

Position Code

1.

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

This position description serves as the official classification document of record for this position. Please complete this form 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 Evaluation
<b>4. Civil Service Position Code Description</b>	<b>10. Division</b>
Departmental Analyst-E	
<b>5. Working Title (What the agency calls the position)</b>	<b>11. Section</b>
Licensing Analyst	Financial Regulation
<b>6. Name and Position Code Description of Direct Supervisor</b>	<b>12. Unit</b>
SCHAFER, JASON P.; FINANCIAL INSTITUTION MANAGER – 4	
<b>7. Name and Position Code Description of Second Level Supervisor</b>	<b>13. Work Location (City and Address)/Hours of Work</b>
TESS, PATRICK J; STATE ADMINISTRATIVE MANAGER-2	530 W. ALLEGAN ST, LANSING, MI 48915  8:00 A.M. – 5:00 P.M.; Monday - Friday
<b>14. General Summary of Function/Purpose of Position</b>	
<p>This position functions as an applications coordinator for auto self-insurers, certified, reciprocal jurisdiction, accredited and trustee reinsurers. The function of the position includes receiving, reviewing, analyzing, and making recommendations on applications for entities to self-insure for auto and reviewing, analyzing and making recommendations on applications and renewals for certified, accredited, trustee and reciprocal jurisdiction reinsurers. This position also acts as secondary applications coordinator for traditional insurer and other risk bearing entities.</p>	

**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 of Duty 1**

**% of Time 45**

Review, research and analyze initial license and annual renewal applications for entities that apply to self-insure for auto insurance. Recommends approval or denial of applications for issuance of the certificate to self-insure.

**Individual tasks related to the duty.**

- Review and analyze applications to ensure compliance with the laws, rules and regulations on auto insurance, and make a recommendation on issuance of the certificate.
- Communicate with the applicant the results of the review and evaluation of the application and any information necessary to facilitate the issuance of the certificate.
- Answer questions and inquiry correspondence on auto self-insurance from outside parties or governmental agencies.
- Research and interpret existing laws, rules and policies and procedures as they relate to the program.
- Recommend any changes to DIFS' processes or legislative changes for the program to better protect the public.
- Maintain records on entities authorized to self-insure for auto and update information on DIFS website.
- Report vehicle counts to the Michigan Auto Placement Facility.

Duty 2

**General Summary of Duty 2**

**% of Time 35**

Review, research and analyze initial license and annual renewal applications for entities that apply to be certified, accredited, trusted and reciprocal jurisdiction reinsurers in Michigan.

**Individual tasks related to the duty.**

- Review and analyze applications to ensure compliance with the laws, rules and regulations to be listed and eligible to be recognized as certified, accredited, trusted and reciprocal jurisdiction reinsurers in Michigan as defined under Chapter 11 of the Insurance Code.
- Handle all inquiries from insurers or other states on Michigan's processes and requirements to be licensed.
- Review web pages and post accurate and timely information to DIFS' website.
- Maintain accurate records including DIFS' database to support licensure activities.
- Maintain written policies and procedures regarding the licensure process.
- Monitor activities or changes to licensure requirements made by National Association of Insurance Commissioners' working groups for these type of entities and make recommendation to any laws or processes Michigan needs to enact or adopt.

Duty 3

**General Summary of Duty 3**

**% of Time 10**

Review, research and analyze applications for licensure for traditional insurance companies and other risk bearing entities.

**Individual tasks related to the duty.**

- Receive and enter any new applications or license maintenance requests into the database.
- Conduct a review of applications for completeness and correspond with the applicant.
- Forward documents to other staff, units or agencies for review, and coordinate getting responses back.
- Answer any questions or inquiries on the application process.
- Conduct a review of corporate documents or other documents assigned to ensure they comply with statutory requirements.

Duty 4

**General Summary of Duty 4**

**% of Time 10**

Other assignments or special projects.

**Individual tasks related to the duty.**

- Perform special projects as assigned by supervisor.
- Review, research and analyze any complex requests under the Freedom of Information Act. Recommend any documents that must be held confidential per statute or any information within documents that must be redacted.
- Coordinate the activities within the office to appropriately respond to FOIA requests within the statutory timeframe to the DIFS FOIA Coordinator.

Duty 5

**General Summary of Duty 5**                      % of Time \_\_\_\_\_

Assist with other related special projects.

**Individual tasks related to the duty.**

Duty 6

**General Summary of Duty 6**                      % of Time \_\_\_\_\_

**Individual tasks related to the duty.**

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

The individual will respond to calls or inquiries on the application process.

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

Any non-routine inquiries or applications involving unique circumstances or determination on whether records are confidential. Decisions that are not covered by internal procedures, guidelines or Department of Insurance and Financial Services' policy.

**18. What kind of physical effort is used to perform this job? What environmental conditions is 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 which includes considerable sitting, occasional standing, limited lifting, considerable microcomputer usage, and normal office routines.

**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. (If more than 10, list only classification titles and the number of employees in each classification.)**

<u>NAME</u>	<u>CLASS TITLE</u>	<u>NAME</u>	<u>CLASS TITLE</u>

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

N Complete and sign service ratings.

N Assign work.

N Provide formal written counseling.

N Approve work.

N Approve leave requests.

N Review work.

N Approve time and attendance.

N Provide guidance on work methods.

N Orally reprimand.

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?**

Reviewing and analyzing licensing applications and annual renewals for auto self-insurers. Reviewing and analyzing licensure and renewal applications for certified, reciprocal jurisdiction, accredited and trustee reinsurers. Conducting full range of professional research and analysis. Coordinates complex office FOIA responses.

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

There have been no changes to the duties and responsibilities.

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

This Office of Insurance Evaluation has the responsibility for licensing and monitoring the financial condition of Michigan's insurance companies, captive insurers and other risk bearing entities to protect consumers. This position analyzes auto self-insurance applications, prepares documents for the director's signature and issues certificate of insurance. The position also analyzes certified, accredited, trustee and reciprocal jurisdiction reinsurer applications and prepares documents for the office director's signature. This position assists with the process of traditional insurer application for licensure or other license maintenance activities.

**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.

**Alternate Education and Experience**

**Departmental Analyst 9 – 12**

Educational level typically acquired through completion of high school and the equivalent of at least two years of full-time active duty experience as or above the E-6 level in the uniformed services may be substituted for the educational requirement.

**KNOWLEDGE, SKILLS, AND ABILITIES:**

- Knowledge of the principles and practices of research and analysis.
- Ability to organize, evaluate, and present information effectively.
- Ability to interpret laws, rules, and regulations relative to the work.
- Ability to effectively communicate both verbally and in writing.
- Ability to exercise considerable tact and diplomacy in dealing with applicants.
- Ability to prioritize tasks.

**CERTIFICATES, LICENSES, REGISTRATIONS:**

None required.

***NOTE: Civil Service approval of this position does not constitute agreement with or acceptance of the desirable qualifications for 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's Signature**

\_\_\_\_\_  
**Date**

**TO BE FILLED OUT BY APPOINTING AUTHORITY**

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

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

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

\_\_\_\_\_  
Date

**TO BE FILLED OUT BY EMPLOYEE**

*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's Signature

\_\_\_\_\_  
Date

**NOTE: Make a copy of this form for your records.**