Classification Title: Senior Insurance Rate Analyst	**Branch/Division/Bureau:** Rate Regulation Branch/ Rate Regulation Division/ Rate Filing Bureau - Oakland II
Working Title: Senior Insurance Rate Analyst	**Office/Unit/Section/Geographic Location:** ///Oakland
Position Number (13 Digit): 413-219-4435-901	**Conflict of Interest Position:** YES
Employee Name:	**Effective Date:**

BASIC FUNCTION:

Under direction of the Supervising Insurance Rate Analyst, the Senior Insurance Rate Analyst will lead a team of Rate Analysts by providing job assignments, reviewing worksheets and written recommendations to assure timely completion of rate filings, accurate analysis, and a high quality work product, and analyzing filings containing rates, rating plans, rating systems, manual rules, and policy forms to ensure accuracy of data, the impact on rates, appropriateness of forms, and compliance with California Insurance Code and California Code of Regulations. Occasional travel may be required within and/or outside the state of California via private or public transportation (i.e., automobile, airplane, etc.). Travel may include overnight stay.

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% Reviews applications to verify receipt of filings on the Public Notice List and assign to team members equitably. Monitors each analyst progress to ensure completion of filings within prescribed time frames. Mentors and counsels individual team members to ensure thoroughness of evaluations and explanations of all factors to support the

recommendation. Reviews worksheets prepared by analysts for completeness of evaluations and accuracy of decisions, suggesting revisions with respect to content, style, and recommendation. Consults with Bureau Chief, Division Chief, Deputy Commissioner, staff actuaries, and Rate Enforcement Bureau. Counsels analysts on strategy for contacting filers regarding deficiencies and acceptable corrective actions.

35% 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 rate filing applications. Communicates and corresponds with insurers to resolve filing deficiencies. Ensures that the final filing submission complies with applicable Insurance Code requirements, regulations, and policy memos. Complete the rate filing recommendation in the Rate Regulation Tracking System (RRTS).

15% Communicates intradepartmental activities bearing on the rate approval process through interaction with various branches appropriately. Handles inquiries from other bureaus and divisions within the Department and responds to inquiries from companies regarding filing status and requirements. Assists at the Public Viewing Desk to provide technical assistance regarding difficult and complicated inquiries. Performs duties in the absence of the Bureau Chief as requested to maintain uninterrupted leadership and direction of day-to-day bureau functions.

10% Promotes professional development of team members by providing opportunities to expand job and career-related knowledge and skills. Conducts regular team meetings to relay information from management, encourages suggestions and comments from team members on various issues to enhance productivity through the improvement of systems and procedures, and maintains good communication with team members. Suggests and provides study materials, classes, and technical training on filing analysis, regulations, insurance products and ratemaking to enhance team members' knowledge and skills. Provides input to Bureau Chief on overall performance of team.

MARGINAL FUNCTIONS

5% Leads individual or group projects as assigned by the Bureau Chief, or Branch management to utilize and develop individual knowledge and skills.

WORK ENVIRONMENT OR PHYSICAL ABILITIES

•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.
•The incumbent must be able to work in a high rise building.

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