Helpful Resources

RESOURCES

Readiness Checklist
Includes important reminders and checklist items for investor reporting.

Digital Transformation Webpage
Find other myOptigoSM investor reporting resources on this webpage.

VIDEOS

View the below videos to help you get started with myOptigo:

Account Set-up
Set up your Optigo® account. Watch here.

Tutorials
Watch these quick how-to guides covering a variety of reporting activities.

- Report a Cash Payoff (Code 61)
- Report a CME Payoff (Code 66)
- Dispute Freddie Mac Expected Interest
- Monthly Reporting on a Single Loan
- Monthly Reporting on Loans through Bulk
- Monthly Reporting on Bonds through Bulk
- Bond Delinquency Reporting
Known Issue

Logging Out of myOptigo

Users have reported their myOptigo sessions are not fully logged out upon closing the browser tab or browser window. To ensure your reporting session is completely logged out to protect your data – and so another user cannot submit requests under your account – please follow these steps:

1. Click the profile icon in the upper right corner of the Hub

2. Click on the words “Log Out” in the bottom right corner of the profile window (refer to image below).

3. A successful log-out will show the following screen displaying “Sign Out Successful”.

Sign Out Successful

You have successfully signed out your single sign-on session.

SIGN IN AGAIN