

Classification Title: Insurance Rate Analyst	Branch/Division/Bureau: Rate Regulation Branch/ Rate Filing Bureau – (Los Angeles I, Oakland, Sacramento)
Working Title: Insurance Rate Analyst	Office/Unit/Section/Geographic Location: // (Los Angeles I, Oakland, Sacramento)
Position Number (13 Digit): 413-XXX-4441-XXX	Conflict of Interest Position: <input type="checkbox"/> NO <input checked="" type="checkbox"/> YES
Employee Name:	Effective Date:

BASIC FUNCTION:

Under the direction of the Supervising Insurance Rate Analyst, the Insurance Rate Analyst reviews and analyzes rate filings of lesser complexity containing rates, rating plans, rating systems, manual rules and policy forms for property casualty lines of business. The analyst determines completeness and accuracy of data, impact on rates, appropriateness of forms, and compliance with California Insurance Code and California Code of Regulations. The analyst completes recommendations, rating templates and related analytical spreadsheets.

This position is designated under the Conflict of Interest Code. The position is responsible for making or participating in governmental decisions that may potentially have a material effect on personal financial interests. The appointee is required to complete a Statement of Economic Interest (Form 700), which includes an Assuming Office filing within 30 days of appointment, annual filings, and a Leaving Office filing within 30 days of physical separation. Non-compliance with the Conflict of Interest Code requirements may result in the voiding of appointment, financial penalties, or enforcement actions.

ESSENTIAL FUNCTIONS

- 30% Prepares rating templates or related analytical spreadsheets to quantify reasonableness of rating requests submitted by insurers. Prepares correspondence to request additional information and data from insurers in support of the rate filing application.
- 25% Consults with team leader in proposing appropriate revisions to rate filing applications. Communicates and corresponds with insurers to correct or improve filing deficiencies. Ensure that the final submission complies with applicable Insurance Code requirements, regulations, and policy memos.
- 25% Prepares Rate Analyst Worksheets including all appropriate elements to support the final recommendation using proper grammar, spelling, clarity of reasoning and logical argument.

ESSENTIAL FUNCTIONS DUTY STATEMENT

HRM-025

15% Completes individual projects or assist with group projects as assigned by the team leader, bureau, or division management to utilize and develop individual knowledge and skills. Enters filing data into data tracking spreadsheets.

MARGINAL FUNCTIONS

5% Participates actively in bureau and team meetings to promote the free exchange of ideas and provide feedback. Assists at the Public Viewing Desk to provide technical assistance.

WORK ENVIRONMENT OR PHYSICAL ABILITIES

- Work in high-rise building
- The incumbent may telework in accordance with CDI's Telework Policy. Teleworking employees may be required to report to their headquarters office location on designated telework days. Travel expenses are not reimbursed; however other authorized transit subsidies do exist for those who qualify.

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the Health & Safety Analyst.)

Employee Signature

Date

Printed Name

I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.

Supervisor Signature

Date

Printed Name

California Department of Insurance
ESSENTIAL FUNCTION DUTY STATEMENT
 HRM-0025

Classification Title Associate Insurance Rate Analyst	Branch/Division/Bureau Rate Regulation Branch/ Rate Filing Bureau – (Los Angeles I, Oakland, Sacramento)
Working Title Associate Insurance Rate Analyst	Office/Unit/Section/Geographic Location /(Los Angeles I, Oakland, Sacramento)
Position Number (13 Digit) 413-XXX-4438-XXX	Conflict of Interest Position <input type="checkbox"/> NO <input checked="" type="checkbox"/> YES
Employee Name	Effective Date

BASIC FUNCTION:

Under direction of the Supervising Insurance Rate Analyst, the Associate Insurance Rate Analyst (AIRA) reviews and analyzes the more complex rate filings, rating plans, rating systems, manual rules and policy forms for property casualty lines of business. Independently determines completeness and accuracy of data, impact on rates, appropriateness of forms, and compliance with California Insurance Code and California Code of Regulations.

This position is designated under the Conflict of Interest Code. The position is responsible for making or participating in governmental decisions that may potentially have a material effect on personal financial interests. The appointee is required to complete a Statement of Economic Interest (Form 700), which includes an Assuming Office filing within 30 days of appointment, annual filings, and a Leaving Office filing within 30 days of physical separation. Non-compliance with the Conflict of Interest Code requirements may result in the voiding of appointment, financial penalties, or enforcement actions.

ESSENTIAL FUNCTIONS

- 35% Prepare rating templates or related analytical spreadsheets to quantify reasonableness of rate change requests submitted by insurers. Prepare correspondence to request additional information and data from insurers in support of their rate filing applications. Complete Rate Analyst Worksheet recommendations on filings summarizing the rating plans, forms, and rate changes submitted by insurers.
- 30% Communicate and correspond with insurers to discuss filing deficiencies. Identify and evaluate potential revisions to rate filing application subject matter where necessary. Ensure the final rate filing submission complies with all applicable Insurance Code requirements, regulations, and policies.
- 30% Complete and assist with projects. Enter filing data into data tracking spreadsheets. Actively participate in meetings. Act as Team Lead in the absence of the Senior Insurance Rate Analyst, which consist of reviewing recommendations, distributing new filings, answering questions, and discuss filings with team members. Assist in training new staff.

MARGINAL FUNCTIONS

5% Assist at the Public Viewing Desk to provide technical assistance.

WORK ENVIRONMENT OR PHYSICAL ABILITIES

- Work in high-rise building
- The incumbent may telework in accordance with CDI's Telework Policy. Teleworking employees may be required to report to their headquarters office location on designated telework days. Travel expenses are not reimbursed; however other authorized transit subsidies do exist for those who qualify.

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the Health & Safety Analyst.)

Employee Signature

Date

Printed Name

I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.

Supervisor Signature

Date

Printed Name