CalyxPath

CalyxPath

Getting Started

Start by opening CalyxPath in a web browser.
Enter your credentials and Log In.

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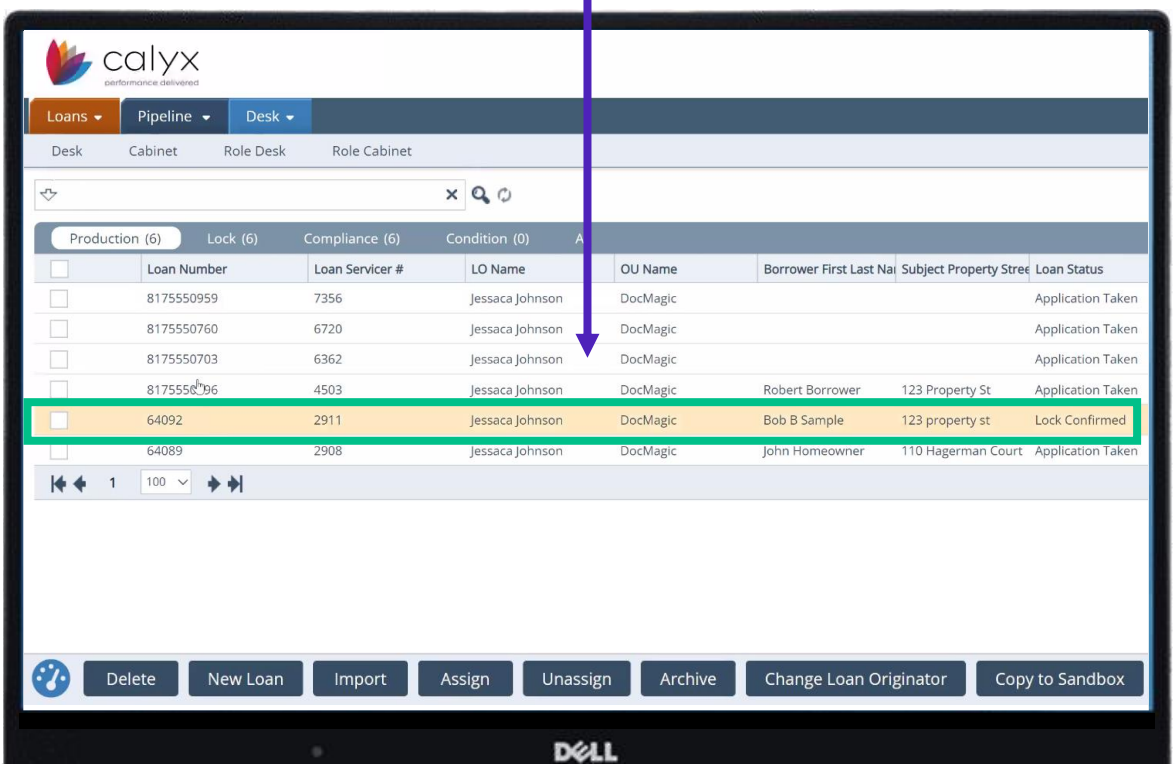
File Selection

Select your file.



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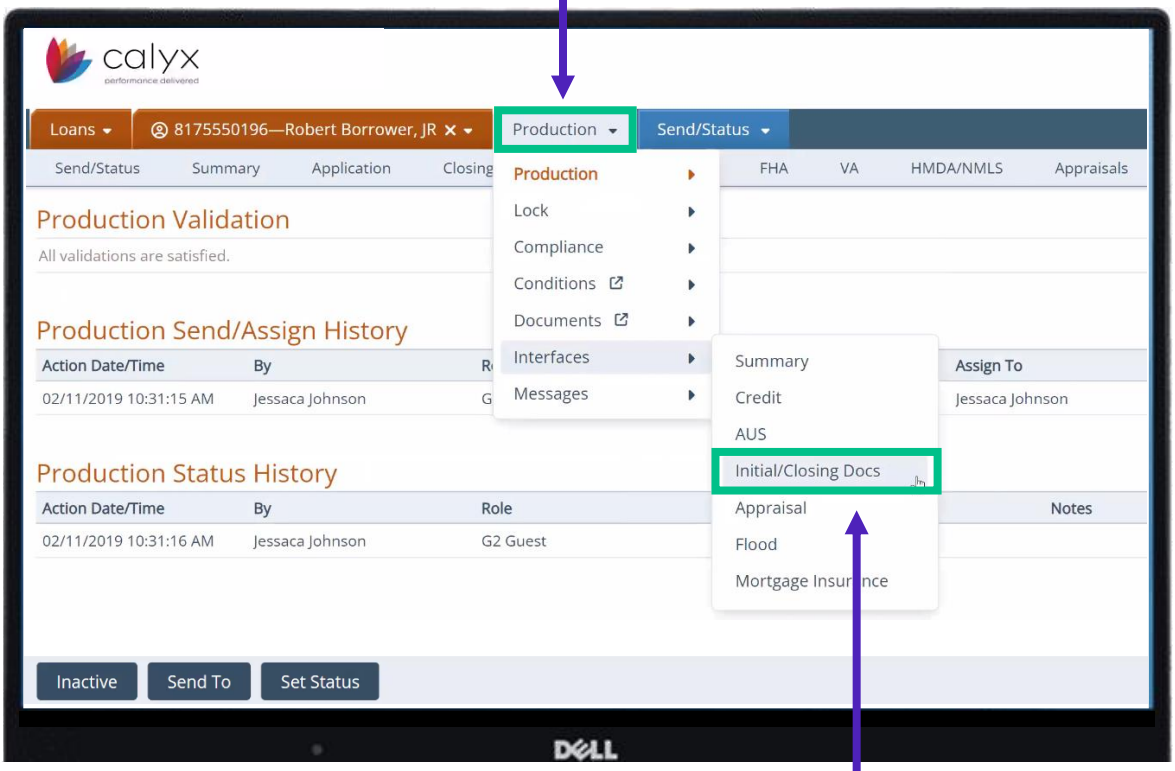
Production → Interfaces → Initial/Closing Docs

Select Production from the top.



Scroll down to Interfaces, then select Initial/Closing Docs.

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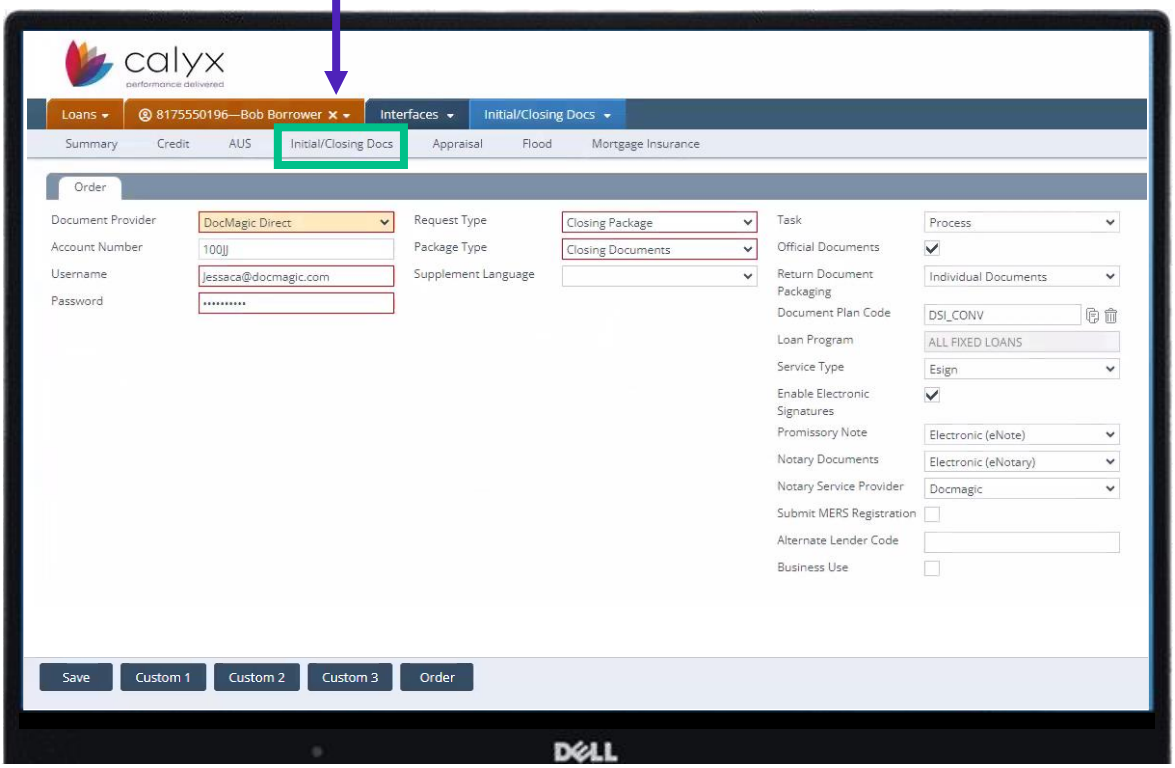
Initial/Closing Docs

You are now on the Initial/Closing Docs screen.



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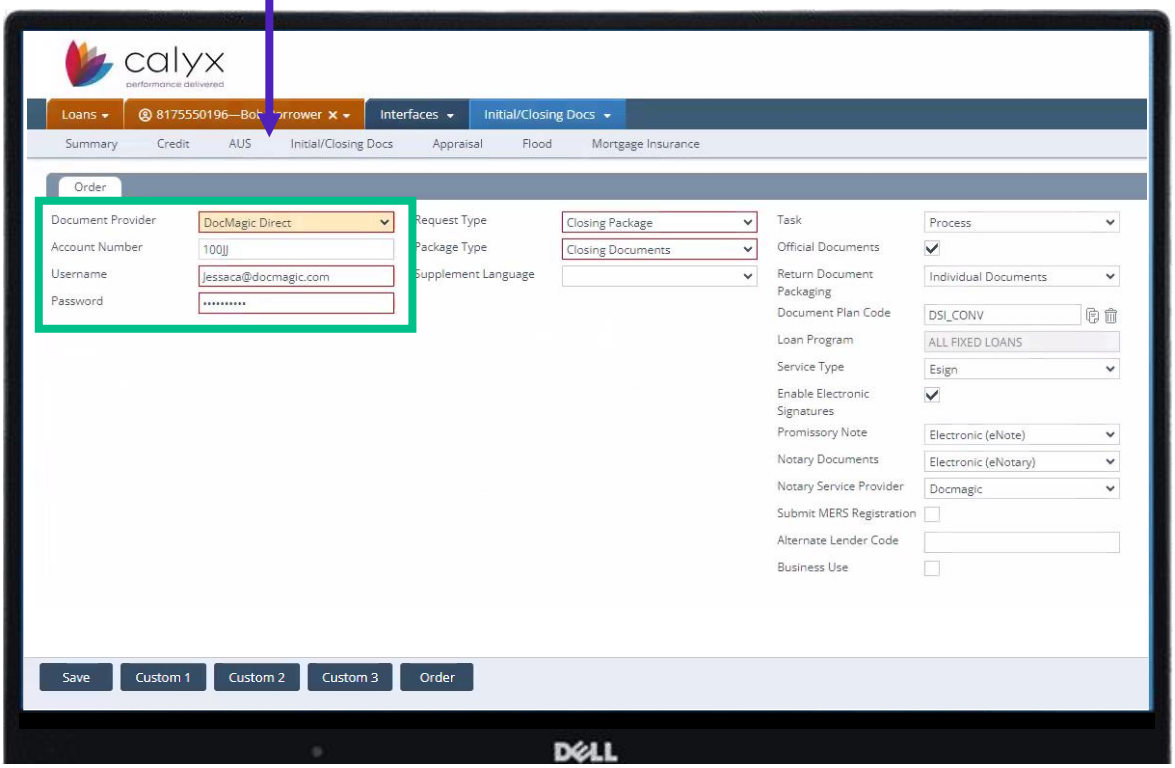
Credentials

Select DocMagic Direct as your Document Provider. Enter in your Account Number and your credentials (Username/Password).



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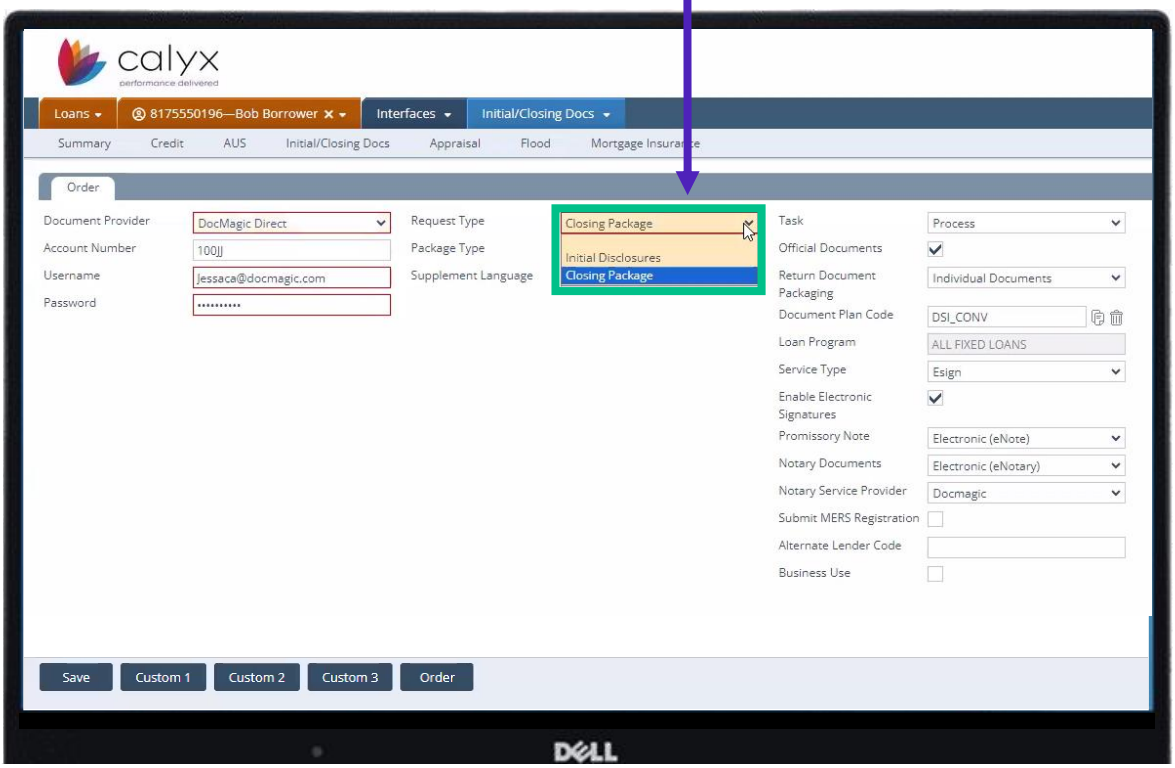
Request Type

Select Initial Disclosures or Closing Package from Request Type.



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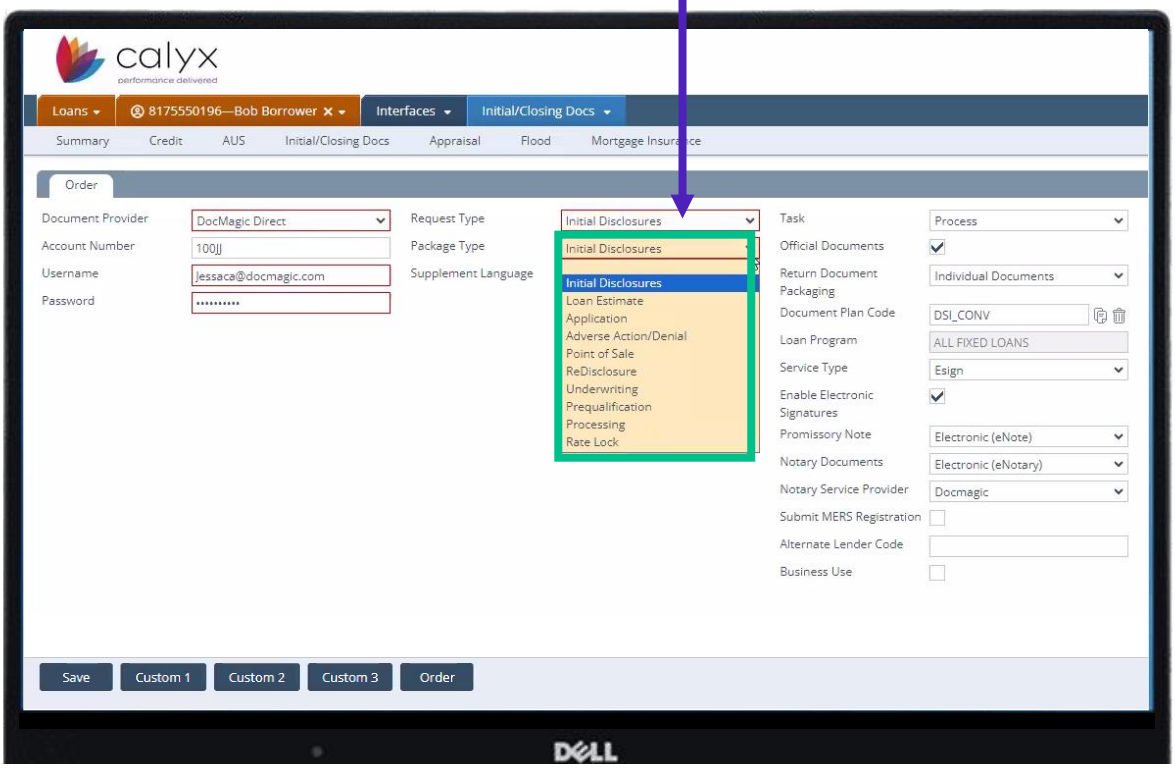
Package Type

After choosing Request Type, select a Package Type.



Your options for Package Type are determined by what Request Type you select.

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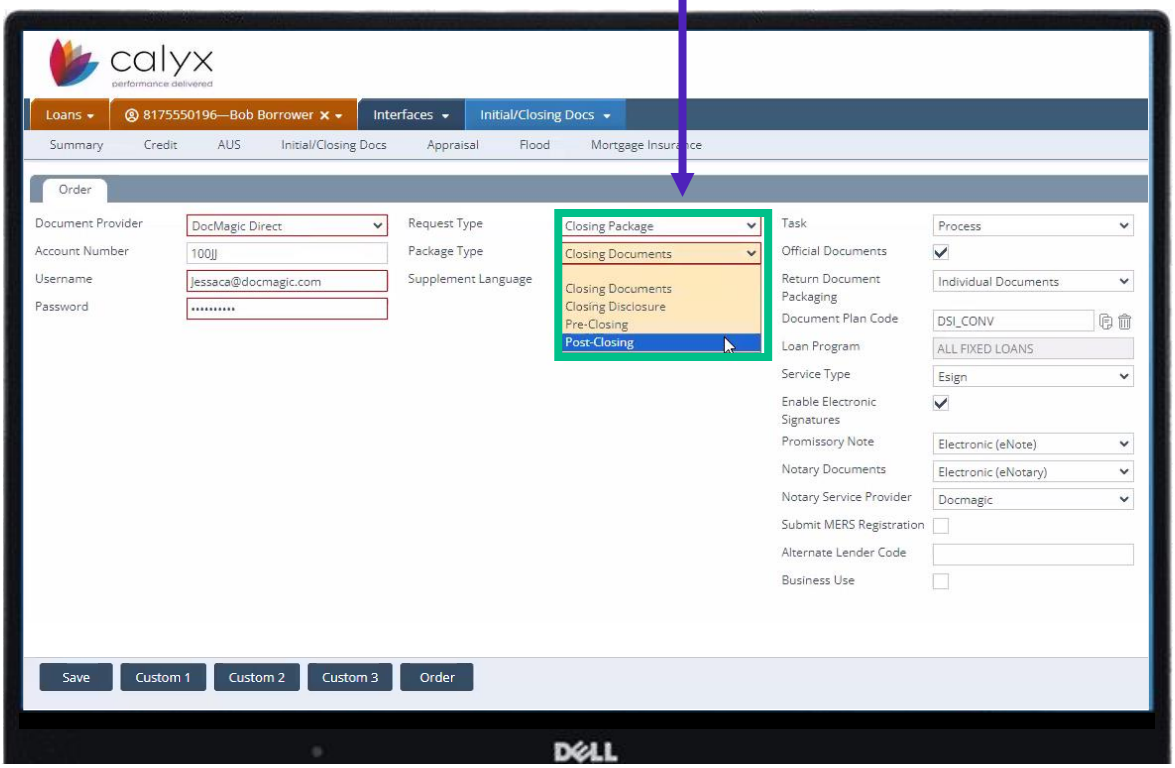
Package Type

If you select Closing Package, you'll get a list of Package Types that correspond.



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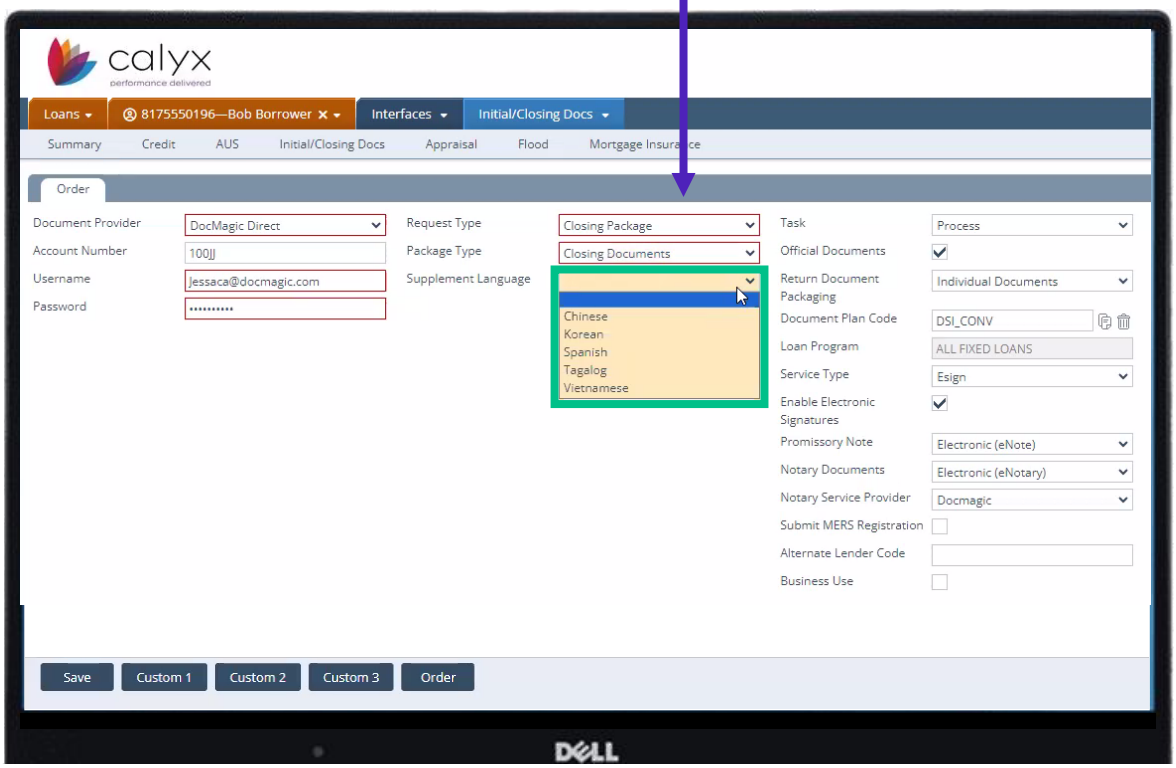
Supplemental Language

Path does include a Supplemental Language option, where you can get the documents back in a different language.



This is not set up by default. Please check with customer service before enabling this.

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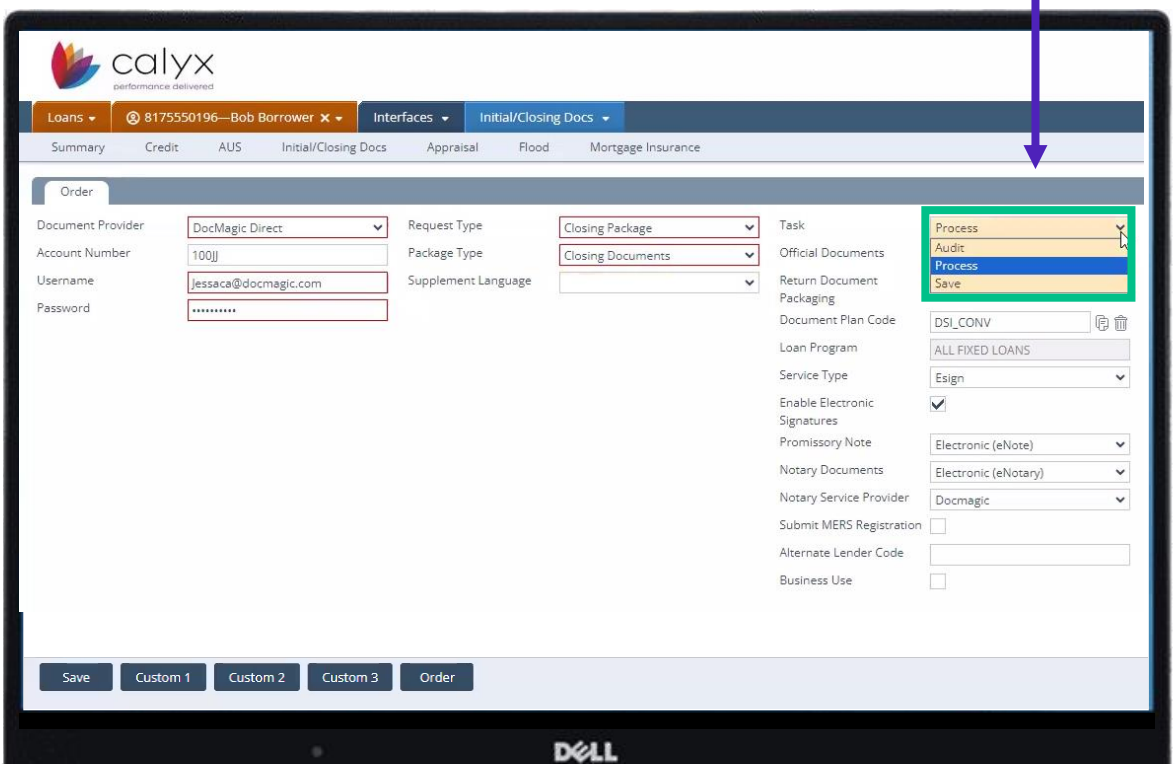
Task

Choose Audit if you want to check the document package for any errors or Process to process the set of documents.



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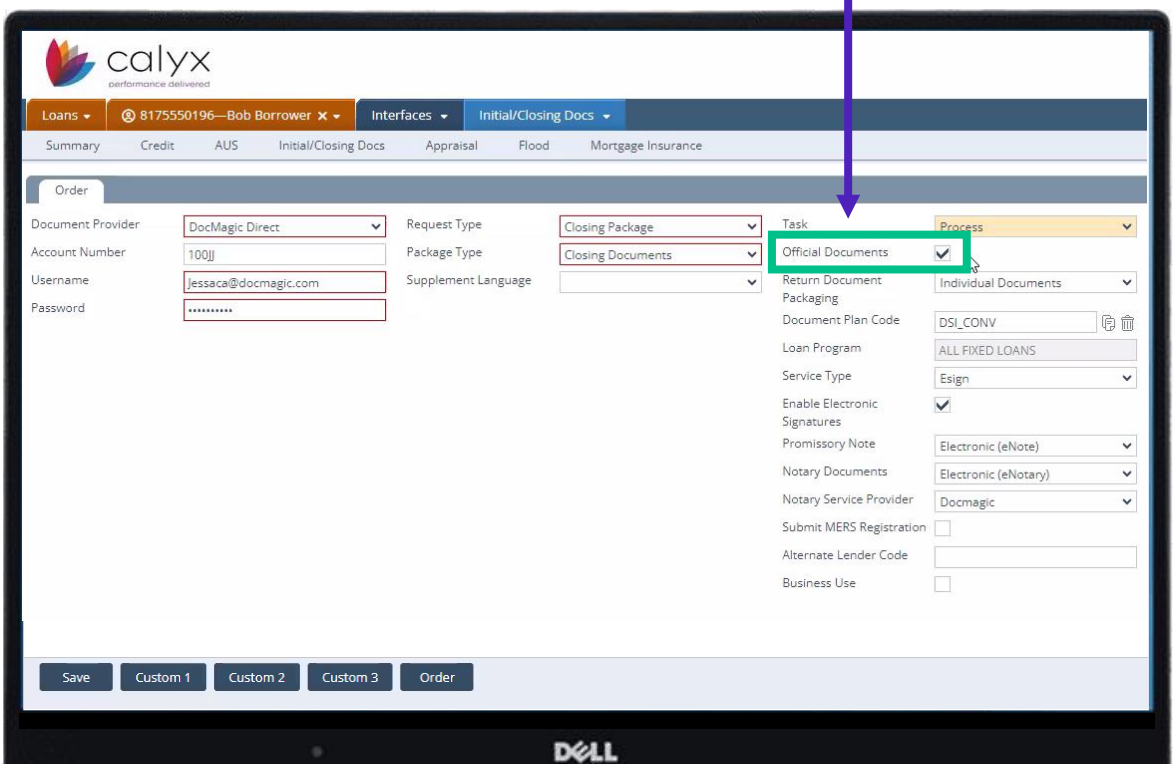
Official Documents

If this box is unchecked, DocMagic will not keep the data. Unchecking this box is mostly reserved for running sample packages, which will be produced with a watermark.



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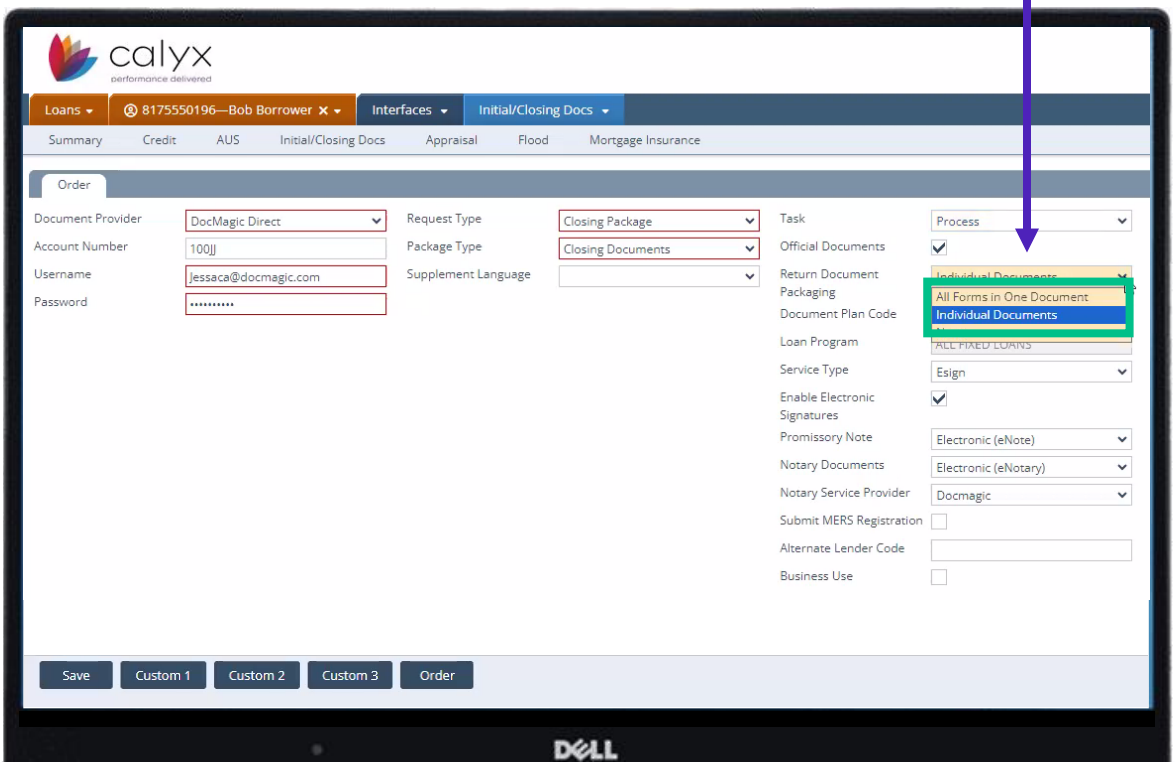
Return Document Package

You can choose to receive the document package as individual documents, or as all forms in a single document.



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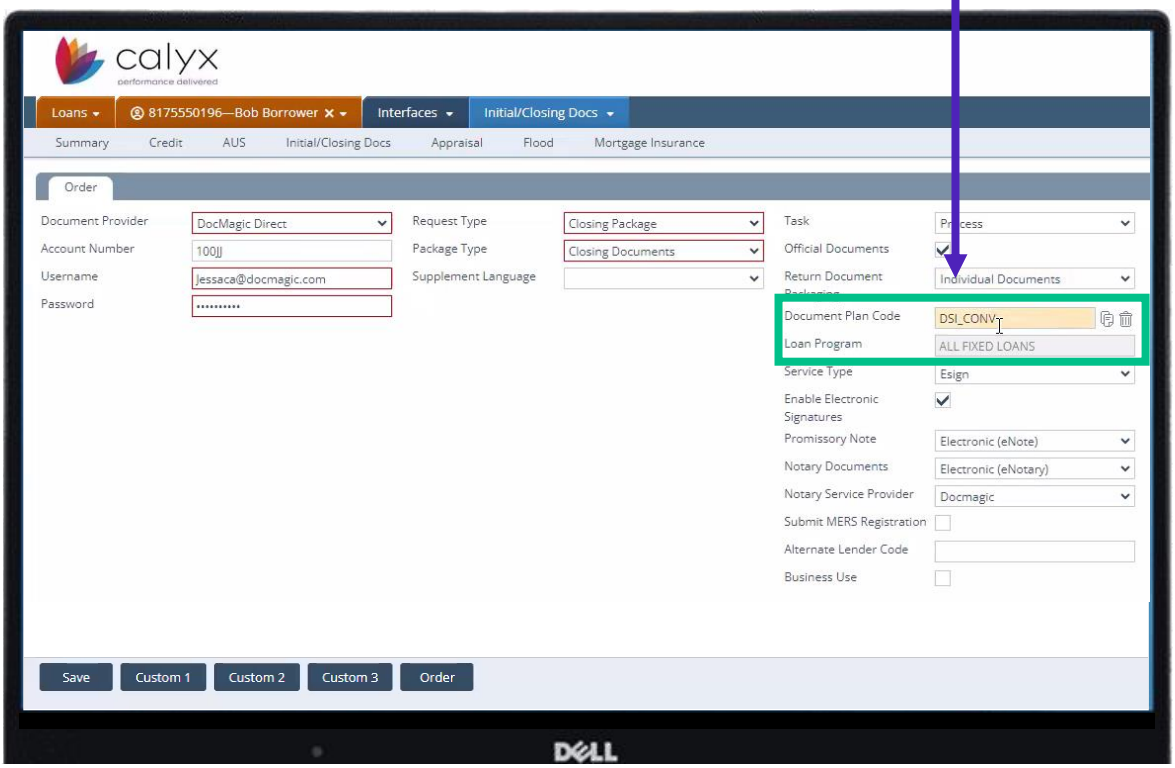
Document Plan Code + Loan Program

Double check that your Document Plan Code and Loan Program are correct.



You may need to log into your DocMagic Dashboard to configure these.

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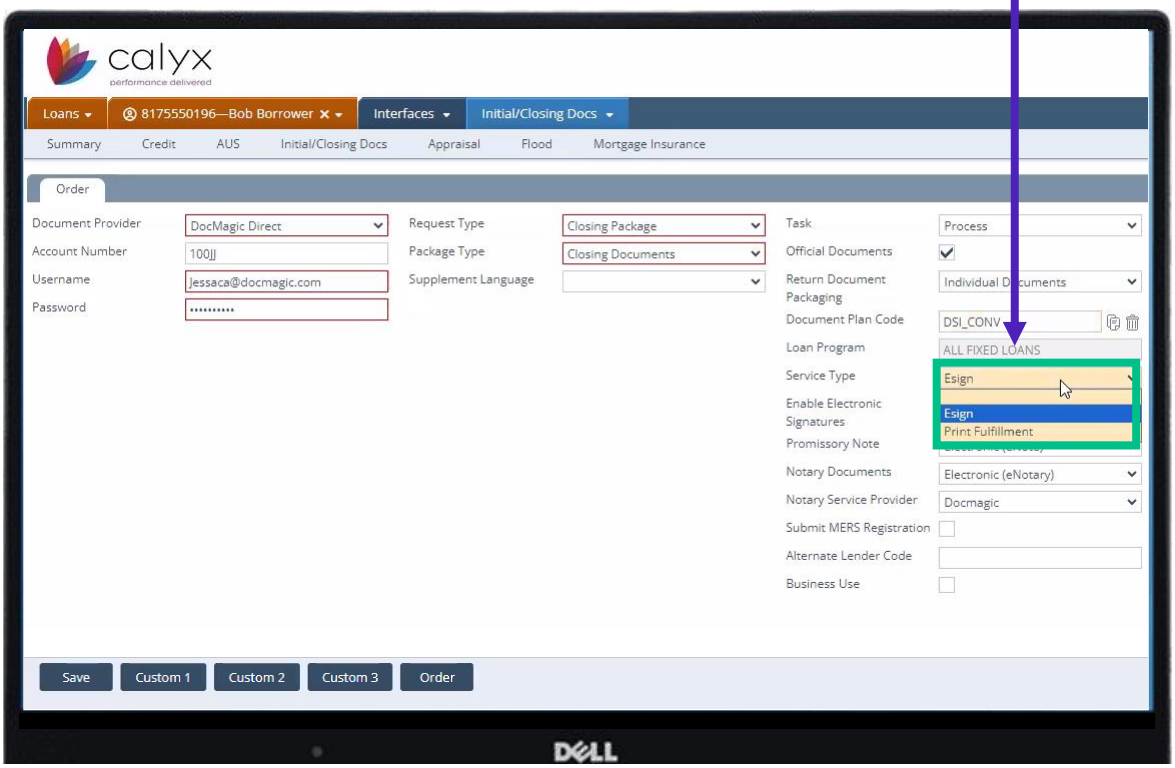
Service Type

Choose E-Sign or Print Fulfillment for Service Type.



E-Sign allows participants to electronically sign the documents. If you select Print Fulfillment, we will print out the document package and mail it to you, and you will be charged accordingly.

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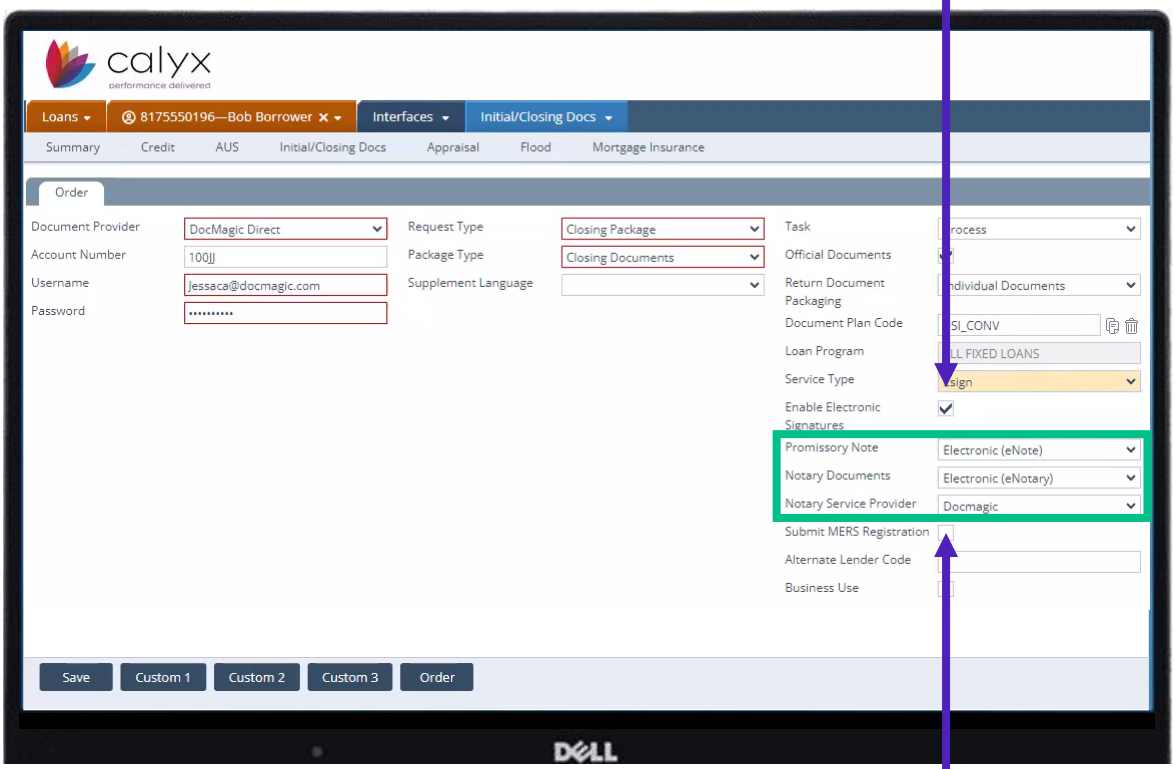
Enable Electronic Signatures, Total eClose Options

Remember to Enable Electronic Signatures for ESign.



Your Total eClose options are here – we'll go through them on the following slides.

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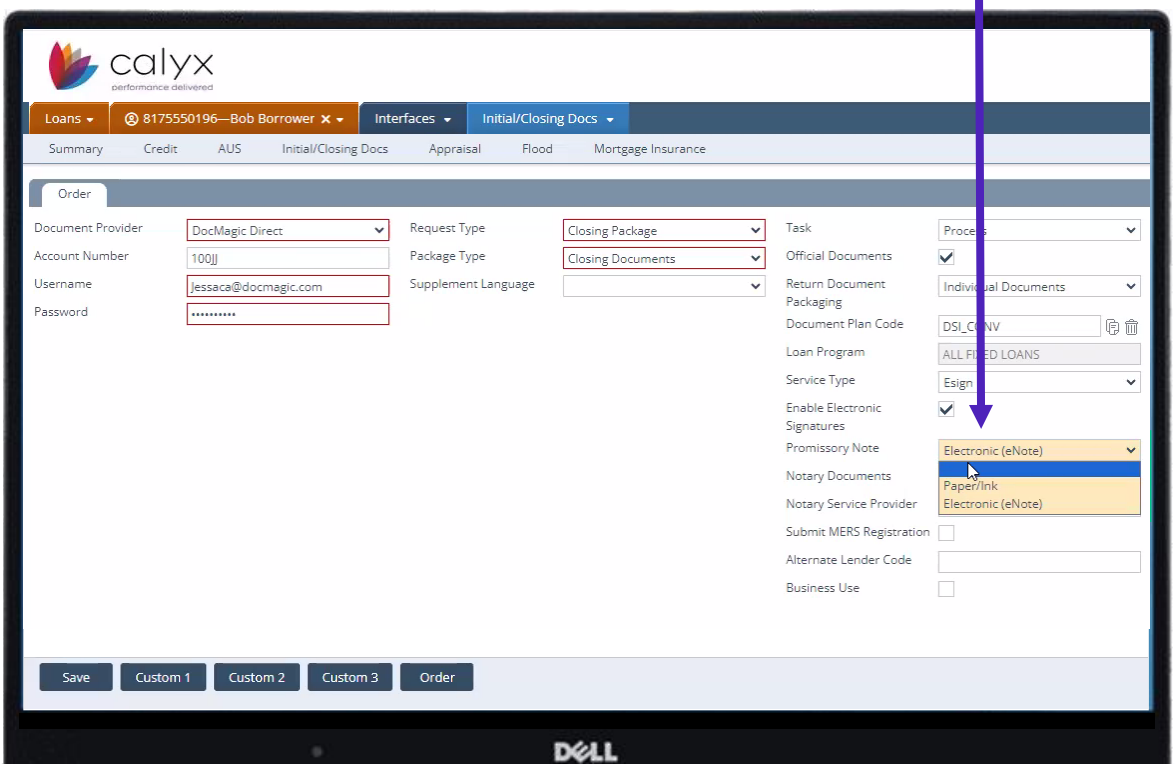
Promissory Note

Select whether you want the Promissory Note to be Paper or Electronic (eNote).



The blank option will automatically select DocMagic's default, which is a Paper Note.

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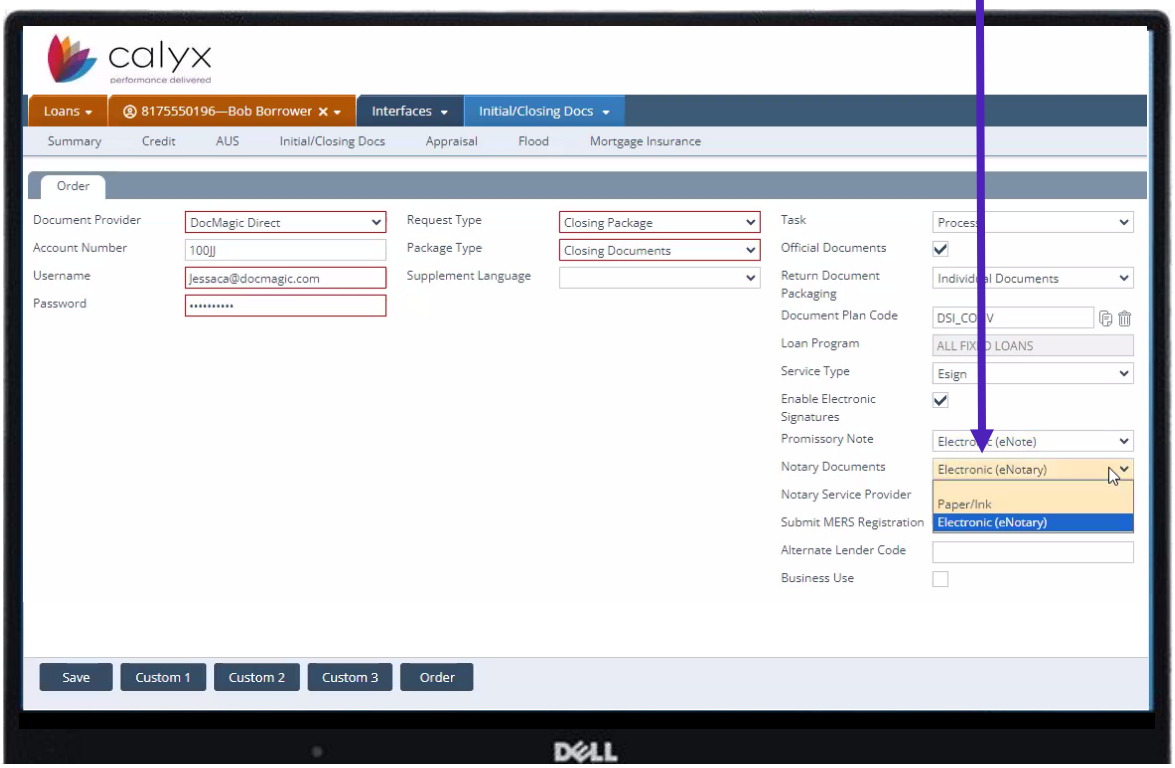
Notary Documents

Select whether you want the notarization to be In Person (Paper/Ink) or Electronic (eNotary).



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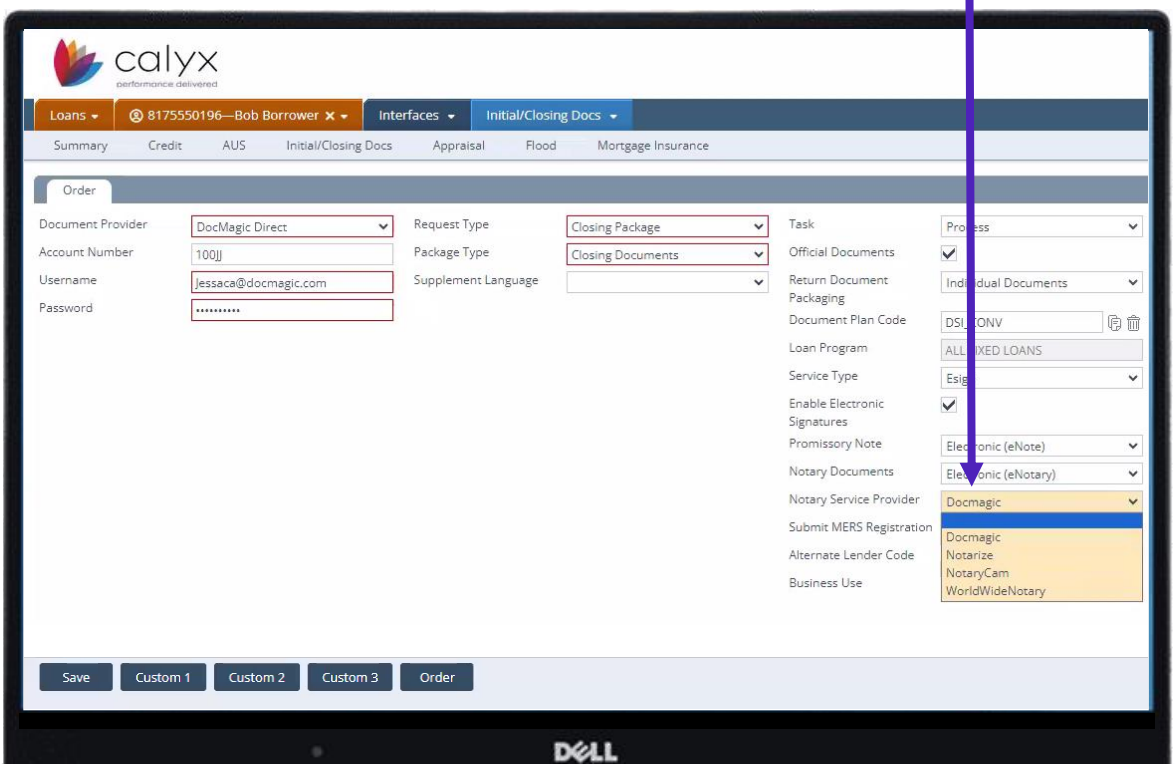
Notary Service Provider

Select your Notary Service Provider here.



Choose Docmagic for DocMagic RON. Other notarization vendors include *Notarize*, *NotaryCam*, or *WorldWideNotary*. The blank option is for non-notarized packages.

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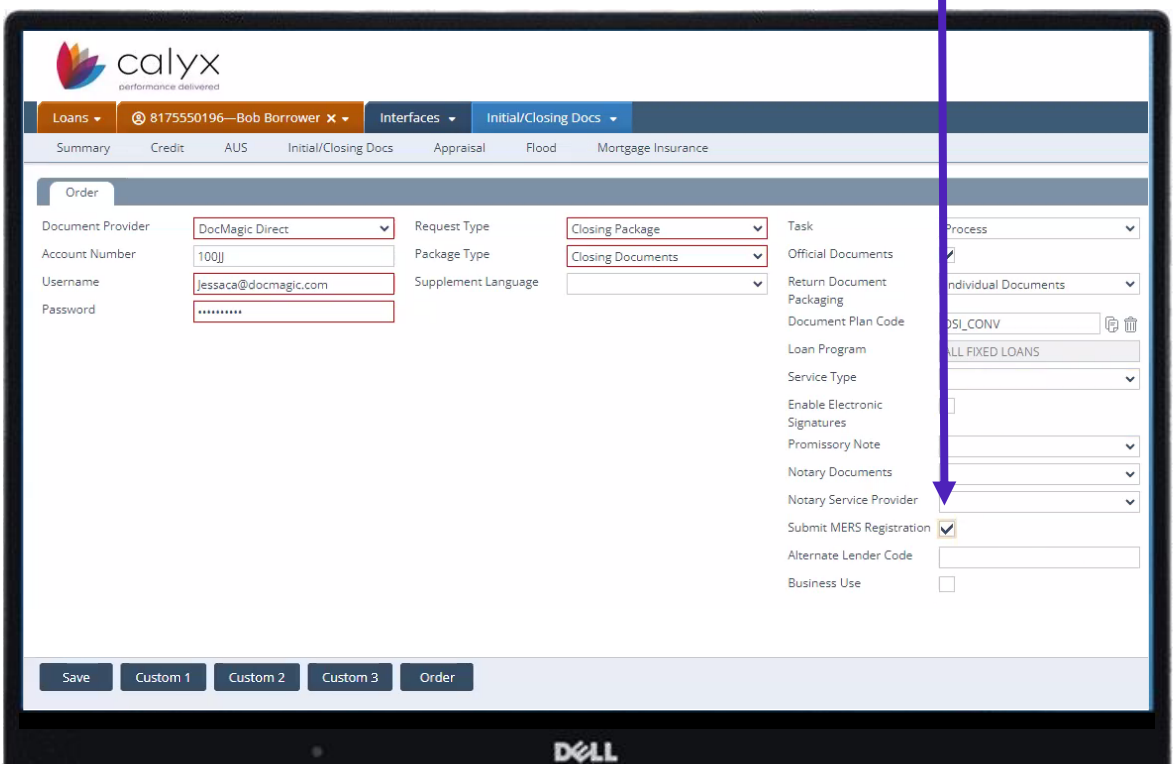
Submit MERS Registration

Submit MERS Registration has nothing to do for eSign. Check this if you want to send a *non-electronic* closing package to MERS.



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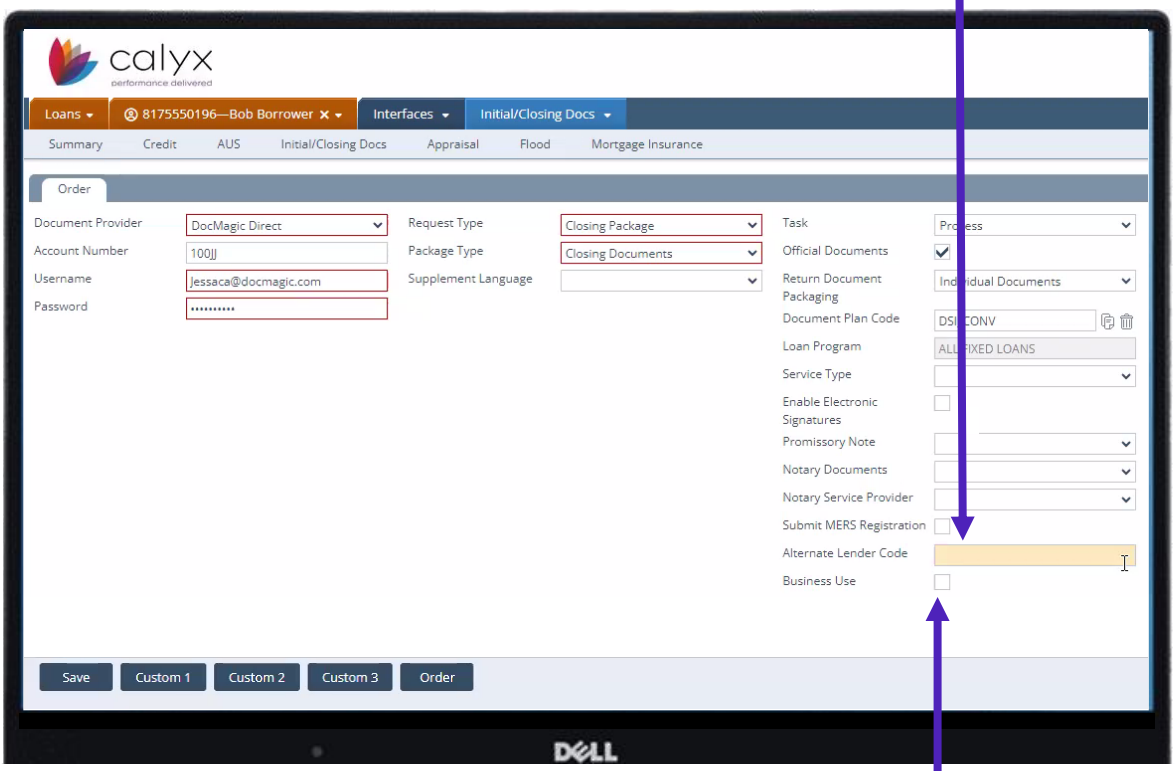
Alt Lender / Business Loan

If you have an Alternate Lender Code, enter it here.



Check this box if it is a Business Purpose Loan.

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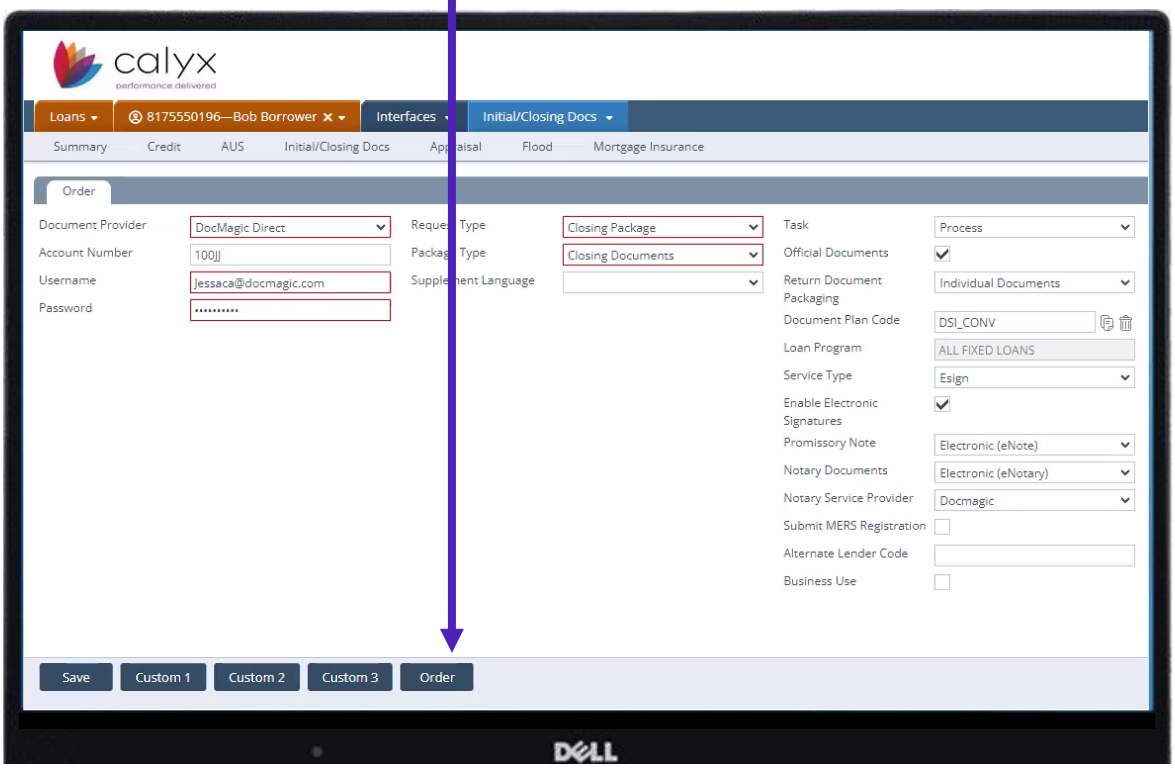
Send It!

If everything looks good, select Order.



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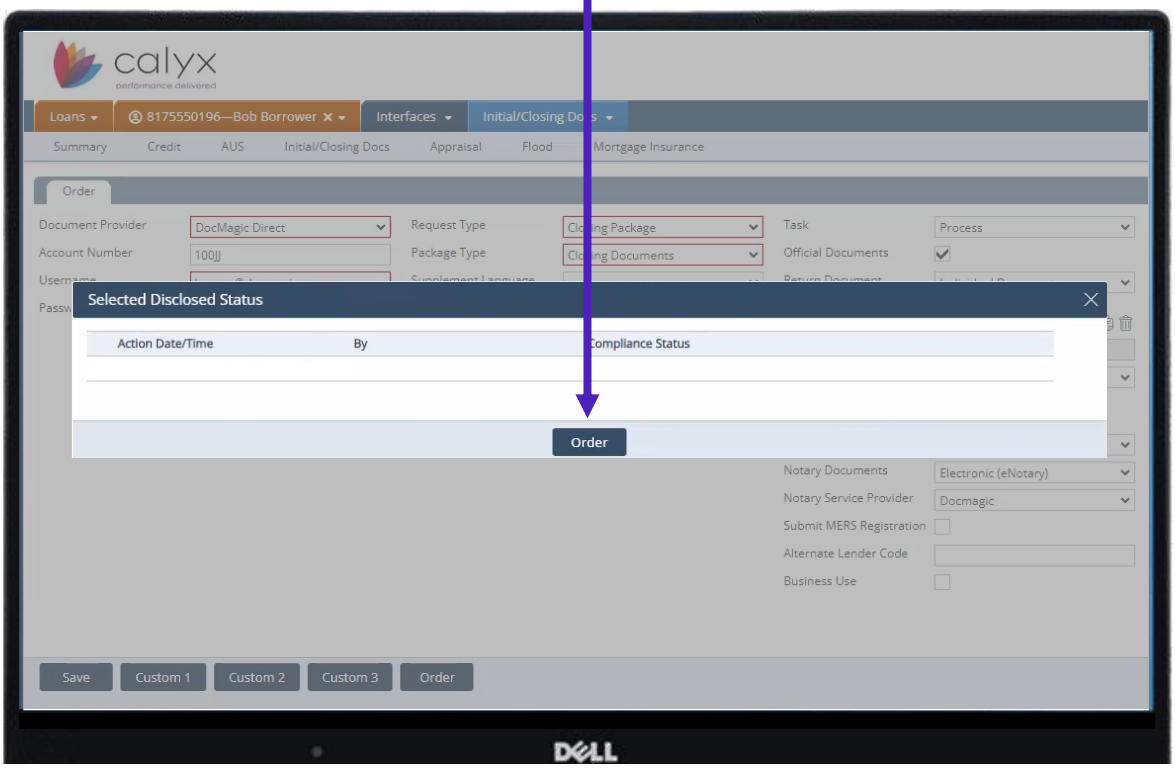
Order Again

This window will pop up. Click Order.