

How to Send an Inspection to a Third-Party Inspector



Allow an inspector without an Optigo Happy account to complete an in-person inspection from a mobile phone or tablet

Third-Party Inspections

Optigo Happy allows lenders to complete an inspection on their mobile device using the Happy Inspector mobile app. Alternatively, if the Optigo® lender is unable to conduct the inspection and uses a third-party inspection service, they can send the inspection form to the Inspector. The Inspector will receive an email with a link to conduct the inspection. Here's a [video tutorial](#) on the process to assist the Third-Party Inspector.

Differences in Optigo Lender and Third-Party Inspections

- The Third-Party Inspector will use on a mobile website, not the downloaded Happy Inspector native app
- The Inspector will only have access to the assigned inspection and does not need a login or password
- Once the Inspector submits the inspection, they **cannot** access it again
- The Inspector does **not** have access to the manage.optigohappy.com desktop platform
- The Inspector cannot submit the inspection to Freddie Mac. The Optigo lender reviews and submits the inspection report

How to send a Third-Party Inspection

Step 1: Log into manage.optigohappy.com to find inspection

- Find the inspection you want to assign to a third party
- Click the checkmark to open the Bulk Actions on the right side of your screen
- Select "Send to Resident"

A screenshot of a web browser displaying the Optigo Happy management interface. The browser address bar shows 'manage.optigohappy.com/folder/75412/inspections'. The interface has a dark sidebar on the left with navigation options: 'Inspections' (selected), 'Reports', 'Templates', and 'Virtual'. The main content area shows a list of inspections. At the top, there are tabs for 'All', 'Open', 'Complete', and 'Expired', with 'Open' selected. A 'New Inspection' button is visible. Below the tabs, there is a search bar and a 'Search' button. A table lists two inspection templates: 'Seller Inspection Template' and 'Freddie Mac Inspection Template'. Both are marked as 'Scheduled' and 'Unassigned'. The date '18 December 2020 at 7:41 pm' is shown for both. On the right side, a 'Bulk Actions' panel is open, showing options: 'Assign Inspector', 'Expire', 'Delete', and 'Send to Resident'. The 'Send to Resident' option is highlighted with a checkmark.

Inspection	Status	Date
Seller Inspection Template	Scheduled	18 December 2020 at 7:41 pm
Freddie Mac Inspection Template	Scheduled	18 December 2020 at 7:41 pm

Step 2: Assign inspection to Third Party

- Provide Inspector's name, email and an optional message

The screenshot shows the Optigo Happy web application interface. The browser address bar displays `manage.optigohappy.com/folder/75412/inspections`. The main content area is titled 'Inspections' and shows a list of inspection templates. A modal dialog box titled 'Send to Resident' is open, displaying the following information:

- Resident Name:** Tony Stark
- Email:** Tony@ironmaninspections.com
- Optional Message:** Hey Tony,
Please complete this Freddie Mac inspection using Optigo Happy.

A blue 'Send' button is located at the bottom right of the dialog box.

Step 3: Confirm inspection is sent

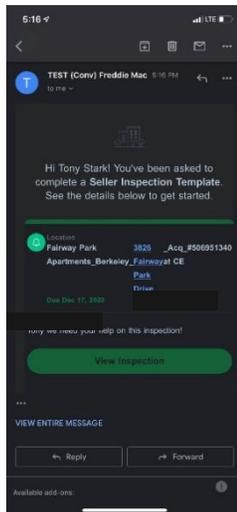
The screenshot shows the Optigo Happy web application interface. The browser address bar displays `manage.optigohappy.com/folder/75412/inspections`. The main content area is titled 'Inspections' and shows a list of inspection templates. The 'Seller Inspection Template' is highlighted with a red box, and its status is 'Scheduled • Sent to Tony Stark'. The 'Freddie Mac Inspection Template' is also visible, with a status of 'Scheduled'.

The 'Bulk Actions' panel on the right side of the interface includes the following options:

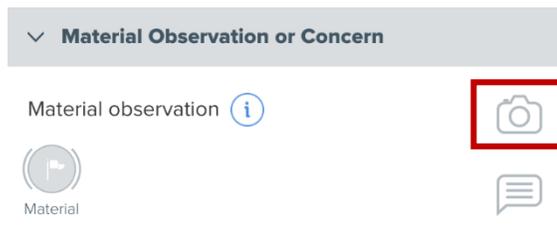
- Assign Inspector
- Expire
- Delete
- Send to Resident

Step 4: Third-Party Inspector completes inspection

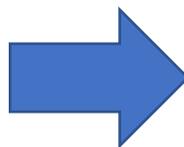
- The Inspector will receive a link to the mobile inspection form. They will not have to download the app or provide login credentials to access.



- The mobile site has the same inspection form and the ability to take pictures for each question. The Inspector does **not** need to save pictures to their phone.



- Once complete, the Inspector scrolls to the bottom, verifies the accuracy and submits.



NOTE: Inspector will not be able to access the inspection once they select "Agree and Complete."

Step 5: Optigo lender verifies inspection and submits to Freddie Mac.

The screenshot shows a web browser window with the URL `manage.optigohappy.com/folder/75380/inspections/MnuiNAC-A-bZX?status=open`. The browser's taskbar shows several open applications, including 'Optigo Happy', 'Life of a Loan Overv...', 'Optigo Happy Dash...', 'OptigoHappy - Agil...', 'Custom Reports: In...', 'Adoption Tracker', and 'myOptigo'. The main application window is titled 'CONVENTIONAL_MASTER' and displays a report template. At the top of the report, there are two dropdown menus: 'Type' set to 'Standard report' and 'Style' set to 'FINAL REPORT'. A blue 'Create Report' button is highlighted with a red rectangular box. Below the dropdowns is a logo for Freddie Mac Multifamily Optigo Happy. The main heading of the report is 'Seller Inspection Template'. Underneath, the word 'test' is displayed. A grey bar indicates the report was created on December 23, 2020, at 1:06 PM. At the bottom, the inspector's details are listed: Name: Frederick Grant, Email: frederick_grant@freddiemac.com.

Additional Help

- For questions or support regarding Optigo Happy inspections, please contact the HappyCo support line: **(628) 272-8050**, or [raise a request through the Support Desk](#)