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"

Step 2: Assign inspection to Third Party

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

Step 3: Confirm inspection is sent

**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.
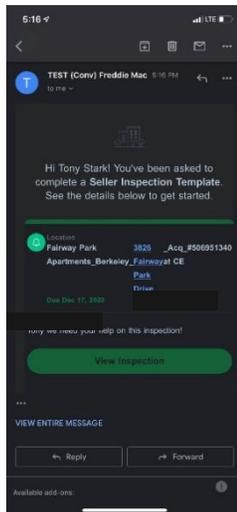
- The mobile site has the same inspection form and the ability to take pictures for each question. The Inspector does **not** need to save pictures to their phone.
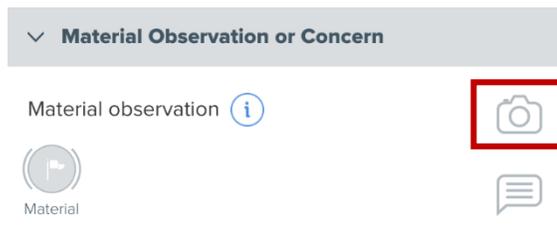
- Once complete, the Inspector scrolls to the bottom, verifies the accuracy and submits**.**
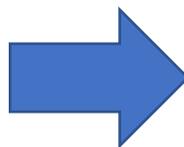
NOTE: Inspector will not be able to access the inspection once they select "Agree and Complete."

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

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**