



## **Insurance Examiner**

**Exam Code: 0PB60**

**Department:** Department of Insurance

**Exam Type:** Departmental, Open

**Final Filing Date:** Continuous

### **CLASSIFICATION DETAILS**

**Insurance Examiner** - \$4,091.00 - \$5,315.00 per month

View the [classification specification](#) for the Insurance Examiner classification.

### **APPLICATION INSTRUCTIONS**

Final Filing Date: Continuous

#### **Who Should Apply:**

Applicants who meet the minimum qualifications as stated on this bulletin may apply for and take this examination.

Once you have taken this examination, you may not retake it for **six (6) months**.

#### **How To Apply:**

The link to connect to the Training and Experience Evaluation is located farther down on this bulletin in the "Taking the Exam" section.

#### **Special Testing Arrangements:**

If you require assistance or alternative testing arrangements due to a disability, please contact the testing department listed in the Contact section of this bulletin.

### **MINIMUM QUALIFICATIONS**

All applicants must meet the education and/or experience requirements as stated on this exam bulletin to be accepted into the examination. Part-time or full-time jobs, regardless of whether paid or volunteer positions, and inside or outside California state service will count toward experience.

### **Insurance Examiner Either 1**

Equivalent to graduation from college preferably with a major in business administration, economics, insurance, accounting, or a related field. (Registration as a senior in a recognized institution will admit applicants to the examination, but they must produce evidence of graduation or its equivalent before they can be considered eligible for appointment.)

### **Or 2**

Completion of the equivalent of 16 semester hours of professional accounting courses given by a collegiate-grade residence institution including courses in elementary and advanced accounting, auditing and cost accounting and three semester hours of business law. (A course in statistics may be substituted for cost accounting.)

### **Or 3**

One year in the California state service performing the duties of a Management Services Technician (Range B).

## **POSITION DESCRIPTION**

### **Insurance Examiner**

An Insurance Examiner may assist in the financial audits of insurance companies or in the financial analysis of insurance companies to determine their financial condition and compliance with all laws applicable to their insurance and investment transactions. An Insurance Examiner may also perform reviews of premium tax returns or assist in premium tax audits of insurance companies in determining compliance with the premium tax laws of the State of California.

## **EXAMINATION SCOPE**

This examination consists of the following components:

**Training and Experience Evaluation** – Weighted 100% of the final score.

The examination will consist solely of a **Training and Experience Evaluation**. To obtain a position on the eligible list, a minimum score of 70% must be received. Applicants will receive their score upon completion of the Training and Experience Evaluation process.

In addition to evaluating applicants' relative knowledge, skills, and ability, as demonstrated by quality and breadth of education and/or experience, emphasis in each exam component will be measuring competitively, relative job demands, each applicant's:

**Knowledge of:**

1. Generally accepted accounting principles and auditing standards.

**Ability to:**

2. Learn the differences between Statements of Statutory Accounting Principles (SSAP) and Generally Accepted Accounting Principles (GAAP).
3. Prioritize work assignments to meet scheduled deadlines.
4. Analyze written materials and identify the most important issues that may affect an insurance company's financial condition or operations.
5. Learn Statements of Statutory Accounting Principles.
6. Understand and apply statutory accounting principles to audits, examinations, or other assigned tasks.
7. Verbally communicate effectively with insurance company personnel in a professional manner.
8. Follow procedures for obtaining documents from insurance companies.
9. Analyze financial information and narrative reports and draw sound conclusions.
10. Follow written instructions.
11. Follow oral instructions.
12. Exercise good judgment when completing work assignments.
13. Work with difficult people.
14. Verbally communicate detailed information within written reports to individuals with varying levels of technical ability.
15. Adapt to new working environments and working cultures.
16. Maintain good working relationship with insurance company management and personnel.
17. Effectively perform multiple tasks simultaneously.
18. Verbally communicate effectively with coworkers, supervisors/ management, and personnel in other departments in order to discuss and resolve pertinent issues affecting assignments or the work environment.
19. Verbally communicate with coworkers, supervisors/management, and personnel from other departments in order to diffuse potentially volatile situations that may impact working relationships.

**ELIGIBLE LIST INFORMATION**

A departmental, open eligible list for the **Insurance Examiner** classification will be established by the California Department of Human Resources for use by:

## Department of Insurance

The names of **successful** competitors will be merged onto the eligible list in order of final score regardless of exam date. Eligibility expires **twelve (12) months** after it is established. Applicants must then retake the examination to reestablish eligibility. Veterans' Preference will be granted for this examination. In accordance with Government Codes 18973.1 and 18973.5, whenever any veteran, or widow or widower of a veteran achieves a passing score on an open examination, he or she shall be ranked in the top rank of the resulting eligible list.

Veterans status is verified by the California Department of Human Resources (CalHR). Information on this program and the Veterans' Preference Application (Std. 1093) is available [online](#). Additional information on veteran benefits is available at the Department of Veterans Affairs.

Career Credits will not be added to the final score for this exam, because it does not meet the requirements to qualify for Career Credits.

## DISTINGUISHING CHARACTERISTICS

Willingness to travel and work away from headquarters' office.

## EXAMINATION INFORMATION

[Preview Training and Experience Evaluation](#)

## PREPARING FOR THE EXAMINATION

Here is a list of suggested resources to have available prior to taking the exam.

**Employment History:** Employment dates, job titles, organization names and addresses, names of supervisors or persons who can verify your job responsibilities, and phone numbers of persons listed above.

**Education:** School names and addresses, degrees earned, dates attended, courses taken (verifiable on a transcript), persons or office who can verify education, and phone numbers of persons or offices listed above.

**Training:** Class titles, certifications received, names of persons who can verify your training, and phone numbers of persons listed above.

## TAKING THE EXAMINATION

**We recommend using Chrome, Firefox, or Edge for optimal performance when accessing the examination.**

Take the online [Training and Experience Evaluation](#) for the **Insurance Examiner** classification.

# **TESTING DEPARTMENTS**

**Department of Insurance**

## **CONTACT INFORMATION**

Questions regarding this examination should be directed to:

California Department of Human Resources  
CalCareer Service Center  
1810 16<sup>th</sup> Street  
Sacramento, CA 95814  
Phone: (866) 844-8671  
Email: [CalCareer@CalHR.CA.GOV](mailto:CalCareer@CalHR.CA.GOV)

California Relay Service: 7-1-1 (TTY and voice)

TTY is a Telecommunications Device for the Deaf, and is reachable only from phones equipped with a TTY Device.

## **EQUAL OPPORTUNITY EMPLOYER**

The State of California is an equal opportunity employer to all, regardless of age, ancestry, color, disability (mental and physical), exercising the right of family care and medical leave, gender, gender expression, gender identity, genetic information, marital status, medical condition, military or veteran status, national origin, political affiliation, race, religious creed, sex (includes pregnancy, childbirth, breastfeeding, and related medical conditions), and sexual orientation.

## **DRUG-FREE STATEMENT**

It is an objective of the State of California to achieve a drug-free State work place. Any applicant for State employment will be expected to behave in accordance with this objective, because the use of illegal drugs is inconsistent with the law of the State, the rules governing civil service, and the special trust placed in public servants.

## **GENERAL INFORMATION**

Examination and/or Employment Application (STD 678) forms are available at the California Department of Human Resources, local offices of the Employment Development Department, and through your [CalCareer Account](#).

If you meet the requirements stated on this examination bulletin, you may take this examination, which is competitive. Possession of the entrance requirements does not assure a place on the eligible list. Your performance in the examination described in this bulletin will be rated against a predetermined job-related rating, and all applicants who pass will be ranked according to their score.

The California Department of Human Resources (CalHR) reserves the right to revise the examination plan to better meet the needs of the service, if the circumstances under which this examination was planned change. Such revision will be in accordance with civil service laws and rules and all applicants will be notified.

**General Qualifications:** Applicants must possess essential personal qualifications including integrity, initiative, dependability, good judgement, the ability to work cooperatively with others, and a state of health consistent with the ability to perform the assigned duties of the class. A medical examination may be required. In open examinations, investigation may be made of employment records and personal history and fingerprinting may be required.

**Eligible Lists:** Eligible lists established by competitive examination, regardless of date, must be used in the following order: 1) sub-divisional promotional, 2) departmental promotional, 3) multi-departmental promotional, 4) servicewide promotional, 5) departmental open, 6) open. When there are two lists of the same kind, the older must be used first. Eligible lists will expire in one to four years unless otherwise stated on the bulletin.

**High School Equivalence:** Equivalence to completion of the 12<sup>th</sup> grade may be demonstrated in any one of the following ways: 1) passing the General Education Development (GED) Test; 2) completion of 12 semester units of college-level work; 3) certification from the State Department of Education, a local school board, or high school authorities that the competitor is considered to have education equivalent to graduation from high school; or 4) for clerical and accounting classes, substitution of business college work in place of high school on a year-for-year basis.