

Your Homepage

After successfully logging in, you will be greeted by your homepage. From here, you can view all active policies, contact HMI / Kings, or launch other activities. Throughout your time in Optim, your location will be indicated by a small orange bar under the tab you are viewing. In this example, the tab is highlighting your "Home" which displays the homepage.





Policy Details

When "View Details" is selected on an active policy listed on the Homepage, the details of the policy will open. From this page, you can access your proof of insurance.

A.P. Insurance Brokers Inc		Policy Holder	8	Status	Next Payment Due By			
 Not available 		Portal Account	4	Active	Next Payment Amount	CA\$0.00		
Send Message	曲	Effective Date May 24, 2022	餔	Expiration Date May 24, 2023	Last Payment Date			
					Last Payment Amount			
	Property	Information					>	
	Schedu	e Items					>	
	Liability						>	
	Policy Contacts						>	
	My Policy Documents						>	
	Important Note The information in this portal will only show some of the inform policy please contact your agent or broker.			Click the ch associated	Click the chevron here to open all documents associated with the selected policy.			







Adding New Documents to a Policy

Here, you can access all documents already associated with the policy – this includes your proof of insurance.

Residential Information		>
Farm Information		>
Liability		>
Policy Contacts		Click the Chevron here
My Policy Documents		on your selected policy
Important Note		
The information in this portal will only show some of the informat policy please contact your agent or broker.	ion about your policy. If you have any questions about what you see here of	or about your
		Here, you will find your proof of insurance
	My Policy Documents	associated with the selected policy. Click the
THE KINGS	New Business Policy Packa Jul 18, 2022	Reinstatement Packa 2022 Cloud Icon to download.
		Drag and drop files
		▲ Upload file