Back Office Staffing Solutions

Boss Partner Welcome Kit

Getting Started with BOSS

Getting Started

Need a Welcome Kit to share with a client or associate? You can always grab the latest one here.

Get Welcome Kits

Request a customized/branded welcome kit
marketing@backofficenow.com

Power Tip:
Save the BOSS website on the homescreen of your mobile device and it will act like the downloaded app.

We are excited to have you as a BOSS Partner! Please review this welcome kit so that you can learn what to expect next and find answers to many commonly asked questions.

You will have a dedicated Relationship Manager who will help navigate you through the process.

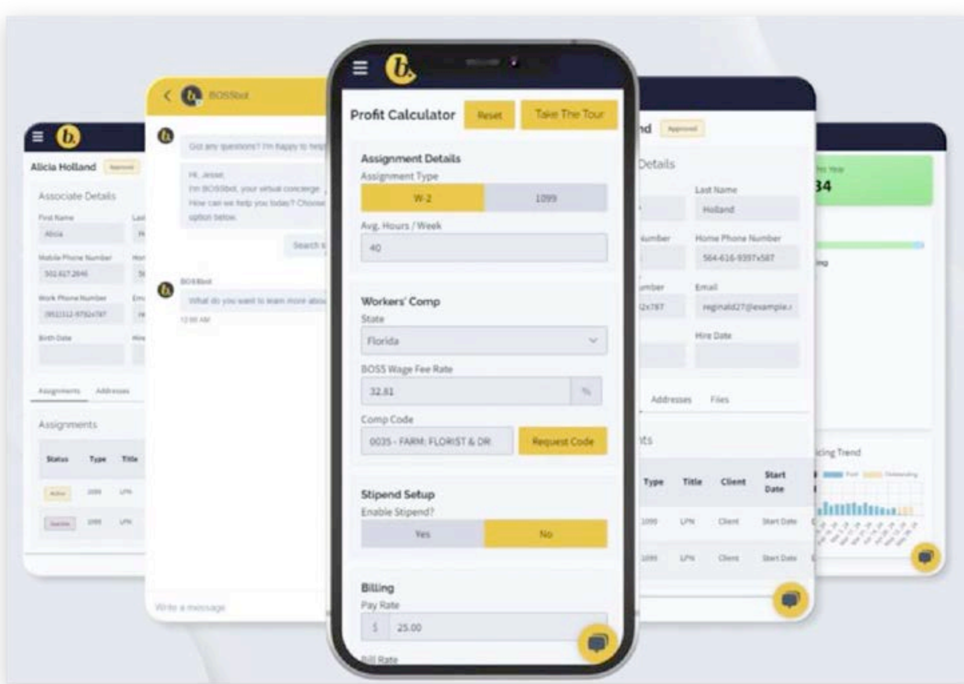
App Setup

Available on iTunes

ANDROID APP ON Google play

The BOSS app is coming soon to the iTunes store and Google play. Stay tuned. Meanwhile, the website acts as an app. The BOSS app will work from any web browser and is mobile-friendly.

Contact support@backofficenow.com as soon as you are ready to start!



BOSS Partner Set-up Process

Enrollment

- Partner enrolls with BOSS.
- Partner submits documentation.
- Account is activated.
- App access is granted.

Meet the BOSS Team

- schedule your orientation and onboarding meeting with your Relationship Manager

BOSS Client Process

Create a new client in the BOSS app via the client dashboard

To start the vetting process for a new client, submit the client's information via the client dashboard in the BOSS app. The process begins with a credit check and confirmation of a signed tri-party contract.

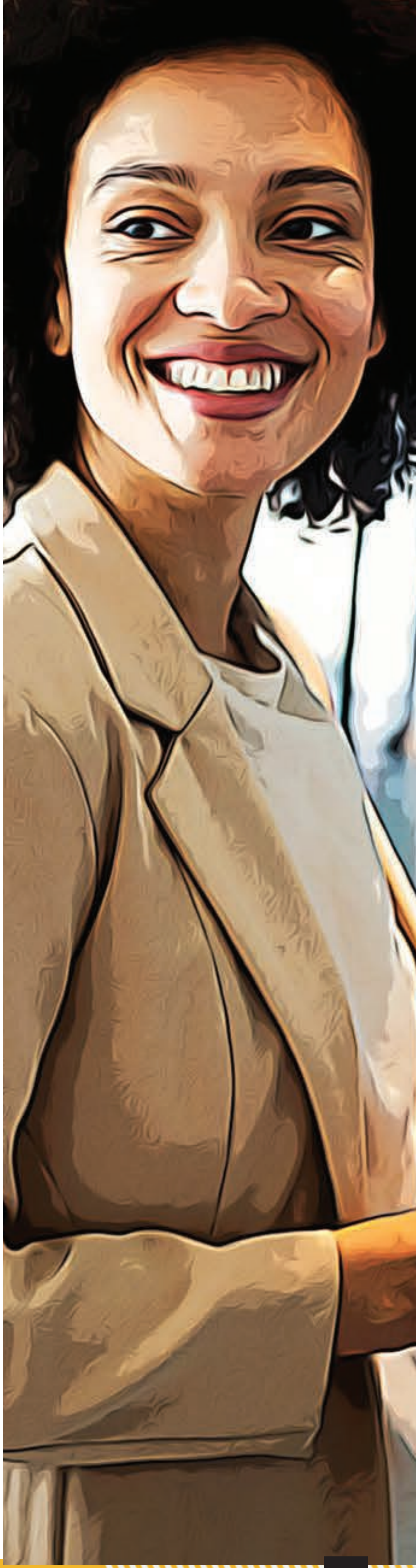
Client credit check and risk assessment process

BOSS provides a complimentary credit check and risk assessment to safeguard your business. Upon submitting a new client in the BOSS app, a soft credit check will automatically be conducted:

- No outreach is made to your client, as the check is run through national databases such as Dun & Bradstreet.
- Ensure you submit the exact legal entity name as it appears in the Client Services Agreement (CSA), rather than a DBA, to avoid delays.
- If insufficient credit reporting is available or the client is deemed moderate to high risk (due to slow or inconsistent payments), a credit application may be requested for further review.

BOSS will continue to vet the client until full approval is granted. Throughout the process, your dedicated Relationship Manager will keep you informed. Feel free to reach out at any time with questions.

BOSS Client Process



Contracting Process

BOSS offers a pre-approved template for the Client Services Agreement (CSA), which is a tri-party contract:

- You can personalize the contract by adding pricing, temp-to-hire language, and other client-specific details.
- The contract may also be rebranded with your company's letterhead and logo to align with your marketing strategy.
- Any edits to the BOSS-provided CSA should be sent to contracts@backofficenow.com for approval before being presented to the client for signature.

If you prefer to use your own contract or if your client provides one for signature, BOSS must approve it prior to execution:

- BOSS will review and redline any necessary changes to ensure compliance with its requirements and will prepare an addendum naming BOSS as your Employer of Record (EOR) partner.
- For signing, use an electronic signature platform such as AdobeSign or DocuSign. Hand signatures are not accepted. Ensure that the contract is routed to BOSS last for signature and final execution.

BOSS Client Process

The client must be approved and the associate must be fully onboarded before the assignment can start

For clients with credit concerns, or those you do not want to go through this process, you can choose to self-fund the payroll.

- During the week of payroll processing, we would submit an ACH pull from your bank for payroll and the BOSS fee totals.
- Realize a cost savings with a discounted BOSS wage fee.
- You can control invoicing and payments, or BOSS can manage them.
- Your agency would not incur late fees if clients pay beyond 30 days. We can still charge the clients for late fees, or you can charge them directly, if agreed upon in your client services agreement. Similarly, you will no be charged back for any invoices over 90 days.
- We will set up 2 accounts in the BOSS app for you, BOSS funded and Partner Self-funded.

Get the Latest Agreements!

Visit the BOSS app Library to download the latest standard Client Services Agreement (CSA), standard Addendum, and editable versions of each.

Get Agreements

Associate Onboarding Process

Associate/Assignment Onboarding Process

- Enter the associate details into the app to start the onboarding process. (Please allow enough time for onboarding before the start date, especially if extensive screenings are required).
- The BOSS onboarding team will cc. you when onboarding is complete.
- Enter the assignment details.
    - Ensure the workers' comp code is correct (check with BOSS if you are unsure).
    - Please note the correct worksite location, especially if it is different from the main client address (for tax and workers' comp purposes).
        - Example: working in one state and commuting from another.
        - Example: working remotely, especially in a different state.
        - Example: if relocating or traveling to a different state.
- Once onboarding is complete and client credit and contract are approved and executed, you can confirm the start date and assignment details with the associate.
- Please do not put an associate on assignment until the client is approved and the associate is onboarded (the associate and client need to be fully onboarded in order to process payroll and be covered by workers' comp and other insurance

Request for Workers's Comp Approval and Pricing

BOSS must always approve the appropriate workers' compensation code for each assignment. Workers' comp codes are determined by the associate's work location. For virtual positions, the workers' comp state will be based on the associate's home state.

For professional staffing, the code is defined by the type of work, while for healthcare roles, it's primarily determined by the facility type. Similarly, for light industrial staffing, the facility type and position are key factors.

To ensure we are properly authorized to support the work, assign the correct workers' comp code, and determine state-specific pricing, we will need to gather some information.

Initially, please provide the following information:

- The client company legal name (which must match the legal name in the CSA) and physical worksite address.
- All addresses, if there are multiple worksite locations.
- Job titles and detailed descriptions for the positions you will place.
- Pay rates per position.
- Number of placements expected per position.
- Estimated term of the assignments.
- Average hours worked per week.
- Client company website address .

See our list of prohibited codes here

Our insurance broker may request additional information to support certain positions:

- If placing in healthcare, will any work be performed in an emergency room?
    - If so, what percentage?
- What equipment, tools, or vehicles will be used by the associate?
- Is there any PPE (Personal Protective Equipment) required?
    - If so, what equipment is required?
- What is the maximum weight the associate will lift?
- What is the maximum height at which the associate may be working?
- Will the associate be operating a forklift?
- Are there any unusual tasks, airborne exposures or other potential hazards to which associates might be exposed?
- What safety guidelines and precautions are in place?
- Confirmation that the client provides site-specific training to associates.

Marketing & Branding

Putting your brand in the right places.

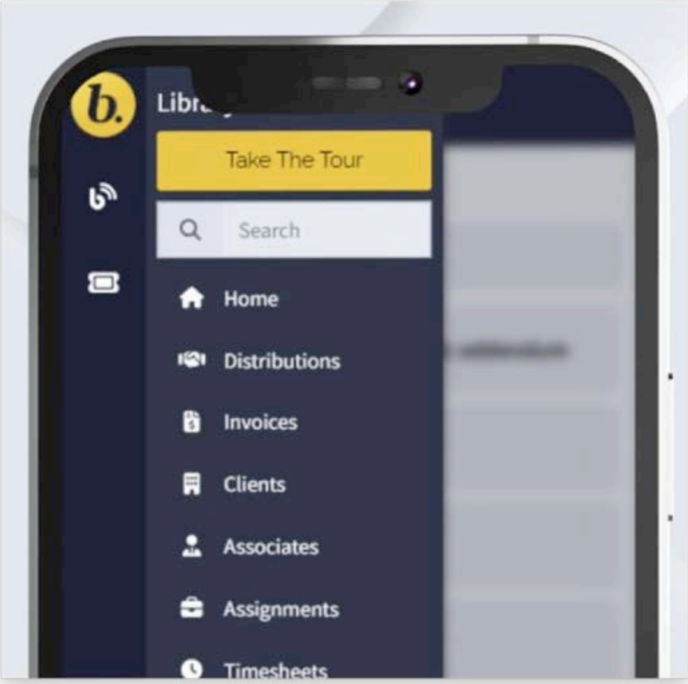
We're the back office experts, and believe your brand should come first! Therefore, you can request your logo to be prominently placed on your client invoices and Client Services Agreements (CSAs). You can request this from your relationship manager or email support@backofficenow.com.

Design services -- at no charge.

Not happy with how your logo looks? Want to have customized/branded welcome kits? All active BOSS Partners — with at least one associate on billing — get free, unlimited access to our dedicated team of marketing designers. They can refresh an existing logo or even create a new one for you. In fact, you get unlimited designs with BOSS. Our marketing services team can help you create everything from: brochures, graphics, ads, business cards and most things you can think of. All of this is completely free for our active partners.

Learn more about Our Marketing Services

Using our App



The BOSS app is one of the most state-of-the-art platforms in its space. The app has all of your real time data and reporting all in one place.

Together, we'll use the BOSS app for managing assignments, timecards, and invoicing your clients. Beyond the obvious tasks of tracking associates' time and client billing, our app offers a wide range of features, including:

- Branded invoices with your logo.
- Ability to easily view associate onboarding status.
- Quick associate onboarding.
- Create shift and holiday pay without creating a new job.
- Full associate activity visibility.
- Ability to bill clients for background checks and interest charges.

Partner FAQ

Knowledge Base

See these FAQ and more with our AI-based Knowledge Base at https://help.backofficenow.com/

HOW DOES YOUR WEEKLY BILLING CYCLE WORK?

Associates' work week is Sunday to Saturday. They submit the time for that week on Sunday. Your clients approve submitted timesheets by Tuesday at Noon. BOSS processes payroll on Wednesday. Invoices go out as soon as the payroll is processed. We process distributions on Friday with payments made by Tuesday. See BOSS Partner Profit schedule, here.

HOW DOES INSTANT PAY WORK?

We will process your profit distribution the same week that we process the timecards and invoices. There is no need with BOSS to wait for your clients to pay for you to get paid. It's that simple. Instant pay is processed each Friday for the previous work week.

HOW CAN I UPLOAD MY LOGO?

Please submit your logo in your app partner profile or email it to support@backofficenow.com

CAN YOU SHARE THE RESULTS OF OUR CONTRACTOR BACKGROUND CHECKS?

Due to The Fair Credit and Reporting Act (FCRA), BOSS cannot provide the details of the background check with you or your clients without permission from the associate. However, each associate is sent a release form that they may voluntarily sign which would grant us permission to share background check results with you and your clients. You can request this release form from your Partner Relationship Manager or email support@backofficenow.com.

HOW CAN I ADD AN EMAIL ADDRESS TO BE COPIED ON SENT INVOICES?

You can add that you want to be copied in the "special instructions" on your assignment submission or simply email support@backofficenow.com and we can add it for you.

HOW DO I ONBOARD ASSOCIATES WITHOUT ENTERING A CLIENT?

In special circumstances, you are able to onboard an associate before having a client or assignment in. Some reasons for this may be that you are still working out small details with your client or waiting on client approval. Talk to your Relationship Manager about submitting an associate prior to having an assignment ready. Otherwise, it is ideal to hold off on onboarding new associates without clients and assignments ready.

WHERE CAN I ADD A PURCHASE ORDER TO ASSIGNMENTS OR INVOICES?

To add a purchase order number to an assignment, simply fill in the "PO Number" on your assignment submission. Or you can email it to us at support@backofficenow.com, and we can add it for you.

WHAT PAYMENT TERMS SHOULD I SELECT FOR MY CLIENT?

You should always try to negotiate the shortest time frame possible to collect the invoice. Seven days is ideal. However, we can extend up to 30 days without further discussion. Of course, their credit needs to be approved at a high enough level to cover their payroll. Should there be any credit issues, a member of our team will contact you to arrange a possible re-negotiation of the contract terms.

Partner FAQ

HOW CAN I CHANGE WHO RECEIVES TIMESHEET APPROVAL EMAILS?

If you would like to change the time approver from who you originally submitted, you can email your dedicated Relationship Manager or email our Support team at support@backofficenow.com, and we can update it for you.

CAN I CHANGE THE TIMESHEET APPROVER OR BILLING ADMINISTRATOR FOR CLIENTS?

Once you submit your assignment to us, you can email us any changes you'd like to make, and we can handle it for you.

WHICH STATE SHOULD I USE FOR GETTING A RATE QUOTE?

Our rates are determined based upon where the associate is working, regardless of the location of the client. For instance, if a client is located in California but the associate is working in Florida, the Florida rate would apply. Similarly, if a associate works remotely, the location will be their home state location. You are able to set the location of the worksite during the job creation. Please use our online calculator tool to determine your rate and forecast the profitability of any placement.

HOW DO I KNOW WHEN INVOICES ARE PAID?

In the Invoice tab on the BOSS app.

HOW DO YOU HANDLE LATE INVOICES?

Partners get free funding for up to 30 days. From day 31 to 89, partners will be charged an interest rate of 1.5% per month up until 90 days. After 90 days, invoices are charged back to the partner and against any outstanding distributions. Partners can edit their Client Service Agreement to pass on this interest to the client.

HOW DO I CHANGE THE BILL RATES OR PAY RATES FOR AN ASSIGNMENT?

Once an assignment is approved, only an authorized BOSS team member can manually change these rates. You can reach out to you designated Relationship Manager or email support@backofficenow.com.

WHAT DO I DO IF I HAVE ASSOCIATE THAT WORKS AT MULTIPLE CLIENTS?

Please contact your Relationship Manager or support@backofficenow.com

HOW LONG DOES IT TAKE FOR AN ASSIGNMENT TO BE APPROVED?

The longest part of the approval process is for the client and contract, which is why most partners prefer to submit those first. If you use our pre-approved CSA, then your assignment is typically approved within a few hours. A revised contract can take a few days.

HOW LONG DO BACKGROUND CHECKS AND DRUG TESTS TAKE?

Background checks usually take 1-3 days. Drug tests usually take 2-5 days for results from the day that the associate takes the test. Both can be done simultaneously. Keep in mind that premium background checks take longer. If this is not required by your client, we suggest going with the basic check.

HOW DO I UPDATE MY EMAIL OR PHONE NUMBER?

You can update your email or phone in the profile section of the app page which is on the bottom left of your dashboard.

CLIENT FAQ

WHAT IS THE TIMESHEET APPROVAL DEADLINE?

Our workweek is Sunday to Saturday. Timesheets should be approved by Tuesday at Noon ET for the prior week's timesheets. Your associate has until Sunday 11:59 PM ET to submit their time.

HOW DO I PAY INVOICES?

Invoices can be paid by ACH, wire transfer, or check by mail. The bank account and address to use is located on your invoice. For quicker processing, please provide complete remittance information including the invoice number each time you send a payment to us. If you would like to set up automatic payments, please refer to the remittance information here: www.backofficenow.com/remit you can contact support@backofficenow.com.

WHO DO I CONTACT IN THE EVENT OF ANY ISSUES?

If this is an invoice, timecard or technology related issue, you can reach BOSS at 855-508-BOSS or email support@backofficenow.com.

ASSOCIATE FAQ

WHEN ARE TIMESHEETS DUE?

Our workweek is Sunday to Saturday. Timesheets are due Sunday night at 11:59 PM EST.

WHERE CAN I VIEW MY PAY STUBS?

Your paystubs can be viewed in your Associate Portal under the “Pay History” tab.

WHEN DO I RECEIVE MY PAYCHECK?

Associates receive payment each Friday for the previous week’s work. In the case where a holiday is held on Friday, employees receive payment on Thursday. Payments should be deposited in the early morning hours, but due to various banking procedures and processes, it is possible that your payment won’t appear in your account until 5pm.

HOW DO I CHANGE MY PAYROLL BANK ACCOUNT?

Log into your portal, select “Profile” then select “Direct Deposit”, then select "Add account".

WHAT IF I HAVE QUESTIONS ABOUT OR WANT TO CHANGE MY TAX WITHHOLDINGS?

If you would like to update your W-4, you can email support@backofficenow.com and we can send you new forms to fill out.

HOW LONG DO BACKGROUND CHECKS AND DRUG TESTS TAKE?

Background checks usually take 1-3 days. Drug tests usually take 2-5 days for results from the day that the associate takes the test. Both can be done simultaneously.

HOW WILL I KNOW IF I PASSED MY BACKGROUND TEST OR DRUG TESTS?

Your recruiter will notify you if there are any problems, or if for some reason you are denied a job because of these, you will be notified with a “Pre-Adverse Action Notice” as per FCRA laws.

WILL YOU SHARE MY DETAILED BACKGROUND TESTS AND DRUG TESTS WITH ANYONE?

No. According to the Fair Credit and Reporting Act, only BOSS will have access to your reports. Your recruiter and client will receive a pass/fail notification, based upon the standards that they set forth. In the event that the reports are requested by the recruiter and/or client, you will be asked to sign an additional release giving us permission to do so.

HOW DO I UPDATE MY EMAIL OR PHONE NUMBER?

You can update your email or phone in the “Settings” page which is at the top right of your dashboard.

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Associate Payroll Schedule

Work week is Sunday through Saturday

Sunday:
TImecards are due from all associates on Sunday 11:59pm.

Monday/Tuesday:
Timecard approval by clients are due no later than Noon on Tuesday

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Wednesday:
Payroll is processed for all approved timecards and file sent to bank for payment on Friday

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Friday:
Direct deposit of payroll is paid to Associates
(payment processed by Associate's bank by close of business).

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Partner Profit Distribution Processing Schedule

Monday - Wednesday:
Invoice clients for all approved timecards

Wednesday:
Cut-off for cash collections to be reflected on Friday profit distributions

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Thursday/Friday:
Partner profit distributions calculated, audited and processed

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Friday:
Distributions published by 5pm and sent to bank for payment by Tuesday

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