

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

Position Code
1. SECRTRYA

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) Office of Insurance Rates & Forms
4. Civil Service Position Code Description Secretary-A	10. Division
5. Working Title (What the agency calls the position) Secretary	11. Section Life & Health
6. Name and Position Code Description of Direct Supervisor FRANCIS, STEPHANIE S; STATE ADMINISTRATIVE MANAGER-1	12. Unit
7. Name and Position Code Description of Second Level Supervisor MERRIMAN, JULIE N; SENIOR POLICY EXECUTIVE	13. Work Location (City and Address)/Hours of Work 530 Allegan St., Lansing, MI. 48933 / 8am-5pm, Monday- Friday

14. General Summary of Function/Purpose of Position

Performs advanced level secretarial support and management assistance to the Life and Health Section Manager and staff. Primary responsibility includes receiving and transmitting confidential and non-confidential correspondence, reports, and unit documents concerning policy forms, rules, and rates. This position also serves as the focal point for the receipt, screening, logging in, assigning and distribution of all insurance filings, correspondence, and reports for the section. Filings are submitted and accessed electronically via the System for Electronic Rate and Form Filing (SERFF). In addition, this position performs administrative support duties to the Director of the Office of Insurance Rates and Forms (OIRF) when necessary due to schedule conflicts and OIRF's operational needs.

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

Provides advanced level secretarial support and management assistance to the Manager and staff of the Life and Health Section of OIRF.

Individual tasks related to the duty:

- Serves as liaison between manager, staff, and constituents.
- Read incoming correspondence and reports, screen items to be handled personally or forward to proper staff person; locate and assemble materials to enable manager and/or analysts to respond as needed.
- Evaluate submitted filings to ensure they meet DIFS filing procedure requirements.
- Assign filings to appropriate analyst for final review based upon the type of product.
- Proof and edit responses to industry representatives and the public.
- Provide secretarial assistance to manager and analysts by completing travel arrangements, preparing of expense vouchers and scheduling conferences and meetings.
- Establish and implement office procedures to ensure consistent workflow within the Office.
- Make recommendations for improving operation efficiency and effectiveness.
- Maintain records of statistical data and other documentation forwarded to the Life and Health Section.
- Draft, review, and edit documents prior to managers' approval.
- Maintain and update Life and Health Section files.
- Assist manager in communicating assignments, projects, and directives to staff.
- Coordinate / organize / maintain record of Life and Health staff meetings, off-site work activities, and leave time usage.

Duty 2

General Summary:

Percentage: 30

Perform other duties as assigned by Manager or Office Director.

Individual tasks related to the duty:

- Prioritize incoming calls, correspondence, and visitors.
- Assist in collecting materials for meetings, conferences, speeches, etc.
- Operate computer and office equipment and computers applications and systems.
- Assist Manager and/or Office Director on special projects as assigned.
- Serve as backup for other administrative support within OIRF.
- Perform other duties as assigned.

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

Decisions on priority of incoming correspondence, telephone calls/inquiries and adjustments to workflow to meet deadlines that affect meeting daily objectives. At the time of entry, decide whether a filing meets filing procedure requirements, or if it needs to be returned. Decide the most efficient and the accurate method of tracking filing deadlines and response deadlines. Decide the most professional manner of composition for specific correspondence and documents.

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

Decisions not covered by supervisor directive, bureau policy, or guidelines. Guidance in classifying unusual types of policy forms or rate filings and responding to inquiries about them.

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.

This job is performed in a general office environment. Much of the work is performed while sitting in front of a personal computer and requires extensive reading. Physical effort would be sitting, standing, or walking to other areas and may involve occasional file transport, which could include stooping, kneeling, reaching, and bending.

Environmental conditions include exposure to heating and cooling of the building during the workday.

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

To provide advanced level secretary support and management assistance to the Life and Health Section Manager, which requires considerable knowledge of the manager's viewpoints and Department operating policies/procedures in order to coordinate activities, communications, and schedules on behalf of the Manager. Also, to provide accurate and timely advance level secretarial services to the manager and staff. Perform initial screening and computer log-in of all insurance filings received by the Life and Health Section. Maintain Office records. The person in this position operates complex computer applications, processes considerable computer-generated documentation, handles considerable telephone communications, maintains Office files, and serves as liaison between manager, staff, and constituents.

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

New establishment.

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

This position serves as an advanced level secretary to the Life and Health Section manager. This section is responsible for the review of insurance policy forms, rules, and rates used in Michigan by regulated entities. It ascertains compliance with applicable law and takes action to bring non-compliant entities into compliance.

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:

Secretary 9

Four years of office experience involving administrative support practices, including one year equivalent to advanced 8-level administrative support work, or equivalent to a Secretary E8, or Legal Secretary E8.

OR

Four years of office experience involving administrative support practices, including two years equivalent to experienced E7-level administrative support work, or equivalent to a Secretary 7, or Legal Secretary 7.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Ability to communicate information clearly and accurately orally and in written correspondence.
- Ability to work well with others.
- Ability to utilize multiple computer programs and learn new databases.
- Able to exercise considerable tact and diplomacy when dealing with constituents inside and outside of DIFS.
- Work effectively with a high degree of independence.

CERTIFICATES, LICENSES, REGISTRATIONS:

None

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

2/20/2025

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