

**State of Michigan
Civil Service Commission**

Capitol Commons Center, P.O. Box 30002
Lansing, MI 48909

Position Code

1. DPTLTCH

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.

2. Employee's Name (Last, First, M.I.)	8. Department/Agency DEPT OF INS AND FIN SERVICE
3. Employee Identification Number	9. Bureau (Institution, Board, or Commission)
4. Civil Service Position Code Description DEPARTMENTAL TECHNICIAN-E	10. Division Insurance Licensing, Investigations, and Audits
5. Working Title (What the agency calls the position)	11. Section Insurance Licensing
6. Name and Position Code Description of Direct Supervisor PAGE, LESLIE A; DEPARTMENTAL MANAGER-3	12. Unit Licensing
7. Name and Position Code Description of Second Level Supervisor HUISKEN, JILL A; STATE ADMINISTRATIVE MANAGER-1	13. Work Location (City and Address)/Hours of Work 530 W Allegan, Lansing, MI 48933 / 8:00 A.M. – 5:00 P.M., Monday - Friday

14. General Summary of Function/Purpose of Position This position serves as a departmental technician for the Insurance Licensing to assist with background investigations of current licensees and pending applicants, reviewing licensing applications, producer follow-up correspondence and make recommendations for action, responding to telephone and email inquiries, responding to correspondence relating to these activities, and maintaining the integrity of the licensing program.
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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: 70

Review individual license applications based on statutory requirements and make recommendations for approval or denial.

Individual tasks related to the duty:

- Review and process applications for different and distinct insurance licenses.
- Review applications for completeness and content.
- Conduct background investigations through MSP, I-CHAT, FINRA, LexisNexis, National Sex Offenders Registry, etc. and investigate responses.
- Use online tools to conduct additional research as necessary.
- Evaluate and determine whether applicant qualifies for issuance of an insurance license based upon statutory criteria.
- Meet with management as necessary to discuss results found outside the parameters of the licensing guiding principles.
- Approve and issue license or prepare and refer licensee file for denial or good moral character and/or 1033 analysis.

Duty 2

General Summary:

Percentage: 20

Respond to inquiries from licensees, their representatives, various outside sources and internal staff.

Individual tasks related to the duty:

- Correspond via email, mail and telephone with licensees and applicants regarding status and other inquiries related to their license.
- Respond to requests received from internal and external staff regarding processes and/or information specific to a licensee record.
- Correspond with the general public and others regarding general insurance licensing questions.

Duty 3

General Summary:

Percentage: 10

Maintain and update licensee records within the database and other duties as assigned.

Individual tasks related to the duty:

- Update and maintain individual licensing records as necessary.
- Notify management of updates/changes needed on licensing website.
- Recommend changes in processes and/or procedures to improve efficiency within the section.

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

Decisions are made through experience with the various resources available to staff (i.e., the DIFS Licensing- Insurance web pages, ISITE, NIPR). The ability to review, verify and recommend action is critical to the success of this position. Other decisions are based on licensing knowledge and good common sense.

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

When a decision would be outside of the typical Licensing Policies or Procedures or requires a policy change.

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 which includes considerable sitting, occasional standing, limited lifting; considerable microcomputer usage which involves repetitive motions involved in data entry 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.

Additional Subordinates

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

☐ Complete and sign service ratings.

☐ Assign work.

☐ Provide formal written counseling.

☐ Approve work.

N Approve leave requests.
N Approve time and attendance.
N Orally reprimand.

N Review work.
N Provide guidance on work methods.
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?

I agree

23. What are the essential functions of this position?

This position is responsible for reviewing individual licensing applications. This includes conducting background investigations and evaluating application in accordance with statutory criteria in order to approve for licensure or refer for denial. Responds to section correspondence and performs related work as assigned.

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

Update PD. To have most current PD on file. Updates were made in the summary of job duties and percentages to better align with current processes.

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 unit is responsible for determining if licensees remain in compliance with Michigan's statutory requirements to maintain licensure. This position has responsibility in a major program with statewide impact.

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

EDUCATION:

Education typically acquired through completion of high school.

EXPERIENCE:

Departmental Technician 7

One year of experience performing administrative support activities equivalent to the 7-level in state service.

Departmental Technician 8

One year of experience performing administrative support activities equivalent to the 8-level in state service.

OR

One year of experience as a technician or paraprofessional equivalent to the entry level in state service.

Departmental Technician E9

One year of experience as a supervisor of administrative support activities equivalent to the 9-level in state service.

OR

One year of experience performing administrative support activities equivalent to the 9-level in state service.

OR

Two years of experience as a technician or paraprofessional, including one year of experience equivalent to the intermediate level in state service.

Alternate Education and Experience**Departmental Technician 7**

Completion of two years of college (60 semester or 90 term credits) may be substituted for the experience requirement.

Departmental Technician 8

Possession of a Bachelor's degree may be substituted for the experience requirement.

Departmental Technician E9

Possession of a Bachelor's degree and one year of job-related experience may be substituted for the experience requirement.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Computer operation skills.
- Good personal communication skills and an ability to coordinate a variety of tasks.
- Ability to work within strict time frames.
- Ability to deal with high volume workloads.
- Ability to adapt to the implementation of new procedures/technologies and an ability to operate in an autonomous capacity.

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.

ERMELINDA GARZA

10/4/2024

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