

# Getting Started

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## Your Homepage

After successfully logging in, you will be greeted by your homepage. From here, you can view all active policies, contact HMI, 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.

Navigate to your documents by clicking the “My Document” tab.

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My Policies

Residential	Farm	Auto
Policy Number 800328H01	Policy Number 800328F01	Policy Number 800328A01
Effective Date May 24, 2022	Effective Date May 24, 2022	Effective Date May 24, 2022
Expiry Date May 24, 2023	Expiry Date May 24, 2023	Expiry Date May 24, 2023
<a href="#">View Details</a>	<a href="#">View Details</a>	<a href="#">View Details</a>

Contact Us

**HEARTLAND**  
Mutual Insurance

General Inquiries  
Phone: 1-800-265-8813  
Need Help With A Claim?  
claims@heartlandfarmmutual.com  
Need Help With Your Billings?  
billings@heartlandfarmmutual.com  
Need Help With Optim?  
optimsupport@heartlandfarmmutual.com

# Downloading Documents

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## Your Documents

From the tab-bar, select My Documents to view all documents associated with your open policies. On this tab, you can view and download these documents.

Note: To add new documents to policies, navigate to the Policy Details page and follow the directions outlined on Slide 8.



Click the chevron associated with the policy you wish to view.

Policy # 1448995F01

New Business Policy Packa...  
Jul 18, 2022



Policy Reinstatement Packa...  
Jul 18, 2022



Policy # 1448995F02

New Business Policy Packa...  
Jul 18, 2022



Policy Cancellation Packag...  
Jul 18, 2022



Policy # 1448995F03

Policy # 1448995F04

New Business Policy Packa...  
Jul 20, 2022



Policy Cancellation Packag...  
Jul 20, 2022



Click the symbol to download this document.

# Uploading Documents

## Policy Details

From the Homepage, click “View Details” next to the policy you wish to attach documents to.

**Residential**

Policy Number 800328H01  
Effective Date May 24, 2022  
Expiry Date May 24, 2023

**View Details**

Click the “View Details” button to open up the Policy Details screen.

**Policy Details Page:**

- Policy Holder** (Icon: Person)
- Portal Account** (Icon: Shield)
- Effective Date** (Icon: Calendar): May 24, 2022
- Status**: Active
- Expiration Date**: May 24, 2023
- Payments**
  - Next Payment Due By: -
  - Next Payment Amount: CA\$0.00
  - Last Payment Date: -
  - Last Payment Amount: -
- Information** >
- Items** >
- Policy Contacts** >
- My Policy Documents** >
- Important Note**

# Uploading Documents

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## Adding New Documents to a Policy

To add additional documentation to a selected policy, click the chevron to the right of “My Policy Documents.” Here, you can see all documents already associated with the policy. You can drag and drop files from your desktop or use the file selector to upload additional files.

Residential Information >

Farm Information >

Liability >

Policy Contacts >

My Policy Documents >

**Important Note**  
The information in this portal will only show some of the information about your policy. If you have any questions about what you see here or about your policy please contact your agent or broker.

Click the Chevron here on your selected policy page. Before uploading a document, insure the policy selected is correct.

**My Policy Documents**

New Business Policy Packa...  
Jul 18, 2022

Policy Reinstatement Packa...  
Jul 18, 2022

Drag and drop files

Upload file

If you wish to download documents already attached to your policy, click here on each document.

Drag and Drop your document here to upload, or use the “Upload File” button to open the file selector.