



BOSS PolicyAssist

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

Make your policy operations easier, cut costs, and boost your underwriting team's productivity with BOSS PolicyAssist. Our certified U.S.-based experts work directly in your systems to handle incoming documents, complete transactions, and take care of exceptions - quickly, accurately, and by the book. We help carriers lower operational workload while improving service and underwriting performance.

Document Review & Transaction Processing

Speed up underwriting decisions by handing off document review and mid-term policy updates to professionals who know your products, processes, and compliance rules inside and out. We handle:



- **Reviewing inspection reports and flagging key issues for underwriters**
- **Sorting and uploading non-standard policy documents**
- **Verifying and attaching third-party reports like MVRs, CLUE, and ISO**
- **Making coverage updates, endorsements, and mid-term changes**

What you get:

- ✓ More time for underwriters to focus on complex risks
- ✓ Faster quoting and binding thanks to cleaner submissions
- ✓ Fewer errors and less rework with consistent, rule-based processing
- ✓ Lower operating costs by shifting repeat tasks to a skilled, cost-effective team

Incoming Document Management

Our team takes the hassle out of handling incoming documents - no matter how they arrive. Whether it's paper mail, email, or fax, we make sure every file gets where it needs to go, accurately and on time. Your records stay current, organized, and ready for audits. We Handle:



- **Centralized processing of all incoming mail, emails, and faxes**
- **Smart tagging of documents by type, urgency, and policy**

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- **Direct uploads into your system with quality checks**
- **Rerouting of documents with missing or incorrect info for quick correction**

What you get:

- ✓ Free up internal teams from scanning, sorting, and filing
- ✓ Make policyholder documents instantly available for underwriter review
- ✓ Reduce risk and admin workload with consistent workflows
- ✓ Boost output without adding staff - helping improve your bottom line

Exception Processing

We take care of those tricky, time-consuming policy tasks that don't come up often - but can slow everything down when they do. Our team steps in to handle these exceptions quickly, accurately, and in full alignment with your procedures. We manage:



- **Premium reallocations, refunds, and write-offs**
- **Policy corrections, cancellations, and reinstatements**
- **Manual renewals for policies that don't auto-renew**
- **Agent of record changes and related documentation updates**

What you get:

- ✓ Fewer delays and backlogs in exception handling
- ✓ More accurate policy and billing records
- ✓ Happier agents thanks to faster turnaround on complex issues
- ✓ Scalable support that helps reduce fixed overhead and lower admin costs

Why BOSS?

We're not just a service provider - we're your underwriting operations partner. Our U.S.-based, insurance-certified team delivers high-quality support with the professionalism your brand expects.

- **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 offshore outsourcing focused solely on cutting costs, BOSS is designed to improve how your underwriting team works while also reducing your expense ratio. With skilled experts and proven processes, we help carriers scale efficiently - without giving up control, compliance, or service quality.



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