

Optigo Happy: Lease Audit Integration



The Lease Audit questions are now integrated into the Optigo Happy property inspection template.

1. Completing the Lease Audit before or during an Inspection

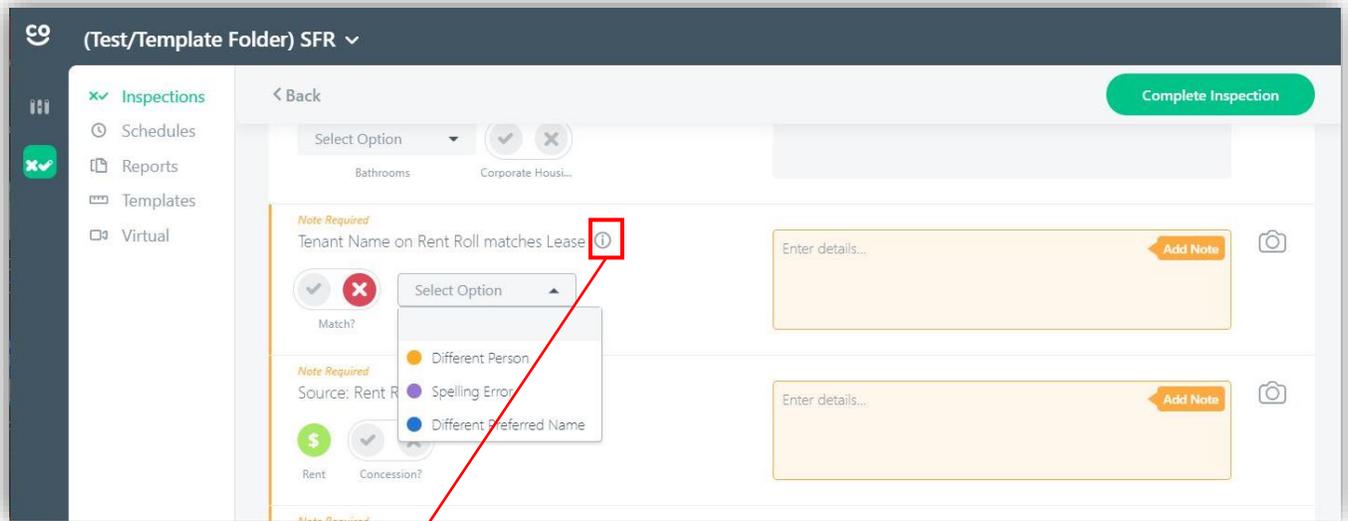
Begin by entering information into the Lease Audit section of the inspection form prior to or during an inspection. The questions highlighted below are the same lease audit questions and content – just in a digital format, replacing the Excel spreadsheet lease audit.

If a representative of the Optigo® lender conducts the property inspection, and lease files are maintained on-site, the lease audit must be conducted at the time of the site inspection. If a virtual or contracted third-party inspection is permitted in response to the COVID-19 pandemic, or the lease files are not on-site, review of lease files by the Optigo lender and/or Freddie Mac may be completed electronically.

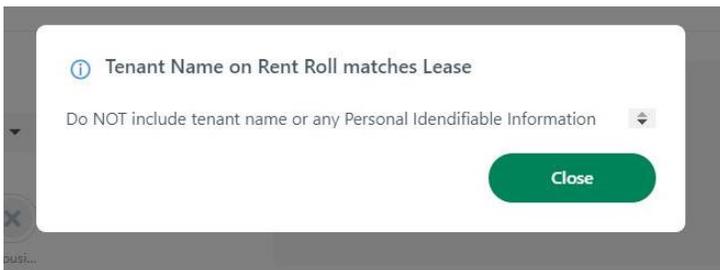
A screenshot of the Optigo Happy property inspection form. The interface is dark-themed with a sidebar on the left containing navigation options: Inspections (checked), Schedules, Reports, Templates, and Virtual. The main content area shows a 'Lease Audit' section with 10 items. The first item is 'Unit #' with an 'Enter details...' field. The second item is 'Type (BR/BA)' with a 'Select Option' dropdown menu and an 'Enter details...' field. The third item is 'Tenant Name on Rent Roll matches Lease' with a 'Match?' checkbox and an 'Enter details...' field. The fourth and fifth items are 'Note Required' sections for 'Source: Rent Roll' and 'Source: Lease', each with a green dollar sign icon, a 'Rent' checkbox, a 'Concession?' checkbox, an 'Enter details...' field, and an 'Add Note' button. A 'Complete Inspection' button is visible in the top right corner.

Tenant Name

In the **Tenant Name on Rent Roll matches Lease** section pictured below, only verify that the tenant's name on the rent roll matches the lease. If there is a mismatch, select a reason why in the drop-down. **Do not enter** the tenant's name.



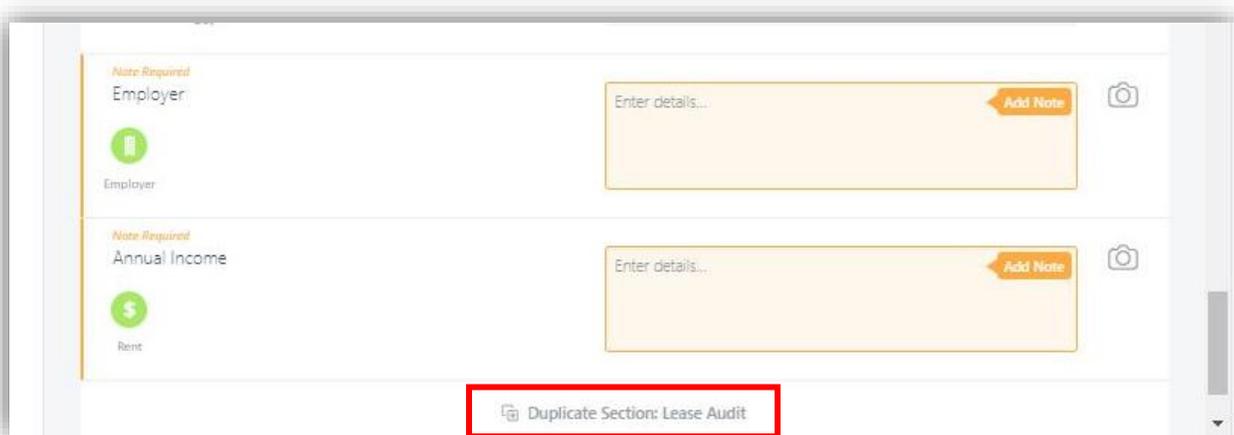
The screenshot shows a software interface for an inspection. On the left is a navigation menu with options like 'Inspections', 'Schedules', 'Reports', 'Templates', and 'Virtual'. The main area has a 'Back' button and a 'Complete Inspection' button. A section titled 'Tenant Name on Rent Roll matches Lease' is highlighted with a red box around an information icon. A dropdown menu is open, showing options: 'Different Person', 'Spelling Error', and 'Different Preferred Name'. Below this are two text input fields with 'Add Note' buttons and camera icons.



This is a detailed view of the pop-up window. It has a title 'Tenant Name on Rent Roll matches Lease' and a sub-header 'Do NOT include tenant name or any Personal Identifiable Information'. At the bottom is a green 'Close' button.

Units to Audit

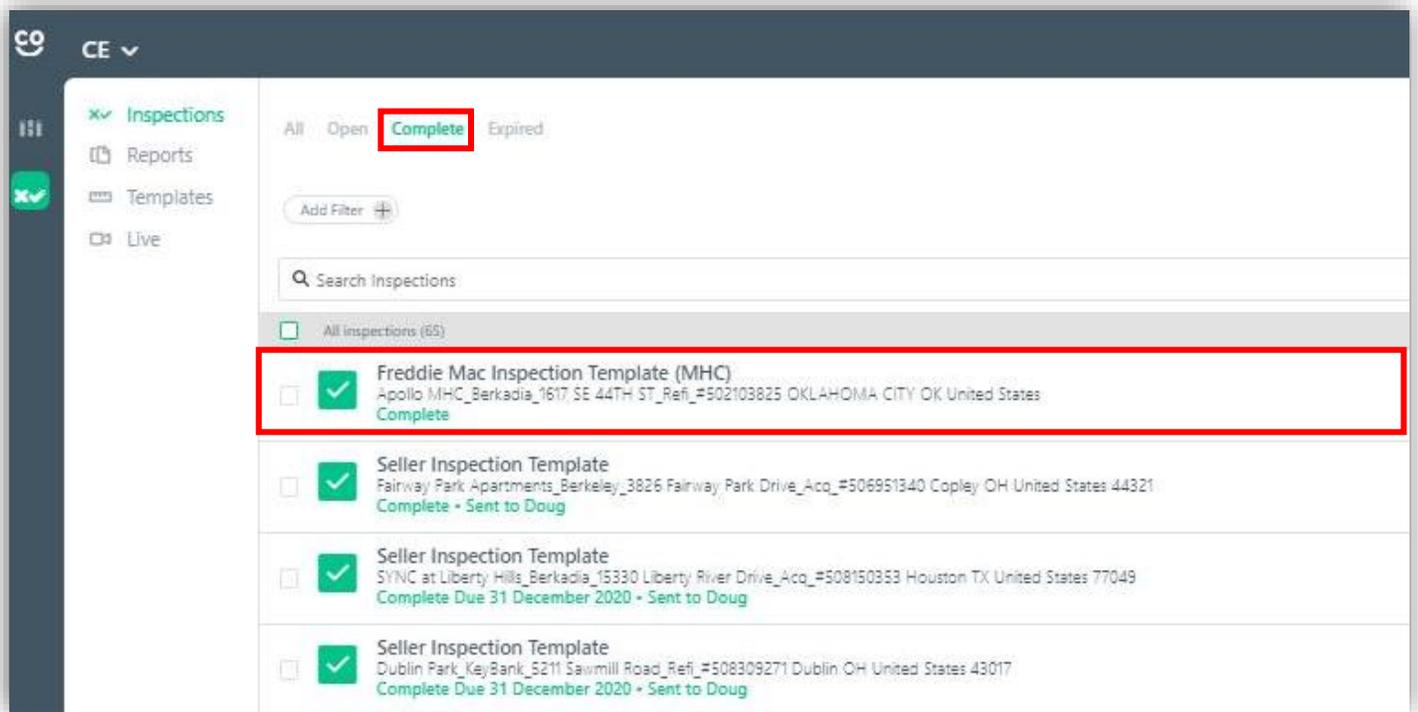
The inspection form will populate the correct number of units to audit. If more leases need to be audited, a Duplicate Section option is available to add additional lease audit records.



The screenshot shows the 'Employer' and 'Annual Income' sections of the form. Each section has a text input field and an 'Add Note' button. At the bottom, a button labeled 'Duplicate Section: Lease Audit' is highlighted with a red box.

2. Completing the Lease Audit after Submitting an Inspection

If you are unable to complete a Lease Audit at the time of the property inspection, and you need to complete it after the submission of the inspection record, simply go into “Complete” inspections and click on the completed inspection record to update it with the Lease Audit.



Unlock and Edit

Once you've opened the inspection file to be updated, click “Unlock & Edit Inspection” in the top right corner. This will allow you to edit the inspection and update the Lease Audit section. Once the Lease Audit has been completed, click “Complete Inspection” and then “Create Report”.

NOTE: For non-SBL deals, when re-submitting an inspection, a new inspection file will be automatically uploaded to the Document Management System (DMS). Please be sure to let your Freddie Mac counterpart know there will be two inspection reports in DMS: one with the Lease Audit and one without. SBL inspection reports still need to be manually uploaded to DMS.



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