

Calyx Path

Initial and Closing Disclosure

Total eClose

Package Processing

File Selection

Loans Pipeline Desk

Desk Cabinet Role Desk Role Cabinet

Advanced Search

Production (8) Lock (8) Compliance (8) Condition (0) All

	Loan Number	Loan Servicer	LO Name	OU Name	Borrower First	Subject Prop	Loan Status	Loan Sub-Sta	Lock Expirat	Loan Amount	Note Rate	Loan Type	Loan Purpose
☐	STAG5080...	10939	Jessaca Joh...	DocMagic			Applicatio...	In Process		0.00	0.000		
☐	STAG4051...	9022	Jessaca Joh...	Real Madrid	BOB B SA...	147 PROPE...	Applicatio...	In Process		120,000.00	3.500	Conventio...	Refinance
☐	STAG4042...	8976	Jessaca Joh...	DocMagic			Applicatio...	In Process		0.00	0.000		
☐	STAG4032...	8805	8976 a Joh...	DocMagic	Robert B S...	123 Subjec...	Applicatio...	In Process		540,000.00	7.000	Conventio...	Purchase
☐	STAG4032...	8803	Jessaca Joh...	DocMagic	Bob B Borr...	123 Proper...	Applicatio...	In Process		200,000.00	4.000	Conventio...	Purchase
☐	8175550196	4503		DocMagic	Bob Borro...	123 Proper...	Applicatio...	In Process		200,000.00	4.000	Conventio...	Refinance
☐	64092	2911	Jessaca Joh...	DocMagic	Bob B Sam...	123 proper...	Applicatio...	In Process		191,250.00	3.500	Conventio...	Refinance
☐	64089	2908		DocMagic	John Home...	110 Hager...	Applicatio...	In Process		360,000.00	3.275	Conventio...	Purchase

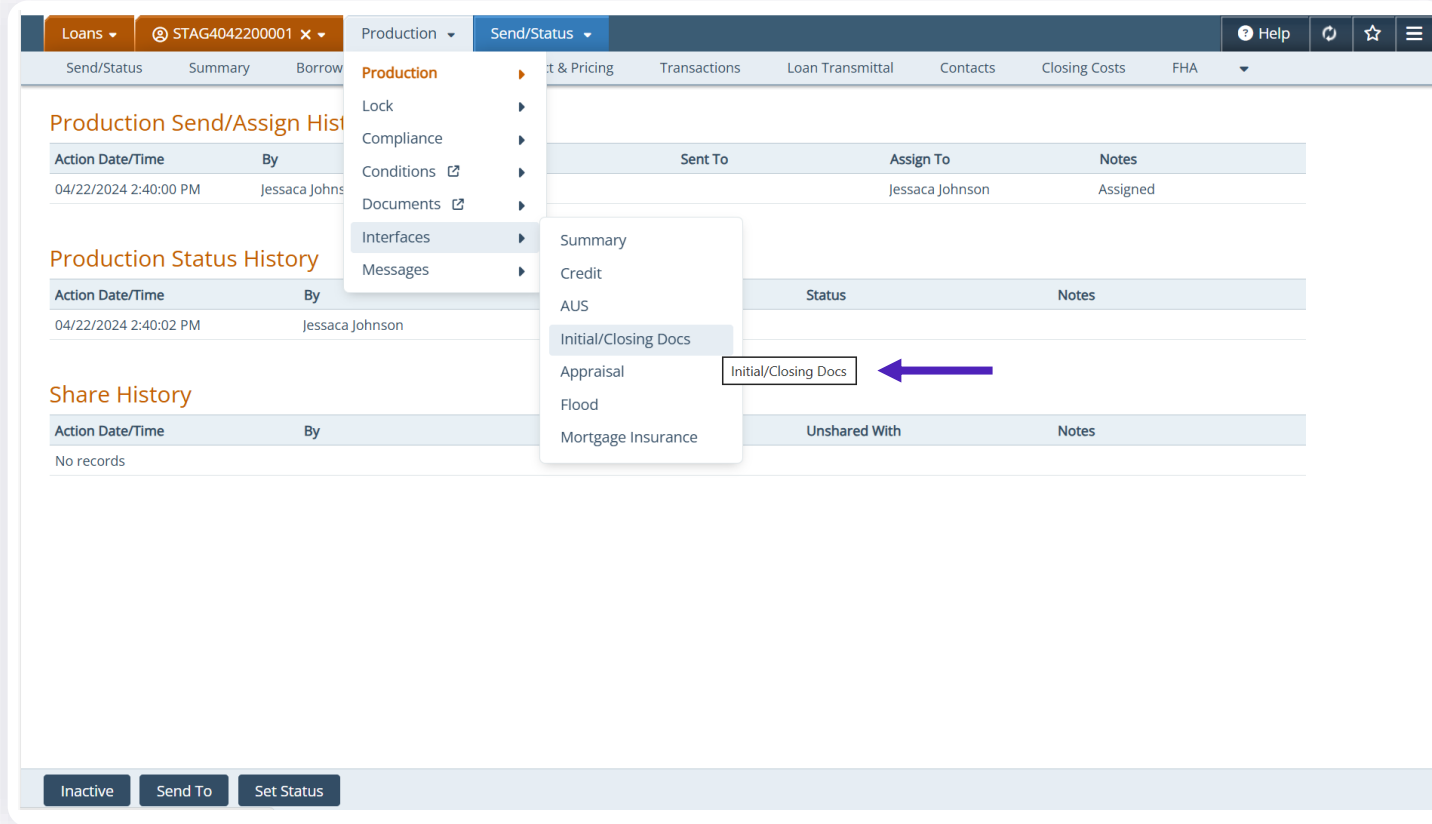
1 100

Delete New Loan Import Assign Unassign Archive Change Loan Originator Copy to Sandbox - All Information Share Unshare

Copy Borrower Info

- Select a file from your CalyxPath pipeline.

Production → Interfaces → Initial/Closing Docs



- Hover your mouse over *Production* at the top, then *Interfaces*, and then click on *Initial/Closing Docs*.

Order Docs Screen

Loans

STAG4042200001

Interfaces

Initial/Closing Docs

Help

SummaryCreditAUSInitial/Closing DocsAppraisalFloodMortgage Insurance

Order

Document Provider

DocMagic Direct

Account Number

207916

Username

Password

Request Type

Closing Package

Package Type

Closing Documents

Supplement Language

Task

Process

Official Documents

☒

Return Document Packaging

All Forms in One Document

Document Plan Code

DSI_CONV

Loan Program

Service Type

Enable Electronic Signatures

☐

Promissory Note

Notary Documents

Notary Service Provider

Submit MERS Registration

☐

Alternate Lender Code

Business Use

☐

History

Date/Time	Document Provider	Request Type	Package Type	Status	Reference Number	Message	Ordered By
05/22/2025 8:24:46 AM	DocMagic Direct	Closing Package	Closing Docume...	Success	STAG4042200001		Jessaca Johnson

Save

Custom 1

Custom 2

Custom 3

Order

- Start on the left side of the screen.
- Ensure that DocMagic Direct is selected for Document Provider, and that valid credentials are entered for the Account Number, Username, and Password.

Request Type

Loans ▾ STAG4042200001 x ▾ Interfaces ▾ Initial/Closing Docs ▾ ? Help

Summary Credit AUS Initial/Closing Docs Appraisal Flood Mortgage Insurance

Order

Document Provider: DocMagic Direct ▾ Request Type: Closing Package ▾ Task: Process ▾

Account Number: 207916 Package Type: **Closing Package**

Username: Supplement Language: Initial Disclosures

Password: Closing Package

Official Documents: ☒ Return Document Packaging: All Forms in One Document ▾

Document Plan Code: DSI_CONV Document Plan Code icons: [icon] [icon]

Loan Program: Service Type: ▾

Enable Electronic Signatures: ☐ Promissory Note: ▾

Notary Documents: ▾ Notary Service Provider: ▾

Submit MERS Registration: ☐ Alternate Lender Code: [icon]

Business Use: ☐

History

History search: [icon] x [icon]

Date/Time	Document Provider	Request Type	Package Type	Status	Reference Number	Message	Ordered By
05/22/2025 8:24:46 AM	DocMagic Direct	Closing Package	Closing Docume...	Success	STAG4042200001		Jessaca Johnson [icon]

Save Custom 1 Custom 2 Custom 3 Order

- Select Initial Disclosure or Closing Package from the Request Type.

Package Type

The screenshot shows the DocMagic interface with the 'Initial/Closing Docs' tab selected. The 'Package Type' dropdown is open, showing options like 'Closing Documents', 'Closing Disclosure', 'Pre-Closing', 'Post-Closing', 'Loan Modification', and 'Servicing Transfer'. The 'Request Type' is 'Closing Package' and the 'Task' is 'Process'.

Document Provider: DocMagic Direct
Account Number: 207916
Username:
Password:
Request Type: Closing Package
Package Type: Closing Documents
Supplement Language:
Task: Process
Official Documents: ☒
Return Document Packaging: All Forms in One Document
Document Plan Code: DSI_CONV
Loan Program:
Service Type:
Enable Electronic Signatures: ☐
Promissory Note:
Notary Documents:
Notary Service Provider:
Submit MERS Registration: ☐
Alternate Lender Code:
Business Use: ☐

History

Date/Time	Document Provider	Request Type	Package Type	Status	Reference Number	Message	Ordered By
05/22/2025 8:24:46 AM	DocMagic Direct	Closing Package	Closing Docume...	Success	STAG4042200001		Jessaca Johnson

Save Custom 1 Custom 2 Custom 3 Order

- Next, select a Package Type.
- Your options for Package Type are determined by the Request Type.

Supplementary Language

Loans STAG4042200001 Interfaces Initial/Closing Docs Help

Summary Credit AUS Initial/Closing Docs Appraisal Flood Mortgage Insurance

Order

Document Provider: DocMagic Direct
Account Number: 207916
Username:
Password:
Request Type: Closing Package
Package Type: Closing Documents
Supplement Language: Chinese, Korean, Spanish, Tagalog, Vietnamese

Task: Process
Official Documents: ☒
Return Document Packaging: All Forms in One Document
Document Plan Code: DSI_CONV
Loan Program:
Service Type:
Enable Electronic Signatures: ☐
Promissory Note:
Notary Documents:
Notary Service Provider:
Submit MERS Registration: ☐
Alternate Lender Code:
Business Use: ☐

History

Date/Time	Document Provider	Request Type	Package Type	Status	Reference Number	Message	Ordered By
05/22/2025 8:24:46 AM	DocMagic Direct	Closing Package	Closing Docume...	Success	STAG4042200001		Jessaca Johnson

Save Custom 1 Custom 2 Custom 3 Order

- DocMagic does support supplementary languages in some cases.
- You can request documents in a different language, pending availability.
- These must be set up to work with your Account prior to requesting them – please contact [Customer Service](#) first.

Select Task

Loans STAG4042200001 Interfaces Initial/Closing Docs Help

Summary Credit AUS Initial/Closing Docs Appraisal Flood Mortgage Insurance

Order

Document Provider: DocMagic Direct
 Account Number: 207916
 Username:
 Password:
 Request Type: Closing Package
 Package Type: Closing Documents
 Supplement Language:
 Task: Process
 Official Documents: Audit
 Return Document Packaging: Process
 Document Plan Code: DSI_CONV
 Loan Program:
 Service Type:
 Enable Electronic Signatures: ☐
 Promissory Note:
 Notary Documents:
 Notary Service Provider:
 Submit MERS Registration: ☐
 Alternate Lender Code:
 Business Use: ☐

History

Date/Time	Document Provider	Request Type	Package Type	Status	Reference Number	Message	Ordered By
05/22/2025 8:24:46 AM	DocMagic Direct	Closing Package	Closing Docume...	Success	STAG4042200001		Jessaca Johnson

Save Custom 1 Custom 2 Custom 3 Order

- Select Audit or Process for the Task.
 - Our DocMagic Audit checks for any issues related to data entry or compliance and generates a full [Loan Detail Report](#).
 - Process orders a set of documents.

Official Documents

Loans

STAG4042200001

Interfaces

Initial/Closing Docs

Help

SummaryCreditAUSInitial/Closing DocsAppraisalFloodMortgage Insurance

Order

Document Provider

DocMagic Direct

Account Number

207916

Username

Password

Request Type

Closing Package

Package Type

Closing Documents

Supplement Language

Task

Process

Official Documents

☒

Return Document Packaging

All Forms in One Document

Document Plan Code

DSI_CONV

Loan Program

Service Type

Enable Electronic Signatures

☐

Promissory Note

Notary Documents

Notary Service Provider

Submit MERS Registration

☐

Alternate Lender Code

Business Use

☐

History

x

Date/Time	Document Provider	Request Type	Package Type	Status	Reference Number	Message	Ordered By
05/22/2025 8:24:46 AM	DocMagic Direct	Closing Package	Closing Docume...	Success	STAG4042200001		Jessaca Johnson

Save

Custom 1

Custom 2

Custom 3

Order

- Unchecking the Official Documents box will produce a document package with a watermark. This is mostly used for running sample packages. Please note that DocMagic will not keep the data if this box is unchecked.

Return Document Packaging

The screenshot displays the 'Return Document Packaging' interface in the DocMagic application. The top navigation bar includes tabs for 'Loans', 'STAG4042200001', 'Interfaces', and 'Initial/Closing Docs'. Below this is a sub-navigation bar with options like 'Summary', 'Credit', 'AUS', 'Initial/Closing Docs', 'Appraisal', 'Flood', and 'Mortgage Insurance'. The main form is titled 'Order' and contains the following fields:

- Document Provider:** DocMagic Direct (dropdown)
- Account Number:** 207916 (text input)
- Username:** (text input)
- Password:** (password input)
- Request Type:** Closing Package (dropdown)
- Package Type:** Closing Documents (dropdown)
- Supplement Language:** (dropdown)
- Task:** Process (dropdown)
- Official Documents:** ☒
- Return Document Packaging:** All Forms in One Document (dropdown)
- Document Plan Code:** All Forms in One Document (dropdown)
- Individual Documents:** Individual Documents (dropdown)
- Loan Program:** (dropdown)
- Service Type:** (dropdown)
- Enable Electronic Signatures:** ☐
- Promissory Note:** (dropdown)
- Notary Documents:** (dropdown)
- Notary Service Provider:** (dropdown)
- Submit MERS Registration:** ☐
- Alternate Lender Code:** (text input with a copy icon)
- Business Use:** ☐

Below the 'Order' section is a 'History' section with a search bar and a table of previous orders:

Date/Time	Document Provider	Request Type	Package Type	Status	Reference Number	Message	Ordered By
05/22/2025 8:24:46 AM	DocMagic Direct	Closing Package	Closing Docume...	Success	STAG4042200001		Jessaca Johnson

At the bottom of the form are buttons for 'Save', 'Custom 1', 'Custom 2', 'Custom 3', and 'Order'.

- You can choose to receive the document package as Individual Documents or generate All Forms in One Document.

Document Plan Code

Loans **STAG4042200001** **Interfaces** **Initial/Closing Docs** **Help**

Summary Credit AUS Initial/Closing Docs Appraisal Flood Mortgage Insurance

Order

Document Provider: DocMagic Direct
Account Number: 207916
Username:
Password:
Request Type: Closing Package
Package Type: Closing Documents
Supplement Language:
Task: Process
Official Documents: ☒
Return Document Packaging: All Forms in One Document
Document Plan Code: DSI_CONV
Loan Program:
Service Type:
Enable Electronic Signatures: ☐
Promissory Note:
Notary Documents:
Notary Service Provider:
Submit MERS Registration: ☐
Alternate Lender Code:
Business Use: ☐

History

Date/Time	Document Provider	Request Type	Package Type	Status	Reference Number	Message	Ordered By
05/22/2025 8:24:46 AM	DocMagic Direct	Closing Package	Closing Docume...	Success	STAG4042200001		Jessaca Johnson

Save Custom 1 Custom 2 Custom 3 Order

- Enter your Document Plan Code. These will need to be added to your Account through the [Plan Manager](#) on the DocMagic Dashboard.
- The DocMagic Plan Code Description may appear as the Loan Program once you load the code in CalyxPath.

Select Service Type

The screenshot shows the 'Initial/Closing Docs' section of the DocMagic interface. The top navigation bar includes 'Loans', 'STAG4042200001', 'Interfaces', and 'Initial/Closing Docs'. Below this is a sub-navigation bar with 'Summary', 'Credit', 'AUS', 'Initial/Closing Docs', 'Appraisal', 'Flood', and 'Mortgage Insurance'. The main content area is titled 'Order' and contains several form fields and a table.

Form Fields:

- Document Provider:
- Account Number:
- Username:
- Password:
- Request Type:
- Package Type:
- Supplement Language:
- Task:
- Official Documents: ☒
- Return Document Packaging:
- Document Plan Code:
- Loan Program:
- Service Type:
- Enable Electronic Signatures: ☐
- Promissory Note: ☐
- Notary Documents:
- Notary Service Provider:
- Submit MERS Registration: ☐
- Alternate Lender Code:
- Business Use: ☐

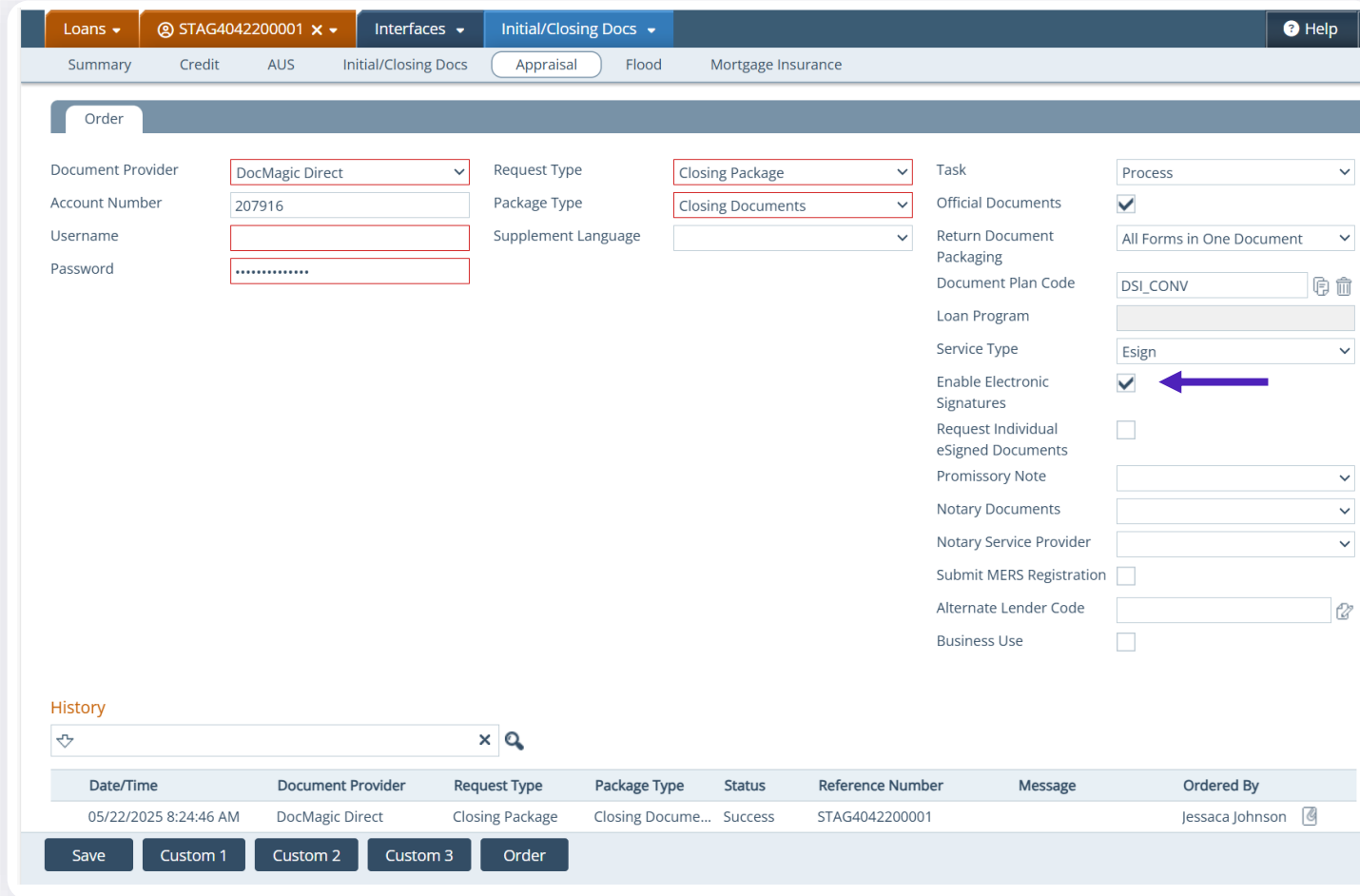
History Table:

Date/Time	Document Provider	Request Type	Package Type	Status	Reference Number	Message	Ordered By
05/22/2025 8:24:46 AM	DocMagic Direct	Closing Package	Closing Docume...	Success	STAG4042200001		Jessaca Johnson

Buttons: Save, Custom 1, Custom 2, Custom 3, Order

- Select Esign or Print Fulfillment for Service Type.
- Esign utilizes our proprietary ClickSign electronic signature technology. Packages generated with this option can be managed in the [eSign Console](#).
- Select Print Fulfillment if you want the document package to be printed and mailed out.

Enable Electronic Signatures



The screenshot shows the DocMagic web application interface. At the top, there are tabs for 'Loans', 'STAG4042200001', 'Interfaces', and 'Initial/Closing Docs'. Below these are sub-tabs: 'Summary', 'Credit', 'AUS', 'Initial/Closing Docs', 'Appraisal', 'Flood', and 'Mortgage Insurance'. The 'Initial/Closing Docs' tab is active, and the 'Appraisal' sub-tab is selected. The main form is titled 'Order' and contains several sections. On the left, there are input fields for 'Document Provider' (DocMagic Direct), 'Account Number' (207916), 'Username', and 'Password'. In the center, there are dropdown menus for 'Request Type' (Closing Package), 'Package Type' (Closing Documents), and 'Supplement Language'. On the right, there are more dropdowns for 'Task' (Process), 'Official Documents' (checked), 'Return Document Packaging' (All Forms in One Document), 'Document Plan Code' (DSI_CONV), 'Loan Program', 'Service Type' (Esign), 'Enable Electronic Signatures' (checked, highlighted with a red box and a blue arrow), 'Request Individual eSigned Documents', 'Promissory Note', 'Notary Documents', 'Notary Service Provider', 'Submit MERS Registration', 'Alternate Lender Code', and 'Business Use'. At the bottom, there is a 'History' section with a search bar and a table showing the order history. The table has columns for Date/Time, Document Provider, Request Type, Package Type, Status, Reference Number, Message, and Ordered By. The first row shows an order from 05/22/2025 8:24:46 AM, DocMagic Direct, Closing Package, Closing Docume..., Success, STAG4042200001, and ordered by Jessica Johnson. Below the table are buttons for 'Save', 'Custom 1', 'Custom 2', 'Custom 3', and 'Order'.

Date/Time	Document Provider	Request Type	Package Type	Status	Reference Number	Message	Ordered By
05/22/2025 8:24:46 AM	DocMagic Direct	Closing Package	Closing Docume...	Success	STAG4042200001		Jessaca Johnson

- You'll need to check the Enable Electronic Signatures box if you select Esign as your Service Type.
- Once you check that box, the option for Requesting Individual eSigned Documents will appear.

eClose Package Configuration

Loans

STAG4042200001

Interfaces

Initial/Closing Docs

Help

SummaryCreditAUSInitial/Closing DocsAppraisalFloodMortgage Insurance

Order

Document Provider

DocMagic Direct

Account Number

207916

Username

interfacesupport@calyxsoftware....

Password

Request Type

Closing Package

Package Type

Closing Documents

Supplement Language

Task

Process

Official Documents

☒

Return Document Packaging

All Forms in One Document

Document Plan Code

DSI_CONV

Loan Program

Service Type

Esign

Enable Electronic Signatures

☒

Request Individual eSigned Documents

☐

Promissory Note

Notary Documents

Notary Service Provider

Submit MERS Registration

☐

Alternate Lender Code

Business Use

☐

History

Date/Time	Document Provider	Request Type	Package Type	Status	Reference Number	Message	Ordered By
05/22/2025 8:24:46 AM	DocMagic Direct	Closing Package	Closing Docume...	Success	STAG4042200001		Jessaca Johnson

Save

Custom 1

Custom 2

Custom 3

Order

- If you are generating an eClose Closing Package, you will need to configure the Promissory Note, Notary Documents, and Notary Service Provider options, explained on subsequent pages.

Promissory Note

Loans

STAG4042200001

Interfaces

Initial/Closing Docs

Help

SummaryCreditAUSInitial/Closing DocsAppraisalFloodMortgage Insurance

Order

Document Provider

DocMagic Direct

Account Number

207916

Username

Password

Request Type

Closing Package

Package Type

Closing Documents

Supplement Language

Task

Process

Official Documents

☒

Return Document Packaging

All Forms in One Document

Document Plan Code

DSI_CONV

Loan Program

Service Type

Esign

Enable Electronic Signatures

☒

Request Individual eSigned Documents

☐

Promissory Note

Notary Documents

Notary Service Provider

Paper/Ink

Submit MERS Registration

Electronic (eNote)

Alternate Lender Code

Business Use

☐

History

Date/Time	Document Provider	Request Type	Package Type	Status	Reference Number	Message	Ordered By
05/22/2025 8:24:46 AM	DocMagic Direct	Closing Package	Closing Docume...	Success	STAG4042200001		Jessaca Johnson

Save

Custom 1

Custom 2

Custom 3

Order

- Select if you want the Promissory Note to be Paper or Electronic (eNote).
- The blank, default option will result in a Paper Note being generated if a Closing Package is requested.

Notary Documents

Loans

STAG4042200001

Interfaces

Initial/Closing Docs

Help

SummaryCreditAUSInitial/Closing DocsAppraisalFloodMortgage Insurance

Order

Document Provider

DocMagic Direct

Account Number

207916

Username

Password

Request Type

Closing Package

Package Type

Closing Documents

Supplement Language

Task

Process

Official Documents

☒

Return Document Packaging

All Forms in One Document

Document Plan Code

DSI_CONV

Loan Program

Service Type

Esign

Enable Electronic Signatures

☒

Request Individual eSigned Documents

☐

Promissory Note

Electronic (eNote)

Notary Documents

Notary Service Provider

Submit MERS Registration

Paper/Ink

Alternate Lender Code

Electronic (eNotary)

Business Use

☐

History

Date/Time	Document Provider	Request Type	Package Type	Status	Reference Number	Message	Ordered By
05/22/2025 8:24:46 AM	DocMagic Direct	Closing Package	Closing Docume...	Success	STAG4042200001		Jessaca Johnson

SaveCustom 1Custom 2Custom 3Order

- Select if you want the Notarization portion of your Closing package to be paper or electronic.

Notary Service Provider

Loans

STAG4042200001

Interfaces

Initial/Closing Docs

Help

SummaryCreditAUSInitial/Closing DocsAppraisalFloodMortgage Insurance

Order

Document Provider

DocMagic Direct

Account Number

207916

Username

Password

Request Type

Closing Package

Package Type

Closing Documents

Supplement Language

Task

Process

Official Documents

☒

Return Document Packaging

All Forms in One Document

Document Plan Code

DSI_CONV

Loan Program

Service Type

Esign

Enable Electronic Signatures

☒

Request Individual eSigned Documents

☐

Promissory Note

Electronic (eNote)

Notary Documents

Electronic (eNotary)

Notary Service Provider

Submit MERS Registration

Alternate Lender Code

Docmagic

Business Use

Notarize

History

Save

Custom 1

Custom 2

Custom 3

Order

- Select your Notary Service Provider if you will be doing electronic notarization for a Closing Package.
- If you want to utilize our proprietary Remote Online Notary (RON) or In-Person Electronic Notarization (IPEN) technology, choose DocMagic for this option.

Order Docs

Loans ▾ STAG4042200001 ✕ ▾ Interfaces ▾ Initial/Closing Docs ▾ ? Help

Summary Credit AUS Initial/Closing Docs Appraisal Flood Mortgage Insurance

Order

Document Provider: Request Type: Task:

Account Number: Package Type: Official Documents: ☒

Username: Supplement Language: Return Document Packaging:

Password: Document Plan Code:

Loan Program:

Service Type:

Enable Electronic Signatures: ☒

Request Individual eSigned Documents: ☐

Promissory Note:

Notary Documents:

Notary Service Provider:

Submit MERS Registration: ☐

Alternate Lender Code:

Business Use: ☐

History

Date/Time	Document Provider	Request Type	Package Type	Status	Reference Number	Message	Ordered By
05/22/2025 8:24:46 AM	DocMagic Direct	Closing Package	Closing Docume...	Success	STAG4042200001		Jessaca Johnson

Save Custom 1 Custom 2 Custom 3 Order

- Finally, you can enter an Alternate Lender Code here if you have one and check the box for Business Purpose Loan if applicable.
- Once you enter in all the information on this screen, click Order at the bottom.
 - A confirmation window may appear and prompt you to confirm the request or fix any errors preventing you from processing.

Request Submission Successful

Loans

STAG4042200001

Interfaces

Initial/Closing Docs

Help

SummaryCreditAUSInitial/Closing DocsAppraisalFloodMortgage Insurance

Order

Document Provider

DocMagic Direct

Account Number

207916

Username

Password

Request Type

Closing Package

Package Type

Closing Documents

Supplement Language

Task

Process

Official Documents

☒

Return Document Packaging

All Forms in One Document

Document Plan Code

DSI_CONV

Loan Program

Service Type

Esign

Enable Electronic Signatures

☒

Request Individual eSigned Documents

☐

Promissory Note

Electronic (eNote)

Notary Documents

Electronic (eNotary)

Notary Service Provider

Docmagic

Submit MERS Registration

☐

Alternate Lender Code

Business Use

☐

History

Date/Time	Document Provider	Request Type	Package Type	Status	Reference Number	Message	Ordered By
11/20/2025 5:38:37 PM	DocMagic Direct	Closing Package	Closing Docume...	Success	STAG4042200001		Jessaca Johnson
☐ 11/20/2025 5:38:09 PM	DocMagic Direct	Closing Package	Closing Docume...	DMDirect ...			Jessaca Johnson

Request submission successful.

Save

Custom 1

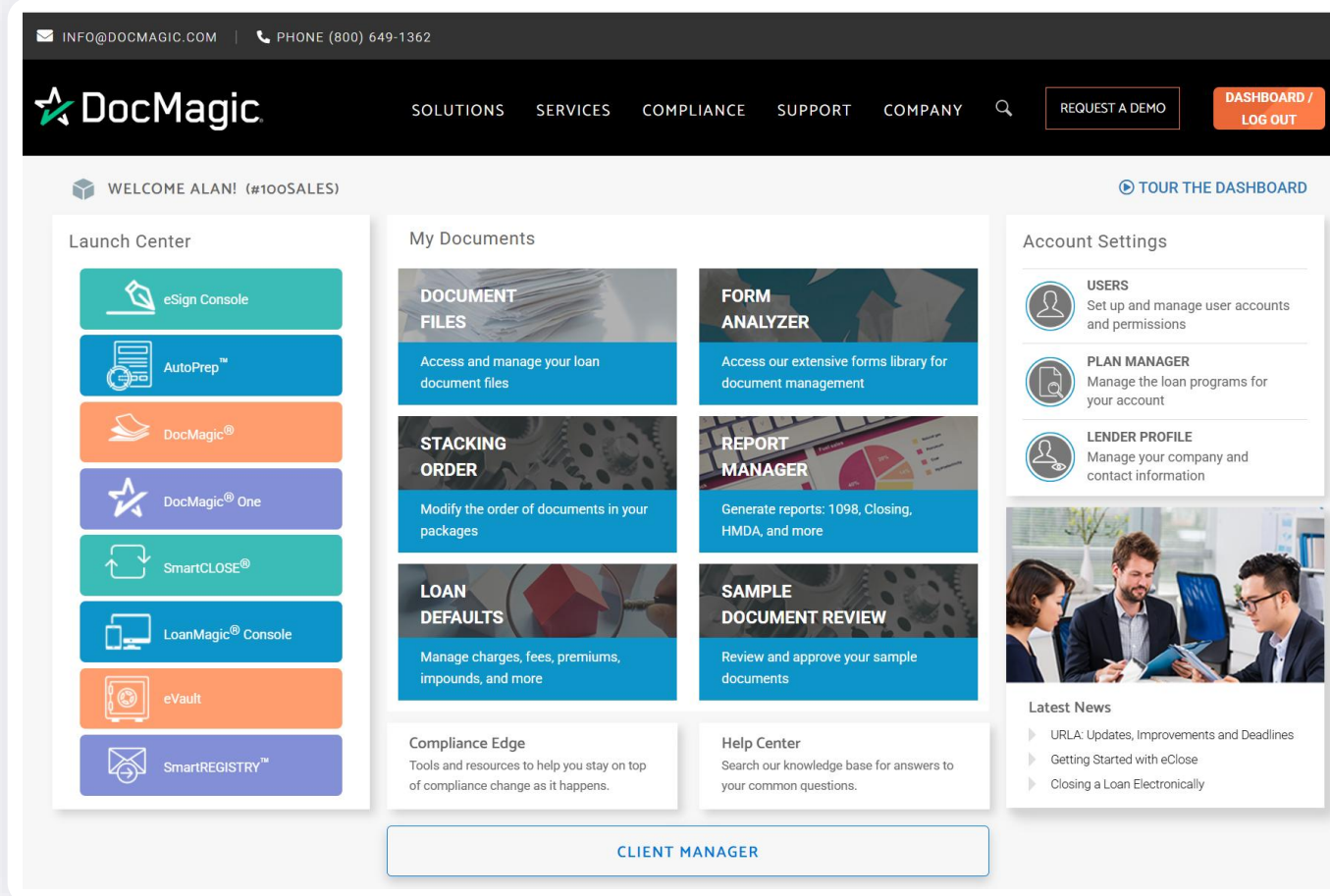
Custom 2

Custom 3

Order

- If your Request was successful, you'll see a "Request submission successful" message towards the bottom of your screen. Your latest request will always appear at the top of the History section.

eSign Console



- If eSign enabled, the document package will appear in your DocMagic [eSign Console](#), at the top of your list.

Frequently Asked Questions

Can I send eSign from CalyxPath?

Yes, from the DocMagic Direct Integration there is a checkbox to enable Electronic Signatures.

Do the eSigned documents get returned to CalyxPath?

Yes.

Does CalyxPath support Total eClose?

Yes.

Can I request UCD directly from CalyxPath?

No – you'll need to go to DocMagic's website.

Can I get my documents back as a DBK file?

No – documents are returned to Path in PDF format.

Why am I getting an error message that says my document provider does not support the new URLA?

Clients must be using the newest DocMagic integration in Path labeled 'DocMagic Direct'. The seamless integration in Path is the only supported integration where URLA data is sent.