15**

Monitor the DIFS Education Roster Entry System (DERES) utilized for education providers to submit course completion data to DIFS. Assure the Licensing web pages specific to the education program remain current. Review and approve education waiver requests (PE and CE). Respond to DIFS-Licensing emails as assigned.

**Individual tasks related to the duty:**

- Monitor the DIFS Education Roster Entry System (DERES).
- Review and approve/deny education waiver requests (PE and CE).
- Monitor the Licensing Section Education website content and recommend changes.
- Research, resolve and respond to individual, licensee, and DIFS staff concerns regarding website content.
- Participate with other offices when Code violations are suspected.
- Receive applicant complaints, and research, resolve and respond to concerns regarding education content issues.
- Respond to DIFS-Licensing emails as assigned.

**Duty 3**

**General Summary:**

**Percentage: 15**

Review proposed legislation regarding the potential impact on the education program, and proposed NAIC Uniform Education Working Group recommendations with applicability to the Insurance Code; give feedback to management.

**Individual tasks related to the duty:**

- Review proposed legislation regarding the potential impact on the education program.
- Review proposed NAIC Uniform Education Working Group recommendations with applicability to the Insurance Code.
- Develop and recommend programming improvements for department related electronic systems as related to the education program.
- Represent DIFS at conferences and seminars, providing speeches and otherwise sharing or learning information in the position's area of expertise as assigned.
- Receive applicant complaints, and research, resolve and respond to concerns regarding Education issues.

**Duty 4**

**General Summary:**

**Percentage: 15**

Processes CE Late Reports on a monthly basis to assure compliance with MCL 500.1204c. Draft Notices of Opportunity to Show Compliance (NOSC) detailing noncompliance and oversee assessment of late penalties and enforcement actions for untimely reporting to the State. Special projects and other duties as assigned.

**Individual tasks related to the duty:**

- Generate system reports for untimely provider reporting of CE credits to the State.
- Generate department Notice of Opportunity to Show Compliance (NOSC) and Settlement Agreement (SA) documents for CE providers for management approval.
- Recommend to management if appropriate to waive or reduce the market conduct penalty when a CE provider disputes a penalty.
- Maintain accurate records of CE late reporting fines, forward appropriate records to unit manager and track CE providers ongoing compliance.
- Review applications for PE and CE instructors
- Enter instructor information into Licensing database
- Update instructor/provider associations in Licensing database
- Process CE Provider annual renewals
- Process CE course offerings to Licensing's website
- Import CE course completion
- Troubleshoot the reporting of CE credits
- Work on special projects as assigned.
- Perform other duties as assigned.
- Assist Unit Manager as needed.

**16. Describe the types of decisions made independently in this position and tell who or what is affected by those decisions.**

Provide guidance to the vendor regarding review of education provider and course applications for approval or denial. Interpret compliance issues in accordance with the statute. Establish priorities for this area to accomplish goals and directives. Review requests for CE and PE waivers.

Education providers can be affected. Producers and/or candidates wanting to become licensed are affected.

**17. Describe the types of decisions that require the supervisor's review.**

Supervisor's review needed when questions arise that have not been previously addressed or for which no guidelines exist. Consult with supervisor for clarification of policy issues.

**18. What kind of physical effort is used to perform this job? What environmental conditions in this position physically exposed to on the job? Indicate the amount of time and intensity of each activity and condition. Refer to instructions.**

Position duties and tasks are performed in a traditional office environment that includes considerable sitting, occasional standing, limited lifting, constant computer usage and normal office routines. Position requires occasional in-state travel by automobile and limited out-of-state travel usually by air. Occasional overnight travel is required.

19. List the names and position code descriptions of each classified employee whom this position immediately supervises or oversees on a full-time, on-going basis.

Additional Subordinates

20. This position's responsibilities for the above-listed employees includes the following (check as many as apply):

- |                            |                                    |                            |                                   |
|----------------------------|------------------------------------|----------------------------|-----------------------------------|
| <input type="checkbox"/> N | Complete and sign service ratings. | <input type="checkbox"/> N | Assign work.                      |
| <input type="checkbox"/> N | Provide formal written counseling. | <input type="checkbox"/> N | Approve work.                     |
| <input type="checkbox"/> N | Approve leave requests.            | <input type="checkbox"/> N | Review work.                      |
| <input type="checkbox"/> N | Approve time and attendance.       | <input type="checkbox"/> N | Provide guidance on work methods. |
| <input type="checkbox"/> N | Orally reprimand.                  | <input type="checkbox"/> N | Train employees in the work.      |

22. Do you agree with the responses for items 1 through 20? If not, which items do you disagree with and why?

Yes.

23. What are the essential functions of this position?

Provides oversight and feedback regarding the administration of the education program portion of the third-party vendor contract for examination development and delivery, pre-licensure education and continuing education, and other contract services utilized by the Office of Insurance Licensing, Investigations, and Audits. This position may assist with examination development and other aspects of the contracted services. The emphasis of this position is the oversight of the pre-licensure and continuing education program charged with review, approval/disapproval of applications for education providers, instructors, and courses as mandated under Section 1204 through 1204f of the Michigan Insurance Code, to assure pre-licensing and continuing education providers and courses remain compliant.

24. Indicate specifically how the position's duties and responsibilities have changed since the position was last reviewed.

Downgrade for recruitment purposes.

25. What is the function of the work area and how does this position fit into that function?

The Insurance Licensing Section is responsible for administering a licensing program for individual and business entity insurance producers, solicitors, adjusters, counselors, premium finance companies, and reinsurance intermediaries. It reviews the licensure qualification of and maintains records on insurance producers, solicitors, adjusters, counselors, premium finance companies and reinsurance intermediaries. The Insurance Licensing Section is also responsible for Third Party Administrator certifications, Managing General Agency appointments and foreign risk retention group and purchasing group registrations. The section also oversees prelicensure and continuing education approval and renewal, as well as record changes including licensee alerts and self-reports.

This position acts as a resource for the Michigan Education Program. This position assures the vendor performs the following functions: review and approval/disapproval of education provider applications and course submittals mandated under Section 1204 through 1204f of the Michigan Insurance Code. Assures education providers comply with pre-licensing and continuing education reporting requirements. Processes CE and PE waiver requests and monitors the content of the Licensing Section Education web pages.

26. What are the minimum education and experience qualifications needed to perform the essential functions of this position.

EDUCATION:

Possession of a Bachelor's degree in any major.

EXPERIENCE:

Departmental Analyst 9 No specific type or amount is required.

Departmental Analyst 10 One year of professional experience.

Departmental Analyst P11 Two years of professional experience, including one year of experience equivalent to the intermediate (10) level in state service.

**KNOWLEDGE, SKILLS, AND ABILITIES:**

- Ability to interpret laws, rules and regulations relative to the insurance industry.
- Ability to organize and interpret information and take appropriate action.
- Ability to communicate effectively both verbally and in writing, handle responsibility and exercise sound judgment.
- Ability to coordinate activities with others, be courteous and helpful to the public and work under pressure.
- Ability to utilize computers and databases within a Windows environment.

**CERTIFICATES, LICENSES, REGISTRATIONS:**

N/A

**NOTE: Civil Service approval does not constitute agreement with or acceptance of the desired qualifications of this position.**

***I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.***

\_\_\_\_\_  
Supervisor

\_\_\_\_\_  
Date

**TO BE FILLED OUT BY APPOINTING AUTHORITY**

Indicate any exceptions or additions to the statements of employee or supervisors.

N/A

***I certify that the entries on these pages are accurate and complete.***

DIANE GRIGGS

6/23/2021

\_\_\_\_\_  
Appointing Authority

\_\_\_\_\_  
Date

***I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.***

\_\_\_\_\_  
Employee

\_\_\_\_\_  
Date