



BOSS PaymentOffice


**White-glove support
designed for P&C
insurance carriers.**

Simplify payment processing and improve financial accuracy with BOSS PaymentOffice. Our U.S.-based, bonded team works directly in your systems to post payments, reconcile accounts, and handle disbursements - ensuring every transaction is secure, compliant, and audit-ready. We help carriers cut accounting overhead while improving cash flow and control.

Integrated Premium & Claims Payment Services

Make reconciliation easier, lower accounting risk, and stay in control of your payment operations - without adding to your team.

We manage:

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- **Daily posting for all payment types: credit card, check, ACH, and eCheck**
 - **Lockbox services for secure check handling and scanning**
 - **Direct posting of payments and NSF transactions into your policy or billing system**
 - **Processing of refunds, cancellations, and claims from your designated accounts**
 - **Daily reconciliation of deposits and receipts**

What you get:

- ✓ Boost accuracy with daily transaction matching and clear reporting
- ✓ Free up your team by offloading time-consuming accounting tasks
- ✓ Maintain full visibility and control of every transaction
- ✓ Eliminate reconciliation delays and improve efficiency
- ✓ Stay compliant with insurance and financial regulations

End-to-End Payment Processing Support

BOSS offers a complete suite of accounting and payment office services for carriers and MGAs.

Services include:



- Premium receipt intake and posting
- Claims check disbursement
- Commission and refund payment processing
- Returned premium for cancellations and midterm changes
- Exception handling and NSF resolution
- On-demand reporting of completed transactions

What you get:

- ✓ Lighten the load on your accounting and finance teams
- ✓ Avoid costly delays in payment processing and refunds
- ✓ Simplify vendor management with one reliable partner
- ✓ Align your accounting operations with documented SOPs and audit trails

Why BOSS?

BOSS is your trusted partner for P&C payment operations.

Our U.S.-based, insurance-trained team handles your financial transactions with the security, accuracy, and compliance your business requires.

- **100% U.S.-based, bonded, and certified in P&C insurance**
- **Deep experience across personal and commercial lines**
- **Transparent, audit-ready tracking and SLA reporting**
- **No time zone delays, no language barriers, no training ramp-up**
- **Flexible - we work within your existing policy systems**

Unlike generic accounting vendors, BOSS is built for insurance. We help carriers scale accounting operations without sacrificing control or compliance—delivering clean, efficient results from day one. **Let's talk about how we can support your payment operations.**



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