

# Getting Started

Home

My Claims

My Billing

My Documents

My Preferences

## 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 open claims, billing information, attached documents, or system preferences by clicking the appropriate tab.

View contact information for HMI

Here are the active policies associated with your account. You can see some information here, such as product, policy number, and important dates. Click “View Details” for more information.

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

## 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 send messages to your Broker, the Underwriter, view all policy details, add documents, view payment information, and make some changes to the active policy.

On this tab, you can see all current policies associated with the account you logged into.

**My Broker**

A.P. Insurance Brokers Inc  
Not available

If there is a phone number listed, you can use it to contact your broker.

**Current**

Policy Holder: [Icon] Policy Holder  
Portal Account  
Effective Date: May 24, 2022  
Expiration Date: May 24, 2023  
Status: Active

**Payments**

Next Payment Due By	-
Next Payment Amount	CAS0.00
Last Payment Date	-
Last Payment Amount	-

Here is all payment information associated with your policy.

**Residential**

Policy Number 800328H01  
Effective Date May 24, 2022  
Expiry Date May 24, 2023  
[View Details](#)

**Property Information**

**Schedule Items**

**Liability**

**Policy Contacts**

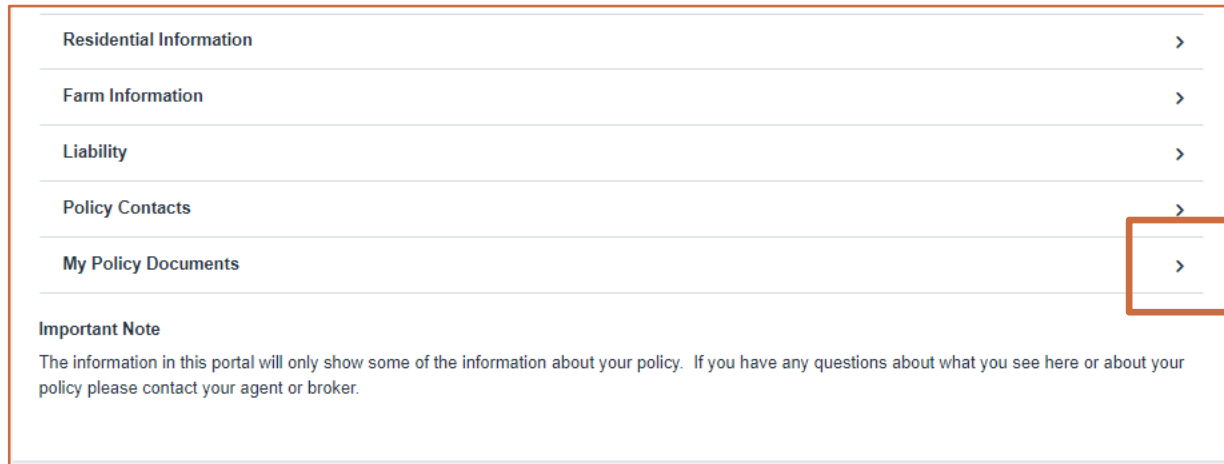
**My Policy Documents**

Click the chevrons here to open details based on the subject you would like to view.

**Important Note**  
The information in this portal will only show some of the information for this policy please contact your agent or broker.

## 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.



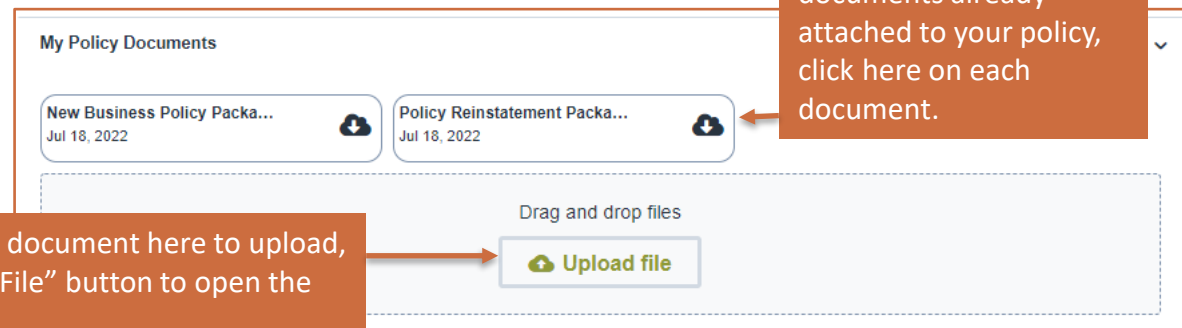
Residential Information	>
Farm Information	>
Liability	>
Policy Contacts	>
<b>My Policy Documents</b>	>

**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.

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.



**My Policy Documents**

New Business Policy Packa... Jul 18, 2022

Policy Reinstatement Packa... Jul 18, 2022

Drag and drop files

[Upload file](#)