Helpful Videos

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

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

Loan Quote Submission
How to submit a Conventional loan quote. Watch here.
How to submit a Student Housing or Green loan quote. Watch here.
How to submit a TAH cash loan quote. Watch here.
How to submit an MHC loan quote. Watch here.

What's New
Keep up with the latest features and enhancements at the myOptigo Snapshot webpage.

FAQs

1. **What part of my usual interaction with Freddie Mac does myOptigo replace?**
    Currently, myOptigo allows users to submit a Loan Submission Template (LST) to Freddie Mac for the quote stage of the process. This will replace the process of uploading an LST to the Origination and Underwriting System (OUS). You can track opportunities from origination through funding. You're also able to directly upload documents relating to production and the core underwriting package through myOptigo. More capabilities will be added over time, and we welcome feedback on helpful features.

2. **Who should I contact with issues?**
    For future enhancements and feedback, please email the Multifamily Feedback mailbox. For technical issues, please contact the Multifamily Service Desk.

3. **My bookmark isn't working for the URL I received. What's wrong?**
    Make sure you have bookmarked the correct URL: **my.optigo.com**, not the link included in your credential emails. Also, please do not favorite/bookmark the sign-in page as the URL changes each time you log in.

4. **Can I log into other Freddie Mac Multifamily systems with the myOptigo credentials?**
    Your Optigo account login is not currently set up to access other Freddie Mac systems, like the Insurance Compliance Tool. Please continue to use your normal login credentials for systems outside of myOptigo.

The [Freddie Mac Access Manager (FAM) system](#) is used only to set up your myOptigo login credentials and to reset your password, should you need it. Once you've set up your credentials in FAM, you can use it to sign into [myOptigo](#).

5. **I want other members of my team to have access to myOptigo. How can I get them onboarded?**
   At this phase, we are onboarding lenders who submit basic Conventional, Student Housing, Manufactured Housing Community (MHC) and TAH cash loan quotes. As we expand our features and product types in the system, we will get more users onboarded. This is a rolling process that ensures we're delivering solutions that work and allows us to continually refine those solutions.

6. **Which version of the Loan Submission Template (LST) does my Optigo account support?**
   Your Optigo account currently supports version 2.9.0_0206 and [LST 2.10](#). Please ensure that the LST has not been unlocked and altered. It's important to note that you cannot submit LSTs where the file name includes the following special characters: - # & \ " +.

7. **Will there be email notifications once the loan is submitted, like with the Origination and Underwriting System (OUS)?**
   Yes, you will receive an email notification when the loan hits Freddie Mac's systems.

8. **If there was a mistake that I'd rather fix on the LST instead of the web portal, can I re-upload the LST?**
   Yes, if you prefer to fix an error within the LST itself, you must delete the opportunity record before re-submitting a revised LST file. Just navigate to your pipeline view and click "Delete" on the record. You can then re- upload the adjusted LST into a new opportunity record.

9. **What types of loans are supported by the platform?**
   myOptigo is being rolled out to all loan types and will replace our legacy systems over time. Today, please use the platform to submit your Conventional, Student Housing, MHC and TAH cash loan requests. Other loan types can be uploaded through OUS until they are supported by myOptigo. There will be further updates and training on new functions in the future, including other loan products and underwriting processes.

10. **How many quote scenarios can I submit?**
    You can request up to eight different quote scenarios for a given opportunity.

11. **Do I still need to go to DMS to upload production-related supporting documents and the narrative?**

No. In July 2020, we rolled out the feature that allows users to upload production and core underwriting package documents directly in myOptigo. These uploaded documents flow automatically to the Document Management System (DMS).

Click "Track" on your submitted opportunity record, which will bring up the Loan Summary page, including a task list in the bottom right. A task is correlated with a single document upload. The task to upload your narrative will auto-generate and other tasks can be created to upload additional document types ("Create New"). The documents, once uploaded, can also be viewed in the Documents tab at the top of the page. Production documents uploaded here will be automatically sent to your Freddie Mac Producer. Core underwriting documents uploaded here will automatically be saved to DMS, so you do not have to upload twice. The file name of the uploaded document will translate to the document title in DMS – so be sure to clearly name the file.

12. **Does myOptigo show the assigned Freddie Mac contacts for the transaction?**

Yes. The respective names of the entire Freddie Mac deal team, consisting of primary production and primary underwriting contacts, can be viewable on the Loan Summary page by clicking on "Track."

13. **What should I do if my opportunity submission reverts to "Draft Created" after I have already submitted it?**

You will receive a notification if your opportunity submission reverts due to an error. Please reach out to the Multifamily Service Desk at 1-866-MultiFM (1-866-685-8436) for assistance if you encounter this – a team member will let you know what must be done to fix the issue.

If the LST data requires a change, please delete the opportunity record from your pipeline and upload a new opportunity with the corrected LST. If the Multifamily Service Desk indicates no data change is required, you may simply click "Edit" to re-enter the opportunity record and re-click "Check & Send" from within the opportunity.

Troubleshooting

- **LST unable to load**: User receives error that LST submission failed or the LST was "unable to load."
  - If this issue arises, please double check that you are working with an unaltered LST and your LST title does not contain any special characters (- # & \ " +). If the problem persists, contact the Multifamily Service Desk.
  - Depending on the root cause of the issue, Freddie Mac may ask that the user resubmit their LST.
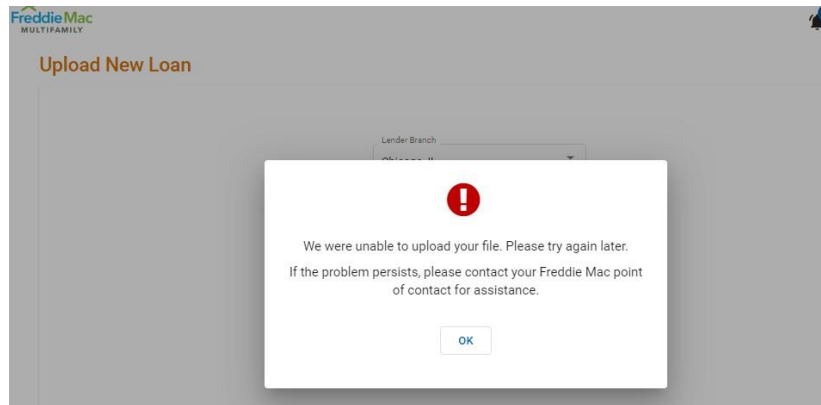
- **Opportunity ID not provided**: User submits the LST successfully but does not receive an Opportunity ID as expected.
  - If this issue arises, please contact the Multifamily Service Desk.
  - Depending on the root cause of issue, Freddie Mac may ask that the user resubmit their LST