STATE OF ARIZONA
POSITION DESCRIPTION QUESTIONNAIRE

POSITION NUMBER	JOB CODE
AID000421ACN	ACV73122
OFFICIAL CLASSIFICATION TITLE	**WORKING TITLE**
Administrative Assistant II	Administrative Assistant II

AGENCY	DIVISION/SECTION
Department of Insurance	Life & Health
ADDRESS (PHYSICAL WORK LOCATION)	**PHONE**
2910 North 44th Street, Suite 210, Phoenix, AZ 85018	602-364-2393

SUPERVISOR'S NAME	TITLE
Position to be established.	Executive Consultant
EMAIL	**PHONE**
	602-364-2393

REQUEST TO		
☑ Establish New Position	☐ Review/Reclass Position	☐ Change Position Status
☐ Update PDQ	☐ Other: _____	

EMPLOYEE INITIATED: SEE PERSONNEL RULE R2-5-301.G. IF YES, EMPLOYEE SHOULD SUBMIT THROUGH AGENCY MANAGEMENT. FOR ASSISTANCE, EMPLOYEE SHOULD CONTACT THEIR AGENCY HUMAN RESOURCES OFFICE.	
☐ Yes	☑ No

SUPERVISE	MANAGE
☐ Yes (If yes, please complete the section below.)	☐ Yes (If yes, please complete the section below.)
☑ No	☑ No

Number of Direct Reports: _____ Number of Indirect Reports: _____

☐ Work Assignment ☐ Work Review ☐ Performance Appraisal ☐ Leave Requests

☐ Disciplinary Actions ☐ Hiring ☐ Other: _____

1. JUSTIFICATION STATEMENT: EXPLAIN THE EVENTS/CHANGES THAT MADE THIS REQUEST NECESSARY, INCLUDING JUSTIFICATION FOR EXEMPT, UNCOVERED POSITION REQUESTS.

The federal government (Department of Health and Human Services or HHS) has awarded ADOI a $550,441.00 grant under Section 2794 of the Affordable Care Act (ACA). The purpose of the grant is to support ADOI efforts to ensure that Arizona consumers get value for their health insurance premium dollars, specifically with regard to certain types of health insurers' rate setting and rate increase practices. The grant is referred to in this PDQ as the "Rate Review Grant" or RR Grant. ADOI will use the grant funds to (1) improve the transparency and effectiveness of its health insurance rate review, and (2) develop the technical infrastructure to comply with ACA requirements for collecting, reviewing and reporting health insurance rates. ADOI's intent is that after the grant period ends on on September 30, 2011, ADOI will have the consumer-support capacity, analytical tools and systems to sustain the improvements it has made, using only pre-grant resources The grant includes funds to contract with outside consultants for actuarial, information technology, web development and other grant-related services. The grant also includes funds to hire a grant-activities manager, a senior insurance analyst and an administrative assistant.

2. JOB SUMMARY: EXPLAIN THE PURPOSE OF THIS POSITION.

The purpose of this position is to provide administrative support for the grant activities for one year. The activities will include logging in and and assigning rate review filings, entering data and running queries on rate review filings and processes, preparing reports and correspondence, handling rate filing questions and public records requests, scheduling public meetings and other RR Grant events, assisting the RR Grant Manager at public meetings and other events, assisting the ADOI business office with handling RR Grant billings and paperwork, and coordinating RR Grant administrative activities with related administrative functions throughout ADOI. Having an administrative assistant dedicated to the RR Grant activities will make it possible for existing ADOI administrative assistants to continue in their current positions without being required to take on additional, grant-related responsibilities.

3. MAJOR RESPONSIBILITIES: USE ACTION VERBS TO STATE THE PRIMARY FUNCTIONS FOR WHICH THIS POSITION IS ACCOUNTABLE, AND EXPLAIN WHAT THIS POSITION DOES AND WHY.

Primary Responsibilities (in increments of no less than 5%)	Percent Time Spent (%)
1. To maintain paper/electronic rate review filings and RR Grant files and to use Word/Excel/Access or similar programs to (1) compile data in HHS template, and (2) enter data, run standard queries and produce reports in useful format for RR Grant analysis, assignments and quarterly reports to HHS.	40
2. To independently screen, handle or appropriately route RR Grant communications from external and internal sources by telephone, regular mail or electronic mail. This includes (1) interpreting RR Grant and agency program rules and regulations, (2) accurately answering frequent/cyclical questions, and (3) using and updating RR Grant desk reference materials. This also includes producing RR Grant correspondence with correct spelling and grammar.	15
3. To assist RR Grant Manager, RR Grant Analyst and RR Grant consultants with conducting RR Grant activities, including public meetings. Public meeting responsibilities include scheduling, finding a venue, preparing materials and A/V handling equipment, attendance, distributing summaries or minutes, and setting up and restoring the room. Assist with meeting minutes, summaries and agendas.	10
4. To Assist RR Grant Manager with producing all aspects of HHS Quarterly Reports, Final Report and any other reports or information required by HHS.	10
5. To provide miscellaneous administrative RR Grant duties in Life & Health including copying, data entry, scheduling, and maintaining/updating RR Grant forms, materials or documents.	10
6. To provide miscellaneous administrative RR Grant duties in other ADOI Divisions, including assisting (1) the Business Office with RR Grant billings and paperwork, (2) the Consumer Assistance Division with RR Grant public information for consumers, and (3) the Director's Office with public information, correspondence, scheduling, and maintaining/updating RR Grant website materials.	10
7. To handle RR Grant public record requests in accordance with the ADOI 2010 revised records request procedures. Responsibilities include: • Arranging appointments for public reviewers. • Pulling and copying files for review. • Calculating and collecting fees.	5
8.	
Attach additional sheets as needed	**Must total 100%**

4. DECISION MAKING AUTHORITY: CHECK THE **ONE** BOX THAT BEST DESCRIBES THIS POSITION'S INVOLVEMENT IN THE DECISION MAKING PROCESS.

- ☐ Follows written and verbal instructions
- ☑ Follows established guidelines
- ☐ Interprets policies and procedures
- ☐ Participates in the establishment of guidelines and policies
- ☐ Acts as final authority to implement guidelines and policies
- ☐ Other: _____

5. PROBLEM SOLVING: CHECK THE **ONE** BOX THAT BEST DESCRIBES THE TYPE OF PROBLEM-SOLVING SITUATIONS REQUIRED OF THIS POSITION.

- ☐ Identical or similar situations following established routines/instructions
- ☑ Diverse procedures in differing situations; some research within area of expertise is required
- ☐ Variable situations requiring analytical, interpretive, evaluative, and/or constructive thinking within broadly defined policies and objectives

6. KNOWLEDGE, SKILLS, ABILITIES (KSAs): EXPLAIN THE KNOWLEDGE, SKILLS, AND ABILITIES AN EMPLOYEE IN THIS POSITION MUST HAVE IN ORDER TO PERFORM WORK SATISFACTORILY.

KNOWLEDGE IS THE UNDERSTANDING OF A SUBJECT THROUGH EXPERIENCE OR EDUCATION; ALWAYS COGNITIVE.

Knowledge of state and agency public record and record retention and confidentiality requirements.
Knowledge of certain state laws and rules relating to health insurance rate and form filings.
Knowledge of agency policies and procedures for handling health insurance rate and form filings.
Knowledge of the functions of the NAIC System for Electronic Rate and Form Filings (SERFF).
Knowledge of math calculations including multiplication, division, calculating ratios, percentages, and decimals.
Knowledge of correct grammar and spelling; standard formats for business correspondence.
Knowledge of the responsibilities of other Agency divisions.

SKILLS ARE LEARNED AND GET BETTER WITH PRACTICE; THEY ARE EITHER COGNITIVE OR PSYCHOMOTOR.

Skill in formatting documents in Excel, Word, Powerpoint, Outlook, Access, PDF or equivalent programs.
Accurate typing and entering data skills
Skill in running reports based on standard queries in Access.
Skill in the using of SERFF, including assigning and disposing of filings, corresponding with filers and running searches.
Skill in scheduling multiple, complicated public and private events
Skill in Web-development basics
Time-management skills.
Organizing tasks and projects skills
Skill in excellent customer service/"customer first" approach to the public, insurers, consultants and co-workers.

ABILITIES ARE NATURAL, CONTRIBUTE TO SKILLS, AND ARE PERCEPTUAL, MOTOR, OR A COMBINATION; THEY ARE EITHER COGNITIVE OR PSYCHOMOTOR.

Ability to work independently, self-direct and manage priorities.
Ability to interpret and explain moderately complicated information relating to health insurance rates.
Ability to promptly learn and integrate new information and procedures.
Ability to adapt easily to changing priorities.
Ability to stay on task despite interruptions.
Ability to enjoy dealing with the public; maintain courtesy when dealing with difficult people or difficult questions.

7. LICENSES/CERTIFICATIONS: LIST ANY LICENSES, CERTIFICATIONS, DEGREES, OR CREDENTIALS THAT ARE REQUIRED BY LAW FOR THIS POSITION.

8. SELECTIVE PREFERENCES: LIST ANY PREFERRED (NOT REQUIRED) QUALIFICATIONS THAT THE IDEAL CANDIDATE WOULD PORTRAY.

Relevant experience in the health insurance field, including experience preparing or reviewing health insurance rates or forms and familiarity with health insurance terminology.
College degree or college level coursework in business administration, business communication, public administration.
Demonstrated abilities as a "people person".

9. ESSENTIAL JOB FUNCTIONS: LIST ALL PHYSICAL, MENTAL, AND ENVIRONMENTAL REQUIREMENTS FOR THIS POSITION BY CHECKING EACH BOX THAT APPLIES. FOR EACH REQUIREMENT, INDICATE THE FREQUENCY WHICH IS REQUIRED IN THIS POSITION. UNDER APPLICABLE MAJOR FUNCTIONS, IDENTIFY THE CORRESPONDING PRIMARY RESPONSIBILITY (FROM PG.3).

C = CONTINUOUSLY (>66%); F = FREQUENTLY (34-66%); O = OCCASIONALLY (10-33%); R = RARELY (<10%); N/A = NOT APPLICABLE

Physical Demands		Frequency	Applicable Major Functions
☑ Balancing		O	Room set up
☐ Climbing			
☐ Crawling			
☑ Fine Dexterity		C	Data Entry
☐ Foot Controls			
☑ Hearing		C	Communications
☑ Kneeling/Crouching/Bending		O	Room set up
☑ Manual Dexterity		C	All
☑ Lifting/Carrying # of pounds 10 *Lifting/Carrying 25 lbs or more will require a physical exam.	Span of Lift: ☑ Floor to Waist ☐ Floor to Shoulder ☐ Waist to Shoulder ☐ Other:	O	Filing/mail
☑ Pushing/Pulling # of pounds 10 *Pushing/Pulling 25 lbs or more will require a physical exam.		O	Room set up
☑ Reaching		O	Room set up
☑ Sitting		C	All
☑ Standing		O	Room set up
☑ Talking		C	All
☑ Twisting		O	Room set up
☑ Upper Extremity Repetitive Motion		C	All
☑ Seeing		C	All
☐ Walking/Running Short Distances	Length of distance _____		
☐ Walking/Running Long Distances	Length of distance _____		
☐ Other _____			

Mental Demands	Frequency	Applicable Major Functions
☑ Analysis/Reasoning	F	Communications
☑ Communications Skills (as distinguished from talking)	F	Customer Service
☑ Math/Mental Computation	O	Billings
☑ Reading	C	All
☑ Sustained Mental Activity (e.g., auditing, grant writing, composing reports, problem solving)	F	Reports
☑ Writing	O	Correspondence
☐ Other _____		

Environmental Demands	Frequency	Applicable Major Functions
☐ Asbestos		
☐ Dust		
☑ Frequent Task Changes	C	All
☑ High Volume Public Contact	O	Meetings
☐ Loud Noise		
☐ Physical Danger		
☑ Tedious/Exacting Work	C	All
☐ Temperature Extremes		
☐ Toxic Substances (e.g., solvents, degreasers, herbicides, pesticides, asbestos, printer toner, etc.)		

TO THE EMPLOYEE: THIS SECTION IS TO BE SIGNED BY THE INCUMBENT.

I have reviewed the contents of the questionnaire, and it accurately describes my job.

Print Name Sign Date

TO THE SUPERVISOR: PLEASE PROVIDE ANY ADDITIONAL INFORMATION THAT YOU BELIEVE WILL CONTRIBUTE TO A CLEARER UNDERSTANDING OF THE DUTIES PERFORMED BY THIS POSITION. USE ADDITIONAL PAPER IF NEEDED.

Comments:

Print Name Sign Date

TO THE AGENCY DIRECTOR OR THE AUTHORIZED REPRESENTATIVE OF THE AGENCY DIRECTOR:

I have reviewed the contents of the questionnaire, and it accurately describes this position.

Print Name Sign Date

** Please attach an organization chart clearly identifying each position's official classification title, position number, class code, and grade. Include at least two levels of supervision above this position, this position's co-workers, and if applicable, subordinates. **If requesting a reclassification,** two (2) organization charts (current and proposed) must be attached.