

Virtual Inspections

Optigo HappySM Quick Guide

How to Get Started and Best Practices



Optigo Happy

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Prepare for the Virtual Inspection

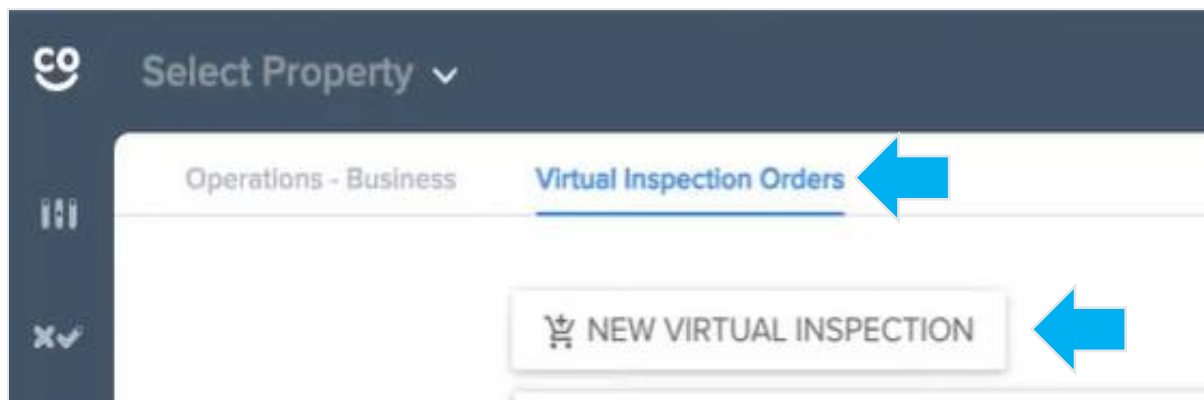
For a virtual inspection to be successful, have an additional participant on-site (such as a property manager) serve as the Camera Operator.

We discourage a lender representative taking on both the Inspector and Camera Operator roles. Attempting to do so may result in technical issues that prevent proper completion of the virtual inspection.

Order a Virtual Inspection

Step 1: Log into [Optigo Happy](#).

Step 2: On your main Optigo Happy homepage/dashboard, click “Virtual Inspection Orders.” Then click on “NEW VIRTUAL INSPECTION.”



Step 3: In the Region/Office field, select the branch location of the property as shown in OUS and click “Next”.

Step 4: Fill out the inspection details on the inspection order page.

- A. **Inspection:** Select the property that will be inspected
- B. **When is the virtual inspection scheduled?** Select the date and time for the scheduled inspection
- C. **Time zone name:** Select the time zone for the scheduled inspection date and time
- D. **Lender Inspector Attending Virtually:** Leave this box checked if the lender inspector is attending virtually. If the lender inspector will be on-site, uncheck this box. The status of this checkbox determines whether a \$300 virtual inspection fee will be charged.
- E. **Lender Inspector:** Select the name of the inspector from the Lender drop-down list. If the **Lender Inspector Attending Virtually** checkbox is unmarked, this field will disappear.
- F. **Camera Operator name:** Type in the name of the camera operator
- G. **Camera Operator email:** Enter the selected camera operator’s email



☰ ALL VIRTUAL INSPECTIONS

Region/Office

Inspection

A)

When is the Virtual Inspection scheduled?

B)

Timezone name

C) Eastern Time (US & Canada)

Lender Inspector

D) Lender Inspector Attending Virtually

Lender Inspector

E)

Camera Operator

Camera Operator Name

F)

Camera Operator Email

G)

Step 5: Select the additional participants that will be joining the Optigo Happy virtual inspection remotely. Select the “Email All Participants Immediately?” checkbox under “Additional Options”. Click “ORDER INSPECTION”.

- **Freddie Mac joining:** Select the checkbox if a Freddie Mac inspector will be remotely joining the property inspection
 - **SBL:** You will be prompted to select the Freddie Mac inspector on this screen.
 - **Conventional & Specialty (includes TAH, Seniors and Structured):** You will enter the Freddie Mac inspector’s name on the next screen.

Other Participants


Engineer joining

Appraiser joining

Freddie Mac joining

Additional Options

Email All Participants Immediately?



Step 6: Review the Virtual Inspection Order details and add additional participants to the ordered Optigo Happy inspection.

- **Freddie Mac Inspector:** Select a Freddie Mac inspector from the drop-down. Click the arrow next to the selected inspector to send the scheduled inspection email to the Freddie Mac



inspector. The Optigo® lender can only assign one Freddie Mac inspector. Once this person is assigned, only Freddie Mac users can reassign the inspection internally.

- **Add Engineer, Appraiser or Other Participant:** Optigo lender can add additional participants (who can see the stream but will have no inspection template to complete) up until the time of the inspection.

Step 7: Review the email history to ensure all invited participants have received a notification email.

If an email has not yet been sent, click the arrow to the right of the email address to send a notification email with Property Address, Date and Time of the now-scheduled virtual inspection.

Virtual Inspection Orders

Region	Los Angeles	Freddie Mac Inspector	Jane Doe jane_doe@email.com <i>never emailed</i>	
Start On:	7/27/20 at 10:00 PDT	Lender Inspector	John Doe <i>never emailed</i>	
Session Code	168-961-157	Camera Operator	Jane Doe jane_doe@email.com <i>last emailed less than a minute ago</i>	
Inspection Status	Scheduled			
Ordered By	John Doe			

ADD APPRAISER **ADD ENGINEER** **ADD OTHER PARTICIPANT**

Email History

Role	Name	Email Address	Sent at
Lender Inspector	John Doe	john_doe@email.com	7/24/20 at 10:16 MDT
Camera Operator	Jane Doe	jane_doe@email.com	7/24/20 at 10:16 MDT

Complete the Virtual Inspection Checklist

Run through the following checks before starting a virtual inspection:

- ✓ Have your designated Camera Operator download the **Optigo Happy** mobile app and check the WiFi signal at the property prior to the inspection.
 - [Download app for Android](#)
 - [Download app for iOS](#)
- ✓ If the WiFi signal at the property is insufficient, request your Camera Operator use their mobile data to conduct the inspection.
- ✓ Test the video quality of the live stream by joining your virtual inspection early with the Camera Operator. Remember, the quality of the video will not impact the quality of the photos being captured, but it will impact the experience of the other virtual inspection participants.



- ✓ Remind your Camera Operator to have a fully charged phone or mobile device at the time of the inspection.

Additional Help

For questions or support regarding Optigo Happy, please contact the support line: (628) 272-8051, or [raise a request through the Support Desk](#).